KNOWHUBS / WORKED EXAMPLE

Weekly order report

Quick start - version 1.0 / 15 November 2026

A reusable Excel example built from six fields. All sample orders and values are fictional. The workbook is a demonstration, not a connection to a live shop or an accounting system.

1. Start with the example

Open **Weekly-Orders-Example.xlsx** in Excel desktop. Keep the as-of date at **15 November 2026** for the supplied data. On Report, you should see **18 open orders**, **17 overdue open orders**, **GBP 4,709.50** overdue open value and **58.3%** on-time dispatch (21 of 36 dispatched orders).

2. Use your own prepared export

Save a copy of **Weekly-Orders-Blank.xlsx**. Check that the export uses the six columns below in this order. Open a CSV in Excel or use Data > From Text/CSV. Set order IDs to Text, dates to Date or exact ISO text, and net values to Decimal Number. Check the imported values before copying them.

Column	Required content
A - order_id	One unique, non-empty ID per order. Keep leading zeros as text. Duplicate IDs are excluded.
B - received_date	Excel date value or exact yyyy-mm-dd text.
C - due_date	Required due date, on or after the received date.
D - dispatched_date	Required for Dispatched orders; blank for Open and Cancelled.
E - status	Exactly Open, Dispatched or Cancelled. Map other source statuses before pasting.
F - net_value_gbp	A numeric GBP value of zero or more. No currency symbols or text numbers.

3. Replace the inputs, then review

On Orders, clear the old values in **A8:F507** before replacing a shorter export. Paste **values only**, without the header row, starting at A8. Keep columns G:O: they contain calculations. Set the snapshot date in **Report!C4**.

Capacity: 500 orders. Do not paste beyond row 507. The overflow warning checks rows 508-10007 only; it is not an unlimited import check. A larger file needs an adapted workbook. Never assume rows outside the input area are included.

Know what is counted

Fix input issues before relying on totals

The Report shows included orders, invalid rows and future receipts excluded. On Orders, filter **Input issue** to find the affected rows. Correct the raw inputs in A:F; do not replace formulas. Fix every warning before using the figures for a decision. A zero total with no source rows is not evidence of zero business activity.

Metric	Definition
Open orders	Valid supplied orders with status Open and a received date on or before the as-of date.
Overdue open orders	Included Open orders whose due date is before the as-of date. Due today is not overdue. This measures dispatch backlog, not customer delivery.
Overdue open value	Sum of the supplied net GBP values for those overdue Open orders. Values are not rounded individually; displayed totals use two decimals.
On-time dispatch	Valid Dispatched orders dispatched on or before their due date, divided by all included valid Dispatched orders. Cancelled orders are excluded. No dispatched orders produces a blank percentage.
Eight-week table and chart	Monday-based event weeks ending in the as-of week. Received counts use received dates and include Cancelled orders. Dispatched counts use dispatch dates. This is activity by event date, not a same-order cohort comparison.

Snapshot limits

The supplied status is treated as the current snapshot. Changing the as-of date does not reconstruct historical statuses or cancellation dates. Future received orders are shown separately and excluded. A dispatch after the as-of date is an input issue. The headline metrics cover all eligible supplied orders, including those received before the eight weeks shown.

Input rules

Dates must be valid calendar dates within 1900-2100. Blank required fields, duplicate IDs, unknown statuses, impossible or ambiguous dates, negative or nonnumeric net values and inconsistent dispatch dates are excluded and shown as issues. Zero-value orders are valid. Do not add formula expressions, customer details or unnecessary personal information to the source.

Before using an update

Check the number of included and excluded orders against the source. Spot-check an overdue order, a dispatched order and a cancelled order. Confirm one edited input changes the expected total. Save, close and reopen the workbook to check that your changes remain.

Format and scope

Macro-free .xlsx with editable formulas and a native chart. No VBA, external links, automatic refresh, shop integration, tax calculation, credit-note handling or currency conversion. Designed for Excel desktop; Google Sheets, mobile Excel and other spreadsheet apps have not been validated. Keep your own backup before editing.

Need a different export or reporting question? Prepare a brief at **knowhubs.co.uk/reporting**. The brief builder runs on your device; it does not submit an enquiry. Describe column names and the decision you need to make, without customer records or login details.