

Reserved Item Report

Report Module Guide: Reserved Item Report

Module Location

Inventory > Reports > Reserved Item Report

Module Objective

The **Reserved Item Report** module is used to generate a report that details all inventory items that have been ordered or reserved for a specific purpose. This report is crucial for knowing how much stock is already "tied up" by transaction documents (such as Sales Orders or Internal Requisitions) and is not available for other uses.

1. Report Parameters (Filter)

The main page of this module is a form containing various parameters to customize the report that will be generated.

Here is an explanation for each parameter:

- **View based on:**

- Select **Document** to see items reserved based on their source document. You can choose the document type such as:
 - **Sales Order:** Reservations for customer orders.
 - **Internal Material Requisition:** Reservations for internal needs.

- **Warehouse Transfer:** Reservations for transfers between warehouses.
- **ReservedDate:**
 - Specify the reservation date range in the **Start Date** and **End Date** fields.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Define the parameters you need, especially the **View based on** document type and the date **Period**.

Step 2: Generate the Report

After all parameters are set, click one of the two buttons at the bottom:

- **[View Report]:** To preview the report directly on your screen.
- **[View via Excel]:** To download the report data in an Excel file format.

3. Reading the Report (Report Content)

The generated report is a detailed list of all items with a reserved status.

This report displays important details such as:

- **Document:** The source document number that caused the reservation (e.g., a Sales Order number).

- **Reservation date.**
- **Item/Service Code** and **Item/Service Name** that is reserved.
- **Document Quantity** and **Order Quantity**: The quantity that is reserved.

Tips & Important Notes

- This report is crucial for the **PPIC and Warehouse teams** to know the actual "**Available to Promise**" stock amount, which is the physical stock minus the total reserved stock.
- Use this report to track your stock commitments to various types of requests.

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