

Reporting Concepts

Reports allow you to make better business decisions based on your data and can also alert you to potential problems. The system offers several types of reports.

Objectives

- Reports Overview
- Setting Up Reports

Reports Overview

From the *Home* page, select *Reports*. Reports are organized into four categories. Accounts Receivable, Inventory, Purchasing and Receiving, and Point of Sale.

Notice that one option here is *Spooled Report Maintenance*. These are reports that have been saved to view online. For more about this feature, see the *Spooler Maintenance* video in Epicor Learning or refer to the Help documentation.

Select *Inventory Reports*. As you can see, many reports provide valuable information regarding your inventory.

For example, if you want to check the performance of items in your inventory, you can select the *Inventory Valuation Report*.

The *Inventory Valuation Report* pulls together the information you need to review the value of your products over time and to help you make decisions about purchasing or pricing on products based on their devaluation.

Each report provides details to help you make better business decisions.

Notice that when you hover over the report name, you will see the acronym for the report in parentheses, *RIV* for Inventory Valuation Report. Acronyms provide shortcuts for opening reports.

As you become familiar with the reports that you need, you can type the acronym into the *Launch Bar*. Almost all of the reports start with an 'R' for report.

Setting Up Reports

In this topic, we show how to set it up and use reports. Every report has a similar format. We will return to the *Inventory Valuation Report* as an example.

Tabs on the left side of the screen give you various options. In the *Print Setup* tab, you can decide whether to print or spool a report, select which printer to send the output to, and decide how many copies are needed.

In the *Standard Options*, there are three options. *Print Prepage?* shows the options used during printing. A best practice is to always include a Prepage.

If you choose the *Totals Only?* option for reports, the system eliminates item lists, leaving only subtotals and totals visible.

Double Space gives the option to put an extra line in between rows to make the information easier to read. Other reports may have additional formatting options.

The *Options* section specifies the types of data include in the report. These options also vary from report to report.

The *From and To* section defines the amount of information you see in a report. You define the parameters for the report so that you only get the data you need.

If you leave these fields blank, the system processes the report for all the data you requested on the *Options* screen.

The *Code Selection* tab allows you to further control the report by including or excluding SKU codes. Enter the code in the appropriate box and select the corresponding *Y* or *N* to exclude or include that code.

For instance, if you enter *A* in the *Popularity* code box and leave the *N* as it is, the report will only include items with a *Popularity Code of A* on this *Inventory Valuation Report*.

The *Flexible Sort* tab allows you to change the way a report normally sorts when printing and is only available on inventory reports.

Finally, the *Fax Setup* section is used for setting up information to fax this report. Fill in the required information in this page

Once you have set up the report, you can save and use the report again. Select *Save* or press *F5*. Enter a description and click *Save*.

The next time you want to run this specific report with the same options, select *Open* or press *F6*. Choose the report and click *Open*.

Recap

The process of reporting will ensure your reports are run efficiently and give you exactly the data you need every time.

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