Printing Forms and Reports

Your system is full of valuable information. Often, you'll gather and distribute some of that information to view on a screen, print out and hand to someone, or even send in an email. There are many options and we're going to focus on those basics.

You also have options for how and when a report is printed - manually as you need it, or automatically, at a time you specify.

Objectives

- In this course you'll learn how to set parameters for your printing.
- Also, how to set options, defaults and use dynamic dates.
- And see common ways of generating forms and report output.

Parameters

This is the Slow-Moving Stock Report. The printing features here are consistent throughout the system.

Most report windows contain Options cards, like this one, used to determine what data is returned on the report, such as the cutoff date, or a range of dates or records.

Or you might see a series of checkboxes on an Options card, like these, that indicate whether to include or exclude according to a parameter.

Many reports also include Filter cards used to select the records you want to include. The Slow-Moving Stock Report, for example, can be filtered by selecting specific parts, part classes, or warehouses.

To use the Filter card, select the search icon next to the filter.

Select how you want the result to display and what will be included. Then tap the Search button.

Select a record or records you want to include and tap OK.

Back on the Filter card, a summary of your choices displays.

Defaults and Options

When you launch a report, the default choices display on the Options and Filters cards.

If these are the options you want, immediately generate the report using the default choices.

You can save different report setting as well. Let's say you always want to Include Managed Inventory. Check that box. Now, so you won't have to remember to check that box every time, tap overflow and select Save Defaults.

These settings save with your user account, so that you see these same options each time you open this report.

Other users at your company can do the same thing with different options, so that everyone gets the report the way they want it.

You can also set up most date parameters to run using Dynamic values.

Now, instead of a date in the Stock Status as of field, the values are date variables – like "Today" or "Monday" or "End of the Month." When the report generates, the calendar date that matches the dynamic value is used for the report parameter.

If you print a report on a regular basis, you can assign it a recurring schedule.

In the Advanced card, select a Schedule for the report and select the Recurring check box.

Now, on whatever dynamic value you select in the Options Card, the system clock will activate the printing of this report automatically.

Let's save these changes too. Tap the Page Overflow.

Select Save Defaults.

These options will save on the Options, Filter, and Advanced cards.

When you open this report program again, the saved defaults display on the window.

And if you ever want to revert to the report's original defaults, tap Page Overflow and Get Defaults.

Output

If you want your report now, you print manually.

Set your options…, filters…, and make sure the Advanced Card > Schedule is set to Now.

If you want a hard copy of the report, tap Print.

If you want to view it on the screen, choose Print Preview.

You might print preview in both cases, to review your report before you use your printer ink.

And another handy option is to Send by Email.

Fill out this form and tap Send.

The recipient will get an email with the report as an attachment.

Recap

There you have it! Now you know about printing reports and forms. To recap…

- We set parameters, such as dates, and filters to narrow report results.

- Next, we looked at dynamic date, recurring options and how to set report defaults.

- And then we were ready to see the report on the screen and saw how to print it or send it by email.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution— in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR.

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298