

Reports — Overview

August 8, 2026

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Applications > Reports

Overview

The Reports area provides a central workspace for accessing reporting-related views across key business functions. It supports Sales representatives, Sales managers, Project managers, Purchasing officers, Warehouse or inventory managers, and Finance or accounting users who need to review operational information in their respective areas.

Reports are organized around functional workspaces, including Sales, project management, purchasing, warehouse operations, and finance. The area also includes access points for personal work, dashboards, tickets, and attachments.

What you can do here

- Select **Dashboard** to access dashboard reporting.
- Select **Reports** to work in the reports workspace.
- Select **My Desk** to access reporting from your personal work area.
- Select **Sales** or **PM** to access sales or project management reporting.
- Select **Purchasing** or **Warehouse** to access purchasing or warehouse reporting.
- Select **Finance** to access finance reporting.
- Use **today**, **Tickets**, **Attach**, and **Ok** to work with the available report controls.

Related pages

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