

# Reports

## Procedural Guide

Reports allow you to pull information from your database into an actionable list.

### 1 - Choose Report

Under the navigation bar, go to Reports > to access the Report List.

**Accounts** reports will display your account balances and other relevant information.

**Backordered Items** will list any items on backorder.

**Deposits** lists deposits made within a date range, and can filter by account or memo.

**Expenses** reports on costs to your business.

**Inventory** tracks both your current inventory and past *Item Edits* made by your employees.

**NHLC Tobacco** is used by *New Hampshire Liquor Commission* licensed wholesalers to make lists on regulated items.

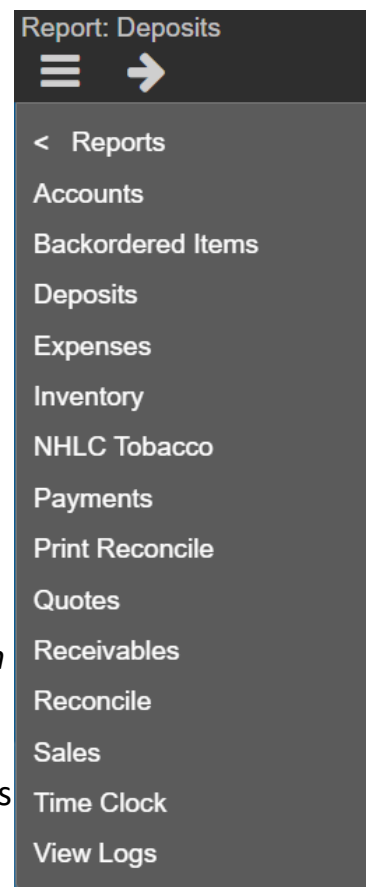
**Payments** lists payment issued to vendors, what account was charged, and the relevant expense.

**Print Reconcile** will immediately print a Reconcile Report.

**Quotes** will list all existing quotes.

**Receivables** reviews outstanding charge balances per customer.

**Sales** lets you run reports on all types of sales made by your business, and any edits made to those sales.



**Time Clock** reviews employee time sheets, shifts & breaks, summaries, and payroll by hour.

**View Logs** displays error logs, as well as QuickBooks authorization calls and Authorize.Net information.

## 2 - Report Commands

When you have a report list, you can perform report commands by clicking the drop-down menu at the top of the page.



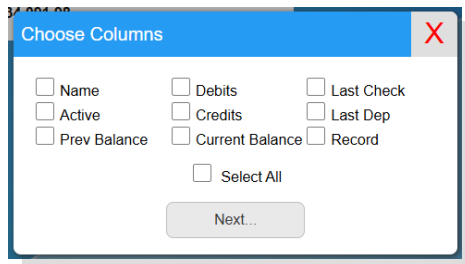
**Copy** sends the HTML information to your clipboard. This can be pasted into a text file and saved as an .HTML to be viewed in a browser.

**View/Edit** can be used on selected items that have customizable options.

**Remove Rows** deletes the selection from the report.

**Keep Rows** deletes everything *but* the selection from the report.

**Choose Columns** filters out unselected data columns.

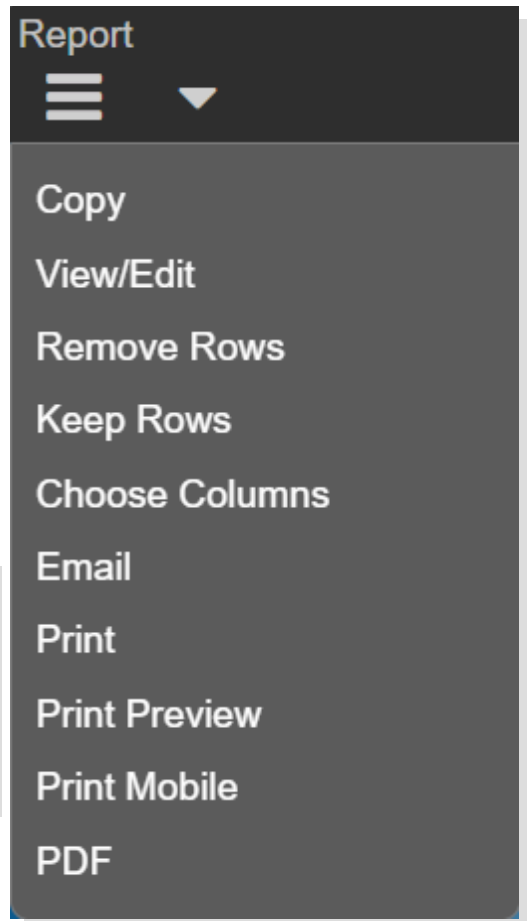


**Email** sends the report to the specified email address, or your own if left blank.

**Print** begins the process of printing the report.

**Print Preview** creates an HTML file of the report that can be printed from the browser.

**Print Mobile** immediately attempts to print a mobile-sized version of the report.



PDF immediately creates and downloads a Report.pdf file.

### 3 - Edit Report

When you create a report that can be edited, more options will become available.

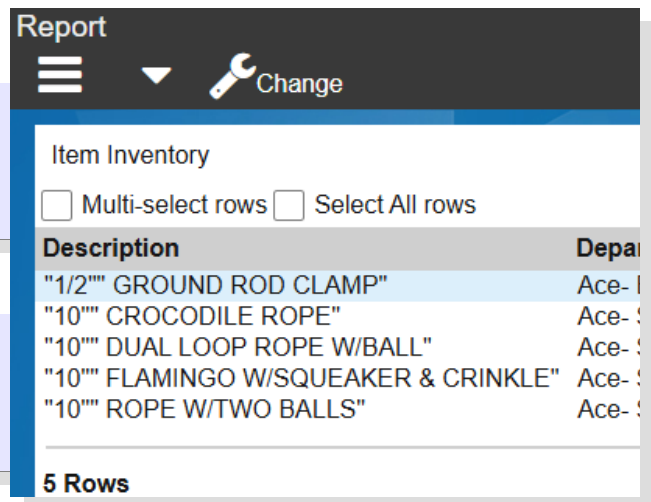
You can select items by clicking on them.


Multi-select rows

To select multiple options, check the Multi-select rows box.

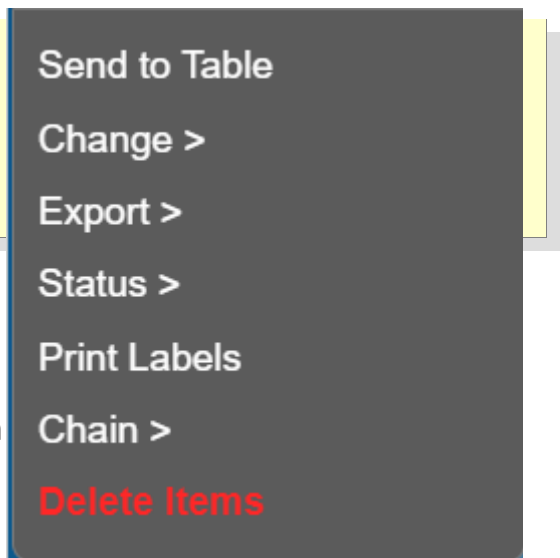
Select All rows

To select all rows, check the Select All rows box.



 Change

Use the Change button to see further options:



**Send to Table** will create an Item Table report using the selected items.

**Change** allows you to update item properties on one or multiple items at once, such as Brand/Mfr, Alternative Search name, Vendor, or reset the inventory.

**Export** will create a file formatted for use with InstaCart or other formats.

**Status** allows you to update item statuses on one or multiple items at once, such as toggling their active state, marking items as Alcohol, Discount & EBT Eligibility.

**Print Labels** immediately prints labels for all selected items.

**Chain** allows you to update item descriptions, costs & retails at all chain sites.

## **WARNING**

**Delete Items** will permanently delete the selected items from your database, including all information and sales history on those items.