

# Reports

REFERENCE QUICK GUIDE

Acumatica ERP 6.1

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# Copyright

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11235 SE 6th, Suite 140  
Bellevue, WA 98004

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# Customer Management Reports

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With the wide variety of reports for the Customer Management module, you can monitor and analyze sales opportunities and campaigns. These reports can give you real-time visibility into which lead sources result in the most conversions and which campaigns bring revenue.

Because the Customer Management module is tightly integrated with other modules, such as Accounts Receivable, you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a report to any supporting details.

All Customer Management reports can be generated in multiple formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures; see Acumatica documentation for more information.

## Customer Management Reports

The Customer Management module includes the following reports:

- **Leads**

- [Lead Pipeline by Owner](#) (CR.62.10.10): Displays the statistics for leads at each stage.
- [Lead Pipeline by Workgroup](#) (CR.62.10.20): Displays the statistics for leads at each stage for each workgroup.
- [Lead Statistics by Owner](#) (CR.62.11.10): Displays the lead statistics for each employee who owns the leads.
- [Lead Statistics by Workgroup](#) (CR.62.11.20): Displays the lead statistics for each workgroup that owns the leads.
- [Lead Statistics by Class ID](#) (CR.62.11.30): Displays the statistics on lead conversion for each lead class.
- [Lead Statistics by Source](#) (CR.62.11.40): Displays statistics on lead conversion for each lead source.
- [Chart: Lead Count Statistics by Owner](#) (CR.62.12.10): Shows statistics on leads won and lost by owners.
- [Chart: Lead Conversion Statistics By Owner](#) (CR.62.12.20): Shows statistics on lead conversion by owners.

- **Opportunity**

- [Opportunity Pipeline by Owner](#) (CR.62.40.10): For each opportunity owner, displays information about opportunities at each stage.
- [Opportunity Pipeline by Workgroup](#) (CR.62.40.20): For each workgroup that owns opportunities, displays information about opportunities at each stage.
- [Opportunity Statistics by Owner](#) (CR.62.41.10): For each opportunity owner, displays information about opportunities of all stages.
- [Opportunity Statistics by Workgroup](#) (CR.62.41.20): For each workgroup, displays information about opportunities of all stages.
- [Opportunity Statistics by Class ID](#) (CR.62.41.30): For each opportunity class, displays information about opportunities of this class in all stages.

- [Opportunity Statistics by Source](#) (CR.62.41.40): Displays information about opportunities currently available in each stage, grouped by lead source.
- [Opportunity Statistics by Stage](#) (CR.62.41.50): Displays statistics on opportunities in each stage.
- [Opportunity Stage Statistics by Owner](#) (CR.62.41.60): For each opportunity owner, displays statistics on opportunities at each stage.
- [Opportunity Stage Statistics by Workgroup](#) (CR.62.41.70): For each workgroup, displays statistics on opportunities at each stage.
- [Chart: Opportunity Count Statistics by Owner](#) (CR.62.42.10): Compares the opportunities counted for each employee
- [Chart: Opportunity Amount Statistics by Owner](#) (CR.62.42.20): Shows the opportunity amounts for each employee.
- [Chart: Opportunity Amount Conversion Statistics by Owner](#) (CR.62.42.30): Shows the amounts of opportunities converted by each owner.
- [Chart: Opportunity Quantity Conversion Statistics by Owner](#) (CR.62.42.40): Compares the quantities of opportunities converted by each owner.
- **Cases**
  - [Case Pipeline by Owner](#) (CR.62.60.10): Displays statistics for cases owned by different employees.
  - [Case Pipeline by Workgroup](#) (CR.62.60.20): Displays statistics for cases owned by specific workgroups.
  - [Case Statistics by Owner](#) (CR.62.61.10): Displays statistics for a specific date range on cases owned by employees.
  - [Case Statistics by Workgroup](#) (CR.62.61.20): Displays statistics for a specific date range on cases owned by different workgroups.
  - [Case Statistics by Class ID](#) (CR.62.61.30): Displays statistics for cases of a specific class.
  - [Chart: Case Count Statistics by Owner](#) (CR.62.62.10): Presents the statistics for cases owned by different employees.
  - [Chart: Case Rate Statistics by Owner](#) (CR.62.62.20): Provides data you can use to compare case resolution rates for cases owned by different employees.
  - [Chart: Case Due Statistics by Owner](#) (CR.62.62.30): Displays statistics on case resolution dates for cases owned by different employees.
  - [Chart: Case Average Resolve Time Statistics by Owner](#) (CR.62.62.40): Displays statistics on case resolution dates for cases owned by different employees.
  - [Chart: Case Average Initial Response Time Statistics By Owner](#) (CR.62.62.50): Displays statistics on initial responses to cases owned by different employees.
- **Business Accounts**
  - [Business Accounts Pipeline by Owner](#) (CR.62.30.10): Displays statistics, grouped by owner, for business accounts of different types.
  - [Business Accounts Pipeline by Workgroup](#) (CR.62.30.20): Displays statistics, grouped by workgroup, for business accounts of different types.
- **Campaign**
  - [Campaign Statistics](#) (CR.62.83.00): Presents statistics on the currently active campaigns.

# Project Reports

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By using the reports of the Projects module, you can get detailed information about projects and tasks.

The reports can be generated in multiple formats, including PDF and HTML. Also, you can print the report you generated or send the report by email. Some reports generated as PDF may require digital signatures; see Acumatica documentation for more information.

- **Balance**

- [Project Balance](#) (PM.62.10.00): Lists the project task balance broken down by project income, expense, and asset.
- [Project Profitability](#) (PM.62.40.00): Lists the projects along with their income, expense, and margin.

- **Audit**

- [Projects](#) (PM.63.10.00): Lists the projects broken down by customers.
- [Project Tasks](#) (PM.63.20.00): Lists either all the project tasks grouped by customer or only the project tasks for the customer you select.
- [Employee Hours](#) (PM.62.20.00): Lists the regular and overtime hours, broken down by customer, spent by employees on the selected project.
- [Employee Hours by Project and Task](#) (PM.62.30.00): Lists the regular and overtime hours, broken down by projects and tasks, spent by the selected employee.
- [Project Transactions](#) (PM.63.30.00): Lists the project transactions broken down by project and customer.

# Time and Expenses Reports

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With the reports available for the Time and Expenses module, you can promptly get detailed information about expense claims, review the data, and track expense claims for different branches, departments, and employees.

Because the Time and Expenses module is tightly integrated with other modules, such as Organization Structure, you can find and analyze the exact information you need. You can use flexible selection options and data links to easily drill down from a financial report to any supporting details.



: Time and Expenses reports are generated by user request. They run on only those accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Time and Expenses reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Time and Expenses Reports

The Time and Expenses module includes the following reports:

- **Audit**
  - [Expense Claim Details](#) (EP.61.30.00): Displays details on expense receipts grouped by expense claims.
  - [Expense Claim Details by Employee](#) (EP.61.40.20): Displays information about claimed expenses grouped by employee.
  - [Expense Claim Details by Department](#) (EP.61.40.10): Displays information about claimed expenses grouped by department.

# General Ledger Reports

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With the wide variety of reports for the General Ledger module, you can promptly get vital information, analyze financial data by various criteria, review transactions efficiently, and track data edits.

Because the General Ledger module is tightly integrated with other modules—such as Accounts Receivable, Accounts Payable, and Cash Management—you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a financial report to any supporting details.



: Because the General Ledger reports can be generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All General Ledger reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## General Ledger Reports

The General Ledger module includes the following reports:

- **Balance**
  - [Trial Balance Summary](#) (GL.63.20.00): Displays the account balances for the period.
  - [Trial Balance Detailed](#) (GL.63.25.00): For the selected period, displays the balances of the accounts, detailed to subaccounts.
  - [Transactions for Period](#) (GL.63.30.00): Displays the list of transactions that occurred during the specified period.
  - [Transactions for Account](#) (GL.63.35.00): Shows activities on the account and under the specified subaccount during the range of periods.
- **Financial Statements**
  - [Balance Sheet](#) (GL.63.40.00): Displays the company's balance sheet as of the start of the specified financial period. Assets are shown against liabilities.
  - [Balance Sheet - Comparative](#) (GL.63.45.00): Displays the company's balance sheet by quarter. Assets are shown against liabilities.
  - [Profit & Loss](#) (GL.63.50.00): Displays your company's profits and losses for the specified period in period-to-date (PTD) and year-to-date (YTD) amounts, versus the PTD and YTD amounts of the previous year as calculated for the same date.
  - [Profit & Loss - Comparative](#) (GL.63.55.00): Displays your company profits and losses in YTD amounts for each quarter. The amounts for the previous year are shown for comparison.
  - [Profit & Loss - Quarterly](#) (GL.63.60.00): Displays your company's profits and losses in year-to-date amounts for each quarter.
  - [Cash Flow](#) (GL.63.65.00): Contains the cash flow statement of your company.
- **Audit**
  - [GL Budget Edit](#) (GL.61.20.01): Displays the list of budget articles with their requested and released amounts in the selected ledger for the specified branch and for the specified financial year.
  - [GL Edit Summary](#) (GL.61.15.00): Displays the list of transactions that were entered but not released during the specified financial period.
  - [GL Edit Detailed](#) (GL.61.05.00): Shows transactions entered but not released for different accounts during the specified period (or all open periods).
  - [GL Edit Account Distribution](#) (GL.61.10.00): Displays the list of transactions, with their details, that were entered but not released during the specified financial period.



- [\*GL Register\*](#) (GL.62.05.00): Displays the list of all the batches released and posted to General Ledger during the specified financial period.
- [\*GL Register Detailed\*](#) (GL.62.10.00): Displays the list of all the batches released and posted to General Ledger during the specified financial period. Batch details include accounts, subaccounts, currency, and amounts.
- [\*GL Recurring Transactions\*](#) (GL.64.15.00): Displays a schedule or the list of schedules created for recurring transactions.
- [\*GL Recurring Transactions Detailed\*](#) (GL.64.05.00): Displays the details of a schedule or schedules to which recurring transactions are assigned.
- [\*GL Reversing Batches\*](#) (GL.69.00.10): Displays the list of reversing batches with their details which have been generated for the selected batch.

# Cash Management Reports

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With the wide variety of reports for the Cash Management module, you can make periodic or daily cash flow projections, view the current balances of cash accounts, monitor results of consolidations, and produce period-end audit reports.

The Cash Management module is tightly integrated with the General Ledger, Accounts Receivable, Accounts Payable, and Currency Management modules. With this integration, you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a financial report to any supporting details.



: Because the Cash Management reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Cash Management reports can be generated in various formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Cash Management Reports

The Cash Managements module includes the following reports:

- **Balance**
  - [Cash Account Summary](#) (CA.63.30.00): Gives summary information about cash account balances during the specified time interval.
  - [Cash Account Details](#) (CA.63.35.00): Shows all activities on the selected cash account during the specified time interval. Cash transactions (receipts and disbursements) are listed by the transaction date.
  - [Reconciliation Statement](#) (CA.62.70.00): Provides the list of cash accounts with information about reconciliations performed for the accounts.
- **Forms**
  - [Deposit Slip](#) (CA.65.65.00): Displays details of the selected deposit along with complete information about the destination bank.
- **Audit**
  - [CA Edit](#) (CA.61.20.00): Shows all unreleased cash documents, entered up to the current business date, affecting cash accounts.
  - [CA Edit Detailed](#) (CA.61.25.00): Shows the details of all unreleased cash documents, entered up to the current business date, affecting cash accounts.
  - [CA Register](#) (CA.62.50.00): Displays the list of all cash documents released in the system for the specified financial period.
  - [CA Register Detailed](#) (CA.62.45.00): Provides the details of cash documents of all types released in the system for the specified financial period.
  - [Reconciliation Register](#) (CA.62.35.00): Summarizes reconciliations for all cash accounts or for the selected one.
  - [Reconciliation Register Details](#) (CA.62.40.00): Displays details of reconciliations performed for the selected cash account during the specified period of time.
  - [CA Batch Register](#) (CA.62.05.00): Displays the list of all batches released in the Cash Management module for the specified financial period.
  - [CA Batch Register Detailed](#) (CA.62.10.00): Provides the details of all batches released in the Cash Management module for the specified financial period.
  - [Undeposited Payments](#) (CA.65.70.00): Provides the list of payments that haven't been deposited until the specified date.

## Other Reports

- [Cash Flow Forecast](#): Provides the details of a 30-day cash flow forecast. The system opens this form when you click the **View as a Report** button on the form toolbar of the [Cash Flow Forecast](#) (CA.40.10.00) form.

# Accounts Payable Reports

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With the wide variety of reports for the Accounts Payable module, you can promptly get vital information, analyze financial data by various criteria, review transactions efficiently, and track data edits. Some reports have both a standard version and a multi-currency (MC) version.

Because the Accounts Payable is tightly integrated with other modules, such as General Ledger and Cash Management, you can find and analyze the exact information you need. Flexible selection options and data links allow you to easily drill down from a financial report to any supporting details.



: Because the Accounts Payable reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Accounts Payable reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Accounts Payable Reports

The Accounts Payable module includes the following reports:

- **Balance**

- [AP Balance by GL Account](#) (AP.63.20.00): For the chosen period, displays the balances of the Accounts Payable accounts and activities on the account.
- [AP Balance by Vendor](#) (AP.63.25.00): Displays the vendor balances for each account related to the vendor.
- [AP Balance by Vendor MC](#) (AP.63.30.00): Displays the vendor balances in each of the currencies used.
- [AP Aged Past Due](#) (AP.63.10.00): Lists the vendors with past due balances, breaking down balances by days past due.
- [AP Aged Past Due MC](#) (AP.63.11.00): Lists the vendors with past due balances, breaking down balances by days past due. The balances are shown in the currencies of the documents and in the base currency.
- [AP Aged Outstanding](#) (AP.63.15.00): Shows the list of vendors with outstanding balances, arranging totals by aging categories.
- [AP Aged Outstanding MC](#) (AP.63.16.00): Shows the list of vendors with outstanding balances in all currencies used, arranging totals by aging categories.
- [AP Aged Period Sensitive](#) (AP.63.05.00): Displays the list of vendors with past-due balances. The balances are arranged by days past due on the last day of the specified period.

- **Payment Processing**

- [Cash Requirements](#) (AP.61.20.00): Shows the cash requirements, grouped by pay date and vendor. The amounts due are calculated for released documents and for documents approved for payment.
- [Bills Pending Approval](#) (AP.61.10.00): Shows all the released documents that have yet to be approved for payment for the selected vendor or all vendors.
- [Bills Pending Payment](#) (AP.61.15.00): Shows documents approved for payment but not paid. You can limit these documents to those for a selected cash account, payment, or vendor.
- [Payments Pending Processing](#) (AP.65.10.00): Displays the cash requirements to the cash account imposed by the outstanding documents of all vendors or only a selected one.
- [Checks Pending Printing](#) (AP.61.25.00): Displays the payments for which checks need to be printed.

- **Forms**

- [Check Form](#) (AP.64.05.00): Prints a check.
- [Check Form with Remittance](#) (AP.64.10.00): Prints a check with remittance.
- [Additional Remittance Form](#) (AP.64.20.00): Prints check stubs.
- [1099-MISC Form](#) (AP.65.30.00): Displays the 1099-MISC form for the chosen 1099 year.

- **Audit**

- [Vendor Summary](#) (AP.65.50.00): Lists all the vendors with their default currency, credit terms, tax zone, and other related information.
- [Vendor Details](#) (AP.65.55.00): Shows all the information from the database about a specific vendor or all vendors.
- [Vendor History Summary](#) (AP.65.21.00): Shows a summary of balance history for vendors whose balance has been changing during the date range you specify.
- [Vendor History](#) (AP.65.20.00): Displays the vendor's balance history over the specified time interval.
- [AP Edit](#) (AP.61.07.00): Lists the Accounts Payable documents that were entered but not released.
- [AP Edit Detailed](#) (AP.61.05.00): Displays, with all details, the list of Accounts Payable documents of the chosen type that were entered but not released.
- [AP Register](#) (AP.62.15.00): Lists all the documents released in Accounts Payable for the specified financial period and for the selected vendor (or all vendors).
- [AP Register Detailed](#) (AP.62.20.00): Shows the details of documents of the selected type (or all types) released in Accounts Payable for the specified financial period.
- [AP Payment Register](#) (AP.62.25.00): Shows the payments (of all types or a selected type) released in Accounts Payable for the specified financial period.
- [AP Batch Register](#) (AP.62.05.00): Displays the list of all batches released in Accounts Payable during the specified financial period.
- [AP Batch Register Detailed](#) (AP.62.10.00): Lists all batches released in Accounts Payable, with details posted, during the specified financial period.
- [1099 Year Summary](#) (AP.65.40.00): Displays the list of all 1099 vendors, with 1099 box amounts for all the boxes defined in the system and company totals for the 1099 boxes.
- [1099 Year Details](#) (AP.65.45.00): Displays the list of all 1099 vendors with related payment documents.

### Other Reports

- [Unreleased AP Documents](#): Provides the list of Accounts Payable documents that are not yet released in the specified range of financial periods. The system opens this form when you click the **Unreleased Documents** button on the form toolbar of the [Close Financial Periods](#) (AP.50.60.00) form.

# Accounts Receivable Reports

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With the wide variety of reports available for the Accounts Receivable module, you can promptly get vital information, analyze financial data by various criteria, review transactions efficiently, and track data edits. Some reports have a standard version and a multi-currency (MC) version.

Because the Accounts Receivable module is tightly integrated with other modules, such as General Ledger and Cash Management, you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a financial report to any supporting details.



: Because the Accounts Receivable reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Accounts Receivable reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Accounts Receivable Reports

The Accounts Receivable module includes the following reports:

- **Balance**

- [AR Balance by GL Account](#) (AR.63.20.00): Displays the balances of the Accounts Receivable accounts and activities on the accounts for the chosen period. Documents are grouped by account and subaccount pair and listed by their reference numbers.
- [AR Balance by Customer](#) (AR.63.25.00): Displays the outstanding balances of the selected customer (or all customers) during the chosen period. For each customer, documents are grouped by account and subaccount pair and listed by their reference numbers. All the amounts are shown in the base currency.
- [AR Balance by Customer MC](#) (AR.63.30.00): Displays the outstanding foreign currency balances of the selected customer (or all customers) during the chosen period.
- [AR Aged Past Due](#) (AR.63.10.00): Lists the customers with outstanding balances, which are broken down by days past due.
- [AR Aged Past Due MC](#) (AR.63.11.00): Displays the customers with outstanding foreign currency balances. The balances are broken down by days past due.
- [AR Aged Outstanding](#) (AR.63.15.00): Shows the list of customers with outstanding balances, with balances arranged by days outstanding.
- [AR Aged Outstanding MC](#) (AR.63.16.00): Displays the list of customers with outstanding balances, with balances arranged by days outstanding. The foreign currency balances and amounts are shown in their original currency.
- [AR Aged Period Sensitive](#) (AR.63.05.00): Displays the list of customers with outstanding balances. The balances are arranged by days past due on the last day of the specified period.



: For details on using AR aging reports, see [Using AR Aging Reports](#).

- **Forms**

- [Invoice/Memo](#) (AR.64.10.00): Prints the invoice or memo form.
- [Dunning Letter](#) (AR.66.10.00): Displays dunning letters that have been generated.

- **Audit**

- [Customer Summary](#) (AR.65.05.00): Lists all the customers with their current balances, default currency, credit terms, tax zone, and other related information.
- [Customer Details](#) (AR.65.10.00): Shows all the details from the database of the selected

customer account or all customer accounts.

- [Customer History Summary](#) (AR.65.21.00): Shows a summary of balance history for customers whose balance has been changing during the date range you specify.
  - [Customer History](#) (AR.65.20.00): Shows the customer's balance history for the specified period of time. All the amounts are shown in the base currency.
  - [AR Edit](#) (AR.61.10.00): Lists the Accounts Receivable documents that were entered but not released. You can choose a specific customer or view the documents for all customers.
  - [AR Edit Detailed](#) (AR.61.05.00): Displays, with all details, the list of Accounts Receivable documents of the chosen type that were entered but not released.
  - [AR Register](#) (AR.62.15.00): Lists all the documents released in Accounts Receivable for the specified financial period and for the selected customer (or all customers).
  - [AR Register Detailed](#) (AR.62.20.00): Shows the details of documents of the selected type (or all types) released in Accounts Receivable for the specified financial period. The details include the batch number and batch transactions.
  - [AR Batch Register](#) (AR.62.05.00): Displays the list of all batches released in Accounts Receivable during the specified financial period.
  - [AR Batch Register Detailed](#) (AR.62.10.00): Lists all batches (with details) released in Accounts Receivable during the specified financial period.
- **Analysis**
    - [Daily Sales Profitability](#) (AR.67.60.00): Displays the net sales amounts, costs, margins, and margin percents calculated on the sales to each customer during the specified date range. The report in detailed format shows the profitability data for each day within the specified date range.
    - [Sales Profitability by Salesperson and Customer](#) (AR.67.30.00): Shows the net sales amounts, costs, margins, and margin percents calculated for the sales performed by particular salespersons during the specified date range. The report in detailed format shows the data broken down by customer.
    - [Sales Profitability by Customer and Order](#) (AR.67.20.00): Shows the net sales amounts, costs, margins, and margin percents on all sales to each customer during the specified date range. The report in detailed format shows the data broken down by sales order.
    - [Sales Profitability by Customer Class and Customer](#) (AR.67.50.00): Displays the net sales amounts, costs, margins, and margin percents on all sales to customers of each customer class during the specified date range. In detailed format, this report shows the data broken down by sales to particular customers.
    - [Sales Profitability by Item and Order](#) (AR.67.10.00): Displays the net sales amounts, costs, margins, and margin percents for the items that were listed on the sales orders created in Acumatica ERP during the specified date range. The report in detailed format shows the data broken down by sales orders.
    - [Sales Profitability by Item Class and Item](#) (AR.67.40.00): Shows the net sales amounts, costs, margins, and margin percents calculated on item class basis on the sales occurred during the specified date range. The report in detailed format shows the data broken down by inventory items.

## Other Reports

- [Unreleased AR Documents](#): Provides the list of Accounts Receivable documents that are not yet released in the specified range of financial periods. The system opens this form when you click the **Unreleased Documents** button on the form toolbar of the [Close Financial Periods](#) (AR.50.90.00) form.

# Fixed Assets Reports

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With the wide variety of reports for the Fixed Assets module, you can promptly get detailed information about fixed asset acquisitions, disposals, depreciation, net value, and transactions grouped by accounts, classes, assets, or periods. Fixed asset reports provide you with asset balance projections by account and by class. You can also track fixed assets for different locations, custodians, and departments.

Because the Fixed Assets module is tightly integrated with other modules, such as Accounts Payable, you can find and analyze the exact information you need. You can use flexible selection options and data links to easily drill down from a financial report to any supporting details.



: Fixed Assets reports are generated by user request. They run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Fixed Assets reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures

## Fixed Assets Reports

The Fixed Assets module includes the following reports:

- **Balances**

- [FA Balance](#) (FA.63.00.00): Displays information related to the asset's balance as of the current date.
- [FA Balance by GL Account](#) (FA.64.30.00): Displays the balance of the selected account used in the Fixed Assets module as the Fixed Asset account or the Accumulated Depreciation account at the end of the specified period. The report can display either the total account balance, or the balance itemized by each particular fixed asset.
- [FA Balance Projection by Account](#) (FA.67.00.10): Displays the projection of fixed asset balances, grouped by accounts, for the specified financial period.
- [FA Balance Projection by Class](#) (FA.67.00.20): Displays the projection of fixed asset balances, grouped by classes, for the specified financial period.
- [FA Balance Projection by Branch](#) (FA.67.00.30): Displays the projection of fixed asset balances, grouped by location, for the specified financial period
- [Fixed Assets Net Value](#) (FA.61.30.00): Displays information about the net value of fixed assets assigned to the specified book for the specified financial period (or all periods).
- [Fixed Assets Cost by Class](#) (FA.69.11.01): Displays information about the additions and disposals of fixed assets assigned to the specified book for the specified financial period.

- **Audit**

- [Fixed Assets List](#) (FA.61.05.00): Lists summary information about fixed assets for the specified time interval.
- [Acquisitions](#) (FA.61.10.00): Displays details of the fixed asset acquisitions for the specified financial period (or all periods).
- [Additions](#) (FA.69.10.02): Displays information about the additions and added costs of fixed assets for the specified financial period.
- [Additions Monthly](#) (FA.69.10.01): Displays information about the additions and added costs of fixed asset accounts and subaccounts for the specified financial period.
- [Splits](#) (FA.64.10.00): Displays information about the list of transactions of fixed asset splits assigned to the specified financial period.
- [Transfers](#) (FA.64.00.00): Displays information about the fixed asset account and subaccount changes, transactions of fixed asset cost and accumulated depreciation, and other changes for the branch, department, and building.



- [Depreciation](#) (FA.61.50.10): Displays depreciation details of assets assigned to the specified book for the specified financial period (or all periods).
- [Disposals](#) (FA.61.20.10): Displays the disposal list for the specified financial period (or all periods).
- [Transactions by Account](#) (FA.63.10.10): Displays information related to fixed asset transactions grouped by accounts for the specified financial period (or all periods).
- [Transactions by Period](#) (FA.63.10.15): Displays information related to fixed asset transactions for the specified financial period (or all periods).
- [Transactions by Class](#) (FA.63.10.25): Displays information related to the fixed asset transactions grouped by classes for the specified financial period (or all periods).
- [Transactions by Asset](#) (FA.63.10.20): Displays information related to fixed asset transactions grouped by assets for the specified financial period (or all periods).
- [Transfer Transactions](#) (FA.64.20.00): Displays information about the list of transactions for fixed asset splits assigned to the specified financial period.
- [Mass Disposal Preview](#) (FA.68.00.10): Displays information about the transactions that will be posted to General Ledger after the release.
- [Non-Depreciated Fixed Assets](#) (FA.65.20.00): Shows the assets that must be depreciated before you can close a financial period.
- [Unreleased FA Documents](#) (FA.65.10.00): Shows the fixed asset transaction documents that must be released before you can close a financial period.
- [Unreconciled Transactions for Period](#) (FA.62.00.10): Shows all GL transactions posted to the selected account (and subaccount, if any) within the specified range of periods that are not reconciled yet.
- [Reconciliation History by Account](#) (FA.62.00.20): Shows the list of transactions posted to the selected account (and subaccount, if any) within the specified period range along with fixed assets linked to the transactions.
- [Reconciliation History by Assets](#) (FA.62.00.30): Shows the list of assets that were placed in service within the selected period range along with all GL transactions linked to the asset.

# Deferred Revenue Reports

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The Deferred Revenue reports show projections of revenue and expenses by periods.

Because the Deferred Revenue module is tightly integrated with other modules, such as Accounts Payable and Accounts Receivable, you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a report to any supporting details.



: Because the reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Deferred Revenue reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Deferred Revenue Reports

The Deferred Revenue module includes the following reports:

- **Balance**

- *DR Balance by Account* (DR.63.00.10): Shows the beginning and ending balances of the deferred revenue accounts in the specified period.
- *Deferred Revenue Balance by Customer* (DR.63.00.12): Shows the beginning and ending balances of the deferred revenue accounts in the specified period, broken down by customer within each account.
- *Deferred Revenue Balance by Component* (DR.63.00.14): Shows the beginning and ending balances of the deferred revenue accounts in the specified period, broken down by component within each account.
- *DE Balance by Account* (DR.63.00.15): Presents the beginning and ending balances of the deferred expense accounts in the specified financial period.
- *Deferred Expense Balance by Vendor* (DR.63.00.17): Shows the beginning and ending balances of the deferred expense accounts in the specified period, broken down by vendor within each account.
- *Deferred Expense Balance by Component* (DR.63.00.19): Shows the beginning and ending balances of the deferred expense accounts in the specified period, broken down by component within each account.

- **Projection**

- *DR Projection by Account* (DR.66.00.70): Over the specified range of periods, shows the projection of deferred amounts by deferral account-subaccount pair.
- *DR Projection by Customer* (DR.66.00.30): Over the specified range of periods, gives information by customer on the movement of funds in deferred revenue accounts.
- *DR Projection by Component* (DR.66.00.40): Over the specified range of periods, displays by component the movement of funds in deferred revenue accounts.
- *DR Recognition Projection by Account* (DR.66.00.80): Displays, by sales account-subaccount pair, the projection of revenue recognized in the selected range of periods.
- *DR Recognition Projection by Customer* (DR.66.00.50): Displays by customer the projection of revenue recognized in the selected range of periods.
- *DR Recognition Projection by Component* (DR.66.00.60): Lists, by component of packages sold, the projection of revenue recognized in the selected range of periods.
- *DE Projection by Account* (DR.66.00.75): Presents, by deferral account-subaccount pair, the projection of deferred expense amounts in the specified range of periods.
- *DE Projection by Vendor* (DR.66.00.35): Shows, by vendor, the movement of funds in

deferred expense accounts over the specified range of periods.

- *DE Projection by Component* (DR.66.00.45): Displays, by component, the movement of funds in deferred expense accounts over the specified range of periods.
- *DE Recognition Projection by Account* (DR.66.00.85): Displays, by expense account-subaccount pair, the projection of deferred expense amounts in the specified range of periods.
- *DE Recognition Projection by Vendor* (DR.66.00.55): Displays, by vendor, the projection of recognized expenses in the specified range of periods.
- *DE Recognition Projection by Component* (DR.66.00.65): Shows, by component of packages purchased, the projection of expenses recognized in the selected range of periods.

- **Audit**

- *Draft Schedules* (DR.63.00.30): Displays the balances of deferral accounts generated based on draft schedules of each type of deferrals.
- *Deferral Schedule Summary* (DR.65.00.40): Displays summary information on deferred revenues or expenses (depending on your selection) scheduled for recognition, with the information listed by customer or vendor respectively.
- *Revenue Recognized by Account* (DR.63.00.70): Displays the revenue recognized to a specific account during a selected financial period.
- *Revenue Recognized by Customer* (DR.63.00.80): Displays the revenue amounts related to a specific customer that were recognized during a selected financial period.
- *Revenue Recognized by Component* (DR.63.00.90): Displays the revenue amounts associated with a specific component recognized during a selected financial period.
- *Expenses Recognized by Account* (DR.63.00.75): Displays the expenses recognized to a specific account during a selected financial period.
- *Expenses Recognized by Vendor* (DR.63.00.85): Displays the expenses related to a specific vendor that were recognized during a selected financial period.
- *Expenses Recognized by Component* (DR.63.00.95): Displays the expense amounts associated with a specific component recognized during a selected financial period.

# Taxes Reports

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By using the reports for the Taxes module, you can view key tax-related information.



: Because the Taxes reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All reports in the Taxes module can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Taxes Reports

The Taxes module includes the following reports:

- **Balances**

- [Tax Summary](#) (TX.62.10.00): For the selected tax agency and tax period, displays the report lines and the respective amounts.
- [Tax Details](#) (TX.62.05.00): For the selected tax agency and tax period, displays the report lines and the supporting documents for each line.
- [Tax Summary by GL Account by Date](#) (TX.62.30.00): For the selected tax agency, displays taxable totals and tax totals, grouped by General Ledger account-subaccount pair and by tax.
- [Tax Details by GL Account by Date](#) (TX.62.25.00): For the selected tax agency, displays taxable transactions, grouped by General Ledger account-subaccount pair, tax, and module.
- [Tax Summary by GL Account by Period](#) (TX.62.20.00): For the selected tax agency and tax period, lists totals of taxable transactions by account and by tax.
- [Tax Details by GL Account by Period](#) (TX.62.15.00): Displays tax information for the selected tax agency, grouped by General Ledger account and by tax. Transactions are listed by transaction date.
- [VAT Pending Recognition](#) (TX.63.10.00): Displays the list of the documents that have a value-added tax (VAT) balance pending recognition at the end of the selected financial period.

# Currency Management Reports

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With the reports for the Currency Management module, you gain better visibility into your financials. You can view the history of foreign currency rates, evaluate unrealized currency gains and losses by revaluing Accounts Payable and Accounts Receivable accounts, view translation details, and track the history of batch modifications.

Because the Currency Management module is tightly integrated with other modules—such as Accounts Receivable, Accounts Payable, and General Ledger—you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a report to any supporting details.



: Because the Currency Management reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Currency Management reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Currency Management Reports

The Currency Management module includes the following reports:

- **Audit**

- [Currency Rate History by Date](#) (CM.65.10.00): Shows fluctuations of the selected currency exchange rate during the date range you select.
- [Currency Rate History by ID](#) (CM.65.05.00): Shows the fluctuations of the selected currency exchange rate, as recorded in the database during the specified date range.
- [Translation Details](#) (CM.65.15.00): Shows the details of the selected translation.
- [CM Batch Register](#) (CM.62.05.00): Displays all batches released in the Currency Management module for the specified financial period.
- [CM Batch Register Detailed](#) (CM.62.10.00): Displays the details of all batches released in the Currency Management module for the specified financial period.

# Inventory Reports

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By using the wide variety of reports for the Inventory module, you can promptly get detailed information about inventory and warehouses, as well as inventory revaluation data. You can also analyze the data by various criteria, and track inventory operations for different warehouses and locations. Many of the reports in this module have both summary and detailed versions; you can decide which version best meets your current needs.

Because the Inventory module is tightly integrated with other modules—such as Purchase Orders, Sales Orders, and General Ledger—you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a financial report to any supporting details.



: Because the Inventory reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Inventory reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Inventory Reports

The Inventory module includes the following reports:

- **Balances**

- [Inventory Balance](#) (IN.61.50.00): Displays detailed, up-to-date information about the quantities and unit costs of inventory items at different warehouses and locations.
- [Historical Inventory Balance](#) (IN.61.60.00): For the selected period, presents detailed information about the beginning and ending quantities of inventory items at different warehouses and locations.
- [Inventory Valuation](#) (IN.61.55.00): Displays information about the quantities on hand and the total cost of inventory by inventory account, with details for different warehouses.
- [Historical Inventory Valuation](#) (IN.61.70.00): For the selected period, displays information about how the balances of the inventory accounts and the costs of the inventory items at different warehouses change during the period.
- [Goods in Transit](#) (IN.61.65.00): Shows up-to-date information about the goods in transit, their total quantities, and their total cost.
- [Lot/Serial Numbers](#) (IN.61.30.00): Displays displays information about inventory items with lot or serial numbers: expiration dates, unit costs, quantities available, and expired quantities as calculated for the selected aging date.

This report is available only if the *Lot/Serial Tracking* feature is enabled on the [Enable/Disable Features](#) (CS.10.00.00) form.

- **Physical Count**

- [Physical Count Tags](#) (IN.62.10.00): Generates physical count tags for the selected physical inventory.
- [Physical Count Sheets](#) (IN.62.05.00): Generates physical count sheets for the selected physical inventory.
- [Physical Count Variance Preview](#) (IN.62.15.00): Lists the inventory items included in physical inventory, and displays the book quantities and the count results for the items.

- **Forms**

- [Inventory Item Labels](#) (IN.61.92.00): Generates labels for inventory items received according to a particular receipt.
- [Location Labels](#) (IN.61.90.00): Generates labels for locations within specific warehouse with an inventory item or item class specified.

- **Audit**

- [Standard Cost Change Preview](#) (IN.61.75.00): Gives you estimates of the changes in the total cost of inventory items stored at various warehouses before you perform updating of the standard costs of the items.
- [Inventory Register](#) (IN.61.40.00): Presents up-to-date, detailed information about inventory operations in different warehouses within the selected financial period (or all periods).
- [Inventory Account Distribution](#) (IN.61.15.00): Provides details of journal entries of the batches generated on release of inventory documents for the specified financial period (or all periods).
- [Inventory Edit Summary](#) (IN.61.05.00): Displays current summary information about unreleased inventory documents: receipts, issues, adjustments, and transfers.
- [Inventory Edit Details](#) (IN.61.10.00): Displays up-to-date summary information about every generated inventory document (receipt, issue, adjustment, or transfer).

**Other Reports**

- [Unreleased Inventory Documents](#): Provides the list of inventory documents that are not yet released in the specified range of financial periods. The system opens this form when you click the **Unreleased Documents** button on the form toolbar of the [Close Financial Periods](#) (IN.50.90.00) form.

# Sales Orders Reports

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Acumatica ERP provides reports for the Sales Orders module that meet your organization's reporting needs. The reports can also be customized.

Because the Sales Orders module is tightly integrated with other modules—including Inventory, Accounts Receivable, and Purchase Orders—you can find and analyze the exact information you need. By using flexible selection options and data links, you can easily drill down from a report to any supporting details.



: Because the Sales Orders reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Sales Orders reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Sales Orders Reports

The Sales Orders module includes the following reports:

- **Forms**

- [Quote](#) (SO.64.10.00): Presents the selected sales quote in a ready-to-print form. You can print the document or send it by email.
- [Sales Order](#) (SO.64.10.10): Presents the selected sales order in a ready-to-print form. You can print the document or send it by email.
- [Pick List](#) (SO.64.40.00): Displays the pick list created for a selected shipment in a ready-to-print form. The document can be printed or sent by email.
- [Shipment Confirmation](#) (SO.64.20.00): Generates the shipment confirmation form created for the selected shipment in a ready-to-print form. The document can be printed or sent by email.
- [Carrier Labels](#) (SO.64.50.00): Displays ready-to-print carrier labels generated for a particular shipment.
- [Invoice & Memo](#) (SO.64.30.00): Displays invoices and memos in a ready-to-print form.

- **Audit**

- [Sales Order Summary](#) (SO.61.05.00): Provides summary information on sales orders, ordered by order type, reference number, and date.
- [Sales Order Details by Customer](#) (SO.61.10.00): Displays information on open sales orders, ordered by customer. The data can be filtered by warehouse, inventory item, and document date.
- [Sales Order Details by Inventory Item](#) (SO.61.15.00): Shows information on open sales orders, ordered by inventory item.
- [Shipment Summary](#) (SO.62.05.00): Gives you information on shipments with all statuses, ordered by customer. Shipment information can be filtered by warehouse, inventory item, and document date.
- [Shipment Details by Customer](#) (SO.62.10.00): Shows information on shipments, ordered by customer. Shipment information can be filtered by warehouse, inventory item, and document date.
- [Shipment Details by Inventory Item](#) (SO.62.15.00): Displays shipment information, ordered by inventory item. Shipment information can be filtered by warehouse, inventory item, and document date.
- [Order Register](#) (SO.61.20.00): Displays the list of sales orders recorded in Acumatica ERP during the specified period. Order information can be filtered by warehouse, customer, and order type.



- [Shipment Register](#) (SO.61.25.00): Displays the list of shipments during the specified period. Shipment information can be filtered by warehouse, customer, and carrier.

# Purchase Orders Reports

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With the wide variety of reports for the Purchase Orders module, you can promptly get detailed information about the purchase orders, purchase receipts, and returns. You can also analyze the data by various criteria and track the purchase of goods at different warehouses and locations.

Because the Purchase Orders module is tightly integrated with other modules—such as Accounts Payable, Sales Orders, General Ledger, and Taxes—you can find and analyze the precise information you need. Flexible selection options and data links allow you to easily drill down from a financial report to any supporting details.



: Because the Purchase Orders reports are generated by user request, they run on only accounts and subaccounts that the user is authorized to access, based on the user's roles and membership in restriction groups.

All Purchase Orders reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Purchase Orders Reports

The Purchase Orders module includes the following reports:

- **Forms**

- [Purchase Order](#) (PO.64.10.00): Displays the purchase orders created in the Purchase Orders module; you can print and email them.
- [Purchase Receipt](#) (PO.64.60.00): Displays the purchase receipts created in the Purchase Orders module; you can print and email them.

- **Audit**

- [Blanket Purchase Order Summary](#) (PO.64.15.00): Displays summary information about blanket purchase orders.
- [Blanket Purchase Order Details by Vendor](#) (PO.64.20.00): Gives you detailed information about blanket purchase orders. The data in this report is grouped by vendor.
- [Blanket Purchase Order Details by Inventory Item](#) (PO.64.25.00): Shows detailed information about blanket purchase orders. The data in this report is grouped by inventory item.
- [Purchase Order Summary](#) (PO.61.05.00): For the time interval you select, shows summary information about purchase orders that are neither closed nor canceled.
- [Purchase Order Details by Vendor](#) (PO.61.10.00): For the time interval you select, displays detailed information about purchase orders that are neither closed nor canceled. The data in this report is grouped by vendor.
- [Purchase Order Details by Inventory Item](#) (PO.61.15.00): For the time interval you select, gives you detailed information about purchase orders that are neither closed nor canceled. The data in this report is grouped by inventory item.
- [Purchase Order Details by Account](#) (PO.61.20.00): For the time interval you select, gives you detailed information about purchase order lines with non-stock items. The data in this report is grouped by expense accounts (and expense subaccounts) specified in purchase orders.
- [Purchase Receipt Summary](#) (PO.62.05.00): Displays detailed information about purchase receipts and returns created in the Purchase Orders module.
- [Purchase Receipt Details By Vendor](#) (PO.62.10.00): Presents detailed information about purchase receipts and returns created in the Purchase Orders module, with the data grouped by vendor.
- [Purchase Receipt Billing Details](#) (PO.63.20.00): Displays detailed information for the bills

generated upon the purchase receipts and returns.

- [Purchase Receipt Billing Summary](#) (PO.63.15.00): Provides summary information for the bills generated upon the purchase receipts and returns.
- [Purchase Receipt Accrual Details](#) (PO.63.10.00): Shows detailed information for the purchase receipts and returns by the accounts they used.
- [Purchase Receipt Accrual Summary](#) (PO.63.05.00): Displays summary information for the purchase receipts and returns by the accounts they used.
- [Purchase Receipt History](#) (PO.64.30.00): Shows detailed information about the receipts performed on purchase orders.
- [Purchase Receipt Allocated and Backordered](#) (PO.62.20.00): Displays detailed information on allocations related to the items listed on receipts (of all statuses) for transfer and purchase orders.

# Purchase Requisitions Reports

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With the reports for the Purchase Requisitions module, you can view and print requests for proposals sent to vendors that can participate in the bidding process, and you can view information about requests and requisitions.

Because the Purchase Requisitions module is integrated with other modules, such as Purchase Orders and Sales Orders, you can find and analyze the exact information you need.



: Because the Purchase Requisitions reports are generated by user request, the user can run them on only accounts and subaccounts that the user may access, based on the user's roles and membership in restriction groups.

All Purchase Requisitions reports can be generated in different formats, including PDFs, and can be printed or sent by email. Some reports generated as PDFs require digital signatures.

## Purchase Requisitions Reports

The Purchase Requisitions module includes the following reports:

- **Forms**
  - *Item Request* (RQ.64.10.00): Displays a request document in a ready-to-print form. You can send this document by email or print it.
  - *Request for Proposal* (RQ.61.10.00): Displays the request for proposal document in a ready-to-print form. You can send this document by email or print it.
- **Audit**
  - *Request Details* (RQ.61.30.00): Displays information on requests. Requests can be filtered by document date, request class, and department.
  - *Requisition Details* (RQ.61.20.00): Shows details of the requisitions to which the selected vendor was assigned. Requisitions can be filtered by document date and by vendor.

# User Security Reports

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The reports available in the User Security module provide information that can be useful for employees who manage users, roles, and access rights to the system objects. You can use these reports, for example, for analyzing, optimizing, and restructuring user accounts, user roles, and access rights.

All User Security reports can be generated in various formats, including PDF, and can be printed or sent by email.

## User Security Reports

The User Security module includes the following reports, which contain information about users, roles, and access rights:

- [User List](#) (SM.65.05.00): Lists the existing user accounts and the properties of the accounts in summary or detailed format.
- [Role List](#) (SM.65.10.00): Lists the roles available in the system and shows the list of user accounts assigned to each role.
- [Access Rights by Screen](#) (SM.65.17.00): Lists all system forms with the user roles for which access rights to the form have been set up explicitly at the form, module, or suite level. For each role, its level of access rights to the form is displayed.
- [Access Rights by Role](#) (SM.65.15.00): Lists the roles available in the system and their access rights to system forms. Only those forms for which access rights were set up explicitly at the form, module, or suite level are displayed in the report.

# **Document Management Reports**

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The audit reports available in the Document Management module provide statistics on wiki articles, which may be filtered by author, time interval, and type of article content.

All reports can be generated in various formats, including PDF, and can be printed or sent by email.

## **Document Management Reports**

The Document Management module includes the following reports, which present statistics about wiki articles:

- [Wiki Articles by Status](#) (SM.65.25.00): Lists all articles created or modified during the specified time interval.
- [Wiki Article Statistics](#) (SM.65.20.00): Shows a list of all articles created or modified by the selected user during the specified time interval.