

Customer Ordered Shortfall Report

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When you choose *Report > transactions* and then select *Customer ordered short fall report* , the transaction report like the one below will be produced. This report is used only for sales to customers.

Note that for this report to make sense the preference *Allow placeholder lines on customer invoices* must be checked, and the preference *Delete placeholder lines when confirming invoices* must be unchecked.

The screenshot shows the 'Transaction report' window with the following settings:

- Type of report:** A list of report types is shown, with 'Customer ordered shortfall report' selected and highlighted in blue. Other options include 'Cross-tab: items in rows, quarters in columns, quantity in cells', 'Cross-tab: items in rows, quarters in columns, value in cells', 'Cross-tab: names in rows, quarters in columns, value in cells', 'Cross-tab: names in rows, quarters in columns, quantity in cells', 'Cross-tab: name [Category 1] in rows, quarters in columns, quantity in cells', 'Cross-tab: name [Category 1] in rows, quarters in columns, value in cells', 'Distribution of quantities issued', 'Received vs. sent', 'Totals for each item grouped by transaction category then item', 'Each invoice sorted by Name > Address1 field then by name', 'Each invoice sorted by Name > Address2 field then by name', 'Custom transaction report1', 'Custom transaction report2', 'Custom trans line report1', and 'Custom trans line report2'.
- Transaction type:** Radio buttons for 'Sales to customers' (selected), 'Sales to and credits from customers', 'Purchases from suppliers', 'Purchases from and credits to suppliers', 'Inventory adjustment - Add stock', 'Inventory adjustment - Reduce stock', and 'Inventory adjustment - Net movement'.
- Transaction category filter:** A dropdown menu set to 'Description' and a comparison operator set to 'equals'.
- Name filter:** A dropdown menu set to 'Name' and a comparison operator set to 'contains'.
- Date range:** Radio buttons for 'Confirmed Date' (selected) and 'Shipping Date'. Below, 'From' is set to '2/04/2015', 'To' is set to '2/04/2015', and a 'Today' button is present.
- Which mode?:** A section at the bottom with a label 'Which mode?' and an empty input field.

From the report window, select the desired parameters and click *OK* . An example report is shown below.

Customer ordered short fall report
National Medical Store

Date range :01/01/2007 to 17/01/2007, Item name contains @ma@Item category includes PHARMACEUTICALS

Transaction Type equals customer, Name code contains @2@, Mode: Both

| Item Code | Item Description | Units of Demand | Units of supply | Shortfall | % shortfall |
|--|----------------------------------|-----------------|-----------------|-----------|-------------|
| Item category : MEDICAL SUPPLIES | | | | | |
| 4455 | MASK,RESUSCITATION,ADULT | 586.02 | 43.02 | 543 | 92.66 |
| 4450 | MASK,OXYGEN,ADULT,W/O TUBING | 2838 | 1984 | 854 | 30.09 |
| Totals for item category: MEDICAL SUPPLIES | | 3424.02 | 2027.02 | 1397 | 40.8 |
| Item category : PHARMACEUTICALS | | | | | |
| 502 | MAGNESIUM TRISIL CO. TAB PKT.20 | 5628 | 3895 | 1733 | 30.79 |
| 10 | ACETAZOLAMIDE TABS 250MG BOT/100 | 1889 | 1639 | 250 | 13.23 |
| Totals for item category: PHARMACEUTICALS | | 7517 | 5534 | 1983 | 26.38 |
| Grand total : | | 10941.02 | 7561.02 | 3380 | 30.89 |

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