

# REPORTS QUICK REFERENCE GUIDE

USER GUIDE

Acumatica ERP 2019 R2

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# Customer Management Reports

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With the wide variety of reports for the Customer Management module, you can monitor and analyze sales opportunities and determine which lead source displays the largest number of conversions.

Because the Customer Management module is tightly integrated with other modules, such as Accounts Receivable, you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a report to any supporting details.

All Customer Management reports can be generated in multiple formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures; see [Security Policies in Acumatica ERP](#) for more details.

Before you use reports, see [Reports](#) for more information.

## Customer Management Reports

The Customer Management module includes the following reports:

- **Leads**

- [Lead Pipeline by Owner](#) (CR621010): Displays the statistics for leads at each stage.
- [Lead Pipeline by Workgroup](#) (CR621020): Displays the statistics for leads at each stage for each workgroup.
- [Lead Statistics by Owner](#) (CR621110): Displays the lead statistics for each employee who owns the leads.
- [Lead Statistics by Workgroup](#) (CR621120): Displays the lead statistics for each workgroup that owns the leads.
- [Lead Statistics by Class ID](#) (CR621130): Displays the statistics on lead conversion for each lead class.
- [Lead Statistics by Source](#) (CR621140): Displays statistics on lead conversion for each lead source.
- [Chart: Lead Count Statistics by Owner](#) (CR621210): Shows statistics on leads won and lost by owners.
- [Chart: Lead Conversion Statistics By Owner](#) (CR621220): Shows statistics on lead conversion by owners.

- **Opportunities**

- [Opportunity Pipeline by Owner](#) (CR624010): For each opportunity owner, displays information about opportunities at each stage.
- [Opportunity Pipeline by Workgroup](#) (CR624020): For each workgroup that owns opportunities, displays information about opportunities at each stage.
- [Opportunity Statistics by Owner](#) (CR624110): For each opportunity owner, displays information about opportunities of all stages.
- [Opportunity Statistics by Workgroup](#) (CR624120): For each workgroup, displays information about opportunities of all stages.

- [Opportunity Statistics by Class ID](#) (CR624130): For each opportunity class, displays information about opportunities of this class in all stages.
- [Opportunity Statistics by Source](#) (CR624140): Displays information about opportunities currently available in each stage, grouped by lead source.
- [Opportunity Statistics by Stage](#) (CR624150): Displays statistics on opportunities in each stage.
- [Opportunity Stage Statistics by Owner](#) (CR624160): For each opportunity owner, displays statistics on opportunities at each stage.
- [Opportunity Stage Statistics by Workgroup](#) (CR624170): For each workgroup, displays statistics on opportunities at each stage.
- [Chart: Opportunity Count Statistics by Owner](#) (CR624210): Compares the opportunities counted for each employee
- [Chart: Opportunity Amount Statistics by Owner](#) (CR624220): Shows the opportunity amounts for each employee.
- [Chart: Opportunity Amount Conversion Statistics by Owner](#) (CR624230): Shows the amounts of opportunities converted by each owner.
- [Chart: Opportunity Quantity Conversion Statistics by Owner](#) (CR624240): Compares the quantities of opportunities converted by each owner.
- **Cases**
  - [Case Pipeline by Owner](#) (CR626010): Displays statistics for cases owned by different employees.
  - [Case Pipeline by Workgroup](#) (CR626020): Displays statistics for cases owned by specific workgroups.
  - [Case Statistics by Owner](#) (CR626110): Displays statistics for a specific date range on cases owned by employees.
  - [Case Statistics by Workgroup](#) (CR626120): Displays statistics for a specific date range on cases owned by different workgroups.
  - [Case Statistics by Class ID](#) (CR626130): Displays statistics for cases of a specific class.
  - [Chart: Case Count Statistics by Owner](#) (CR626210): Presents the statistics for cases owned by different employees.
  - [Chart: Case Rate Statistics by Owner](#) (CR626220): Provides data you can use to compare case resolution rates for cases owned by different employees.
  - [Chart: Case Due Statistics by Owner](#) (CR626230): Displays statistics on case resolution dates for cases owned by different employees.
  - [Chart: Case Average Resolve Time Statistics by Owner](#) (CR626240): Displays statistics on case resolution dates for cases owned by different employees.
  - [Chart: Case Average Initial Response Time Statistics By Owner](#) (CR626250): Displays statistics on initial responses to cases owned by different employees.
- **Business Accounts**

- [\*Business Accounts Pipeline by Owner\*](#) (CR623010): Displays statistics, grouped by owner, for business accounts of different types.
- [\*Business Accounts Pipeline by Workgroup\*](#) (CR623020): Displays statistics, grouped by workgroup, for business accounts of different types.

# Projects Reports

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With the Acumatica ERP reports, you can get detailed information about various aspects of project accounting, including projects, project tasks, project transactions, and employee hours. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All project-related reports can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Time and Expenses Reports

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With the Acumatica ERP reports related to time and expenses, you can promptly get detailed information about expense claims, review the data, and track expense claims for different branches, departments, and employees. If a report contains data links, you can easily drill down from the report to any supporting details.

The reports are available if the *Expense Management* feature is enabled on the [Enable/Disable Features \(CS100000\)](#) form.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All reports related to time and expenses can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.



# General Ledger Reports

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With the wide variety of Acumatica ERP reports related to the general ledger, you can promptly get vital information, analyze financial data by various criteria, and review transactions efficiently. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All general ledger reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Cash Management Reports

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With the wide variety of Acumatica ERP reports related to cash management, you can make regular cash flow projections, view the current balances of cash accounts, monitor the results of consolidations, and produce period-end audit reports. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All cash management reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Accounts Payable Reports

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With the wide variety of Acumatica ERP reports related to accounts payable, you can promptly get vital information, analyze financial data by various criteria, and review transactions efficiently. Some reports have both a standard version and a multicurrency (MC) version. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All accounts payable reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Accounts Receivable Reports

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With the wide variety of Acumatica ERP reports related to accounts receivable, you can promptly get vital information, analyze financial data by various criteria, and review transactions efficiently. Some reports have a standard version and a multicurrency (MC) version. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All accounts receivable reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Fixed Assets Reports

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With the wide variety of Acumatica ERP reports related to fixed assets, you can promptly get detailed information about fixed asset acquisitions, disposals, depreciation, net value, and transactions. Fixed asset reports provide you with asset balance projections by account and by class. You can also track fixed assets for different locations, custodians, and departments. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All reports related to fixed assets can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Deferred Revenue Reports

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With the wide variety of Acumatica ERP reports on deferred revenue, you can view projections of revenue and expenses by period. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All deferred revenue reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Taxes Reports

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With the Acumatica ERP reports related to taxes, you can view key tax-related information. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All tax-related reports can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Currency Management Reports

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With the Acumatica ERP reports related to currency management, you gain better visibility into your financial details. You can view the history of foreign currency rates, view translation details, track the history of batch modifications, and evaluate unrealized currency gains and losses by revaluing accounts payable and accounts receivable accounts. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All currency management reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.



# Inventory Reports

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With the wide variety of Acumatica ERP reports related to inventory, you can promptly get detailed information about inventory and warehouses, as well as inventory revaluation data. You can also analyze the data by various criteria, and track inventory operations for different warehouses and locations. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All inventory reports can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Sales Orders Reports

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With the wide variety of Acumatica ERP reports, you can meet your organization's reporting needs as they relate to sales orders, shipments, and SO invoices. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All reports related to sales orders can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Purchase Orders Reports

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With the wide variety of Acumatica ERP reports related to purchase orders, you can promptly get detailed information about purchase orders, purchase receipts, and purchase returns. You can also analyze the data by various criteria and track the purchase of goods to different warehouses and locations. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All purchasing-related reports can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Purchase Requisitions Reports

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With the Acumatica ERP reports related to purchase requisitions, you can view and print requests for proposals sent to vendors that can participate in the bidding process, and you can view information about requests and requisitions. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All reports related to purchase requisitions can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# User Security Reports

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The Acumatica ERP reports related to user security provide information that can be useful for employees who manage users, roles, and access rights to system objects. You can use these reports for analyzing, optimizing, and restructuring user accounts, user roles, and access rights. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All reports related to user security can be generated in different formats, including PDF and HTML, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.

# Document Management Reports

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With the Acumatica ERP audit reports on document management, you can view statistics on wiki articles, which can be filtered by author, time interval, and type of article content. If a report contains data links, you can easily drill down from the report to any supporting details.



A report includes only the objects or entities that the user running the report is authorized to access, based on the user's roles and membership in restriction groups.

All document management reports can be generated in different formats, including PDFs, and can be printed or sent by email. For more information about reports, see [Reports](#).

Each of the topics of this chapter provides reference information about a particular Acumatica ERP report, including details about the applicable report parameters you can use to select the exact data you want to view and analyze.