Reporting & Custom Reports

A guide to the reporting and analysis tools available in Stock Control, and to My Customised — reports built specifically for your business

Introduction

Data Fusion brings together a set of built-in stock reports with a separate area called My Customised, where reports built especially for your business are made available to you. Both are found in the Stock Control section of the app.

This guide covers the standard Analysis reports in Stock Control, and explains how My Customised works — including how a report ends up appearing there in the first place.

Before You Begin — Prerequisites

- You need a Data Fusion login with Stock Control access to see these reports.
- My Customised only shows reports that have been specifically built and switched on for your company — if you don't see any listed, none have been set up for you yet.
- Custom reports are built by your Data Fusion provider on request. If you need a new report, or a change to an existing one, contact support to arrange it.

Key Terms — Glossary

Term	What It Means
Stock Control	The area of Data Fusion where transfers, adjustments, stock counts, and reporting all live.
Analysis	The section of Stock Control containing the standard, built-in stock reports.
My Customised	A section listing reports that have been custom-built for your business specifically — not part of the standard Data Fusion report set.
Report	In My Customised, one named entry in the list that, when selected, runs and displays its results on screen.

Where This Happens

Task	Location
View standard stock reports	Stock Control > Analysis
View reports built specifically for your business	Stock Control > My Customised
Export a report to Excel	Available from within the report itself (where offered)

Standard Reports in Stock Control

Under Stock Control, the Analysis section gives every business access to the same two built-in reports:

Report	What It Shows
Stock/Lot Movement	A log of item and lot number transactions — what moved, when, and how much.
Stock/Lot Balances	Current stock balances by store, so you can see on-hand quantities at a glance.

⚠ **Note:** Only these two reports are currently available under Analysis. Any other tools you may be shown for this area are not yet active — treat those as coming soon rather than something you can use today.

My Customised — Reports Built For Your Business

My Customised, found in Stock Control, is a separate area from the standard Analysis reports. It lists reports that have been individually built for your company by your Data Fusion provider — they are not part of what every Data Fusion customer sees.

Using a custom report is simple:

1. Go to Stock Control and select My Customised.
2. Choose a report from the list on the left.
3. The report's results load on the right, as a table you can page through and sort by clicking column headings.
4. If an Excel download option is offered for that report, use it to export the results you're currently viewing.

Understanding How a Custom Report Gets to You

A report only appears in your My Customised list because your Data Fusion provider has specifically built it and linked it to your company. Nothing appears there by default.

- **Reports are company-specific.** Each report is tied to one company, so what you see in My Customised is unique to your business — other Data Fusion customers will not see your reports, and you will not see theirs.
- **You cannot build or edit these yourself.** Custom reports are set up behind the scenes by your provider. If you need a new report, or changes to how an existing one works, this is a support request, not something you configure in the app.
- **The report always reflects live data.** When you select a report, it runs fresh against your current data every time — you are never looking at a stale, pre-saved snapshot.

Common Mistakes to Avoid

- **Expecting to see reports other customers have.** My Customised only ever shows reports built for your own company.
- **Trying to edit or design a report yourself.** This isn't a self-service report builder — request changes through support instead.
- **Assuming an empty list means something is broken.** If My Customised shows no reports, it simply means none have been set up for your company yet.