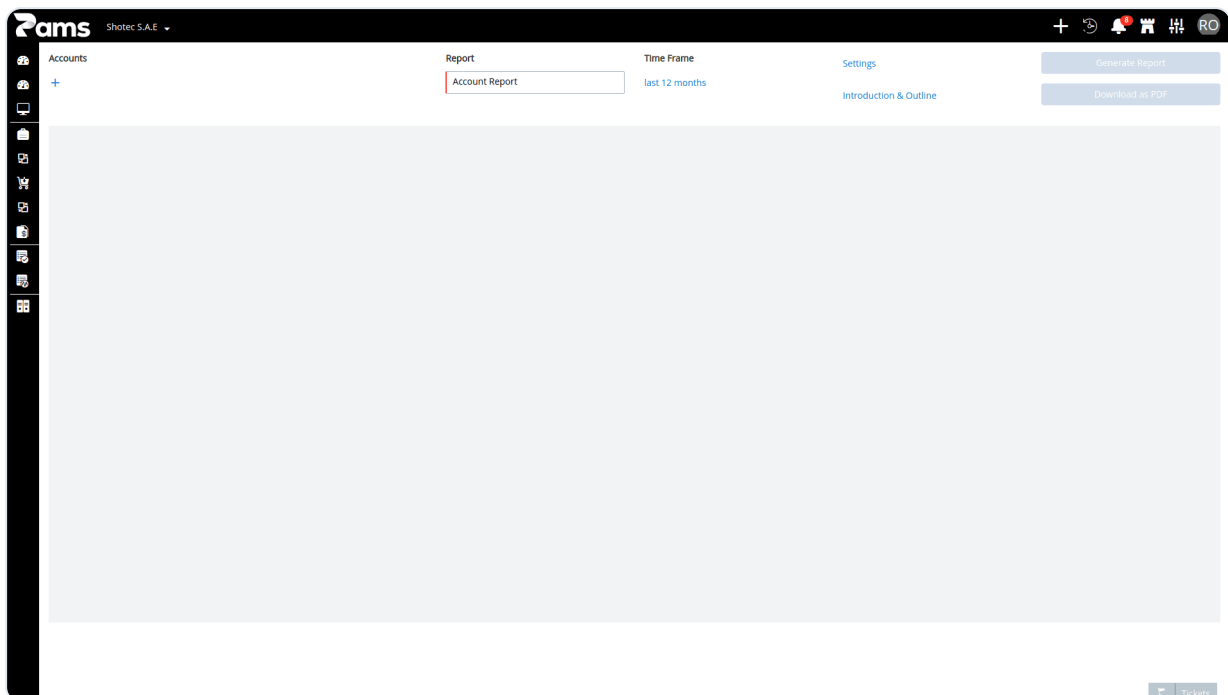


Principal Report

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Principal Report

User Guide > Principal Report



Principal Report

Overview

Use Principal Report to generate and download a report from the reporting workspace. Sales representatives, sales managers, purchasing officers, warehouse managers, project managers, and finance officers can use this report when they need a formal PDF output for operational review or distribution.

The Principal Report form contains eight mandatory fields. Complete the required report information before generating the report.

Before you start

- Ensure that you can access **Reports**.
- Prepare the information required for the eight mandatory fields in the Principal Report form.

Steps

1. On the application navigation bar, select **Reports**.
2. On the Principal Report form, complete all eight mandatory fields.
3. Select **Generate Report** to generate the Principal Report.
4. Select **Download as PDF** to download the generated report as a PDF file.

Tips & cautions

Note: The Principal Report form has eight mandatory fields. Complete each required field before you generate the report.

Tip: Generate the report before selecting **Download as PDF**.

Result

The Principal Report is generated and downloaded as a PDF file.

Related pages

- [Principal Report — Overview](#)
- **Principal Report — Learning Path**