

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 or close the current file and click on the FILE tab. Select OPEN OTHER FILES in the START window or OPEN in the BACKSTAGE VIEW.
 - (B) Access the CHAPTER 14 folder of the ACCESS 2016 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.

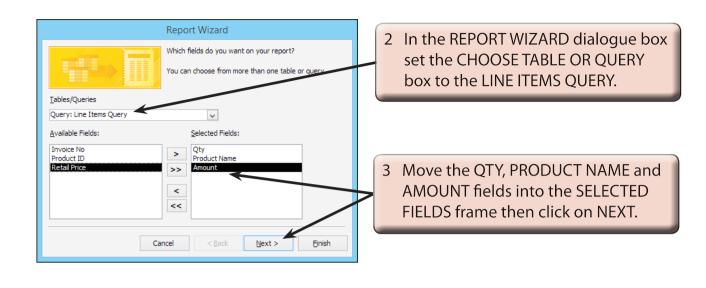
Creating a Total Items Sold Report

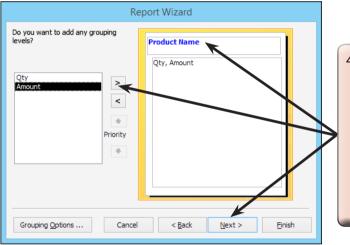
A report can be created to show how many of each product has been sold. By doing this the company can see which products are selling well and which are not by the click of a mouse button.

A Starting the Report Wizard

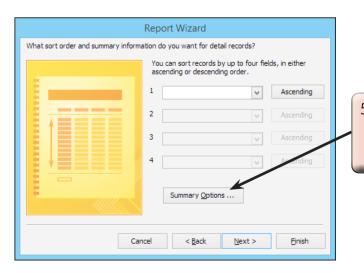
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Open the CREATE tab of the RIBBON and select the REPORT WIZARD icon.



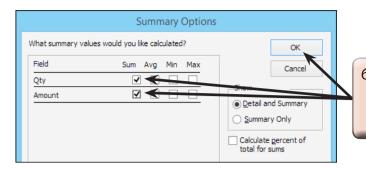


4 You will be asked about the grouping required. We want to list the totals for each product type so the PRODUCT NAME field is suitable. Select it in the left frame and move it into the GROUP frame. We will leave the GROUPING OPTIONS as normal, so click on NEXT.



5 We won't need any sorting within the group in this case so click on the SUMMARY OPTIONS button.

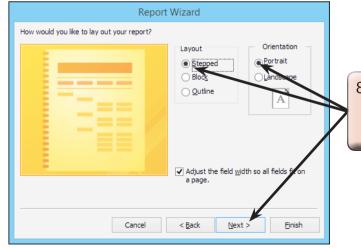




6 Set the QTY and AMOUNT fields to have their sums (sub-totals) calculated and click on OK.



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



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

Report Wizard	
What title do you want for your report? PC Direct	
That's all the information the wizard needs to thate your report. Do you want to preview the report or modify the report's design? Preview the report. Modify the report's design. Cancel Back Enish 	 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

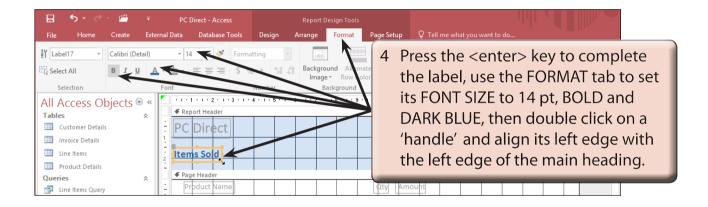
As with most Report Wizard generated reports, adjustments are required. If you look through the report you will see that the report is too detailed. We don't need to know the individual sales for each invoice, just the totals.

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

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6 To display the product name and its totals we need to place the PRODUCT NAME field in the PRODUCT NAME FOOTER section next to the sum calculation controls.