Creating Reports

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Overview

Reports help in making better business decisions. Reports that are made of carefully selected data and sound analysis provide guidance for a more effective inventory management. Order Time offers a dynamic and simple-to-use Reports tool. The task of setting different report variables, which usually takes time and effort, is now quick and uncomplicated with the Reports tool.

Types of Reports

There are different types of reports that can be generated with the Reports tool. Choosing the report type depends on the level of details that you want to appear on the report. You can select the report type from the **Render Type** picklist in the **Customize Report** page. The following are the different types of reports:

- Tabular The reports are usually more detailed. The information in this type of report are broken down to specific data which are typically presented in rows and columns.
- Summary The reports are based on stand-alone details that can provide the gist of the information. This may also mean fewer tables and columns depending on your criteria.
- Pivot The reports are formed by applying *pivot, data* and *rows* which are processed by different operations such as counting, averaging or summing.

Creating Reports

In the *Reports* main page, reports are classified in to tabs: *Frequently Run, My Reports* and *All Reports*. You can easily access saved reports by clicking the appropriate tab.

- 1. Click Reports.
- 2. Click on the **New Repor**t button.
 - **OrderTime**^{Beta} Project021 🔅 Reports 🕋 Home 🛛 🛷 Sales 📜 Purchasing **O**[®] Production 🗑 Warehouse Home

 Reports Reports Frequently Run My Reports All Reports Purchasing Vendors Vendors Purchase Orders Open Purchase Orders by Vendor Open Purchase Orders by Item Receivers & Vendor Returns Net Receiving by Vendor - Trailing 12 Months
- 3. On the next screen, you will see the *New Report* page, which contains the *report source groupings*. Each report source grouping contains tables and columns that you can include in your reports. This will allow you to select the type of information such as fields and tables that you want to reflect on your reports.

• Click the link of the report that you want to create/generate.

🚖 Purchasing 🛛 😋 Production	🕞 Warehouse 🛛 🔅 F	eports
Reports + New Report		
New Report Please click on the report source grouping. Ea grouping represents, you can hover over the		ist of 'Tables' and 'Columns' that you can display on your report. To find out what each
Sales	General	Purchasing
 Customers & Leads Sales Orders & Quotes Ship Docs & Customer Returns 	 Activities Items Inventory Valuation 	 Vendors Purchase Orders Receivers & Vendor Returns
Production		
Work Orders & Disassemblies		

4. Add the tables and columns to form the report. The steps for adding tables and columns are listed below.

• Adding Tables

The *Customize Report* page will display the *Tables* list on the left side of the screen after you click the link of the report that want to create. This is a list of tables that are relevant to the type of report that you selected. The *Tables* tab will also be available. This is where you will place the tables that you want to include in the report.

🚓 Home 🏼 🧳	Sales 🐂 Purchasing	¢ [©] Production	🗑 Warehouse 🛛 🖨 Reports	
Reports + Customize I	Report			
New Report		-		RenderType Tabular \$ Canc
Tables	Tables			
Sales Order & Quotes				
Customers & Leads	TABLE		JOIN	ACTION
Sales Order/Quote Li	ne Items			
Items				
Bin				
Sales Rep				
Class				
Currency				
Discount				
Sales Tax Code				
item Sales Tax				
Location				
Ship Method				

Select and drag the table name inside the box of the **Tables** tab. Once the table is selected, the page will display more tabs. The additional tabs are: Columns, Filters and Sort By.

The order of the table is important because it will dictate what other tables will be available to join the to initially selected table.

New Report			RenderType	Tabular
Tables	Tables Columns	Filters Sort By		
Customers & Leads				
Sales Order/Quote Line Items	TABLE		ЈОІМ	ACTION
Items	Sales Order & Quotes			٥
Bin				
color boo				

To *join* another table with the first table, drag and drop the table inside the box. At this point you are associating 2 tables. Once the tables are associated, their names are displayed under the *Join* column. Repeat this step if you want to join more tables with your primary table.

lew Report					RenderTyp	pe Tabular \$ View	v Save As Can
Tables	Tables	Columns	Filters	Sort By			
Customers & Leads						•	
tems	TABLE				JOIN		ACTION
Bin	Sales Ord	er & Quotes					0
	Customer	rs & Leads			Sales Order & Quotes-Customers & Leads		0
Sales Rep	Sales Ord	er/Quote Line It	ems		Sales Order & Quotes-Sales Order/Quote Line Items	0	
lass							
Currency							
Discount							

There are certain tables that can be joined with more than one*preceding tables*. You will know if a table can be associated or joined with another table when options appear at the bottom of the interface. This provides you the option to join a specific table to another table aside from the primary table.

					RenderType	Tabular	÷ V	iew	Save As	Cance
ables	Columr	ns Filters	Sort By							
TABLE				ЈОІМ					ACT	ION
Sales Ord	es Order & Quotes stomers & Leads Sales Order & Quotes-Customers & Leads		e	Э						
Custome	rs & Leads			Sales Order & Quotes-Customers & Lea	ads				C	Э
Sales Ord	ler/Quote Li	ine Items		Sales Order & Quotes-Sales Order/Quo	ote Line Items				¢	Э

If you want to join a table for the second time and join it with a table other than the primary table, drag the table from the **Tables** list and drop it in the box. You can also rename the table by using the **Table** field.

TABLE	JOIN	ACTIO
Sales Order & Quotes		0
Customers & Leads	Sales Order & Quotes-Customers & Leads	0
Sales Order/Quote Line Items	Sales Order & Quotes-Sales Order/Quote Line Items	0
Sales Rep	Sales Order & Quotes-Sales Rep	0
Sales Rep-2	Customers & Leads-Sales Rep	٥
Sales Kep-2	Customers & Leads-Sales Rep	Ø
Sales Kep-2	Customers & Leads-Sales Rep	Q

Repeat the steps above if you want to add more tables.

• Adding Columns

When you have established your tables, you can proceed to building the details of your report by adding columns.

1. Click the **Columns** tab to begin adding columns.

The tables that you selected are listed on the left side of the screen.

쑴 Home	A Sales	🎽 Purchasing	Q [®] Production	Warehouse	🚓 Reports		
Reports + Custo	mize Report						
New Report						RenderType Tabular \$	View Save As Canc
Tables		Tables	Columns Filters	Sort By			
Sales Order &	Quotes	-					
Customers & L	eads	TABLE	COLUMN	CAPTION	SECTION	SUMMARY FUNCTION	ACTION
Sales Order/Qu	iote Line Items						
Items							
Sales Rep							
Units of Measu	re						
Sales Rep-2							

2. Click the table name to expand the list and see the column names for that table.

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🖀 Home	🏘 Sales	😭 Purchasing	Q [®] Pro	duction
Reports Custo	mize Report			
New Report				
Tables		Tables	Columns	Filters
Sales Order & O	Quotes			
Customers & Le	eads	TABLE	COLU	MN
Account #				
Active				
Allow Ship Parti	al			
ARAccountRefle	d			
Bill Address Alt.	Contact			
Bill Address Alt.	Phone			
Bill Address Car	re of			
Bill Address City	/			
Bill Address Cor	ntact			
Bill Address Cou	untry			
Bill Address Em	ail			

3. Select the columns that you want to include in the report by dragging and dropping the column name inside the box. Depending on your report requirements and the details that you want to have, you can add more columns by repeating this step.

4. Click **Save As**. Enter a name for the report. Click **OK**.

쑭 Home	Ø Sales	🐂 Purchasing	Q [®] Prod	luction	🗊 Warehouse	🚓 Reports				
Reports + Cust	omize Report									
New Repor	t							RenderType Tabular	\$ View	Save As Can
Tables		Tables	Columns	Filters	Sort By					
Credit Limit		TABLE		Г	COLUMN	CAPTION	SECTION	SUMMARY FUNCTIO	N	ACTION
Currency Id		Customer	s & Leads		Full Name			None		0
Discount Id										
Expire Month										
ExpYear										
FOB Id										
Full Name Hold Orders										
Id										
Invoice Send M	lethod									

Viewing Reports

You may view your report at anytime during the report creation by clicking **View**. You can also

rearrange the order of the rows in the **Columns** tab by dragging the row(s) to your desired spot.

Reports > Customize Report			RenderType	e Tabular 🛟 View	Save As Canc	
Tables	Tables Columns Filters	Sort By				
Sales Order & Quotes						
Customers & Leads	TABLE	COLUMN	CAPTION	SECTION	SUMMARY FUNCTION	ACTION
Sales Order/Quote Line Items	Customers & Leads	Full Name			None	0
	Sales Rep	Name			None	0
Cleared	Sales Order & Quotes	No.			None	0
Conversion Rate	Sales Order & Quotes	Date			None	0
Customer Part No	Items	Name / Number			None	0
Description						
DocNo	Sales Order/Quote Line Items	Description			None	٥
Ext.	Sales Order/Quote Line Items	Ext.			None	0

The next screen will display the *View Report* page where you can see the report.

There are also other options available in the *View Report* page:

- Export to export your file onto your local directory.
- Print to obtain a hard copy of the report
- Customize Report to modify the report based on your requirement specifications
- Save to save the report
- Save As to save the report with another name.
- Delete to remove the report from the system

Summary Reports

You can opt to have a *Summary Report* if you want a concise version of a report.

- 1. Click **New Report** from the *Reports* page *OR* click the **Customize Report** button if you have an existing report that you want to change to *Summary*.
- 2. Select the **Summary** from the **Render Type** picklist.

					RenderType	Summary	¢	View	Save	Save As	Cancel
Tables	Columns	Filters	Sort By								
TABLE				JOIN						AC	TION
Sales Ord	er & Ouotes										٥

- 3. Select the tables and columns that you want to include in the report by dragging and dropping the table and column names inside the box.
- 4. Refine the level of details of the report by removing columns. Click the **Delete Column** icon under the **Action** column.

lables [Columns	Filters	Sort By				
TABLE			COLUMN	CAPTION	SECTION	SUMMARY FUNCTION	ACTION
Customers	& Leads		Full Name		Customers & Leads-Full Name	None	0
Customers	& Leads		Bill Address Name/Company		Customers & Leads-Full Name	None	0
Sales Rep			Name			None	0
Sales Orde	er & Quotes		No.			None	o
Sales Orde	er & Quotes		Date			None	0

- 5. Click **Save** or **Save As**.
- 6. Click **View** to check the summary report.

1496316 Ontario Inc.		Bill Address Name/Company.
REP	NAME / NUMBER	ÐT.
	106	20.00
		20.00
21st Century Snack Food	ds	Bill Address Name/Company:
REP	NAME / NUMBER	EXT.
	102	125.00
	103	300.00
	105	35.00
	109	161.00
	201	0.00
	203	14.00
	90	3.00
	H0009	350.00
		968.00

Note: You can make a summary report even without doing a detailed/tabular report first.

Pivot Reports

You can also do matrix reporting by creating a *Pivot* report.

Click **New Report** from the *Reports* page OR click the **Customize Report** button if you have an existing report that you want to change to *Pivot*.

- 1. Select **Pivot** from the *Render Type* picklist.
- 2. Choose the tables and columns that you want to include in the report by dragging and dropping the table and column names inside the box.
- Select the corresponding *Pivot Type* from the picklist for each of your column. *Important:* You have to have at least three (3) columns: only one(1) Pivot, only one (1) Data and 1 or more Rows

Reports + Customize Report						
New Report					RenderType Pivot	View Save As Cancel
Tables	Tables Columns	Filters Sort By				
Bin	TABLE	COLUMN	CAPTION	SECTION	SUMMARY FUNCTION	ACTION
Location	Location	Name			None	0
Active						
Available						
City						
Country						
Created Date/Time						
Floor/Suite						
Id						
Modified Date/Time						
Name						
Name/Company						
Note						
	Table Loc	ation				
	Column Nar	ne				
	Caption					
	Section					
	Section					
	Pivot type Pi	vot		\$		

- Pivot: You can enter a *Caption*.
- Data: Select the *Summary Function* from the picklist. You can also enter a *Caption*.

Tables	Column	IS F	Filters	Sort By		
	column					
TABLE			COLU	MN	CAPTION	SECTION
Location			Name	2		
Inventory			On ha	and		
	Table II	wentory				
_		iventory				
Summary		nventory Sum				\$
Summary		Sum				¢
Summary	Function	Sum				\$
Summary	Function	Sum m nand				\$
Summary	Function	Sum m nand				\$

• Row: You can select Section and enter a *Caption*.

ables	Colum	nns	Filters Sort By		
TABLE			COLUMN	CAPTION	
Location			Name		
Inventory	/		On hand		
Items			Name / Number		
Items			Description		
	Table Column Caption		ption		
	Column Caption	Descri	ption		
	Column	Descri	ption		•

4. Click Save or Save As.

5. Click **View** to see the report.

Reports > View Report					
nventory-New Report				Export	Print Customize Report Save As
NAME / NUMBER	DESCRIPTION	HQ	NY	TRUCK 1	TOTAL
BOT001		6,800	0	0	6,800
BOK001		400	0	0	400
Liquid		3,000	0	0	3,000
150	4CPTI	72	0	0	72
53	7BW16	512	0	0	512
570	7BW24-4C	240	0	0	240
54	7BW32	20	0	0	20
500	AL-5DB	6	0	0	6
117	APET - Bales Black	3	0	0	3
5	APET - Bales Clear	1	0	0	1
521	APET - Bales Colored	4	0	0	4
583	APET - BHCL Regrind	441	0	0	441
549	APET - Black Regrind	2	0	0	2

NEXT: Customizing Reports