Manage created reports

Reports that have been created remain in the list until they are deleted. It is good to keep a certain structure among your reports by deleting those that are wrong and only save those that are necessary to save, for example annual reports that must be saved so that subsequent reports can be linked.

In order for you to be able to sort out important reports more easily, you can mark your reported annual report, for example, and indicate it as "booked". For reports you are "working with" and think will be the one you post, you can, for example, put them as "favorite".

A good thing to aim for is that you have checked that no new agreements have been added, and that all possible extensions and agreements that have been terminated prematurely are adjusted before you generate and mark the annual report. If you create, for example, accumulated monthly reports, or quarterly reports, it is a bit forgiving during the financial year if you missed adding or adjusting an agreement because the figures are adjusted in the next report.

Screenshot

Below, the annual report per 2020-12-31 is marked as "Booked" and the report per 2021-12-31 is marked as "Favorite".

Screenshot

Revision #4
Created 27 September 2022 19:52:56 by Alina Nordberg
Updated 5 February 2023 15:58:46 by Maria Ek