

## General Information

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### TOPIC CONVENTIONS

Each report is listed under a separate topic.

The topics will include

1. Brief Description and Purpose of the Report
2. Report Name
3. Path To Execute the Report
4. Comments
5. Sample Reports
6. Additional Steps
7. Query Fields

The primary focus is on both profit and customers. The report includes customer name, customer account number and lookup code, invoice number and date, total selling price, total cost, total profit and margin. The data is sorted by Percent Profit, Dollar Profit, Quantity Sold, and Gross Revenue. The data is grouped under the customer name and subtitled on the customer name line. Gra...

**Customer Profit Report:**  
 Report Center: Sales Reports > Customer Profit > Run Report [F7]  
 Accounting: Reports: Sales Reports: Customer: : Options

See [\(Date Range\)](#)

Customer Profit Report  
 From: 11/23/2005 To: 11/23/2005 Date Range [F2]  
 Items Sorted By:  Percent Profit,  Dollar Profit,  Quantity Sold,  Gross Revenue  
 Print Detail  
 Print [F7]  
 Cancel

PRINT DETAIL  
**Customer Profit Report**  
*Confidential*  
 Blink's Video Game Emporium

### IF OPTIONS ARE REQUIRED....

When running reports, you may be prompted to use queries, select of report options, or in some way affect the output of the report.

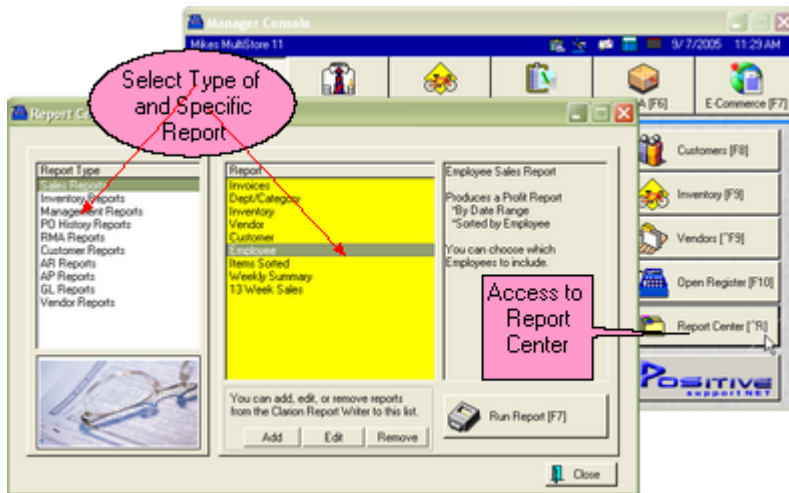
The following topics in the section explains the various routines you will likely encounter. Generally, a link to these routines is available as you review a specific report.

## Overview

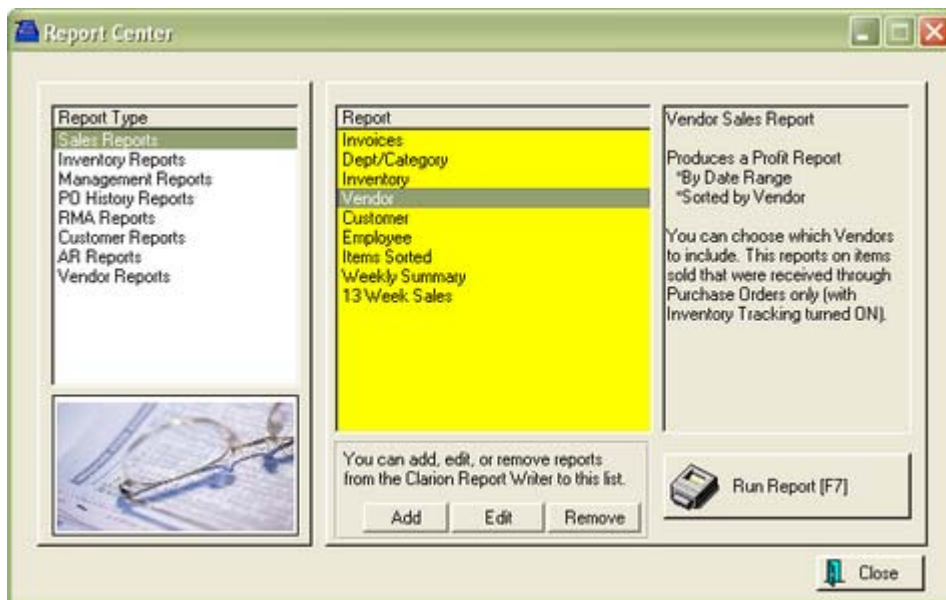
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The Report Center consolidates the commonly referenced reports in one handy location.

The Report Center [CTRL-R] is accessed from the Manager Console.



On the left are types of reports and in the center are the specific reports available. At the far right is a brief description of the highlighted report and the option to Run Report [F7].



### Running A Report

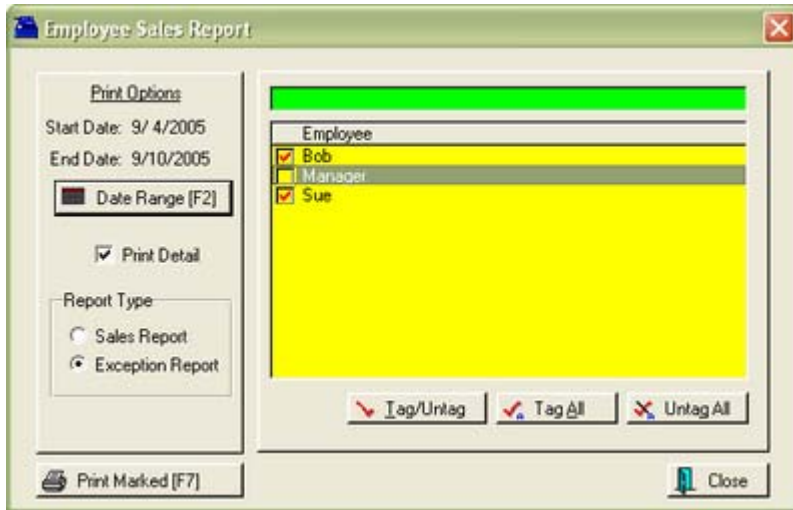
To run a report, highlight a Report Type on the left and select the desired report on the right. Choose Run Report [F7].

Depending upon the type of report you have selected, you will be prompted for a date range or filtering options and a preview option.

### Select Report Criteria

Depending upon the report, you will be able to choose

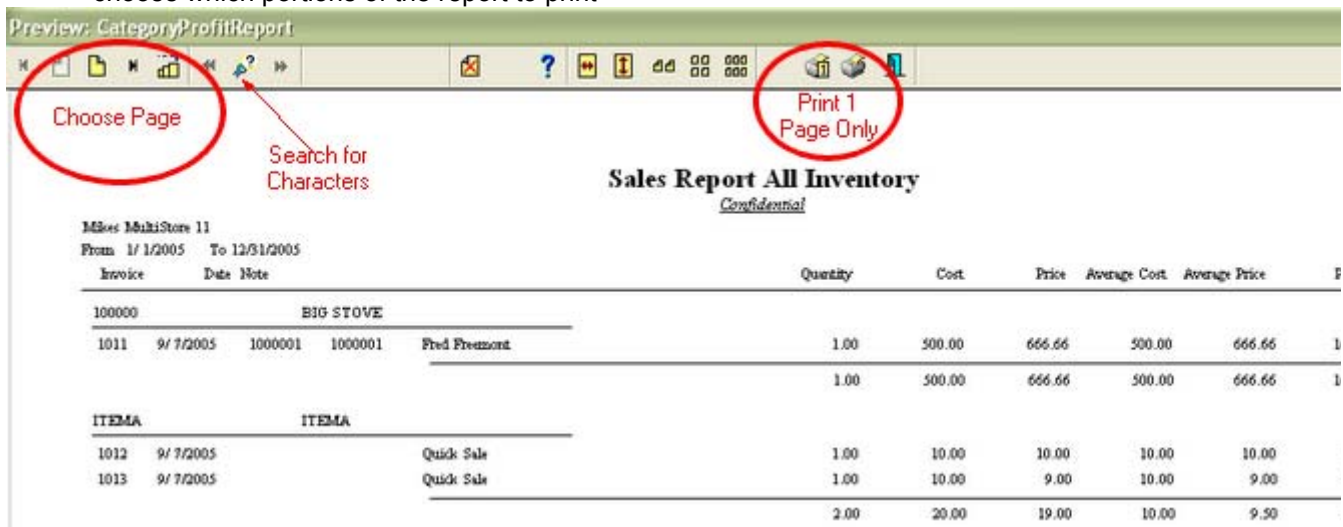
- Date Range
- Detail or Summary
- Selectable groups for inclusion or exclusion by tagging
- and more



Preview / Print (all or portions) of the Report

When you run the report, we recommend you choose to PREVIEW instead of Print to assure that...

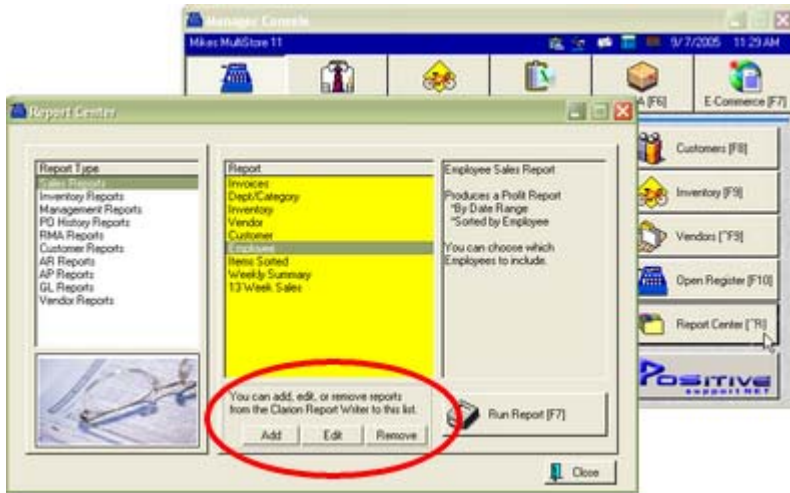
- the information is what you were expecting before sending it to the printer
- find specific information somewhere in the report
- choose which portions of the report to print



### Add-On Reports

OPTIONAL: Specially created Clarion Reports can be added to the Report Center listing. Customized reports are for a fee. For more information, contact your dealer.

The Add - Edit - Remove buttons at the bottom center of the Report Center screen allows you to add such special reports created by a third party program, Clarion Report Writer.



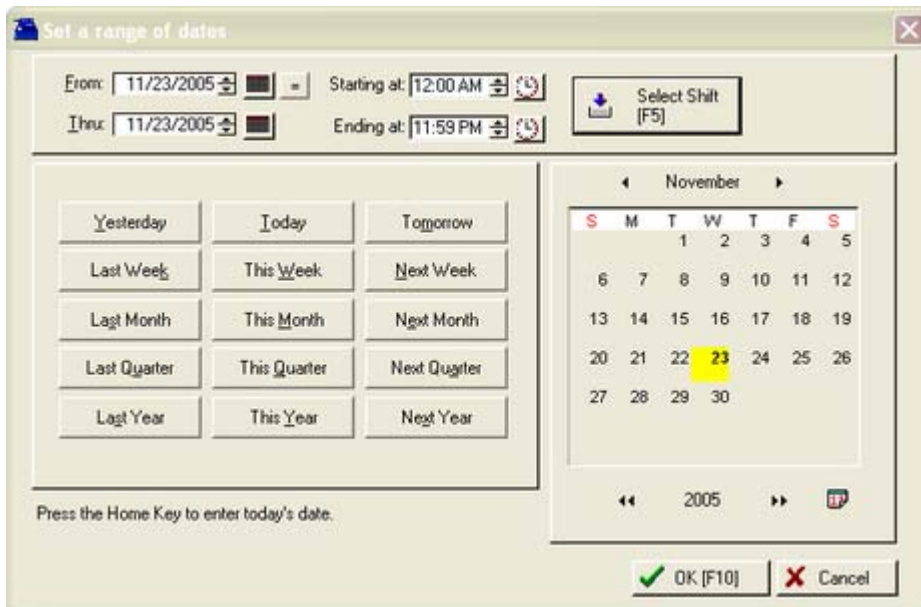
- First, you must obtain the report files from your programmer and place them in the c:\pww\reports directory.
- Then open Report Center, highlight the Report Type on the left which best suits the report information, and Add button.
- Enter the .TXR file name (stored in c:\pww\reports).
- Fill in a description and details about what the report will do.
- Once this is done, then you will be able to run the report at will.

## Date Range

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Selecting a Date Range is a common practice in most all reports.

The report will encompass activity between the FROM date to the THRU date. Starting and Ending Time of day is assumed to cover the full 24 hours, but can be modified to a specific time segment.



Various Methods For Selecting A Date Range

**Type the Date** - click into the FROM or THRU field and type the date using a numeric entry such as 6/1/04. If you do not enter a year, the current year will be assumed.

**Pre-Defined Date Buttons** - just clicking on a button will automatically fill in the FROM and THRU fields.

**Home Key** - pressing the Home key on the keyboard will enter Today's date.

**Drag & Drop** - Click on a date on the calendar at right and drag it to the FROM or THRU field. The calendar can be changed using the left and right arrow buttons flanking the month and/or year values.

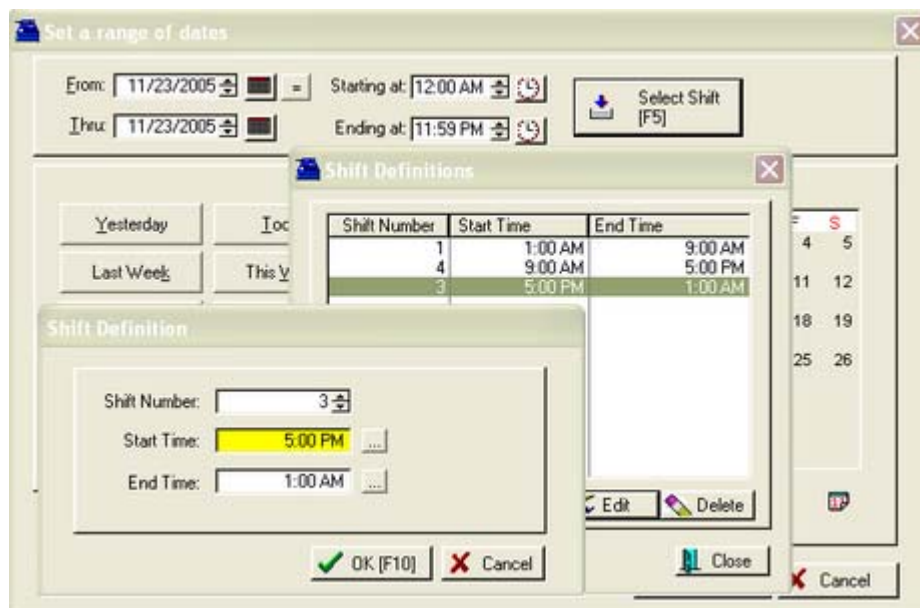
**Equal Button** - after entering a FROM date, clicking on the Equals button to the right will fill the same date into the THRU field.

**Calendar Button** - to the right of the FROM and THRU fields are calendar buttons. Scroll through the calendars and select the desired date.

### Methods For Selecting a Time Range

A 24 hour period is selected by default. To change the time, you can

- **Type the Time** - Click into the field and type the time.
- **Scroll the Time** - Using the up/down buttons, find the desired hour.
- **Lookup Time** - Click on the clock icon to the right. Highlight, scroll, or type the hour on the left and minutes on the right. Choose AM or PM and then select OK.
- **Select a Work Shift for the Report** - Choose the Select Shift [F5] button. Highlight a shift and choose Select. The Add button allows you to create a shift period. Shift periods should not overlap times.



## Define Report Format

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Some reports will ask if you want to print the report using the current view format.

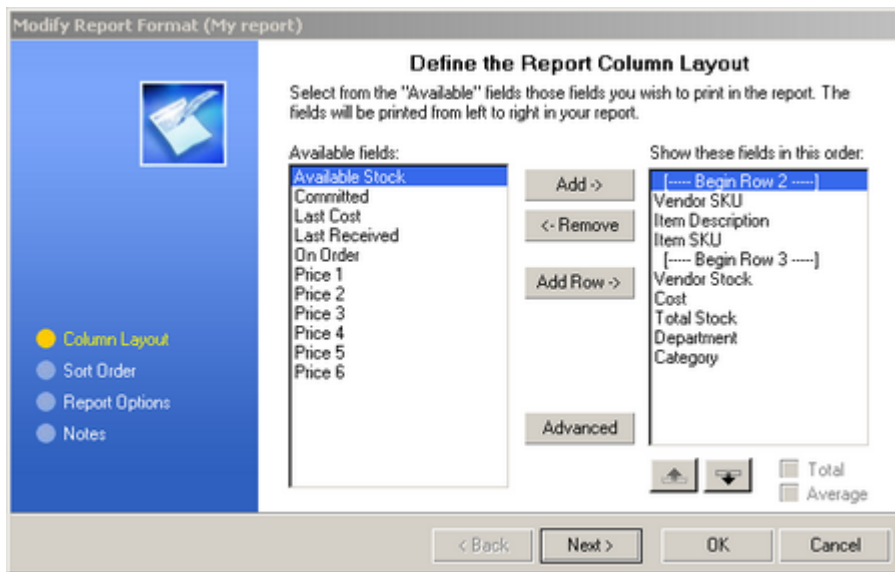


If YES, then you are prompted to Define the Layout.

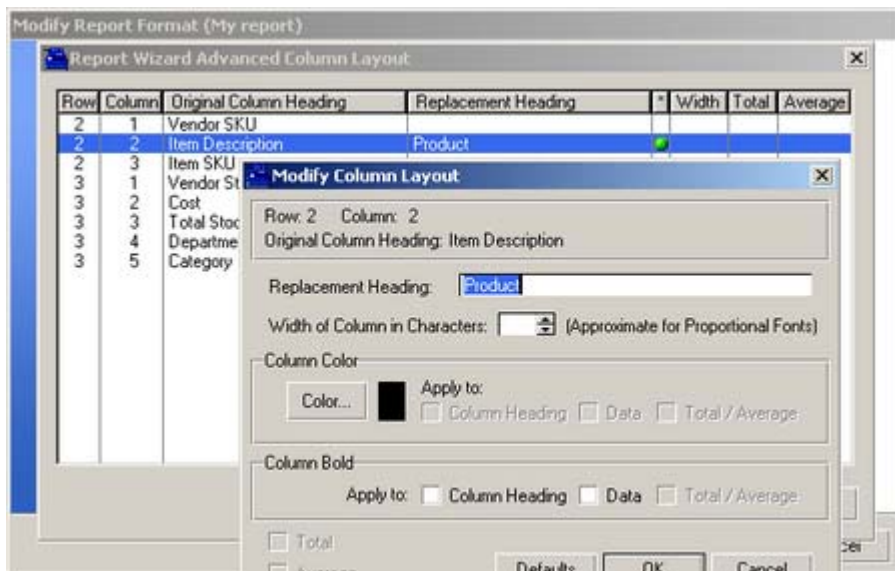
Defining the report consists of four major steps as outlined here.

### COLUMN LAYOUT

Available information is listed on the left. Choose the information you want included in the report by highlighting and "adding" or "removing" field names.

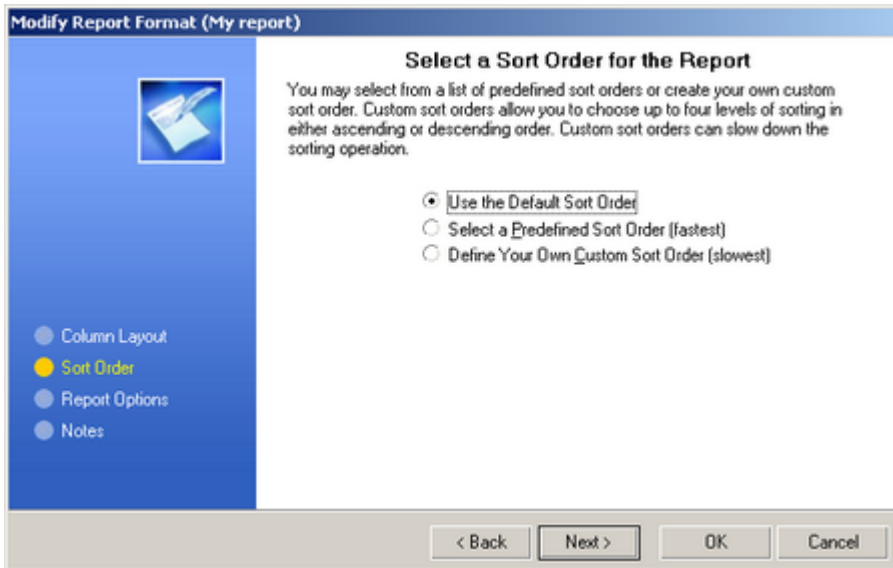


The Add Row button allows you to piggy back information in multiple rows. The Advanced button allows for renaming the title and re-defining colors and fonts.



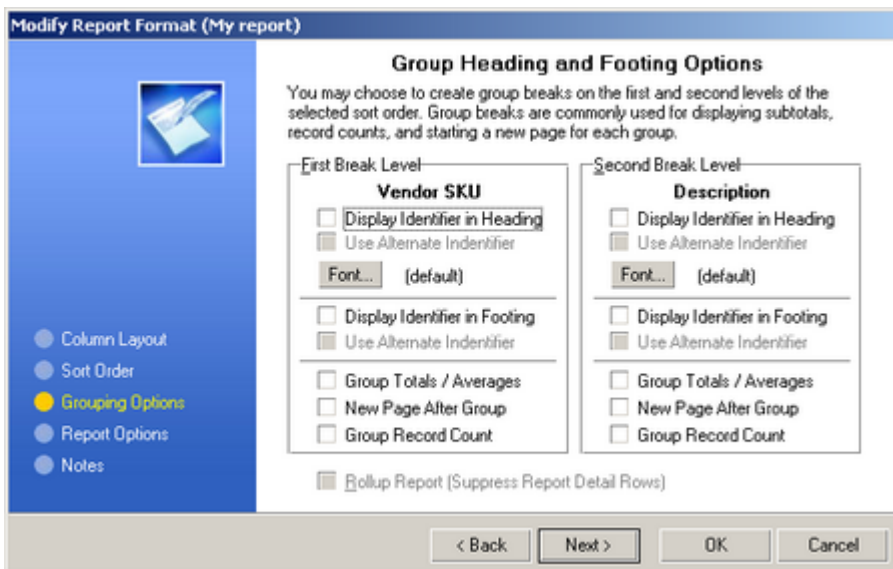
### SORT ORDER

Data will be sorted in the report automatically. You may choose to define your own sort ordering.



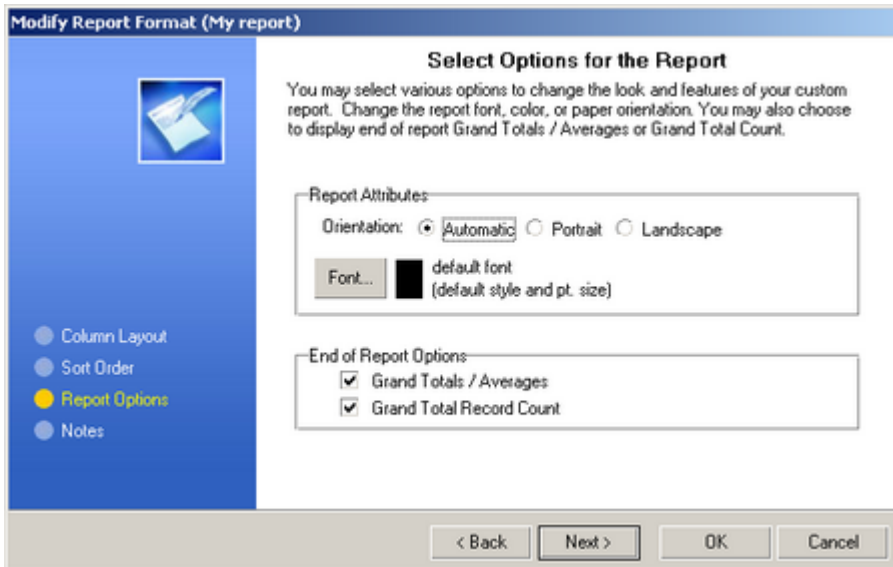
### GROUPING OPTIONS

This option appears if you have chosen "Define Your Own Custom Sort Order" described above. Group breaks for first and second levels are commonly used to subtotal and start a new page for groups or records.



### REPORT OPTIONS

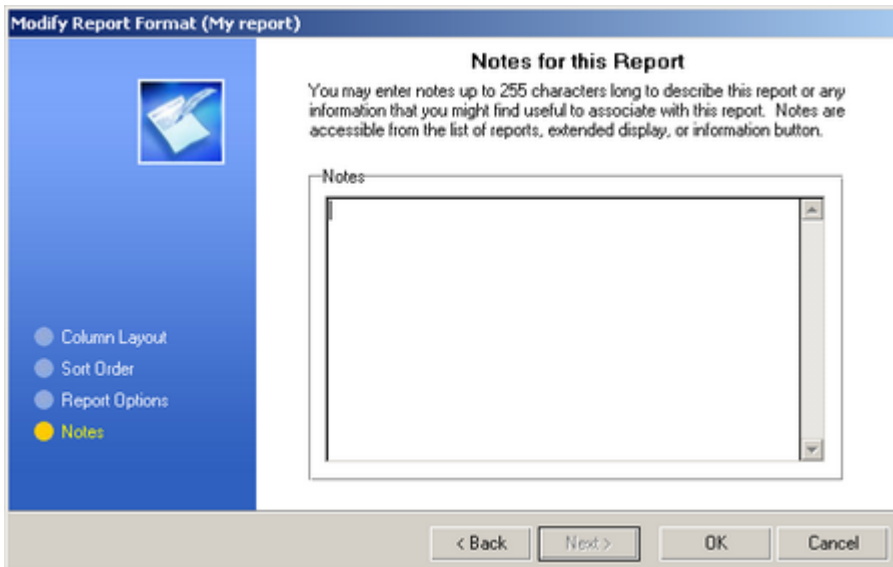
The report can be oriented to best use the space and display the data. The coloring and size of fonts can be controlled. When reporting on data values, some values can be counted, totalled, or averaged.



NOTES

(As of this writing, this is a non-supported feature.)

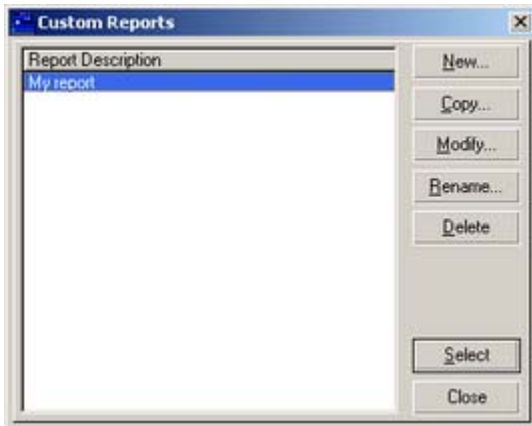
Choose OK to finish and save the report.



MODIFYING REPORTS

Once a report has been created it can be modified or used as the basis of a new report.





**New** - Creates a new report

**Copy** - Makes a copy of an existing report and allows for changes and save as a new report

**Modify** - Edits an existing report

**Rename** - Changes the name of a report

**Delete** - Removes the report from the list

**Select** - Runs the highlighted report. You may be prompted to also select or create a query or filter.

### SEE ALSO

There are other topics which may give you more ideas about creating reports.

[Specialized Inventory Report](#)

[Specialized Customer Report](#)

## How To Use Queries

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Some reports can filter out some data and printed qualifying results by applying a Query.

There are four phases in creating a query.

### FIELD SELECTION

A list of available fields relative to the report in question will be listed.

Select only one by highlighting it and then choose Next. (In the last phase you may choose to add another field to the query.)

### OPERATION SELECTION

Highlight one of the following and choose Next.

**Is Equal To** - Requires an exact entry

**Is NOT Equal To** - Will exclude this exact entry from the report

**Is Greater Than** - Alphabetic and Numeric rules apply

**Is Less Than** - Alphabetic and Numeric rules apply

**Is Greater Than OR Equal To** - will include the value

**Is Less Than OR Equal To** - will include the value

**Is Between** - Requires a low and high value

**Is Not Between** - will exclude anything between the low and high values

**Begins With** - starts with the alpha - numbers

**Contains** - includes the alpha - numbers

**Does NOT Begin With** - does not start with these alpha - numbers

**Does NOT Contain** - excludes these alpha - numbers

### VALUE ENTRY

REVIEW and GROUP

RUNNING THE REPORT

SAVED QUERIES SAMPLE

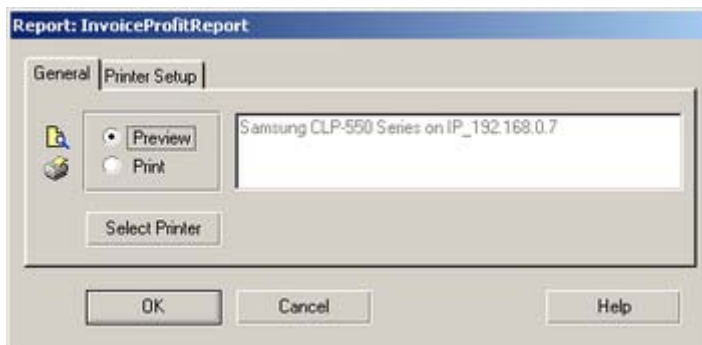


## Preview Report

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Most reports in PFW are printed to your MS-Windows default printer which should be a full page laser, ink jet, or dot-matrix printer.

When choosing to run a particular report you should be prompted with a Preview or Print option.



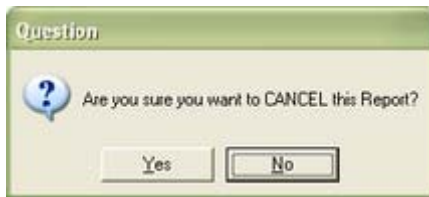
Previewing a report allows you to look it over before choosing to print all or just one page of the report.

The name of the printer is displayed. To change the printer, use the Select Printer button.

## Cancel A Report

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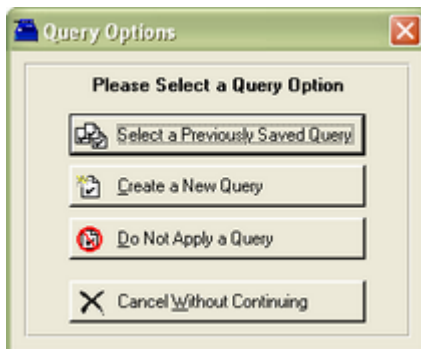
If you choose to cancel a report you will be prompted for input. Generally, it does not take long for a report to be generated, but some reports will take more time. A status bar or symbol is often available to show progress. If you have waited a long time and it appears that the hard drive of the server is not processing data, then you may cancel the report and try again.



## Select a Query Option

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A Query is a filter. It allows you to stipulate what information should be included or excluded from the report.



**Select a Previously Saved Query** - ALT-S - If you have created queries previously and chosen to save the query, this will open the list and you may select from it.

**Create a New Query** - ALT-C - starts from scratch, letting you define the filter(s). (see [How To Use Queries](#))

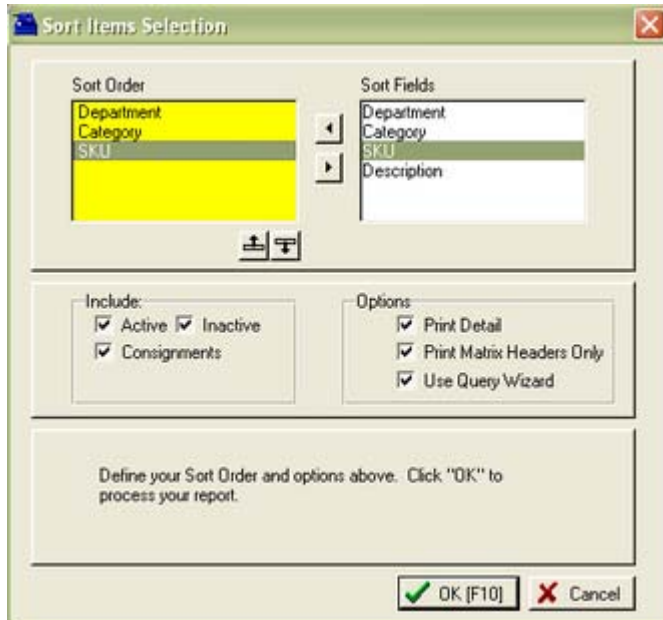
**Do Not Apply a Query** - ALT-D - skips creation of or selection of a Query and runs the report in full without filters.

**Cancel Without Continuing** - ALT-W - stops the report from running.

## Sort Items Selection

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Some reports allow you to define the sort order of primary elements on the report, namely SKU and Description. In addition you may choose to group the report by Department and/or Category.



### NORMAL HIERARCHY of sorting

**Department** - the department to which the category is assigned

**Category** - the category to which the inventory item is assigned

**SKU** or **Description** - either one or the other, but not both. The report will always include both the SKU and Description, you are simply selecting which field to alphabetize.

Choosing the above Sort Order fields will add a title for Department and Category and then the individual inventory items under each category.

### SAMPLE REPORT

#### Inventory Listing

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Blink's Video Game Emporium

SKU	Description	Type	Stock	Committed	Location
<b>Furniture - LRoom</b> Department name					
<b>Seating</b> Category name					
L123	LOVESEAT	Actv	3.00	0.00	warehouseB1 showroom12
S123	SOFA	Actv	3.00	0.00	warehouseC1 showroom12

### Distorted Reports - Common Errors

If you are seeing poorly arranged reports, it could be because of incorrect hierarchy. For example, the following will cause the report to be distorted.

- **Wrong Hierarchy**  
SKU

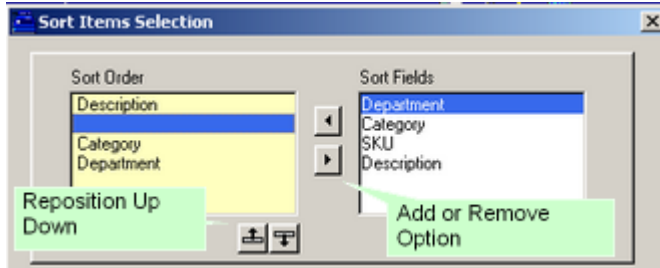
Department

Category

This will give a poorly laid out report because SKU must be below Category.

- **Blank Entry In List**

Sometimes choosing to add a sorting field is unsuccessful and a blank line is added instead as illustrated here.

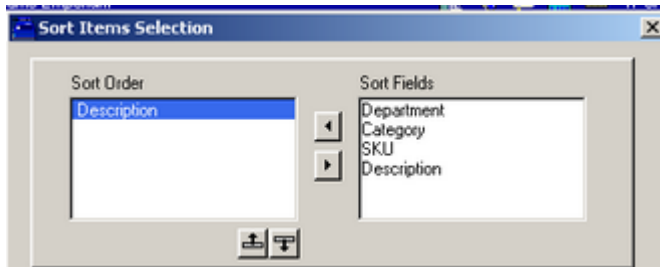


To correct this problem,

- use the Remove (right pointy button) to transfer the blank item on the left back to the right side.
- Because Department is listed last instead of first, highlight Department and use the UP reposition button. Repeat until all the fields are in the correct hierarchy.

### Acceptable Variations

It is acceptable to not include the Department or Category as sort order options.



Using the report in this way will list all inventory without breaking them into groups of department and/or category.

SAMPLE REPORT

## Inventory Listing

*Confidential*

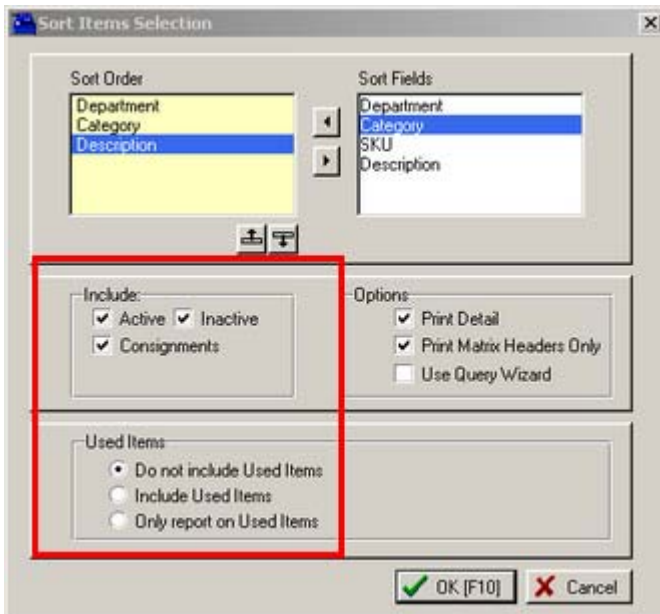
Blink's Video Game Emporium

SKU	Description	Type	Stock	Committed	Location
1095	\$10.95 SPECIAL	Actv	0.00	0.00	
STAPLES	10 BOX STAPLES	Actv	10.00	0.00	
15USB	15" SUPER USB	Actv	26.00	1.00	
345	345 NYLON 1/4 ROPE		0.00	0.00	
CAN7UP	7-UP CAN		24.00	0.00	
GLUB-1027	BARIO IN WONDERLAND		54.00	14.00	Aisle 1 Aisle 2
BEER	BEER		0.00	0.00	
BW	BEV NAPKIN WHITE		0.00	0.00	
BEVNAP	BEV NAPKINS		0.00	0.00	
BLANK	BLANK MATRIX	Mtrx	0.00	0.00	
BLUE	BLUE PAPER	Actv	0.00	0.00	
89-C	Bird Houses	Cons	0.00	0.00	
3139420226008	COLOGNE	Actv	3.00	0.00	
DC	DELUXE CRIB	Actv	2.00	2.00	
SNA1	DELUXE JOYSTICK	Actv	0.00	0.00	

When sorting by Description, all items are listed alphabetically (numbers first) no matter what the SKU may be.

### INCLUDE Inventory Types

Checkmark the types of inventory which should be included in the report.



Active - Inventory which appears in the Inventory List

Inactive - an option in PFW is to make a particular inventory inactive and therefore not visible in the list. This is typically used for seasonal products. You do not have to delete the item, simply make it inactive.

Consignments - items which you are selling in behalf of a customer of yours.

Used Items - items which you have taken in on trade and are similar to new items you sell.

- Do not include Used Items
- Include Used Items
- Only report on Used Items (all other inventory will be excluded, no matter what is selected for active, inactive, or consignments)

## OPTIONS

Checkmark the options controlling this report.

**Print Detail** - the report will not be summarized, but will include explanatory detail such as purchase order information or sales information.

**Print Matrix Headers Only** - if you are using matrix type inventory, the report can give you a consolidated stock count for the matrix header instead of listing all matrix children on the report. (If you are not using matrix inventory then it does not matter if this is checkmarked or not.)

**Use Query Wizard** - this triggers the opportunity to apply filters to the report to include or exclude specific items. (see [How To Use Queries](#))

## Tag / Untag

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Some reports allow for selection of specific items or groups of items by check marking some or all options.

**Tag/Untag** - check marks the highlighted item

**Tag All** - check marks all items

**Untag All** - check marks no items

