

Detailed Sales Report

Last Modified on 04/20/2022 4:46 pm EDT

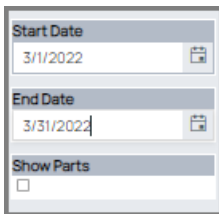
The Detailed Sales Report prints Invoices and Credits generated for a particular date range. The data is grouped by Item Code, with a secondary sort on the invoice/credit date. The Amounts on this report do not include sales tax.

If inventory parts are on the invoice or credit, these are shown at the beginning of the report under the Item Code of Parts. There is a parameter option labeled "Show Parts". If the report is generated with this option, the actual part numbers on the invoice or credit are listed.

Report Parameters

The parameters available for this report are:

- Start and End Date
- Show Parts

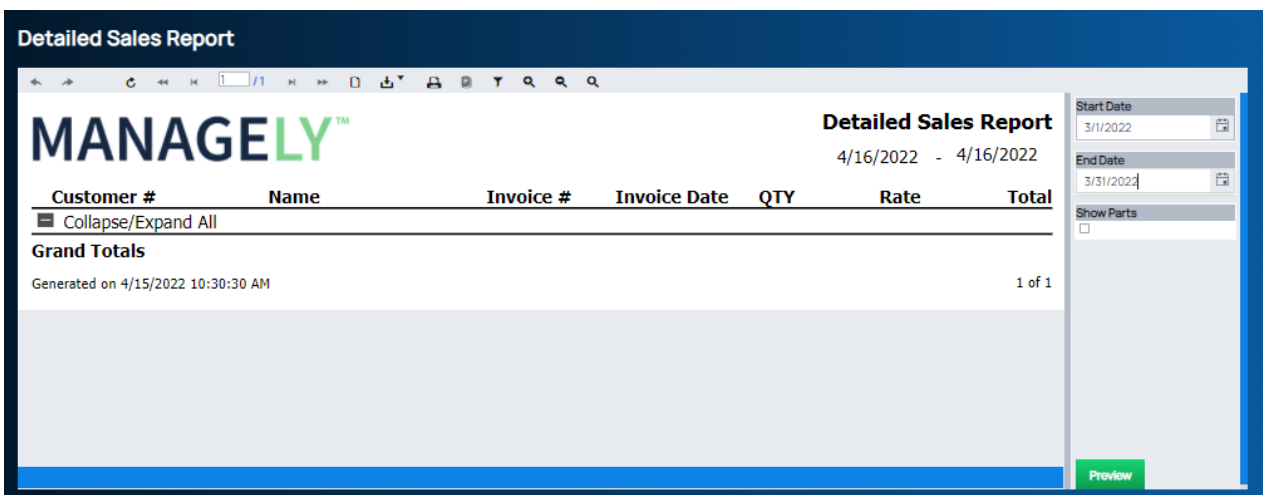


A screenshot of the report parameters form. It contains three sections: 'Start Date' with a text input field containing '3/1/2022' and a calendar icon; 'End Date' with a text input field containing '3/31/2022' and a calendar icon; and 'Show Parts' with a checkbox that is currently unchecked.

Generate the Detailed Sales Report

To generate this report, navigate to Reports > Sales > Detailed Sales Report.

The Detailed Sales Report page is displayed. In the Parameters area, make the desired selections. When finished, click on the Preview button.



A screenshot of the 'Detailed Sales Report' interface. The page title is 'Detailed Sales Report' and the date range is '4/16/2022 - 4/16/2022'. The 'MANAGELY' logo is visible in the top left. Below the logo is a table with columns: Customer #, Name, Invoice #, Invoice Date, QTY, Rate, and Total. A 'Collapse/Expand All' button is located above the table. Below the table, it says 'Grand Totals' and 'Generated on 4/15/2022 10:30:30 AM'. On the right side, there is a parameters panel with 'Start Date' (3/1/2022), 'End Date' (3/31/2022), and 'Show Parts' (unchecked). A 'Preview' button is at the bottom right of the parameters panel.

The report results are based on the selections in the parameters area. Users may use the function buttons to print or export the report.

Below is a sample of the report without selecting the "Show Parts" option.

Detailed Sales Report

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Detailed Sales Report
3/2/2022 - 4/1/2022

Customer #	Name	Invoice #	Invoice Date	QTY	Rate	Total
Collapse/Expand All						
Parts						
3583	Toby Test1	21443	03/11/22	5.00	10.00	50.00
3583	Toby Test1	21441	03/11/22	3.00	10.00	30.00
3699	Steve's Snow Blowing	21446	03/14/22	1.00	350.00	350.00
3699	Steve's Snow Blowing	21445	03/14/22	1.00	350.00	350.00
3719	Emily Wood	21450	03/22/22	1.00	45.00	-45.00
1277	Steve Rogers	21454	03/25/22	1.00	35.00	35.00
1044	Justin Adams	21455	03/25/22	1.00	35.00	35.00
3719	Emily Wood	21452	03/25/22	1.00	20.90	20.90
3719	Emily Wood	21452	03/25/22	1.00	36.64	36.64
1029	Bill Donoson	213	03/29/22	1.00	125.00	125.00
3719	Emily Wood	224	03/31/22	1.00	125.00	125.00
3719	Emily Wood	226	03/31/22	1.00	125.00	125.00
3719	Emily Wood	226	03/31/22	1.00	125.00	125.00
3719	Emily Wood	222	03/31/22	1.00	35.00	35.00
3719	Emily Wood	219	03/31/22	1.00	125.00	125.00
Total: Parts						1,522.54

Below is a sample of the report where the "Show Parts" option was selected.

Detailed Sales Report

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Detailed Sales Report
3/2/2022 - 4/1/2022

Customer #	Name	Invoice #	Invoice Date	QTY	Rate	Total
Collapse/Expand All						
5834						
3719	Emily Wood	21450	03/22/22	1.00	45.00	-45.00
Total: 5834						-45.00
IM-1270						
1277	Steve Rogers	21454	03/25/22	1.00	35.00	35.00
1044	Justin Adams	21455	03/25/22	1.00	35.00	35.00
3719	Emily Wood	222	03/31/22	1.00	35.00	35.00
Total: IM-1270						105.00
5800PIR						
1029	Bill Donoson	213	03/29/22	1.00	125.00	125.00
3719	Emily Wood	224	03/31/22	1.00	125.00	125.00
3719	Emily Wood	226	03/31/22	1.00	125.00	125.00
3719	Emily Wood	219	03/31/22	1.00	125.00	125.00
Total: 5800PIR						500.00