

Reports settings

September 10, 2026

Reports settings

Use **Reports settings** to review report-setting roles, their tabs and widgets, the users assigned to them, and their last modification dates.

Reports settings

Reports settings is the reference list for report settings. A row contains **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified**.

If you need to...	Go to
Read the role, tab, widget, user, and modification information	Read the Reports settings list
Review invoice-delay settings	Review forecast settings
Open a saved report setting	Open a report setting for maintenance
Create a report setting	New report setting
Change a saved report setting	Edit report setting
Work with the reports that use these settings	Reports hub

The list is a reference surface rather than a business-process stage. Use the new-setting or maintenance page for changes.

Role	Tabs	Widgets	Users	Last modified
Owners	5	22	Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, S-Bo...	11 Aug 2026 - 09:57 PM
SupperAdmin	4	4	Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, Ma...	3 Dec 2024 - 10:59 AM
Sales Manager	4	8	Mahmoud El Shahawy, Ayman Shohoud, Shahawy, Mohamed ...	12 Aug 2026 - 05:30 PM
Team Leader	0	0	Mahmoud Sabry, Mohamed Mamdouh, Mohamed Sabry, Moh...	
Sales Engineer	0	0	A Assem, A Assem, Fatma Mohamed, Ibrahim Muhammed, Ma...	
Shotec Secretary	0	0	Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah	
Purchasing Manager	4	0	Mohamed Sabry, Mohamed-Sabry, A Assem, Mohamed Elhadd...	30 Aug 2026 - 08:28 PM
ShotecFinanceManager	4	3	Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Maddah, Pa...	8 Apr 2025 - 06:43 AM
Section Head	0	0	Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhaddad, T...	
Admin	0	0	Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Mazen Al ...	
Service Admin	0	0	Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah	
Principal Netzsch	0	0	Mazen Al Maddah, Mazen Al Maddah, Atloria Docs Principal	
Principal Lewa	0	0	Mazen Al Maddah, Mazen Al Maddah	
Project Manager	0	0	Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, Sahar ...	
Warehouse Keeper	0	0	Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa ahm...	
Accountant	0	0	Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, Maze...	
Assistant Sales Manager	0	0	Mazen Al Maddah, Mazen Al Maddah	
MrmBooking	4	1	Mazen Al Maddah, Mazen Al Maddah	3 Nov 2024 - 07:28 AM
MrmSales	4	2	Mazen Al Maddah, Mazen Al Maddah	4 Nov 2024 - 11:42 AM
Mazen_AlMaddah	5	48	Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Maz...	3 Sep 2025 - 09:12 AM
Count: 22				

Before you start

You need signed-in access to the configuration area. The Reports settings route uses the product's authentication guard.

Prerequisites

- Have access to `/configuration/reports-settings`.
- Know whether you are reviewing the list or opening a saved row for maintenance.
- Select a saved report-setting row before opening its maintenance page.

The list depends on the account's subscription configuration. When that configuration does not include the feature, the page follows its subscription alternative instead of showing the report-setting list.

Open Reports settings

Use this procedure to reach the report-setting list from the configuration area.

Prerequisites

- Have signed in to PAMS.

Steps

1. Open `/configuration/reports-settings` .
2. Confirm that the page shows **Configuration Reports** and the **Forecast settings** entry.
3. Confirm that the list shows the **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified** headers.

Role	Tabs	Widgets	Users	Last modified
Owners	5	22	Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, S-Bo...	11 Aug 2026 - 09:57 PM
SupperAdmin	4	4	Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, Ma...	3 Dec 2024 - 10:59 AM
Sales Manager	4	8	Mahmoud El Shahawy, Ayman Shohoud, Shahawy, Mohamed ...	12 Aug 2026 - 05:30 PM
Team Leader	0	0	Mahmoud Sabry, Mohamed Mamdouh, Mohamed Sabry, Moh...	
Sales Engineer	0	0	A Assem, A Assem, Fatma Mohamed, Ibrahim Muhammed, Ma...	
Shotec Secretary	0	0	Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah	
Purchasing Manager	4	0	Mohamed Sabry, Mohamed-Sabry, A Assem, Mohamed Elhadd...	30 Aug 2026 - 08:28 PM
ShotecFinanceManager	4	3	Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Maddah, Pa...	8 Apr 2025 - 06:43 AM
Section Head	0	0	Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhaddad, T...	
Admin	0	0	Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Mazen Al...	
Sevice Admin	0	0	Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah	
Principal Netzsch	0	0	Mazen Al Maddah, Mazen Al Maddah, Atloria Docs Principal	
Principal Lewa	0	0	Mazen Al Maddah, Mazen Al Maddah	
Project Manager	0	0	Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, Sahar...	
Warehouse Keeper	0	0	Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa ahm...	
Accountant	0	0	Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, Maze...	
Assistant Sales Manager	0	0	Mazen Al Maddah, Mazen Al Maddah	
MrmBooking	4	1	Mazen Al Maddah, Mazen Al Maddah	3 Nov 2024 - 07:28 AM
MrmSales	4	2	Mazen Al Maddah, Mazen Al Maddah	4 Nov 2024 - 11:42 AM
Mazen_Almaddah	5	48	Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Maz...	3 Sep 2025 - 09:12 AM
Count: 22				

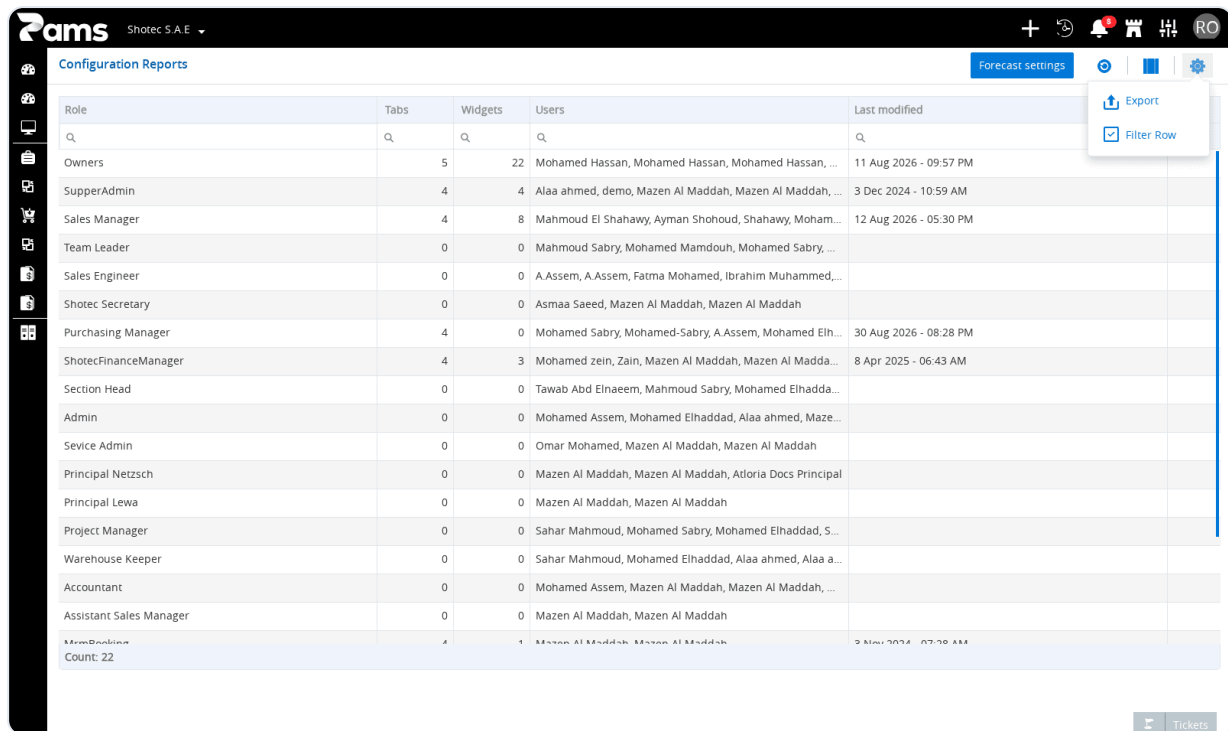
Result: The Reports settings list is open.

Read the Reports settings list

Each row summarises one report setting. Read the headers from left to right as follows:

Header	What to read
Role	The role associated with the report setting.
Tabs	The number of tabs in the setting.
Widgets	The number of widgets in the setting.
Users	The users associated with the setting.
Last modified	The date shown for the latest modification.

When **Filter Row** is available, select it to filter a column. The toolbar shows **Refresh**, **Table Layout**, and **Settings**. After you open **Settings**, **Export** and **Filter Row** are visible.



Role	Tabs	Widgets	Users	Last modified
Owners	5	22	Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, ...	11 Aug 2026 - 09:57 PM
SupperAdmin	4	4	Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, ...	3 Dec 2024 - 10:59 AM
Sales Manager	4	8	Mahmoud El Shahawy, Ayman Shohoud, Shahawy, Moham...	12 Aug 2026 - 05:30 PM
Team Leader	0	0	Mahmoud Sabry, Mohamed Mamdouh, Mohamed Sabry, ...	
Sales Engineer	0	0	A Assem, A Assem, Fatma Mohamed, Ibrahim Muhammed,...	
Shotec Secretary	0	0	Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah	
Purchasing Manager	4	0	Mohamed Sabry, Mohamed-Sabry, A Assem, Mohamed Elh...	30 Aug 2026 - 08:28 PM
ShotecFinanceManager	4	3	Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Madda...	8 Apr 2025 - 06:43 AM
Section Head	0	0	Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhadda...	
Admin	0	0	Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Maze...	
Sevice Admin	0	0	Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah	
Principal Netzsch	0	0	Mazen Al Maddah, Mazen Al Maddah, Adloria Docs Principal	
Principal Lewa	0	0	Mazen Al Maddah, Mazen Al Maddah	
Project Manager	0	0	Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, S...	
Warehouse Keeper	0	0	Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa a...	
Accountant	0	0	Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, ...	
Assistant Sales Manager	0	0	Mazen Al Maddah, Mazen Al Maddah	
More Details Count: 22	4	4	Mazen Al Maddah, Mazen Al Maddah	2 Nov 2024 - 07:38 AM

Use the headers and row values to choose the report setting you need. The list does not provide a create or delete route; use [New report setting](#) to create one and [Edit report setting](#) to change an existing one.

[!NOTE]

A saved row is the starting point for its maintenance page.

The list search panel is hidden, and the column chooser is disabled. Work from the headers that are visible in your list.

Review forecast settings

Forecast settings contain the average payment-delay values used for purchase, sales, and commission invoices. The three invoice groups each use a number and one of the unit choices **Days**, **Weeks**, or **Months**.

Prerequisites

- Have the Reports settings list open.

- Have access to **Forecast settings**.

Steps

1. Select **Forecast settings**.
2. Open the applicable forecast branch.
3. Review **for purchase invoices**, **for sales invoices**, and **for commission invoices**.
4. Review the available unit choices **Days**, **Weeks**, and **Months** for each invoice group.

The invoice fields appear inside the forecast popup when its branch is open.

Result: The forecast popup displays the applicable invoice-delay fields and their available unit choices.

Open a report setting for maintenance

Opening a report setting transfers you from the reference list to the existing setting's maintenance page.

Prerequisites

- Have the Reports settings list open.
- Have a saved report-setting row available.

Steps

1. Choose the way you want to open the saved setting:

If you need to...	Select
Open the setting in the current page	A data-row cell other than the row's edit cell
Open the setting in another browser tab	Open in new tab in the row context menu

Result: The selected report setting opens on its maintenance page.

Handle availability and request outcomes

Reports settings availability follows the account's subscription configuration. The list has no additional data-load message.

When you maintain a report setting on the related new-setting or maintenance page, the request messages are:

Message	Use
Your request was completed successfully	The maintenance request completed successfully.
An error occurred while processing your request	The maintenance request returned an error.

The list page does not provide a create or delete action. Use the list as the review and hand-off point, then continue to [New report setting](#) or [Edit report setting](#) for those tasks.

Continue with report settings

After reviewing the list, choose the maintenance page that matches your task:

If you need to...	Continue to
Create a new report setting	New report setting
Change an existing report setting	Edit report setting
Add a tab	Select Blank Tab on New report setting or Edit report setting
Import tabs	Select Import From on New report setting or Edit report setting
Set editable previous months	Use Editable prev. months on New report setting or Edit report setting
Set the time frame	Use Time Frame on New report setting or Edit report setting
Save and close the setting	Select Save and Close on New report setting or Edit report setting
Work with the reports that use report settings	Reports hub
Return to the configuration entry point	Configuration dashboard

Reports settings does not move a business record from one lifecycle stage to another. It is the reference list and hand-off point for report-setting work.