



# Technical Document for Sales Reports

*Created by Beth A. Martin*

## Purpose

The purpose of the **Sales Reports** is to track product sales and tons for our staff.

This report is mostly useful for the Management staff. Sales Reps will run for business use on as needed basis.

The GC Premier Database captures all information associated with Sales Order Processing through Microsoft's Great Plains - Dynamics (the front-end) and ties into the SQL (Structured Query Language) which is the database back-end. This database serves indirectly in support of the front-end services. However, these secondary systems are mostly transparent to the users.

The **Sales Reports** query the GC Premier Database and request a Date Range and Item (Inventory) IDs. SalesRepReports – Generate reports from the database pulling data in the requested date range and IDs from the fields of Customer Name, Customer ID, Ship to Address, City and State, Item Number, and Sales/Invoice info. The report is grouped by Customer Name, ID, Ship to Address, City and State, and then by Item Number. The Units Sold, Sales Volume Tons and Product Sales Total are calculated and grouped accordingly. The Subtotals and Grand Total are calculated and grouped for each customer, ship to address and item number.

## Specs

**Location of the Sales Reports** is on Secured on Gcsrv

L:\Co Reports\Dist\_Crystal\_reports\SalesRepReports

As of Mar. 7, 2008 the only report located there is a Crystal Report (rpt).

SumCustUnitTonSalesUAP.rpt This is for our UAP customer only.

**Location of Database** is on [\\Giles-acctsqli](#)

You will not need to access this directly.

**Application** to run/view report in is **Jeff-Net Report Runner Viewer 11**. This application runs off of the server.

The Database is designed in Microsoft ® Great Plains Version 8 & Microsoft ® SQL Version 8.

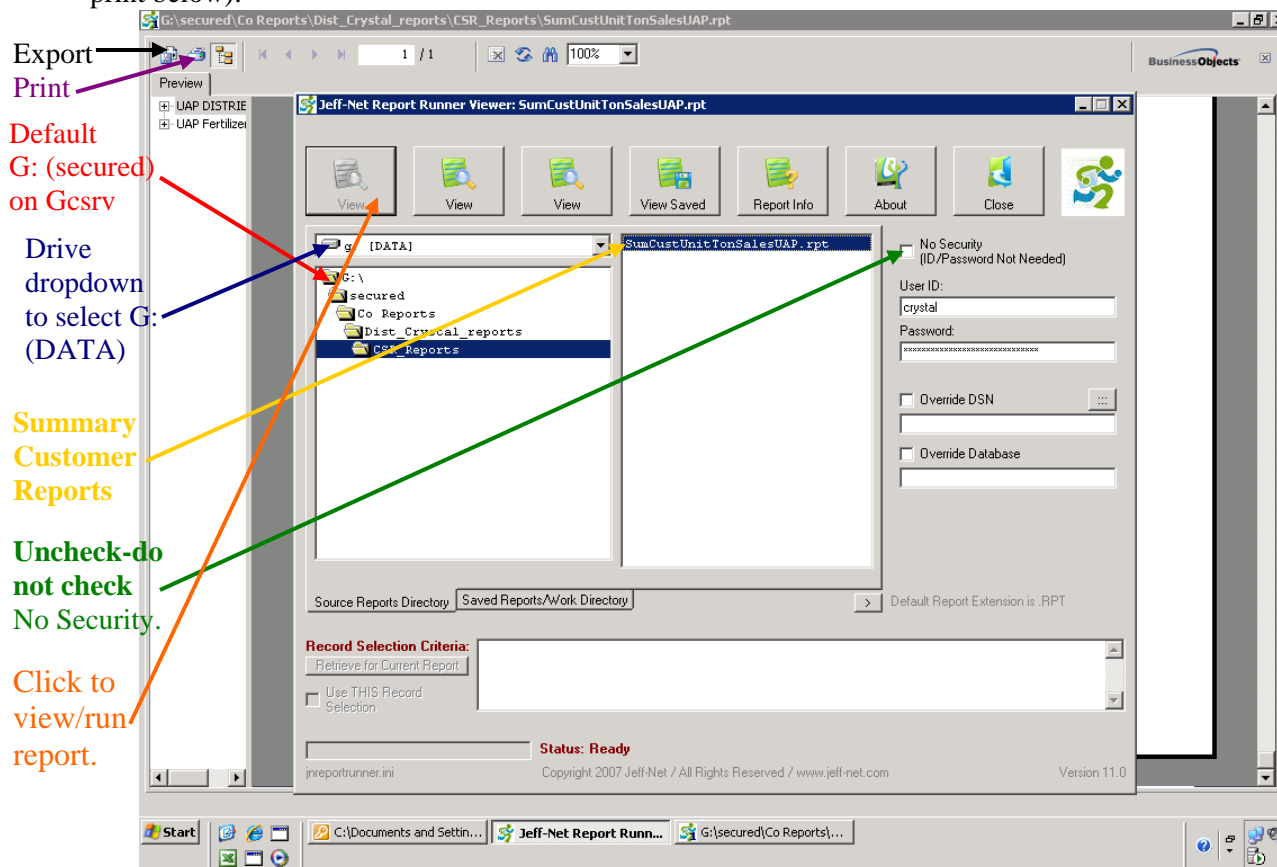
The Reports were created in Crystal Reports ® Professional 11 by Beth A. Martin.

All software and product licensing is registered to Giles Chemical a Division of Premier Chemicals as of 2008.

## Instructions/Use (How to run/view reports)

### Opening Application

Log in to thin client or PC. Open with double click the Giles Applications (Yellow/Orange key) Icon, then double click desktop shortcut JNRRE11.EXE (Green and Blue man running) Icon, if present. If not, click on Windows Start Menu button. Go to All Programs and select Jeff-Net Report Runner Viewer, select Report Runner Viewer 11. Jeff-Net Report Runner Viewer application will open up (see screen print below).



### Use and Layout of Application

Left side of Window may or may not default to G:\secured\Co Reports\Dist\_Crystal\_reports\SalesRepReports (see red arrow). If it does not, select drive dropdown g: (DATA) (see navy arrow). Then back in window below (red arrow), double click each folder in the following order G:\secured\Co Reports\Dist\_Crystal\_reports\SalesRepReports until SalesRepReports is reached. WARNING-If error message "You are not authorized to view that directory!" is displayed, click OK. Error message may be displayed a few more times, OK to each. This is Giles Security and we have restricted some directories. Right side of Window should now display CSR Reports (see yellow arrow). Select Report to run/view, again in window (yellow arrow). **Uncheck** No Security, if checked (see green arrow). Click on View button in upper left corner (see orange arrow).

### Setting up the Report Criteria/Options - *Tips are shown in italic.*

Report **Enter Values** Window will open up and prompt for Date Range and Item Number Range. Follow instructions for entering date range in YYYY-MM-DD format, for example 2007-08-01 and 2007-08-31. Place (click) mouse/cursor in first field - Start of Range: Enter a Value: and type in beginning of requested date range. Then (click) move mouse/cursor to second field - End of Range: Enter a Value: and type in end of range then click Add Range. This will populate the query criteria into the Selected Values: box below. *Additionally, dates maybe selected by clicking on calendar icon to right of each Enter a Value: field.* Scroll down to lower portion of window by using the right side scroll bar. Now enter Item Number values/range using similar steps. Place (click) mouse/cursor in first field - Start of Range: Enter a Value: and select beginning of requested item number range from dropdown menu. Then (click) move mouse/cursor to second field - End of Range: Enter a Value: and select end of range from dropdown menu then click Add Range. This will populate the query criteria into the Selected Values: box below. Click OK to generate the report. *The 2 arrow buttons (> and >>), as well as the SHIFT/hold and click and the CTRL/hold and click options may also be used here when selecting. If incorrect criteria has been entered into the Selected Values: box, it can be easily removed by selected the criteria and then using either the Remove or Remove All buttons.* The report will now be generated based on the date and item number ranges that were entered and a new window will open. This is the requested report.

Report may be printed by clicking the Printer Icon second picture in uppermost left of the report window (see purple arrow in screen print on page 2), exported (instructions in following section), or drilled down into (if available). On left side of report under Preview, groupings may be expanded. Additional tabs next to Preview may be available, if drilldown is possible.

**This last section is additional info. and may not be required for Sales usage.**

### **Saving/Exporting the Report**

If the client requests an export, the Export Report option must be selected. This is the picture in the uppermost left of the report window. It is the icon with the floppy disk and a page (see **black arrow** in screen print on page 2). Click this button to Export report. The Export window will open and ask 2 things: Format and Destination. (1) The Format is the new file type of the report, generally either Adobe Acrobat (PDF) or Microsoft Excel 97-2000 (XLS). These file formats are easier to view and use, so select one of these 2 formats by using the dropdown list. (2) The Destination is the new location of the file, generally the file is saved and then attached to an e-mail later using the Disk File option or it is opened in the Application for editing. Use the dropdown list to select the location/destination of the new file. *The Disk File option is the easiest and the only requirement is that a note is made on where the file is saved.* Click OK to close window. Click OK in next window to select default printing options.

The Choose export file window will open (this is actually the save as window). Confirm and remember new file location, type in a new filename, and then click Save. All that is left is to close the report and the application, use the X in the uppermost right hand corner which will close the report. Then either select the Close button or the X in the uppermost right hand corner which will close the Jeff-Net application.

The new file (export) has been saved and may be retrieved from the same location to which it was saved. The file may also be attached through an e-mail client such as Outlook. The attachment is done the same way as all other attachments. The attachment process is not discussed in this document.