



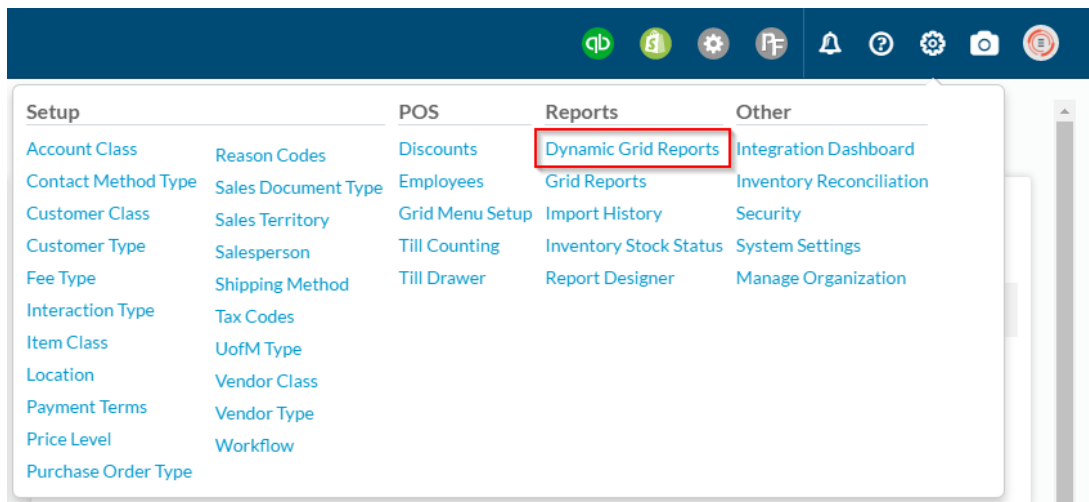
## Dynamic Grid Reports

Megan De Freitas - 2024-12-02 - Settings

### Overview

Dynamic grid reports in SalesPad Cloud provide valuable insights into the performance of your company.

To get started, select **Dynamic Grid Reports** from the Settings menu.










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### Run a Dynamic Grid Report

SalesPad Cloud provides you with a number of built-in dynamic grid reports, including Items Returned, Top 10 Items Sold, Sales By Item, Items Not Yet Sold, Items Sold To Customer, Sales By Customer, and Sales Document. Simply select the report you wish to view from the list on the left-hand side of the screen.

## Dynamic Grid Reports

<b>Items Returned</b>	
Top 10 Items Sold	
Sales By Item	
Items Not Yet Sold	
Items sold to customer	
Sales By Customer	
Sales Document	

For a brief description of SalesPad Cloud's built-in dynamic grid reports, click the bolded text below:

### **Built-In Dynamic Grid Reports**

**Name:** Bin Pick Qtys

**DataSet:** BinPickQtys

**Description:** Shows quantity available for items in given warehouses and bins.

**Columns:**

Item\_Number;Item\_Description;Warehouse\_Name;Qty\_Allocated;Bin\_1;Bin\_2;Bin\_3;Bin\_4;Bin\_5;Upc;Sku

**Name:** Customer and Vendor Contacts

**DataSet:** CustomerAndVendorContacts

**Description:** Shows all of the contacts for all customers and vendors.

**Columns:**

Entity\_Type;Contact\_Code;Contact\_Usage;Contact\_Person;Email;Phone;Address\_1;Address\_2;Address\_3;City;State;Zip;Country

**Name:** Customer Billing Contacts

**DataSet:** CustomerBillingContacts

**Description:** Shows contact person, email, and phone for all customers.

**Columns:**

Item\_Number;Item\_Description;Item\_Class;Qty\_On\_Hand;Qty\_Allocate;Qty\_Available

**Name:** Customer Profitability

**DataSet:** CustomerProfitability

**Description:** Shows total revenue, cost, and difference associated with sales to customers in a given time period.

**Columns:** Customer\_Name, Cost, Sales, Difference

**Name:** Customer Totals

**DataSet:** CustomerTotals

**Description:** Shows totals for sales documents associated with customers.

**Columns:** Customer\_Num;Customer\_Name;Total

**Name:** Daily Invoice Summary

**DataSet:** DailyInvoiceSummary

**Description:** Shows basic sales line information sold in a given time period.

**Columns:**

Sales\_Doc\_Num;Doc\_Date;Customer\_PO;Item\_Number;Warehouse\_Name;Qty\_In\_Base;Unit\_Cost

**Name:** Daily POS Sales By Location

**DataSet:** DailyPOSSalesByLocation

**Description:** Shows all sales by location. POS is used to convey it's importance in summary document situations.

**Columns:**

Location;Post\_Date;Total;Subtotal;Discount;Tax;Shipping\_Amount;Subtotal\_Less\_Disc

**Name:** Daily Sales By Location

**DataSet:** DailySalesByLocation

**Description:** Shows all sales by location. Very similar to Daily POS Sales By Location.

**Columns:**

Location;Post\_Date;Total;Subtotal;Discount;Tax;Shipping\_Amount;Subtotal\_Less\_Disc

**Name:** Daily Summary Invoice

**DataSet:** DailySummaryInvoiceReport

**Description:** Shows all sales lines on invoices in a given time period.

**Columns:**

Sales\_Doc\_Num;Doc\_Date;Customer\_PO;Item\_Number;Warehouse\_Name;Qty\_In\_Base;Unit\_Cost

**Name:** Dropship\_Reconcile

**DataSet:** DropshipReconcile

**Description:** Shows all drop ship items sold in a given timeframe with sold versus purchase cost.

**Columns:**

Sales\_Doc\_Num;Created\_On;Post\_Date;Item\_Number;Item\_Master\_Purchase\_Cost;Sales\_Order\_Line\_Cost;Receipt\_Line\_Unit\_Cost;Purchase\_Line\_Unit\_Cost;Sales\_Line\_Purchase\_Cost

**Name:** Employee List

**DataSet:** EmployeeList

**Description:** Shows all POS employees and their status.

**Columns:** Employee\_Name;Employee\_POS\_Pin;Employee\_Inactive;Role\_Inactive

**Name:** Employee Time Summary

**DataSet:** EmployeeTimeSummary

**Description:** Shows all POS employees and their time entries.

**Columns:** Employee\_Name;Punched\_In;Punched\_Out;Time\_Clocked

**Name:** EOD Till Report

**DataSet:** EODTillReport

**Description:** Shows all till transaction amounts for a given time period.

**Columns:** Till\_Transaction\_Type;Transaction\_On;Amount;Location;Drawer\_Name

**Name:** Inactive Customers by Order Amounts

**DataSet:** InactiveCustomersbyOrderAmounts

**Description:** Shows all customers and sum of total amounts from invoices and non-historical and unvoided orders that have a sum total less than the given total.

**Columns:** Customer\_Name;Amount

**Name:** Inventory Bin Quantities

**DataSet:** InventoryBinQuantities

**Description:** Shows all items in bins and the quantity on hand, quantity fulfilled and quantity available for each bin.

**Columns:**

Item\_Number;Item\_Description;Item\_Class;Qty\_On\_Hand;Qty\_Fulfilled;Qty\_Available

**Name:** Inventory Stock By Date

**DataSet:** InventoryStockByDate

**Description:** Shows the inventory quantity and value on a given date.

**Columns:** Location;Item\_Number;Quantity;Value

**Name:** Inventory Stock Status by Vendor

**DataSet:** InventoryStockStatusbyVendor

**Description:** Shows the current inventory stock status of each vendor item and the sales per month.

**Columns:**

Vendor\_Name;Item\_Number;Item\_Description;On\_Hand;Available;On\_PO;Sales/Month

**Name:** Inventory Stock Status by Vendor Over 3 Months

**DataSet:** InventoryStockStatusbyVendorOver3Months

**Description:** Shows the current inventory stock status of each vendor item and the sales per month over a three month period.

**Columns:** Vendor\_Name;Item\_Number;Item\_Description;On\_Hand;Available;On\_PO;Sales/3 Month

**Name:** Item Reorder By Vendor

**DataSet:** ItemReorderByVendor

**Description:** Shows all vendor items that have a quantity on hand lower than the item's reorder point.

**Columns:**

Item\_Number;Item\_Description;Vendor\_Name;Qty\_Onhand;Qty\_Available;Qty\_On\_BO;Qty\_On\_PO;Reorder\_Qty;Warehouse\_Name;

**Name:** Item Sales

**DataSet:** ItemSales

**Description:** Shows sales for each item.

**Columns:** Sales\_Doc\_Num;Item\_Number;Qty;Uofm;Unit\_Price

**Name:** Item Sales Date Range

**DataSet:** ItemSalesDateRange

**Description:** Shows the sales of items for a given date range.

**Columns:** Sales\_Doc\_Num;Item\_Number;Qty;Uofm;Unit\_Price

**Name:** Item Sales By Location and Post Date

**DataSet:** ItemSalesByLocationAndPostDate

**Description:** Shows sales for each item by location and post date.

**Columns:** Item\_Number, Item\_Class, Warehouse\_Name, Post\_Date, Qty\_Sold, Total\_Price, Cost\_Of\_Goods\_Sold

**Name:** Item Sales Date Range

**DataSet:** ItemSalesDateRange

**Description:** Shows the sales for each item for a given date range.

**Columns:** Sales\_Doc\_Num;Item\_Number;Qty;Uofm;Unit\_Price

**Name:** Item Serial Number Status

**DataSet:** ItemSerialNumberStatus

**Description:** Shows the sales status (i.e. Sold or In Stock) of each serial tracked item per sales document.

**Columns:**

Item\_Number;Item\_Description;Serial\_Lot\_Num;Status;Sales\_Doc\_Num;Sales\_Doc\_Type;Source;Customer\_Num

**Name:** Items Not Yet Sold

**DataSet:** ItemsNotYetSold

**Description:** List of items where the Qty On Hand - Qty Allocated is greater than zero

**Columns:** Item Number, Item Description, Item Class, Qty On Hand, Qty Allocate, Qty Available

**Name:** Items Returned

**DataSet:** ReturnedProduct

**Description:** Items on return sales document grouped by Item Number and Item

Description

**Columns:** Item Number, Item Description, Quantity (Sum Qty), Total Cost (Sum Extended Cost)

**Name:** Items sold to customer

**DataSet:** CustomerSalesLines

**Description:** Sales ordered by Customer Name between a date range

**Columns:** Customer Name, Item Number, Qty, Uofm, Unit Cost, Unit Price, Doc Date, Sales Doc Num, City, State, Zip (From Shipping Address)

**Name:** Lot Lookup

**DataSet:** LotLookup

**Description:** Shows all the Lot tracked items with quantity available, unit cost and expiration.

**Columns:** Item\_Number;Item\_Description;Serial\_Lot\_Num

**Name:** Lot Transactions

**DataSet:** LotTransactions

**Description:** Allows the user to enter a lot number and return all transactions that the lot number has been used on.

**Columns:** Consumed\_Qty;Quantity

**Name:** Match QBO transactions to Posted Purchase Receipts

**DataSet:** QBO\_to\_Cloud\_Purchase\_Receipt\_Matching

**Description:** Shows all transactions in QuickBooks Online that match posted purchase receipts in SalesPad Cloud.

**Columns:**

Cloud\_URL;Purchase\_Receipt\_Num;Vendor\_Name;Post\_Date;QuickBooks\_Online\_Vendor\_Bill\_URL

**Name:** Match QBO transactions to Posted Sales documents

**DataSet:** QBO\_to\_Cloud\_Invoice\_matching

**Description:** Shows all transactions in QuickBooks Online that match posted sales documents in SalesPad Cloud.

**Columns:**

Cloud\_URL;Sales\_Doc\_Num;Customer\_Name;Post\_Date;QuickBooks\_Online\_Sales\_Document\_URL;QuickBooks\_Online\_Journal\_Entry\_URL

**Name:** Open Purchase Orders By Purchase Lines

**DataSet:** OpenPurchaseOrdersByPurchaseLines

**Description:** Returns unreceived purchase lines.

**Columns:** Purchase\_Order\_Num, Item\_Number, Qty, Qty\_Received, Vendor\_Name, Location\_Name

**Name:** Pick Qty

**DataSet:** PickQty

**Description:** Returns fulfilled items for documents in a given batch and the bins with the 5 largest quantities of that item.

**Columns:**

Item\_Number;Item\_Description;Warehouse\_Name;Qty\_Allocated;Bin\_1;Bin\_2;Bin\_3;Bin\_4;Bin\_5;Upc;Sku

**Name:** Pick Qty From Batch

**DataSet:** PickQtyFromBatch

**Description:** Returns fulfilled items for documents in a given batch and the bins with the 5 largest quantities of that item.

**Columns:**

Item\_Number;Item\_Description;Warehouse\_Name;Qty\_Fulfilled;Bin\_1;Bin\_2;Bin\_3;Bin\_4;Bin\_5;Upc;Sku

**Name:** POSUnfulfilledLines

**DataSet:** POSUnfulfilledLines

**Description:** Returns sales line that are unfulfilled from document created in a POS point.

**Columns:**

Sales\_Doc\_Num;Warehouse\_Name;Item\_Number;Item\_Description;Qty;Qty\_Fulfilled

**Name:** Quantity By Fulfilled Bins

**DataSet:** Quantity\_By\_Fulfilled\_Bins

**Description:** Returns the items fulfilled in a warehouse bin for an item.

**Columns:** Item\_Number;Qty\_Fulfilled;Uofm;Serial\_Lot\_Num;Warehouse\_Name;Bin

**Name:** Recent Item Sales

**DataSet:** RecentItemSales

**Description:** Returns the 10 most recently sold items.

**Columns:** Item\_Number;Qty;UofM;Extended\_Cost;Extended\_Price;Doc\_Date

**Name:** Sales By Customer

**DataSet:** SalesByCustomer

**Description:** List of sales by customer between a date range

**Columns:** Customer Name, Sales Doc Num, Sales Document Status, Sales Person, Doc Date, Subtotal, Tax, Discount, Shipping Amount, Total, Extended Cost, City, State, Zip (From Shipping Address)

**Name:** Sales By Item

**DataSet:** SalesByItem

**Description:** List of Items on sales lines sold between a date range

**Columns:** Item Number, Item Group, Item Class, Qty Sold (Sum Qty), Dollars Sold (Sum Extended\_Price), Cost Of Goods Sold (Sum Extended Cost)

**Name:** Sales Document

**DataSet:** SalesBySalesPerson

**Description:** List of sales by Salesperson between a date range

**Columns:** Sales Person, Sales Doc Num, Sales Doc Type, Sales Document Status, Doc Date, Customer Name, Subtotal, Tax, Discount, Shipping Amount, Total, Extended Cost, City, State, Zip (From Shipping Address)

**Name:** Sales Person Payments

**DataSet:** SalesPersonPayments

**Description:** Returns per sales person the payments they have received per sales document.

**Columns:** Sales\_Person;Customer\_Name;Sales\_Doc\_Num;Total;Applied\_Amount;Applied\_On

**Name:** Sales Rep Profitability

**DataSet:** SalesRepProfitability

**Description:** Returns per sales person their cost of goods sold, gross sales, and net.

**Columns:** Sales\_Person, Cost, Sales, Difference

**Name:** SalesByItemWithVendor

**DataSet:** SalesByItemWithVendor

**Description:** Returns the total qty and total value sold per item and includes the primary vendor that item.

**Columns:**

Item\_Number;Item\_Group;Item\_Class;Qty\_Sold;Dollars\_Sold;Cost\_Of\_Goods\_Sold;Warehouse\_Qty\_OnHand;Warehouse\_Qty\_Available;Warehouse\_Qty\_Purchasing;Warehouse\_Name;Vendor\_Name

**Name:** Till Date Report

**DataSet:** TillDateReport

**Description:** Returns the total per till per day for the days in the date range.

**Columns:** Till\_Drawer\_Name;Date;Open\_Amount;Close\_Amount;Close\_Amount\_Counted

**Name:** Top 10 Customers Since Year Start

**DataSet:** TopTenCustomersSinceYearStart

**Description:** Returns the 10 customer with the most sales since the start of the year.

**Columns:** Customer\_Name;Open\_Sales;Historical\_Sales;Total

**Name:** Top 10 Items Sold

**DataSet:** TopTenItems

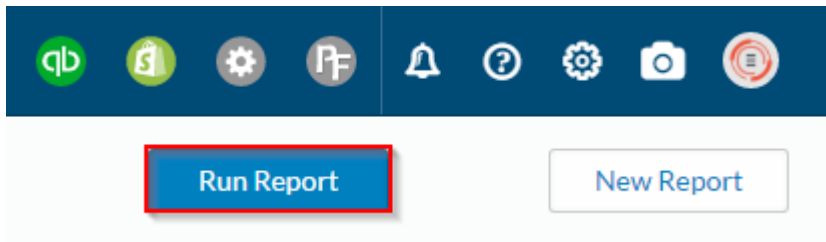
**Description:** List of 10 items sold grouped by Item Number between a date range

**Columns:** Item Number, Qty (Sum Qty)

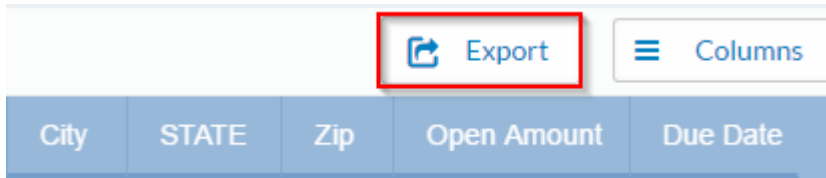
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To run a dynamic grid report, select a report to run, enter your criteria into the Criteria fields that appear (the fields will vary depending on which report you select), and click **Run Report** in the upper right-hand corner of the screen.





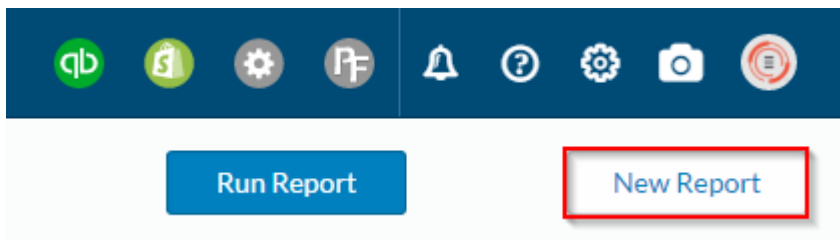
To export a dynamic grid report to Microsoft Excel, click the **Export** button in the upper right-hand corner of the grid.



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#### Create a Dynamic Grid Report

To create a new dynamic grid report, click **New Report** in the upper right-hand corner of the screen.



Name your report and select a data source in the Create Report drawer that appears.

### Create Report



#### Data Source








Click **Save** when you are finished making your changes. Your new report is now available in the list of dynamic grid reports on the left-hand side of the screen.

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#### Edit a Dynamic Grid Report

To make changes to a dynamic grid report, click the **pencil** icon next to the name of the report.

## Dynamic Grid Reports

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Make any changes in the Edit Report drawer that appears and click **Save** when you are finished.

## Edit Report



### Data Source



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