Section IX

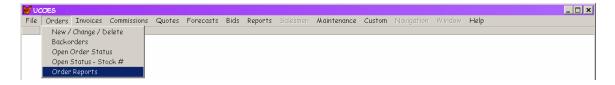
Reports

Reports Module

Reports	Maintenance	Fax/EDI
All Rep	orts	
Bid Rep	ports	
Commis	sion Reports	
Custom	ier Phone List	ALT+1
Fax Re	ports	
Foreca	st Reports	
Invoice	e Reports	
Princip	als List	ALT+2
Order	Reports	
Other I	Reports	
Price R	eports	ALT+P
Quote	Reports	

Common Report Features and Behaviors

Reports can be accessed from a variety of places in the menu system. For example, Order reports can be reached using the Order Reports option on the Orders menu pad.



Reports can also be reached from the Reports menu pad on the main menu.

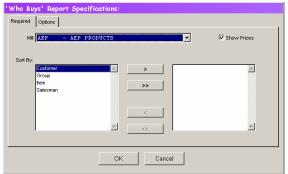
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File	Edit	Orders	Invoices	Commissions	Quotes	Forecasts	Reports	Maintenance	Everyone Ou	ut! Fax/EDI	Navigation	Window	Help	
							All Rep	orts	_					
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							Custom	ier Phone List	ALT+1					
							Fax Re	ports						
							Foreca	st Reports						
							Invoice	e Reports						
							Princip		ALT+2					
							Order	Reports						
							Other	Reports						
							Price R	eports	ALT+P					
							Quote	Reports						

In each case, you will be offered a list of reports and a choice of output format.

Pre-Call Planner	×
Mho Buys	
	=1
Output Destination	<u>·</u>
Print Preview	
C Send to Printer	Run
C Send to Text File	Close
C Send to HTML	

Highlight the report you'd like to run, choose the output format and click Run. If you choose Preview, you will be shown the report on-screen *and* there will be a Print button on the menu bar. This will provide a printer dialog where you can choose your printer and choose to print all pages of the report or just specific pages. In the Preview window, you can determine how many pages will print. By viewing the report on screen, you may decide to print only selected pages or rerun the report with additional specifications to refine the results.

The report you choose may require additional information. If so, a form will collect your specifications.



For many reports, you can choose one or more items from a list. In some cases you can sort those choices as well. See the information on Mover Dialogs for instructions on using this feature.

Who Buy Required	ys' Report Specifications: Options
Mil	AEP - AEP PRODUCTS
	Croup
	OK Cancel

Once you have indicated the information you'd like to see, click the OK button to run the report.

	Group ** - All Groups	×
	Salesman ** - All Salesmen	.
vailable item(s):		Selected items (*up to 26 or ALL*)
14	- 3 0Z. CONE CU	A
00102	- Case P/U Allow	>
00105	- Per Cent P/U J	>> [
00109	- Cube P/U Allow	**
L	- 5-1/4X5-1/4X7/	
1.5	- 8-3/8X3-7/8X7/	
L.5G	- 8-3/8X3-7/8X7/	<
10066	- 6 X 6 WHITE TI	<< 1
L0066G	- 6 X 6 GREEN TI -	<s. td="" y<=""></s.>

If you chose to Preview the report, you will see it page by page as in the example below. A report toolbar appears below your main menu. The buttons, from left to right, are: First Page, Previous Page, Go To Page, Next Page, Last Page, Zoom, Exit and Print.

UCOES											_ [
e Edit Orders Invoice	es Commiss	sions Reports Ma	inten	ance Eve	ryone Out! Fax	/EDI Navigation	Window	Help			
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	Report Desi	gner - whobuys.fr>	c – Pi	age 1						×	
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	PAGE 1				ABC Sales, Inc.						
	07/01/04			Who Buys Repo	rt for GENPAK Sorted by Cu	stomer & Hem			Status OL		
	11:05:10 am										
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				Broker Custo	mer Last Purchas	ed			e e		
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	1.5G	8-3/8X3-7/8X7/8 GREEN TRAY	15	186917 DOUG	1030 10/30/03				0 0		
	10500	WHITE 5 COMPT. SCHOOL	720	184493 2088	08/27/03				сс		
		10-34X5-34X2 WHITE TRAY	10	185780 2088	10/01/03				сс		
		10-344X5-344X1/2 WHITE TRAY	20	186917 DOUG					0 0		
		10-34X5-34X1/2 BLACK TRAY	15	186917 DOUG					0 0		
		10-34X5-34X1/2 YELLOW	25	186917 DOUG					0 0		
		14X18X7/8 WHITE FOAM FOOD 12-1/4X7-1/4X1/2 WHITE TRAY	10 15	185780 2088 186917 DOUG	10/01/03 10/30 10/30/03				C C 0 0		
		8-14X4-34X1/2 WHITE TRAY	20	186917 DOUG					00		
		8-14X4-34X1/2 BLACK TRAY	10	186917 DOUG					0 0		
		5-14X5-14X1/2 WHITE TRAY	10	186917 DOUG					0 0		
		5-1405-140017 YELLOW TRAY	5	186917 DOUG					0 0		
	2	8-14005-34007/8 WHITE TRAY	60	186917 DOUG	1030 10/30/03				0 0		
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		VENTED LARGE WHITE 3	30	186071 10803					C C		
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		WHITE SMALL SANDWICH	10	186886 GP10:					0 0		
		SESAME SMALL SANDWICH	4	186886 GP10					0 0		
		WHITE LARGE SANDWICH	48	186886 GP10					0 0		
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		JUMBO WHITE 3 COMPT.	5	186886 GP10					ŏ ŏ		
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	28	8-14X5-34X1/2 WHITE TRAY	55	186917 DOUG					0 0	-	
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If you choose the print button, you will see the Print dialog. If you have more than one printer available on your network, you can direct the printout. You can choose to print the whole report or just a few pages. You can also print multiple copies

Print			? ×
Printer			
Name:	\\ANTIGONE\HERMES	•	Properties
Status: Type: Where: Comment:	WANTIGONEVHERMES WCHARON/Star NX-10 Fax Generic / Text Only hp officejet d series hp officejet d series fax Star NX-10		
Print range O All O Pages O Selection	from: 7 to: 9	Copies Number of c	
		OK	Cancel

Data Lists with Reporting Feature

Customer List

Custo	omer List:1					_	
**Code	**Company	**Ship To	**City	**State	Phone	Fax	<u>^</u>
ААААА	AL'S ALLIED ASSOCIATED ART .	AL'S	ANOTHER CITY	MA	18009991212	9991111212	-
868888	BARRY BARNS BOUNTY	BARRY BARNS	BURLINGTON	MA	18002222222	13332223434	
							v
		Print Custome	er List Qose				

The Customer List can be accessed from the Reports Menu or, at any time, by pressing the key combination Alt + 1. The list can be sorted on any column whose title begins with **. When you press the Print Customer List button, the list will print in the currently displayed order.

The Customer List can be configured so that salesmen are able to view and print only their own customers. Contact the UCOES Support Team if you would like to implement this restriction.

Principal List

**Code	**Company	**Territory	Phone	Fax	Address1	Address 2 **
DISPP	DISPOSABLE PRODUCTS				P. O. BOX 1633	261 NARRAGANSIE
ABRI	FABRI-KAL CORPORATION	N.E.&N.Y.		18008875003	PLASTICS PLAC	к
JENPAK	GENPAK CORPORATION				P.O. BOX 727	68 WARREN STRE G
MCNAIR	MCNAIRN PACKAGING	N.E & N.Y.		14135621903	6 ELISE STREET	- V

The Principal List can be accessed from the Reports Menu or, at any time, by pressing the key combination Alt + 2. The list can be sorted on any column whose title begins with ******. All of the Print options for the Principal list are sorted in Code order and not necessarily the currently displayed order.