

# Reports Settings

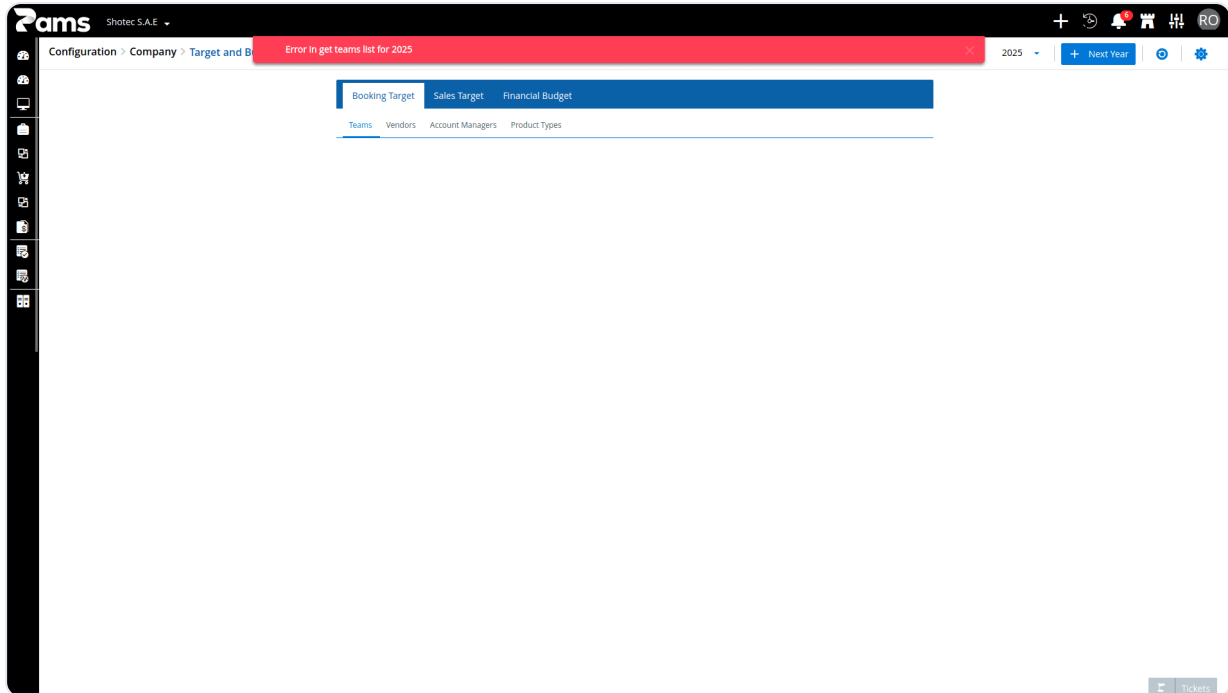
| Configuration Reports   |      |         |       |                                                                       | Forecast settings      |  |  |  |  |
|-------------------------|------|---------|-------|-----------------------------------------------------------------------|------------------------|--|--|--|--|
| Role                    | Tabs | Widgets | Users |                                                                       | Last modified          |  |  |  |  |
| Q                       | Q    | Q       | Q     |                                                                       | Q                      |  |  |  |  |
| Owners                  |      | 5       | 22    | Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, S-Bohnacker, Rag...   | 12 May 2026 - 05:18 AM |  |  |  |  |
| SupperAdmin             |      | 4       | 4     | Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, Mazen Al Madda... | 3 Dec 2024 - 10:59 AM  |  |  |  |  |
| Sales Manager           |      | 4       | 8     | Mahmoud El Shahawy, Ayman Shohoud, Shahawy, Mohamed Elhaddad, M...    | 16 Dec 2024 - 12:43 PM |  |  |  |  |
| Team Leader             |      | 0       | 0     | Mahmoud Sabry, Mohamed Mamdouh, Mohamed Sabry, Mohamed Elhadd...      |                        |  |  |  |  |
| Sales Engineer          |      | 0       | 0     | A.Assem, A.Assem, Fatma Mohamed, Ibrahim Muhammed, Mahmoud Tare...    |                        |  |  |  |  |
| Shotec Secretary        |      | 0       | 0     | Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah                         |                        |  |  |  |  |
| Purchasing Manager      |      | 0       | 0     | Mohamed Sabry, Mohamed-Sabry, A.Assem, Mohamed Elhaddad, Alaa ahm...  |                        |  |  |  |  |
| ShotecFinanceManager    |      | 4       | 3     | Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Maddah, Pams User       | 8 Apr 2025 - 06:43 AM  |  |  |  |  |
| Section Head            |      | 0       | 0     | Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhaddad, Tawab Abd Eln...  |                        |  |  |  |  |
| Admin                   |      | 0       | 0     | Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Mazen Al Maddah          |                        |  |  |  |  |
| Sevice Admin            |      | 0       | 0     | Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah                        |                        |  |  |  |  |
| Principal Netzsich      |      | 0       | 0     | Mazen Al Maddah, Mazen Al Maddah                                      |                        |  |  |  |  |
| Principal Lewa          |      | 0       | 0     | Mazen Al Maddah, Mazen Al Maddah                                      |                        |  |  |  |  |
| Project Manager         |      | 0       | 0     | Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, Sahar Muhamoud,...    |                        |  |  |  |  |
| Warehouse Keeper        |      | 0       | 0     | Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa ahmed, Youssef S... |                        |  |  |  |  |
| Accountant              |      | 0       | 0     | Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah,...  |                        |  |  |  |  |
| 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, Mazen Al Maddah... | 3 Sep 2025 - 09:12 AM  |  |  |  |  |
| Shorosh Test            |      | 0       | 0     | Mohamed-Shorosh, Mazen Al Maddah, Mazen Al Maddah, Mohamed-Shoro...   |                        |  |  |  |  |
| Count: 22               |      |         |       |                                                                       |                        |  |  |  |  |

## Overview

Sales, PM, Purchasing, Warehouse, and Finance users can use these settings to keep report layouts aligned with the information required for their operational reporting.

# Settings

Open **Configurations > Reports Settings** to access the Reports Settings workspace.



## Reports settings — Configurations > Reports Settings

The page provides the following layout controls:

| Control         | Use                                                    |
|-----------------|--------------------------------------------------------|
| Layout name     | Enter or review the name of the report layout.         |
| Search          | Search for a layout or available record.               |
| files[]         | Attach or review files associated with the layout.     |
| Standard Layout | Work with the standard layout option.                  |
| Add Layout      | Create a new layout.                                   |
| Columns Chooser | Select the columns to display.                         |
| Save            | Save the layout currently being created or edited.     |
| Update Current  | Update the currently selected layout.                  |
| Delete Current  | Delete the currently selected layout.                  |
| Delete          | Use the available delete action for the selected item. |
| Cancel          | Exit the current action without saving.                |

## Note

Use a clear and specific **Layout name** so that users can identify the correct reporting layout when several layouts exist.

Before changing an existing layout, use **Search** to locate and review the current record. If you are creating a separate layout for a different reporting need, use **Add Layout** rather than overwriting a layout that other users may rely on.

## Workflow

1. Open **Configurations > Reports Settings** and identify whether you need to work with an existing layout or create a new one.

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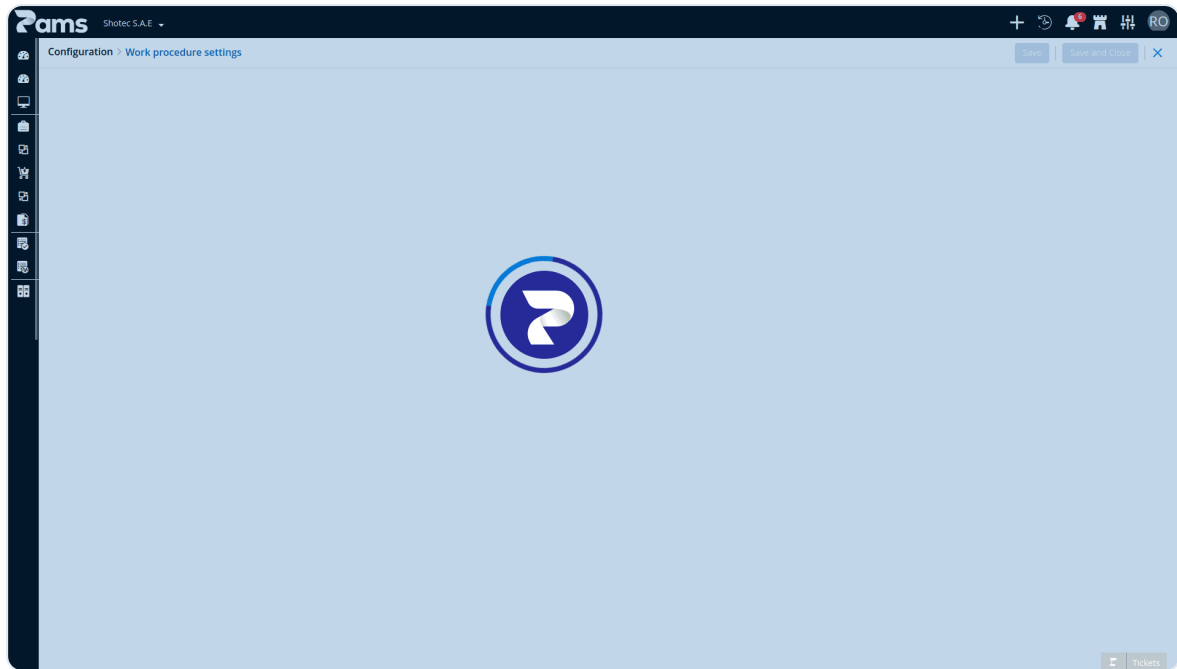
### Reports settings — Configurations > Reports Settings

Use **Search** to locate an existing layout. If the required layout is already available, select it and review its **Layout name** before making changes.

2. Decide whether to use the standard layout, revise an existing layout, or create a separate layout.
  - Select **Standard Layout** when the standard layout is the appropriate starting point.
  - Select **Add Layout** when you need a new layout.
  - Select an existing layout when you need to revise the current layout.

Enter a meaningful value in **Layout name** for a new layout. Use **Cancel** if you decide not to continue with the new or edited layout.

3. Define the information shown in the layout.



#### *Reports settings — Configurations > Reports Settings*

Select **Columns Chooser** to choose the columns required for the layout. Use **files[]** when files need to be included with the layout record.

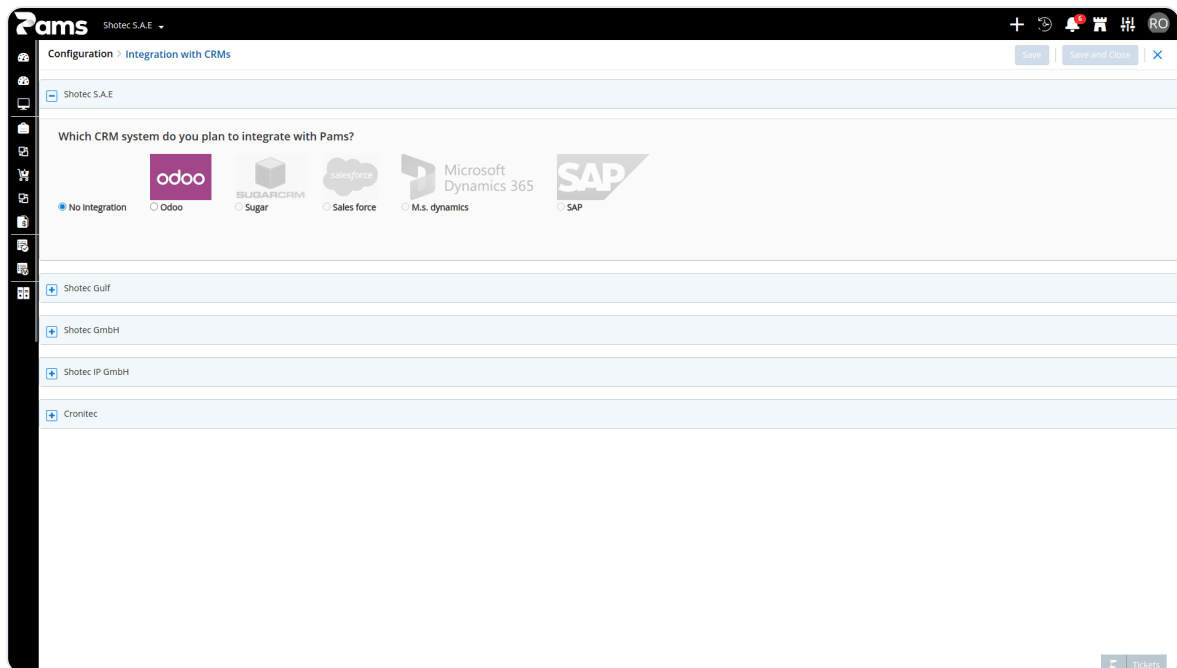
Review the selected columns before saving. Only retain columns that support the reporting purpose, such as operational review, sales follow-up, purchasing analysis, Warehouse control, finance review, or Job Profitability analysis.

4. Decide whether you are saving a new layout or changing the current one.

- Select **Save** to store the layout you are creating.
- Select **Update Current** to store changes to the layout currently selected.
- Select **Cancel** if the changes should not be retained.

After saving or updating, use **Search** and **Layout name** to confirm that you can locate the intended layout.

5. Decide whether a layout should remain available.



## Reports settings — Configurations > Reports Settings

If a layout is no longer required, select **Delete Current** for the current layout or use **Delete** for the selected item. Confirm that you have selected the correct layout before deleting it.

### Warning

Review the **Layout name** carefully before using **Delete Current** or **Delete**. The screen provides delete actions but does not show a restore action.

## Dashboard Settings

Select **dashboard settings** to review dashboard-related settings records. This stage contains role-oriented dashboard records, with information such as **Role**, **Tabs**, **Widgets**, **Users**, and **Last modified** available to help identify the applicable dashboard setup.

Use these records to determine which roles have dashboard tabs and widgets assigned, how many users are associated with the record, and when the record was last modified. The available controls do not identify a button that moves a record into or out of this stage.

## Integration with CRMs

Select **integration with crms** to review records related to report integration with CRMs. Use the available report settings controls, including **Search**, to locate the record you need to review.

Where records are listed, use the available identifying information, including roles and last-modified details, to distinguish the correct configuration. The available controls do not show a specific action for moving records into or out of the CRM integration stage.

## Targets and Budgets

Select **targets and budgets** to review report settings associated with Targets and Budgets. Use this stage when the reporting layout or record selection must support planned performance goals or financial spending and revenue plans.

Use **Search** to locate the relevant setting and review the listed record information before changing a layout. The available controls do not identify a specific button that transfers records into or out of this stage.

## Work Procedure Settings

Select **work procedure settings** to review settings records associated with work procedures. This stage is used to review the reporting records that support the business work procedure context.

Use **Search** to find the required record and use the available role, tab, widget, user, and modification information where displayed to identify the appropriate setting. The available controls do not show a specific record-movement action for this stage.

## Examples

A Finance officer needs a separate layout for monthly Targets and Budgets reporting.

1. Open **Configurations > Reports Settings**.
2. Select **Add Layout** and enter **Monthly Targets and Budgets Review** in **Layout name**.
3. Select **Columns Chooser** and choose the columns required for the review layout.
4. Select **Save** to store the new layout.
5. Select **targets and budgets** to review the settings area related to Targets and Budgets.

6. At a later date, use **Search** to locate **Monthly Targets and Budgets Review** . If the layout requires revised columns, use **Columns Chooser** and then select **Update Current**.

## Tips

### Tip

Use **Search** before creating a layout. An appropriate layout may already exist and only require an update.

### Tip

Use separate layouts for distinct reporting purposes, such as Sales reporting, Warehouse reporting, finance review, or PM analysis, rather than using one broadly named layout for all users.

## Troubleshooting

| Symptom                                         | Likely cause                                                     | Fix                                                                                                                             |
|-------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| The required layout cannot be found.            | The layout name is unclear or the search criteria are too broad. | Use <b>Search</b> with a more specific value and review available <b>Layout name</b> entries.                                   |
| Changes to a current layout are not retained.   | The revised layout was not updated.                              | Select the correct layout, make the required changes, and select <b>Update Current</b> .                                        |
| A new layout does not appear in search results. | The layout was created but not saved.                            | Enter the required <b>Layout name</b> and select <b>Save</b> .                                                                  |
| The wrong reporting area is being reviewed.     | The incorrect reports settings tab is selected.                  | Select the appropriate tab: <b>dashboard settings, integration with crms, targets and budgets, or work procedure settings</b> . |

## Related pages

- [Configurations — Overview](#)
- [2 Factor Authentication](#)
- [Configurations — Learning Path](#)
- [Account Managers](#)

- [Custom Fields](#)
- [Dashboard Settings](#)
- [Dynamic Validation](#)
- [Integration With Other CRMs Settings](#)
- [Manage Demo Data](#)
- [Branches](#)
- [Flags](#)
- [Frequent Currencies](#)
- [Products](#)
- [Banks](#)
- [Invoice Settings](#)