

Reporting From Invoice Systems

A major advantage in setting a LINE ITEMS table in the invoice system such as the one you have set up in the past two chapters is that reports can be created from it. The company will be interested in two things. Firstly, the total number of each product that have been sold so the company can see which are the best sellers. Secondly, how much has been made each month. We will create two reports to satisfy these needs. The company will also want mailing labels based on the Customer Details to easily contact their customers.

Loading the Sample File

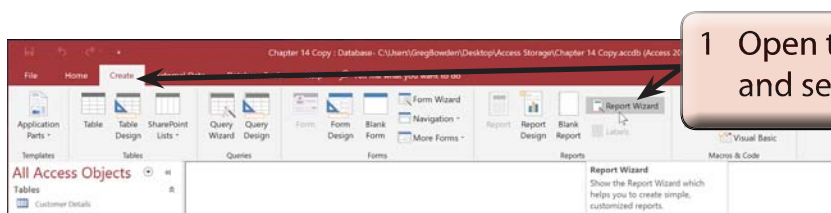
You will be using the invoice system from the previous chapter.

- 1 If your invoice system from the previous chapter worked well, open the file from your STORAGE folder.
- 2 If you would prefer to use a fresh fully operational file:
 - (A) Load Microsoft Access and select OPEN OTHER FILES in the START window or close the current file and select OPEN in the FILE tab.
 - (B) BROWSE to the CHAPTER 14 folder of the ACCESS 2019 SUPPORT FILES and open the CHAPTER 14 file as an OPEN READ-ONLY file.
 - (C) Click on the SAVE AS icon in the WARNING BAR under the RIBBON.
 - (D) Access your STORAGE folder and save the file as CHAPTER 14 COPY.
 - (E) Click on the ENABLE CONTENT button so that the data can be viewed.

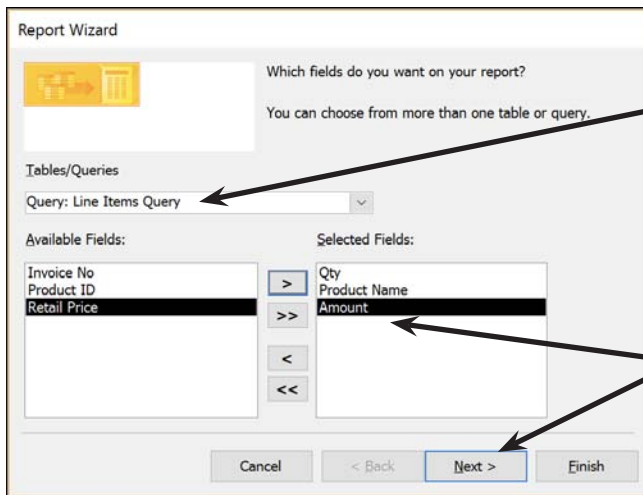
Creating a Total Items Sold Report

A report can be created to show how many of each product has been sold. By doing this the company can see which products are selling well and which are not by the click of a mouse button.

A Starting the Report Wizard

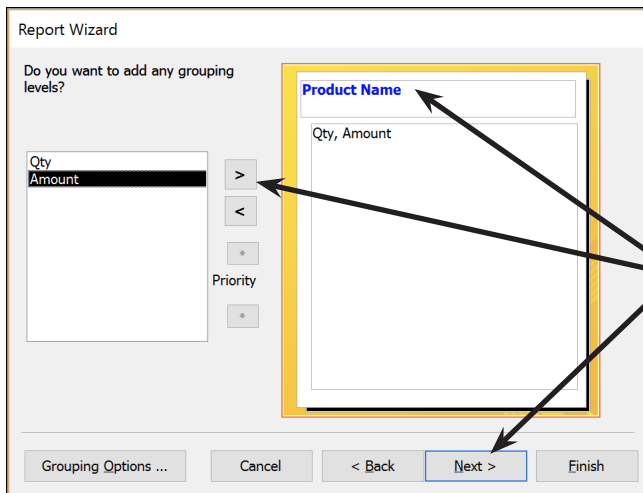


1 Open the CREATE tab of the RIBBON and select the REPORT WIZARD icon.

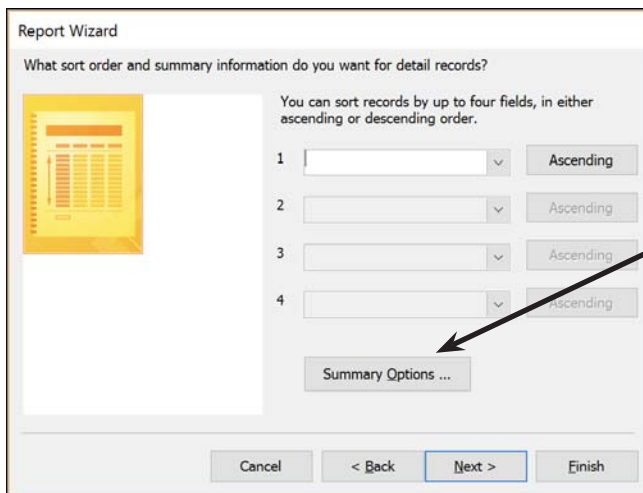


2 In the REPORT WIZARD dialogue box set the CHOOSE TABLE OR QUERY box to the LINE ITEMS QUERY.

3 Move the QTY, PRODUCT NAME and AMOUNT fields into the SELECTED FIELDS frame then click on NEXT.



4 You will be asked about the grouping required. We want to list the totals for each product type so the PRODUCT NAME field is suitable. Select it in the left frame and move it into the GROUP frame. We will leave the GROUPING OPTIONS as normal, so click on NEXT.



5 No sorting within the group will be needed in this case so click on the SUMMARY OPTIONS button.

Summary Options

What summary values would you like calculated?

Field	Sum	Avg	Min	Max
Qty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Show

Detail and Summary
 Summary Only

Calculate percent of total for sums

OK
Cancel

6 Set the QTY and AMOUNT fields to have their sums (sub-totals) calculated and click on OK.

Report Wizard

What sort order and summary information do you want for detail records?

You can sort records by up to four fields, in either ascending or descending order.

1 Ascending
 2 Ascending
 3 Ascending
 4 Ascending

Summary Options ...

Cancel < Back Next > Finish

7 You will be returned to the SORT section of the REPORT WIZARD, click on NEXT.

Report Wizard

How would you like to lay out your report?

Layout

Stepped
 Block
 Outline

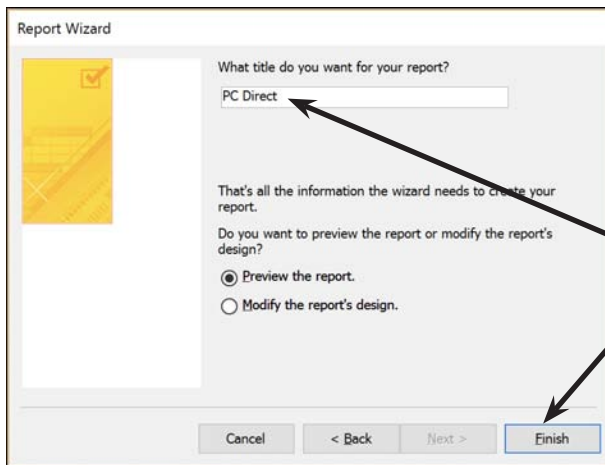
Orientation

Portrait
 Landscape

Adjust the field width so all fields fit on a page.

Cancel < Back Next > Finish

8 Select the STEPPED layout with PORTRAIT orientation and click on NEXT.



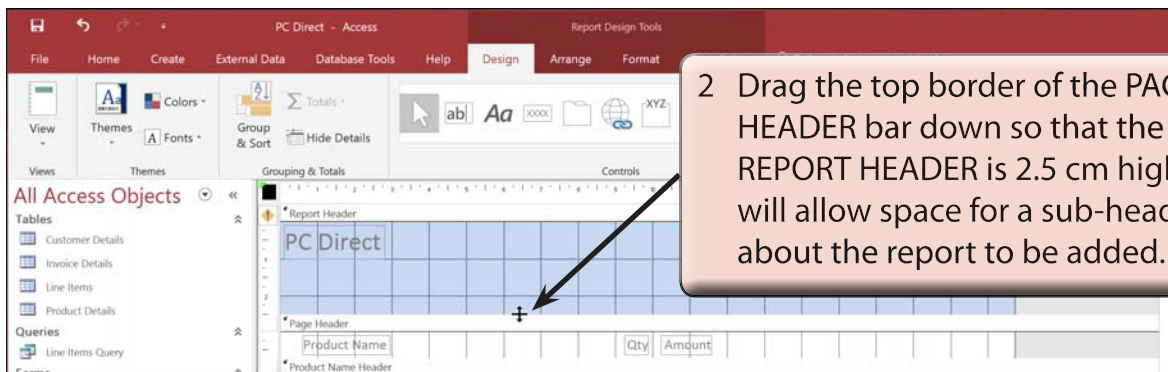
9 Enter the report title:
PC Direct
then click on the FINISH button to
create the report.

NOTE: The report title, PC Direct, will be placed as a heading in the report. It will also be the name under which the report is saved. It is not an appropriate name for the report, so we will alter it shortly.

B Making the Total Items Sold Report More Concise

As with most Report Wizard generated reports, adjustments are required. If you look through the report you will see that the report is too detailed. We don't need to know the individual sales for each invoice, just the totals.

- 1 Close the preview to return the view to DESIGN VIEW.



2 Drag the top border of the PAGE HEADER bar down so that the REPORT HEADER is 2.5 cm high. This will allow space for a sub-heading about the report to be added.