

Advanced Reporting



Advanced Reporting will let you create reports based on certain read-only database elements. These elements can be combined together to create custom reports based on the specified data.

In this example we will create a report that will display sales information, not including gift card sales.

Accessing Advanced Reporting

Manager

Options

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Reporting**.

Reporting

Category
Sales
Inventory
Customer
Employee
Restaurant
Rentals

Report
Invoice Totals Report
Invoice Totals by Customer
Invoice Totals -- Daily Summary
Grand Totals by Payment Method
Daily Totals

Date/Time Range
Start Date 4/10/2010 **Start Time** 12:00:00 AM
End Date 4/10/2010 **End Time** 12:00:00 AM

Criteria
Green = ALL in list selected
Red = One or more selected

Select Cashier ALL
01
100101

Select Department ALL
01
02
03
04
05

Select Station ALL
01
02
03

Select Store ID ALL
1001

Select Vendor ALL
2018426200
4405824303
5704769982
8005623771
8008776655

Select Category ALL
NONE

Select Matrix Group ALL
ALL

Print Format
 Full-Size
 Receipt

Stores **Store Groups**

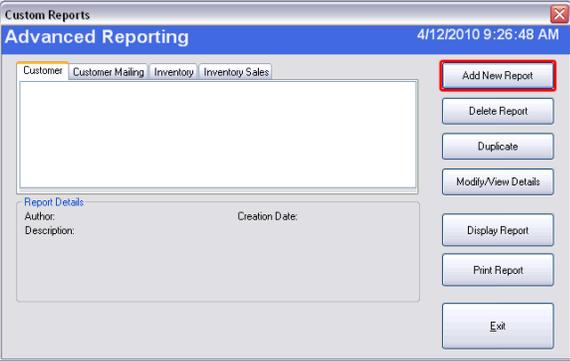
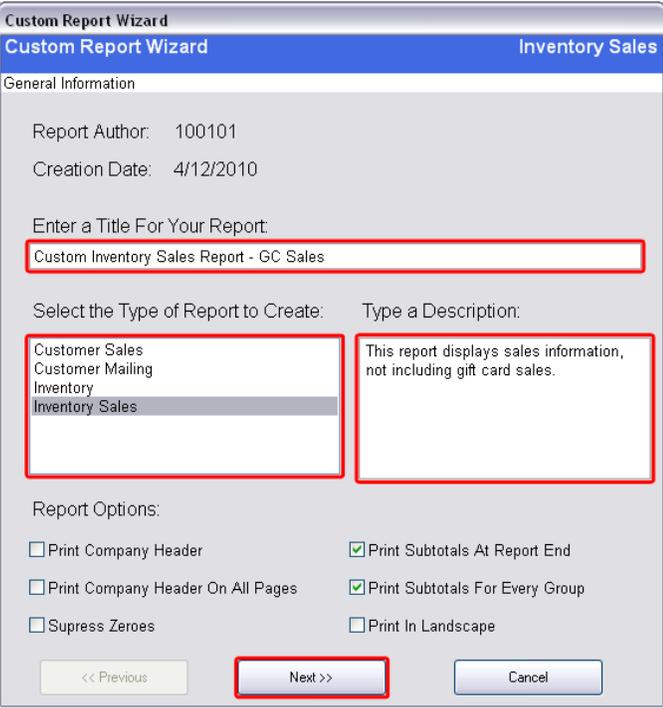
No inventory item selected **No customer selected**

Display **Print** **Exit**

Select Item Clear Select Customer Clear

4. Select **Advanced Reporting**.

Creating Custom Reports

	<p>1. Select Add New Report.</p>
	<p>2. Enter a Title For Your Report. Make sure to enter a title to quickly reference the report.</p> <p>3. Select the Type of Report to Create (e.g. Inventory Sales).</p> <p>4. Type a detailed description for your report.</p> <p>5. Review the Report Options below and select Next>>.</p> <p>Note: If following the example then select the following options:</p> <ul style="list-style-type: none"> • Print Subtotals At Report End • Print Subtotals For Every Group
<input checked="" type="checkbox"/> Print Company Header	<p>This will print the Company header on the first page of the report.</p>
<input checked="" type="checkbox"/> Print Company Header On All Pages	<p>This will print the Company header on each page of the report.</p>
<input checked="" type="checkbox"/> Supress Zeroes	<p>This will not show zeros after decimal places (when applicable) on the first page of the report.</p>
<input checked="" type="checkbox"/> Print Subtotals At Report End	<p>This will print the Subtotals at the end of the report.</p>
<input checked="" type="checkbox"/> Print Subtotals For Every Group	<p>If your data will be grouped together, in departments for example then at the base of each group a subtotal will be printed for that group.</p>
<input checked="" type="checkbox"/> Print In Landscape	<p>This will print the report in Landscape Orientation (as opposed to the traditional portrait orientation).</p>

Selecting the Fields to be Displayed

Custom Report Wizard Inventory Sales

Select Fields to Display

Available Tables:

- Categories
- Departments**
- Inventory
- Inventory_Vendors
- Vendors

Available Fields:

- Dept_ID
- Store_ID
- Description**
- Type
- TSDisplay

Build A Formula + - * / () Count Sum Max Min Clear

Provide a name for the field:

 Subtotal this Field **Add to Report** Remove from Report

Selected Fields

Up Down

<< Previous Next >> Cancel

1. Under **Available Tables** select a table to filter fields from (e.g. **Departments**).
2. Under **Available Fields** select a field which you would like displayed on the report.
3. Under Provide a name for the field you can type a description, other than what the field name is.
4. Optionally you can select to Subtotal this Field.
5. Select **Add to Report**.

Optionally you can double click the field to add it to the report.

Custom Report Wizard Inventory Sales

Select Fields to Display

Available Tables:

- Inventory
- Inventory_Vendors
- Vendors
- Invoice_Itemized**
- Invoice_Totals

Available Fields:

- ItemNum
- Quantity**
- CostPer
- PricePer**
- Tax1Per

Build A Formula + - * / () Count Sum Max Min Clear

Invoice_Itemized.Quantity * Invoice_Itemized.PricePer

Provide a name for the field:

 Subtotal this Field **Add to Report** Remove from Report

Selected Fields

Field	Display Name	Subtotal
(Departments.Description)	[Description]	False
(Inventory.ItemName)	[ItemName]	False
(Invoice_Itemized.Tax1Per)	[Tax1Per]	False

Up Down

<< Previous Next >> Cancel

For our example we will add the following fields to the report:

- **Departments, Description**
- **Inventory, ItemName**
- **Invoice_Itemized, Tax1Per**

We will then add the final fields via a formula.

- Check **Build A Formula**.
- Select the **Invoice_Itemized** table and then double click the **Quantity** field.
- Select * which will multiply the two fields we are selecting.
- Select the **Invoice_Itemized** table and then double click the **PricePer** field.
- Select **Subtotal this Field**.
- Select **Add to Report**.

We will then want to make sure that the Build A Formula section is displaying:

Invoice_Itemized.Quantity* Invoice_Itemized.PricePer

6. Select **Next** when finished.

More Options

Custom Report Wizard Inventory Sales

Select Criteria to Narrow Down the Report

Available Tables: Available Fields:

Categories
Departments
Inventory
Inventory_Vendors
Vendors

ItemNum
ItemName
Store_ID
Cost
Price

CRE assumes 'AND' between all criteria fields.

AND OR NOT 'Date' % ' () Clear

Equal To =
Not Equal To <>
Sounds Like
Prompt

Remove from Report Add to Report

Selected Criteria

<< Previous **Next >>** Cancel

1. Under **Available Tables** select a table to filter fields from (e.g. **Inventory**).
2. Under **Available Fields** select a field which you would like to specify data to be displayed on the report.
3. The following options require data from the field you selected:

- **Equal To =**
- **Not Equal to <>**
- **Sounds Like**
- **Prompt**

Note: When entering data after the option your data may need to be in single quotes (e.g. **'Gift_C'**).

4. Select **Add to Report**.

Optionally you can double click the field to add it to the report.

Custom Report Wizard Inventory Sales

Select Criteria to Narrow Down the Report

Available Tables: Available Fields:

Categories
Departments
Inventory
Inventory_Vendors
Vendors

ItemNum
ItemName
Store_ID
Cost
Price

CRE assumes 'AND' between all criteria fields.

AND OR NOT 'Date' % ' () Clear

Equal To =
Not Equal To <>
Sounds Like
Prompt

Inventory.ItemNum <> 'Gift_C'

Remove from Report Add to Report

Selected Criteria

<< Previous **Next >>** Cancel

For our example we will then need to specify that the inventory item gift card will be excluded from the report.

- Select the **Inventory** table and then double click the **ItemNum** field.
- Double click **Not Equal To <>** field.
- We will then need to specify the Gift Card by the item number. Make sure that it is showing in single quotes (e.g. **'GIFT_C'**). The total statement should be displayed as:
Inventory.ItemNum <> 'Gift_C'
- Select **Add to Report**.

5. Select **Next** when Finished.

Group By and Order By

Custom Report Wizard
Inventory Sales

Select Fields to Group Records By

Available Tables:

- Categories
- Departments**
- Inventory
- Inventory_Vendors
- Vendors

Available Fields:

- Dept_ID
- Store_ID
- Description**
- Type
- TSDisplay

Add as Group **Add as Order By**

Selected Groups

Up
Remove Group By
Down

Selected Order By Fields

Up
Remove Order By
Down

<< Previous Next >> Finish

1. Under **Available Tables** select a table to filter fields from (e.g. **Departments**).
2. Under **Available Fields** select a field which you would like to Group or Order the data by.
3. Select **Add as Group** to group the data by the field you selected.
4. Select **Add as Order By** to order (sort) the data by the field you selected.

Custom Report Wizard
Inventory Sales

Select Fields to Group Records By

Available Tables:

- Categories
- Departments**
- Inventory
- Inventory_Vendors
- Vendors

Available Fields:

- Dept_ID
- Store_ID
- Description**
- Type
- TSDisplay

Add as Group **Add as Order By**

Selected Groups

Field
▶ **(Departments.Description)**

Up
Remove Group By
Down

Selected Order By Fields

Field
▶ **(Departments.Description)**

Up
Remove Order By
Down

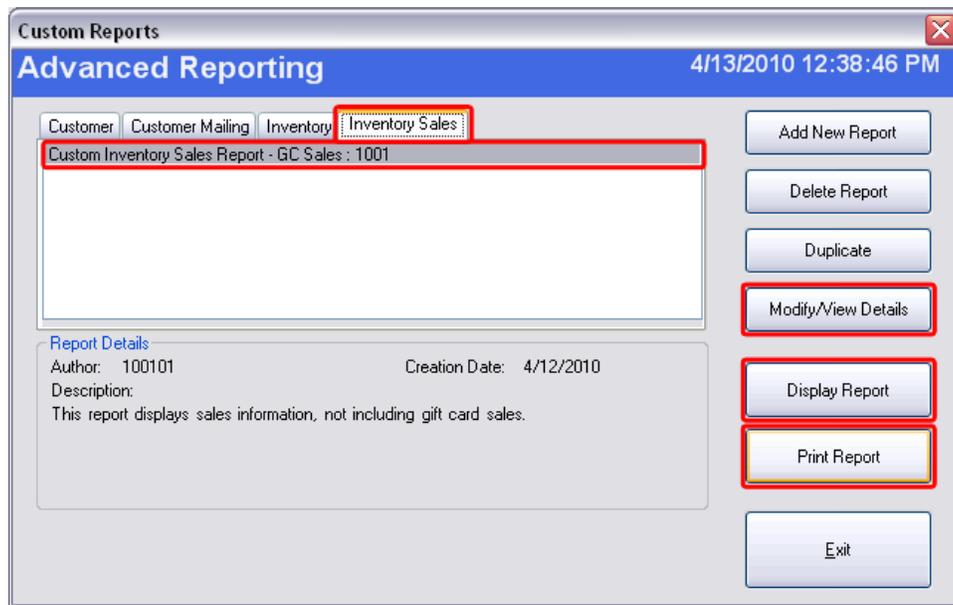
<< Previous Next >> Finish

For our example we will group and order the data on the report by the Description field of the Departments table.

- Select the **Departments** table and then the **Description** field.
- Select **Add as Group**.
- Select **Add as Order By**.

5. Select **Finish** when done.

Viewing/Printing the Newly Created Report



1. Access the advanced reporting screen and select the tab according to the newly created report. In our example select the **Inventory Sales** tab.
2. Select the report you would like to execute. In our example select the **Custom Inventory Sales Report - GC Sales : 1001**.
3. We can now **Display/Print** the report.
4. We can also **Modify/View Details** of the report.