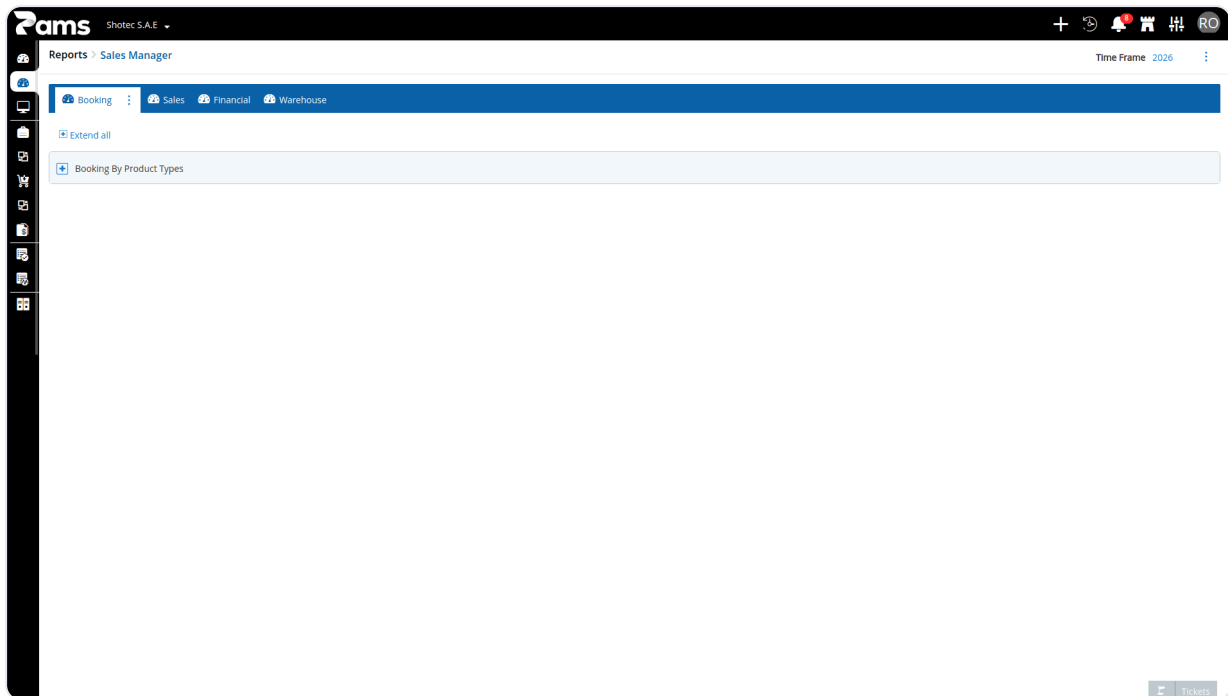


Reports

August 8, 2026

Reports

Applications > Reports



Reports — Reports

Overview

Use Reports to access reporting information from the **Reports** application. Sales managers and operational users can use the available report view to review bookings by product type and locate report-related items using the search area.

Open this feature when you need to review booking information by product classification or work with report attachments and tickets.

Workflow

1. Open **Reports** from the main application navigation.

2. Decide whether you need to review the current report view or find a specific item.

- To return to the current date context, select **today**.
- To find an item, enter relevant text in **Search for widget**.
- To work with ticket-related items, select **Tickets**.

Tip: Use a focused search term when locating a particular report item or widget.

3. Decide whether supporting documentation is required.

- Select **Attach** to add a file.
- In the attachment area, select a file or drag it to **or Drop a file here**.
- Select **Ok** to complete the action.

Note: Attach only documents that are relevant to the report or ticket being reviewed.

4. Review the **Booking By Product Types** report view to assess booking information grouped by product type.

Booking By Product Types

The **Booking By Product Types** view contains booking information organized by product type. Use this view when reviewing the mix of products represented in bookings and when comparing booking activity across product classifications.

The screen also displays **Sales Manager**, which identifies the sales-management context shown in the report.

Examples

A sales manager needs to review bookings for a weekly product-type discussion.

1. Open **Reports**.
2. Select **today** to work from the current date context.
3. Open **Booking By Product Types**.
4. Review the product-type booking information and use **Search for widget** to locate a relevant report item.

5. If the discussion requires supporting material, select **Attach**, add the file in **or Drop a file here**, and select **Ok**.

Tips

Tip: Review **Booking By Product Types** before preparing sales discussions that require product-level booking context.

Note: Use **Tickets** when the report task relates to ticket items rather than the general report view.

Warning: Confirm that the correct file has been selected before choosing **Ok** after attaching documentation.

Troubleshooting

Symptom	Likely cause	Fix
The required report item is not visible.	The current view contains more items than can be reviewed easily.	Use Search for widget to narrow the displayed items.
A file cannot be added as expected.	The file has not been selected or dropped into the attachment area.	Select Attach , then select the file or drag it to or Drop a file here .
The report needs current-date context.	The view is not set to the current date context.	Select today .

Related pages

- [Reports — Overview](#)
- [Reports — Learning Path](#)