



Define Your Templates for Financial Reports

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ari schapira | [Follow](#)
Director Product Management at SAP



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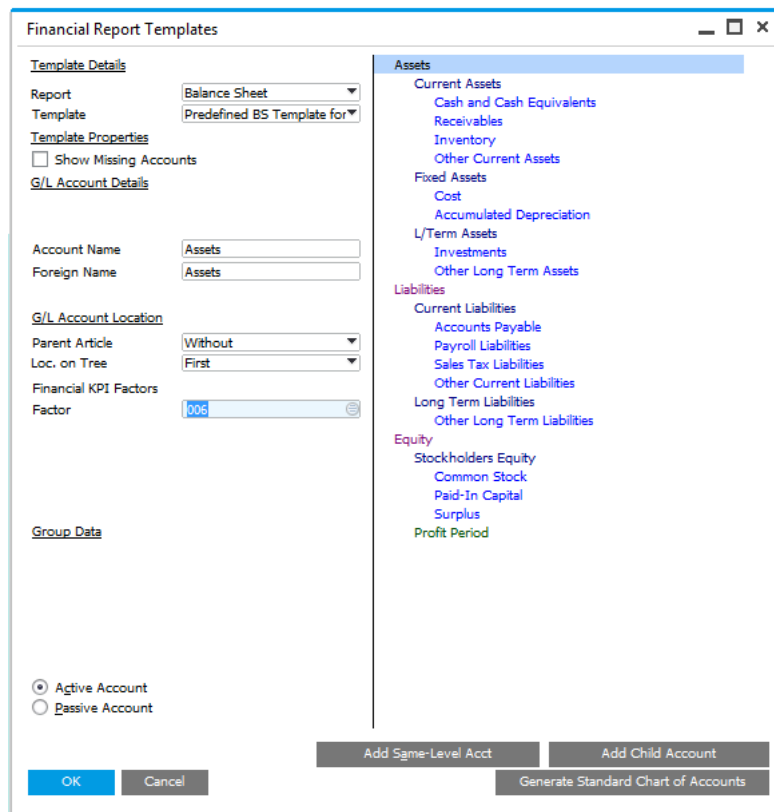


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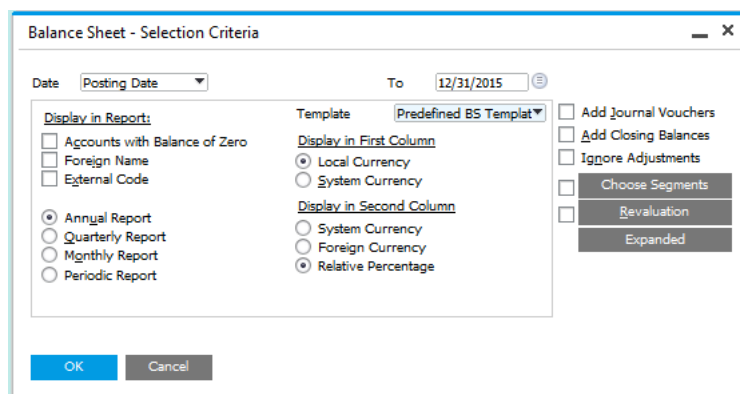
Presenting financial reports to different parties requires sometimes customized formatting. This is exactly what the SAP Business One Financial Report Templates are for!

Under the Financials module, you can create multiple templates for financial reports such as Profit and Loss or Balance Sheet.

You can choose whether to base your template on the company's chart of account and then make the required adjustments such as adding subtotal, and changing the location of a given account, or start from scratch and design the complete template on your own.



When generating the report all you need to do is select your template in the selection criteria window:



Available in SAP Business One, version for SAP HANA and SAP Business One.



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Edmundo Garcia

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Thanks Ari it work it , the only retro I could give you is about the way you guys are making like master data this GL report, the find button is disabled, you define the template to save it in GL and then to retrieve the template you must close the window and select it in the list box of the template name, it could be very nice to have the same principle of the master data... [See more](#)

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ari schapira

Director Product Management at SAP

1y

Thanks for the feedback, will take it into consideration

Like Reply



Edmundo Garcia

Freelance SAP FI and SAP Business One

... 1y

Hi Ari you guys put in general ledger report something about saving the configuration of report please give us how to save it

Like Reply | 1



ari schapira

Director Product Management at SAP

1y

Hi

In order to save the selection criteria of the "General Ledger" report you should perform the following steps:

- Change form to "Add" mode by using "Ctrl + A" for example... [See more](#)

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