

If our latest Lunch & Learn already feels like a lifetime ago, look no further. Here the main takeaways from **Reporting For Duty: The Custom Reports That Actually Show Up**.



Build your own data dump, then drill down

Custom reporting pulls in everything in iCompleat, letting you filter, sort and export to Excel exactly the data you're after. They are far more flexible than the standard reports.



Move, hide, or add columns to suit you

Drag columns into the order you want, toggle which ones appear, and sort ascending or descending. Your layout is saved against the report for next time.



Filter with expressions and groups

Combine criteria like date range, transaction type and supplier name — using "or" groups to widen a filter — to get precisely the results you need.



Save reports for the whole team to use

Once built, a saved report is available to all users instantly, with new functionality coming soon to restrict who can see specific reports.



Control who can create, edit, and save

User permissions decide who can access custom reporting and who can additionally create, amend and save reports - others can filter and run but not save changes.



Turn approved invoices into a single PDF pack

Invoice packs bundle fully approved invoices into one continuous file, with an optional second page per invoice showing its approval timeline.



Assign separate creators and approvers

Give one user rights to build a pack and another to review and approve it — and remember, once an invoice is added to a pack it's locked in for good.