

<u>Knowledgebase</u> > <u>Settings</u> > <u>Dynamic Grid Reports</u>

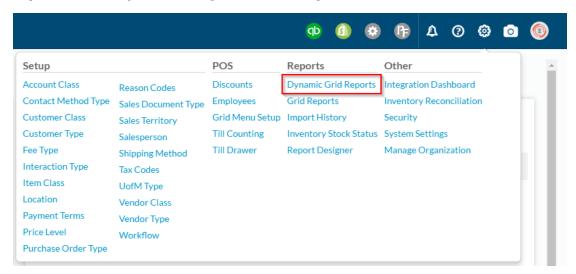
Dynamic Grid Reports

Cavallo Support - 2025-08-06 - Settings

Overview

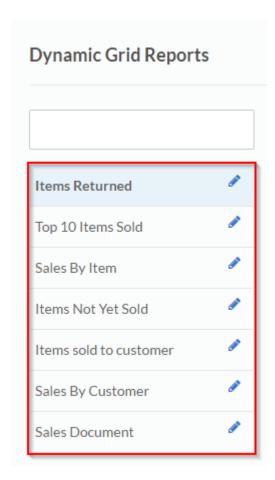
Dynamic grid reports in SalesPad Cloud provide valuable insights into the performance of your company.

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



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:

 $Item_Number; Item_Description; Warehouse_Name; Qty_Allocated; Bin_1; Bin_2; Bin_3; Bin_4; Bin_5; Upc; Skunder (Skunder) and (Skunder) and (Skunder) are supported by the property of the pro$

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.

 $\textbf{Columns}: Item_Number; Item_Description; Item_Class; Qty_On_Hand; Qty_Allocate; Qty_Available \\$

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:

 $Sales_Doc_Num; Created_On; Post_Date; Item_Number; Item_Master_Purchase_Cost; Sales_Order_Line_Cost; Receing a continuous continuo$

 $pt_Line_Unit_Cost; Purchase_Line_Unit_Cost; Sales_Line_Purchase_Cost$

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

 $\boldsymbol{Description} :$ Shows the inventory quantity and value on a given date.

 $\textbf{Columns}: Location; Item_Number; Quantity; Value$

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.

 $\textbf{Columns}: Vendor_Name; Item_Number; Item_Description; On_Hand; Available; On_PO; Sales/3\ Monther (Sales) and the property of the property$

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

 $\textbf{Description} \hbox{: List of items where the Qty On Hand - Qty Allocated is greater than zero}$

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.

 $\textbf{Columns}: Item_Number; Item_Description; Serial_Lot_Num$

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.

 $\textbf{Columns} \hbox{: } Consumed_Qty; Quantity$

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

 $\textbf{DataSet} : \mathsf{QBO_to_Cloud_Invoice_matching}$

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 gunanties 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; Oty; 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

 $\boldsymbol{Description}.$ 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.

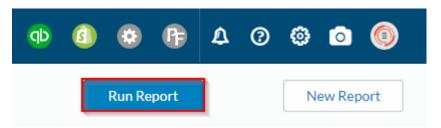
Columns: Customer Name; Open Sales; Historical Sales; Total

Name: Top 10 Items Sold DataSet: TopTenItems

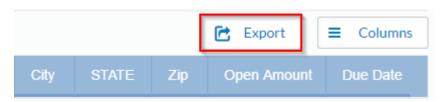
Description: List of 10 items sold grouped by Item Number between a date range

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.

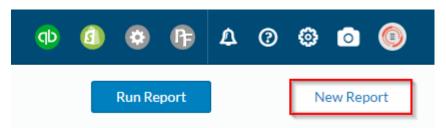


To export a dynamic grid report to Microsoft Excel, click the **Export** button in the upper right-hand corner of the grid.



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.

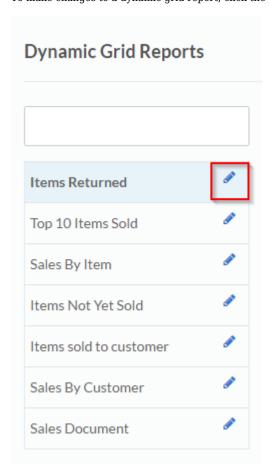
Create Report

Data Source DailyInvoiceSummary ▼

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.

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.

Edit Report ×

