



Quick Report Examples

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Overview

This document applies to Item Quick Report, Vendor Quick Report, Customer Quick Report, Purchase Order Quick Report, Sales Document Quick Report and Sales Line Quick Report.

Settings

Follow the steps below in Modules > Security Editor

1. Filter to *Quick and select the appropriate Quick Report setting (Item, Purchase Order, Sales Document, Sales Line, Vendor)
2. *Multi Quick Reports Path* - allows user to enter the path for many reports
3. *Multiple Reports* - defaults to False so one report is being used. Change this to True to use multiple quick reports
4. *Quick Report* - If a single report is being used, enter the Quick Report path in this field

Security

Select All

Select None

Copy From...

Acc...	Name
<input type="checkbox"/>	*quick
<input checked="" type="checkbox"/>	Customer Quick Report*
<input checked="" type="checkbox"/>	Equipment Management Quick Report*
<input checked="" type="checkbox"/>	Item Quick Report*
<input checked="" type="checkbox"/>	Purchase Order Quick Report*
<input checked="" type="checkbox"/>	Quick Reports*
<input checked="" type="checkbox"/>	Quick Start (Beta)
<input checked="" type="checkbox"/>	Sales Document Quick Report*
<input checked="" type="checkbox"/>	Sales Line Quick Report*
<input checked="" type="checkbox"/>	Vendor Quick Report*

☒

[Name] Like '%quick%'

Edit Filter

Misc

Multi Quick Reports Path	
Multiple Reports	False
Quick Report	

Multi Quick Reports Path

The full path of the Quick Reports folder when using multiple reports. Defaults to ".

Usage

The sales document quick report filters on the sales doc number and sales doc type fields, so the document must be saved in order to work. The two fields are automatically passed in, so they aren't required in your SQL, but whatever data you are querying must have the two fields available to filter on.

Note: You must use the tag in the xml or the reports will not work correctly.

Sales Line Quick Report Sample

```

SELECT sl.Sales_Doc_Num, sl.Sales_Doc_Type, sl.Source, Item_Number, Sales_Batch,
sl.Warehouse_Code
FROM spv3SalesLineItem as sl (nolock)
join spv3SalesDocument as sd (nolock) on sd.Sales_Doc_Num = sl.Sales_Doc_Num and
sd.Sales_Doc_Type = sl.Sales_Doc_Type
/*where*/

```

Sales Document Quick Report Sample

```
<br /> select * from (<br /> select sli.Sales_Doc_Num, sli.Item_Number, sli.Quantity,  
sli.Item_Description from spv3SalesLineItem as sli<br /> )<br /> as a<br /> /*where*/<br />
```

Vendor Quick Report Sample

```
select * from spvVendorItem  
/*where*/
```

Item Quick Report Sample

```
SELECT sl.Sales_Doc_Num, sl.Sales_Doc_Type, sl.Source, Item_Number, Sales_Batch,  
sl.Warehouse_Code  
FROM spv3SalesLineItem as sl (nolock)  
join spv3SalesDocument as sd (nolock) on sd.Sales_Doc_Num = sl.Sales_Doc_Num and  
sd.Sales_Doc_Type = sl.Sales_Doc_Type  
/*where*/
```

Customer Quick Report Sample

```
select * from spvCustomerItemNumber  
/*where*/
```

Purchase Order Quick Report Sample

This PO Quick Report has auto-link examples to the PO document and Vendor card:

PO Number	PO Type	PO Status	PO Date	Promised Date	Required Date	Vendor ID	Vendor Name	Total	Discount Amount	Misc Charge	Freight Amount
PO2072	OROPSHR	NEW	4/1/2017	4/12/2017	4/12/2017	ACETRAVE0001	A Travel Company	\$39,480.00	\$39,480.00	\$0.00	\$0.00
PO2071	STANDARD	Released	4/1/2017	4/12/2017	4/12/2017	ACETRAVE0001	A Travel Company	\$34,152.00	\$34,152.00	\$0.00	\$0.00
PO2020	STANDARD	Closed	3/29/2017	4/11/2017	4/11/2017	SIGNATL60001	Signature Systems	\$1,197.00	\$1,197.00	\$0.00	\$0.00
PO2062	STANDARD	Closed	3/27/2017	4/11/2017	4/11/2017	TELESAT10006	Tele Satellite Industries	\$10,000.00	\$10,000.00	\$0.00	\$0.00
PO2068	STANDARD	Closed	3/23/2017	4/11/2017	4/11/2017	ADVANCED0001	Advanced Office Systems	\$183.79	\$183.79	\$0.00	\$0.00
PO2067	STANDARD	Closed	3/20/2017	4/11/2017	4/11/2017	CRUGEREN0001	Cruger Engineering Company	\$90.25	\$90.25	\$0.00	\$0.00
PO2066	STANDARD	Closed	3/17/2017	4/11/2017	4/11/2017	ADVANCED0001	Advanced Office Systems	\$328.06	\$328.06	\$0.00	\$0.00
PO2065	STANDARD	Closed	3/12/2017	4/11/2017	4/11/2017	CRUGEREN0001	Cruger Engineering Company	\$28.46	\$28.46	\$0.00	\$0.00
PO2064	STANDARD	Closed	3/10/2017	4/11/2017	4/11/2017	ADVANCED0001	Advanced Office Systems	\$455.36	\$455.36	\$0.00	\$0.00
PO2063	STANDARD	Closed	3/4/2017	4/11/2017	4/11/2017	CRUGEREN0001	Cruger Engineering Company	\$142.30	\$142.30	\$0.00	\$0.00