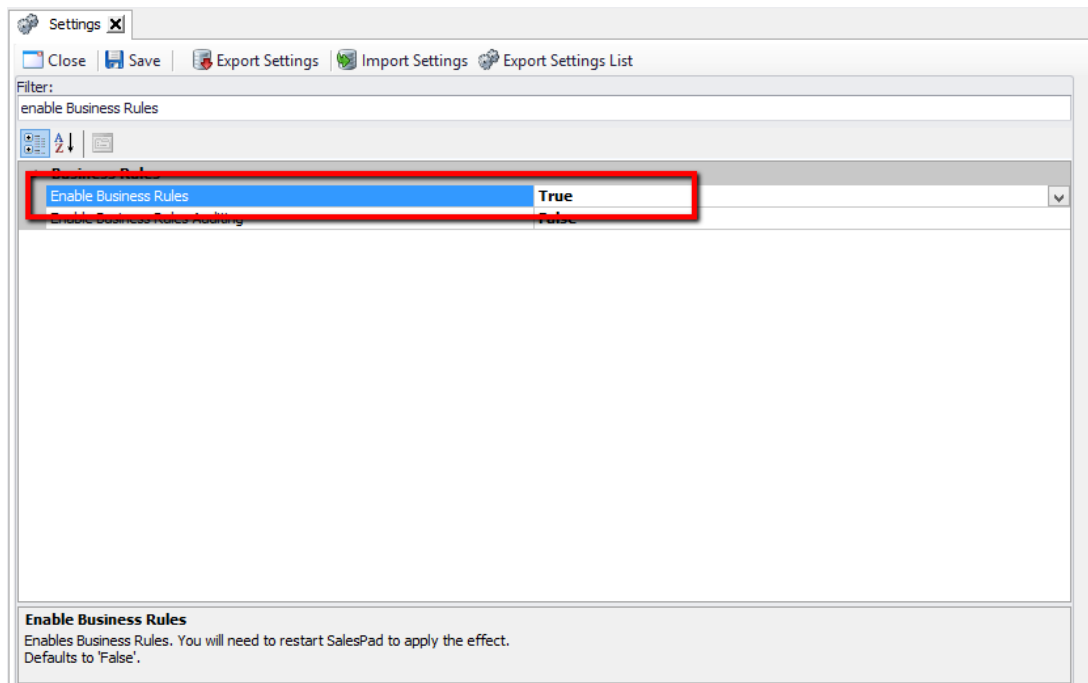# Item Class Report

Megan De Freitas - 2024-11-22 - Inventory

Note: This feature may not be in versions prior to 4.1.

Overview

The Item Class Report module provides a graphical representation of item sales by item class for a given date range, in terms of dollars, quantity, price, and/or margin. The Item Class Report module will display data as both a bar graph and as raw data displayed in a spreadsheet.

Security

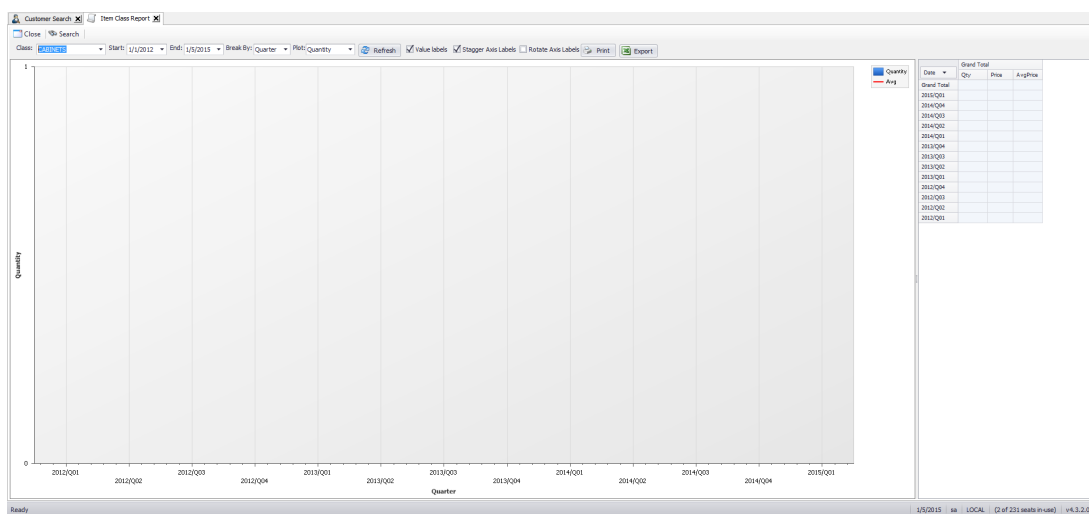In the Security Editor, *Item Class Report* must be enabled:

Security
Select All | Select None | Copy From...

Access	Name
☐	Item Class
☑	Item Class Report*

✕ ☑ Starts with([Name], 'Item Class') ▾

To display Cost and Margin for an item class, set *Show Cost* to True. Otherwise, this column will be hidden.

Use

Go to Modules > Inventory > Item Class Report to open the module.

The graph and spreadsheet will be blank. Enter and select the appropriate specifications to display the graph as desired:

Class: Enter an item class to display, otherwise leave this field blank to pull data from all item classes.

Start:/End: Choose the start date and end date for the time period to display.

Break By: Set the interval that will be displayed on the graph and spreadsheet (Day, Week, Month, Quarter, or Year).

Plot: Select to display Quantity, Price, Cost, or Margin on the graph.

Note: Cost and Margin will not be options if Show Cost under Item Class Report is False in the Security Editor

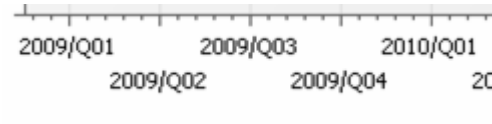*Value Labels:* If checked, the numerical values of each column will be displayed.

Stagger Axis: If checked, Labels will be staggered. This is useful when a longer timeframe is selected, to make the display easier to read.

Rotate Axis: If checked, the labels will be displayed vertically instead of horizontally.
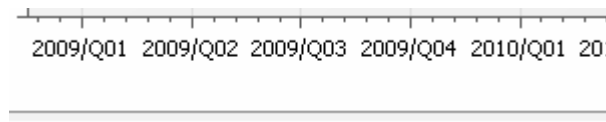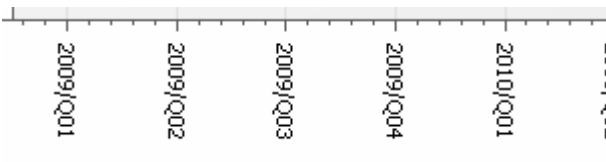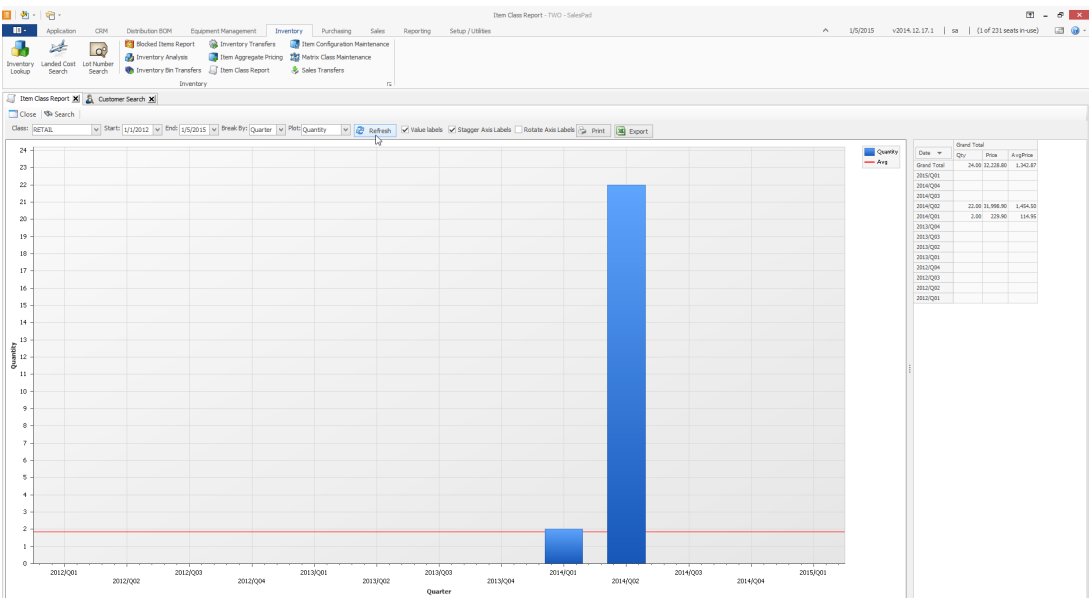
Value Label:

Staggered Axis:

Non-Staggered Axis:

Rotated Axis:

Click Refresh to display the graph with the selected criteria:

Use the **Print** button to print the graph. A print preview will open, which can be saved, printed, emailed, etc. Use the **Export** button to export the spreadsheet to Microsoft Excel.

Make adjustments to the criteria and display as needed, and click **Refresh** each time to update the display.