Dynamic Grid Reports

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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.

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 different 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 re-order 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 qunanties 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 qunanties 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 recieved 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)

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.

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.

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

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