

Reporting on Invoice Systems

When you setup a sales invoice system it is important to be able to extract information from that system. For example, the mail-order company, PC Direct, you used in the last chapter would probably want to know how many units of each item they have sold and how much sales revenue has been achieved each month. The advantage of having a list of each item sold as a separate record (in the ITEMS SOLD table) is that it is easy to create reports on the products sold. These reports would be much more difficult to do from the invoice.

To demonstrate this we will create two reports, one showing which products have been the best sellers, the second showing the monthly sales for the company.

Opening the File

The CH18 INVOICE COPY database that you developed in the last chapter will be used again in this chapter.

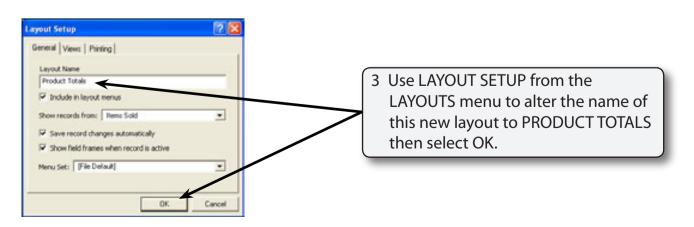
- 1 Load FileMaker Pro, click on OPEN AN EXISTING FILE and select OK. Or close the current file and select OPEN from the FILE menu.
- 2 Access your FMP8 FILES folder and open the file: CH18 INVOICE COPY

Creating the Product Totals Layout

A Duplicating the Items List Layout

The ITEMS LIST layout will be duplicated and modify it to suit the needs of this report.

- 1 Set the screen to LAYOUT MODE open the ITEMS LIST layout.
- 2 Display the LAYOUTS menu and select DUPLICATE LAYOUT.

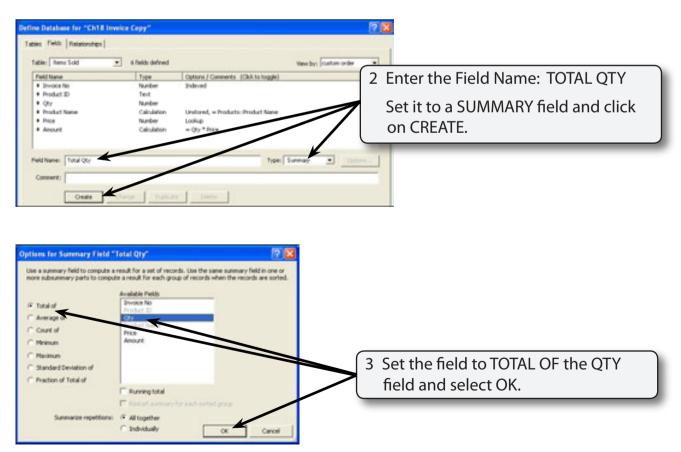


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Layout - I Comments Freduct 2 (21) Product Name	centre the headings.
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B Setting the Summary Fields

Two SUMMARY fields are needed, one to total the QTY sold, the other to total the AMOUNT sold. These will be placed in a sub-summary part and a grand summary part.

1 Display the FILE menu, highlight DEFINE and select DATABASE.

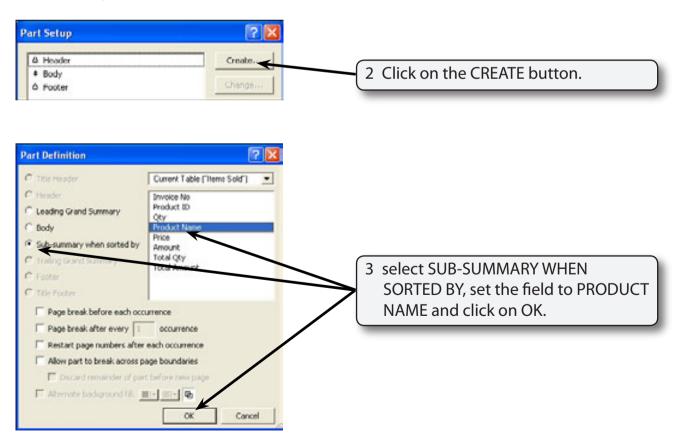


Peid Nane Proce No	Type	Options / Comments (Click to toggle)		TOTAL AMOUNT field that totals the
Product ID Qty	Number Text Number	Indexed		AMOUNT field.
 Product Name Price Anount Total Amount 	Calculation Number Calculation Summary Summary	Unitered, = Products: Product Nase Lookup = Qty * Price = Total of Qty = Total of Amount		
			5	Select OK to return to the layout.

C Inserting the Summary Parts

Two summary PARTS will need to be added to the layout, a SUB-SUMMARY part and a GRAND SUMMARY part.

1 Display the LAYOUTS menu and select PART SETUP.



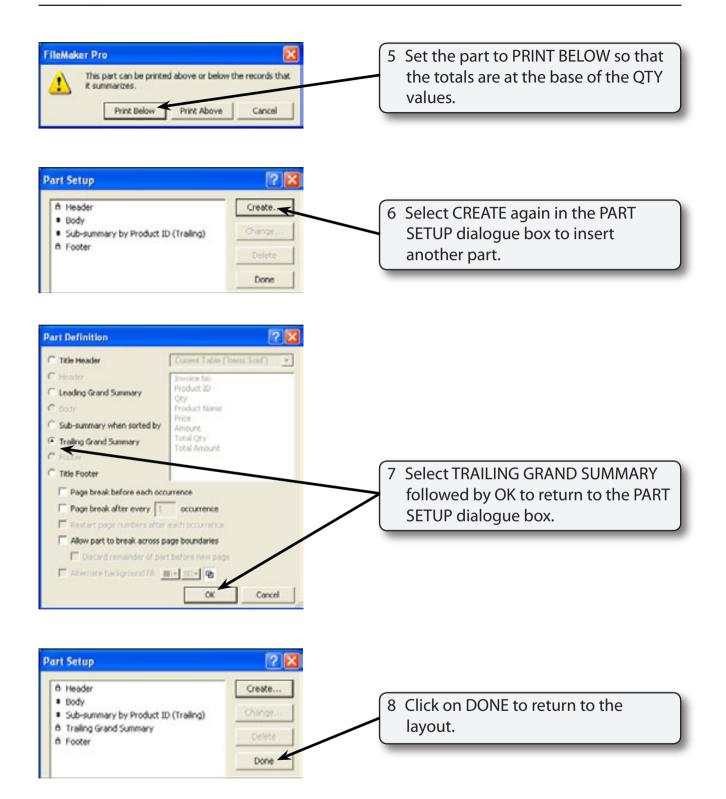


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	4, 113, 114, 119, 129, 121, 123, 124, 125,
Layout and answer Total Answer	9 Increase the height of both the SUB-SUMMARY part and the GRAND SUMMARY part to about 1 cm each.

D Adjusting the Layout

We do not want to list the product name for every sale that has been made, we simply want the each product listed once with the quantity and amount they have sold. To do this the PRODUCT ID and PRODUCT NAME fields will be placed in the SUB-SUMMARY part and the BODY part deleted.

