

Managing Selected Fields option in Report Quick Settings

Purpose

In **FirstBIT ERP**, many standard reports include a **Quick Settings** panel that allows users to quickly adjust report parameters without modifying report variants or report settings.

One of the available sections within this panel is **Selected Fields**, which enables users to control which columns are displayed in the report and in what order.

STATEMENT OF SETTLEMENTS WITH CUSTOMERS

Accounting Currency	Opening Balance			Sale		Prepayment		
Company	Debt	Prepayment	Total	Sold	Paid	Debited	Set Off	De
AED				28,430,197.99	786,829.34	307,165.63	288,182.13	27,643,368.59
Al Mujtaba Trading LLC				19,624.50	9,345.00			10,279.50
# 04-15-25/AED from 4/15/2025 to 4/15/2026 (AED)				19,624.50	9,345.00			10,279.50
Atua Mora Holding				1,008,862.00	1,387.00	617.50		1,007,475.50
# from 01.03.2017 to 30.06.2017 (AED)				1,006,012.00	1,387.00			1,004,625.00
# Main from (AED)				2,850.00		617.50		2,850.00
Block Optic				78,246.00	52,746.00	7,051.00	7,051.00	25,500.00
# 3646N from 01.01.2017 (AED)				78,246.00	52,746.00	7,051.00	7,051.00	25,500.00
Bowbridge Software				233,379.88	138,379.88	22,235.00	22,235.00	95,000.00
# 754B from 01.01.2017 (AED)				232,829.00	137,829.00	22,235.00	22,235.00	95,000.00
# USD from 1/1/2018 (USD)				550.88	550.88			
Dilart				357,945.75	102,804.25	92,650.25	92,108.75	255,141.00
# from 01.04.2017 (AED)				357,945.75	102,804.25	92,650.25	92,108.75	255,141.00
Ecotech IT solutions				15,115.00	8,860.00			6,255.00
Main Contract				15,115.00	8,860.00			6,255.00
Entourage Event Management Ltd				5,307,853.50	31,363.50			5,276,490.00
Main Contract				5,307,853.50	31,363.50			5,276,490.00
Geepas Distribution LTD				11,536.88		9,229.50		11,536.88
Main Contract				11,536.88		9,229.50		11,536.88
Good Furniture ME				1,966.67		2,300.00		1,966.67
# 2344C from 01.01.2017 (AED)				1,966.67		2,300.00		1,966.67
Hardware Store				105.00	105.00		35.00	
Main Contract				105.00	105.00	35.00	35.00	
Individual (Retail)				62,873.00	59,433.00			3,440.00
Individual (Retail)				62,873.00	59,433.00			3,440.00
Kuwait Furniture Trading LLC				210,360.00				210,360.00
Main Contract				210,360.00				210,360.00
Martin Toth				18,659,818.00	63,118.00	67,750.00	62,750.00	18,596,700.00
# 3463F from 01.01.2017 (AED)				18,659,818.00	63,118.00	67,750.00	62,750.00	18,596,700.00
Meccon Media Concept				831,814.25	36,584.25	7,325.00	6,815.00	795,230.00
# 6443M from 01.01.2017 (AED)				831,814.25	36,584.25	7,325.00	6,815.00	795,230.00
Msc - Metal Solutions & Commerce				52,143.10	36,793.10	31,425.00	31,140.00	15,350.00
# 5785 from 01.01.2017 (AED)				52,143.10	36,793.10	31,425.00	31,140.00	15,350.00
Multi Printed Circuit Boards				781,397.98	12,156.48	5,576.24	5,576.24	769,241.00
# 696IG from 01.01.2017 (AED)				781,397.98	12,156.48	5,576.24	5,576.24	769,241.00
Office Inspirations Ltd				52,535.08	52,535.08	360.14	360.14	
Main Contract				52,535.08	52,535.08	360.14	360.14	
Oprisk Solutions International				134,420.00	134,420.00	27,200.00	27,200.00	
# 423O from 01.01.2017 (AED)				134,420.00	134,420.00	27,200.00	27,200.00	
Poukian Press Middle East				27,576.80	25,778.80	16,381.00	15,881.00	1,798.00
# 5674N from 01.01.2017 (AED)				25,779.00	23,981.00	16,381.00	15,881.00	1,798.00
# EUR from 3/1/2018 to 10/31/2018 (EUR)				1,797.80	1,797.80			
Protect-scheme				13,865.00	11,865.00	10,995.00	10,995.00	2,000.00
# Pr7879 from 01.01.2017 (AED)				13,865.00	11,865.00	10,995.00	10,995.00	2,000.00
Rotane Hotel				128.10				128.10
Rent				128.10				128.10
Royal Furniture				174,800.00				174,800.00

This functionality is particularly useful when a report contains a large number of indicators and the report header becomes extensive and difficult to review. By using **Selected Fields**, users can simplify the report layout and focus only on the information relevant to their business needs.

How to Work with Selected Fields

The **Selected Fields** section is located within the **Quick Settings** panel on the right side of the report screen.

Each available field is displayed with a checkbox:

- Selected field – displayed in the report.
- Unselected field – hidden from the report.

To modify the report structure:

1. Open the **Selected Fields** section in **Quick Settings**.
2. Select the fields that should be displayed in the report.
3. Clear the checkboxes for fields that are not required.
4. Click **Generate** to refresh the report.

The report will be regenerated according to the selected settings.

Managing Field Order

Users can also control the sequence in which columns appear in the report.

To change the order of fields:

1. Select the required field in the **Selected Fields** list.
2. Use the arrow buttons to move the field up or down.
3. Regenerate the report.

The order defined in this section directly determines the order of columns displayed in the report.

Benefits

The **Selected Fields** functionality provides several advantages:

- Simplifies complex report layouts.
- Reduces the amount of unnecessary information displayed.
- Allows users to focus only on relevant indicators.
- Improves report readability and usability.
- Enables quick adaptation of standard reports for different analytical scenarios.
- Allows users to customize both the composition and sequence of report columns without modifying the report itself.

This functionality is especially convenient when working with reports that contain a large number of columns. With just a few clicks, users can significantly simplify the report structure by keeping only the fields required for their analysis.

Example

In the **Statement of Settlements with Customers (Multi-Currency)** report, a user may only need to analyze invoiced amounts.

Instead of displaying all settlement indicators, the user can leave only the **Sold** group fields selected and remove unnecessary columns such as **Opening Balance** or **Prepayment and Closing Balance**.

As a result, the report becomes easier to review, navigate, and analyze.

← →
Statement of Settlements with Customers
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Generate
🔍 Найти... 🏠 📅 🔄 📊 📁 📧 Send...
Quick Settings ⚙️ Ещё ▾

STATEMENT OF SETTLEMENTS WITH CUSTOMERS

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	Sold	Paid
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Protect-scheme	13,865.00	11,865.00
# P17879 from 01.01.2017 (AED)	13,865.00	11,865.00
Rotane Hotel	128.10	
Rent	128.10	
Royal Furniture	174,800.00	
# 20655 from 01.01.2017 (AED)	174,800.00	

Period: // x // x (🔍)

> Filters

> Group By:

> Selected Fields:

- ☐ Opening Balance
- ☐ Debt
- ☐ Prepayment
- ☐ Total
- ☒ Sale

Сделать скриншот (Ctrl+F11)

Report created Statement of Settlements with Customers ✕

Additional Information

The **Selected Fields** section is available in various standard reports of the **FirstBIT ERP** configuration. Depending on the report, the list of available fields may differ.

Together with other sections of the **Quick Settings** panel, such as **Filters** and **Group By**, this functionality provides users with a flexible way to customize report presentation and quickly adapt standard reports to different business scenarios.

Similar settings are also available in reports from the **Project Costing** section, including the **Project Cost Analysis, Financial Analysis of Projects, Overview of Projects** report and other reports with complex structures. Since these reports may contain a large number of analytical dimensions and indicators, the **Selected Fields** functionality becomes particularly useful. Users can quickly simplify report presentation by displaying only the fields required for analysis and arranging them in the most convenient order.

Thank you for being FirstBIT customer!