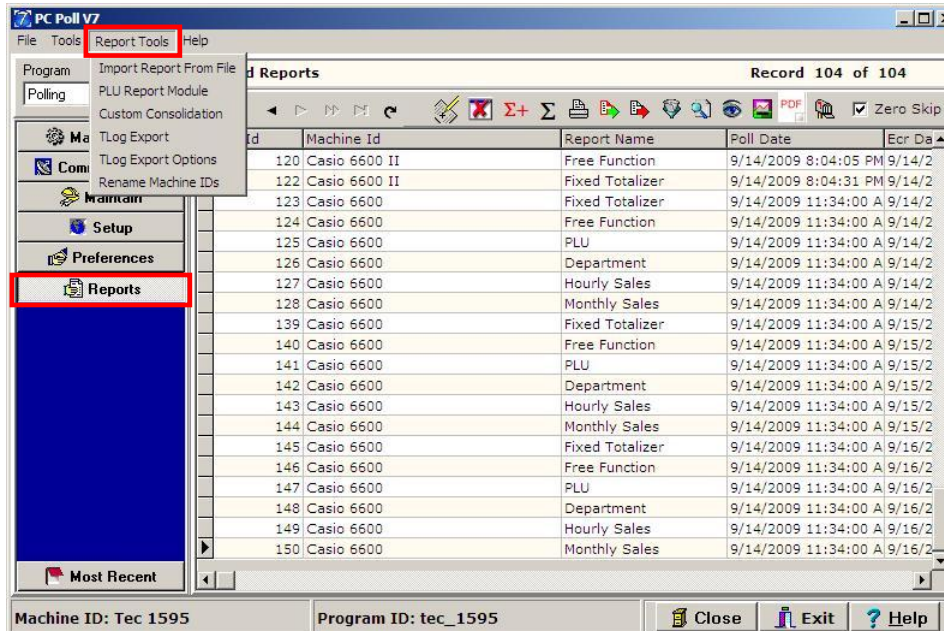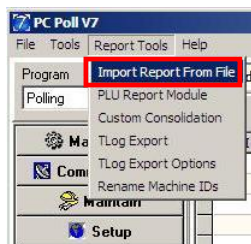# Reports Area

Report Tools

The Reports area of the V7 software is found by clicking on **Reports** on the left hand menu. The **Report Tools** menu at the top of the screen has the following features.


Import Report from File

1. From the left menu when **Reports** is picked, the **Report Tools** menu has the following options: **Import Report from File**, **PLU Report Module**, **Custom Consolidation**, **TLog Export**, **TLog Export Options,** and **Rename Machine IDs**.
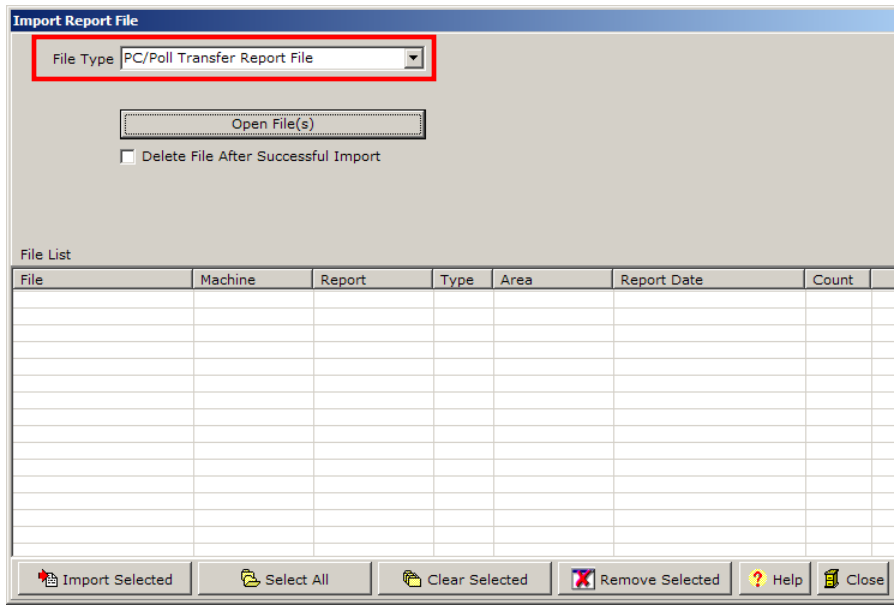
2. The first option, **Import Report From File**, opens the Import Report File screen. The image above shows the screen with the option **PC/POLL Transfer Report File** selected.
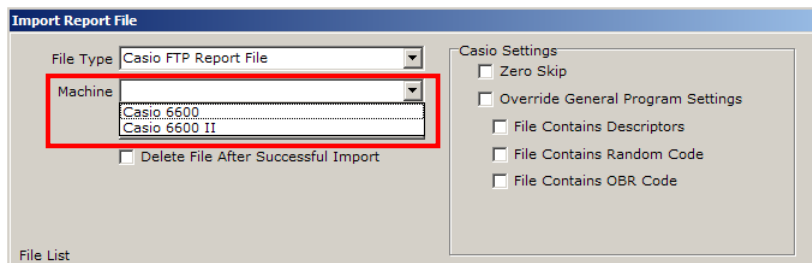
*Note: PC/POLL Transfer Files can be created automatically via scripted reports with the Transfer Export tab configured or they can be created manually via the **Reports Export Text File** button.*
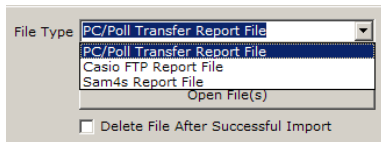
3. Pick the type of file to import with the **File Type** drop down menu.
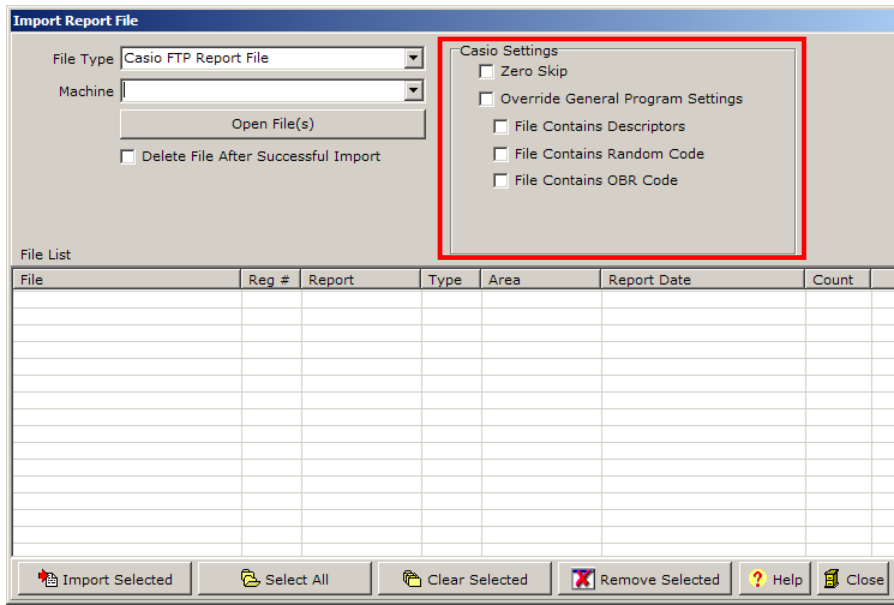
4. The **Casio FTP Report File** option has an additional Casio Settings section on the upper right.

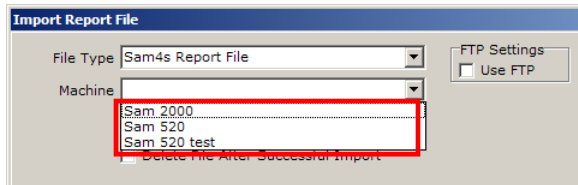   A. The **Casio FTP Report File** option will also open a **Machine** drop down menu.
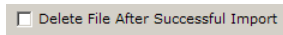   B. Select the appropriate machine.

Also Note: Casio FTP Report Files are created by Casio registers. Sam4s Report Files are created by Sam4s registers.
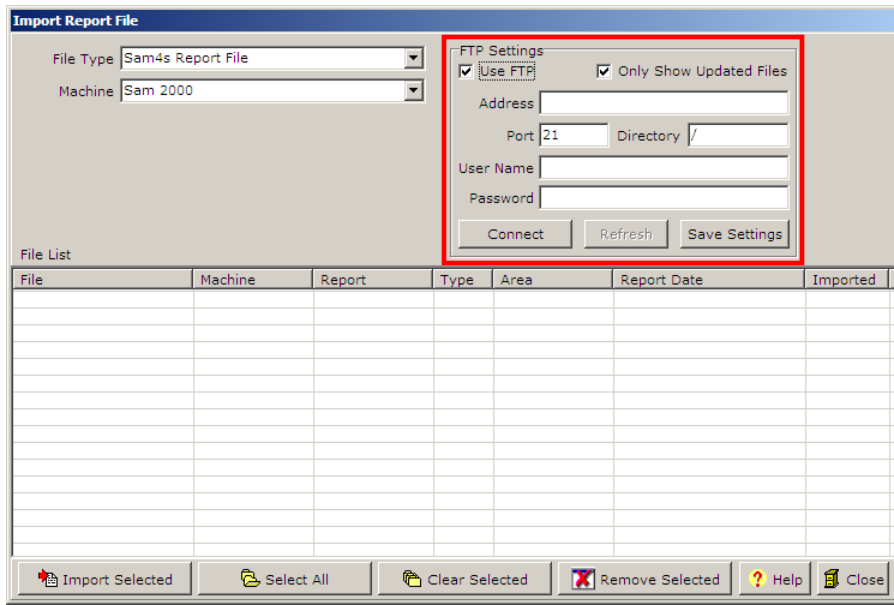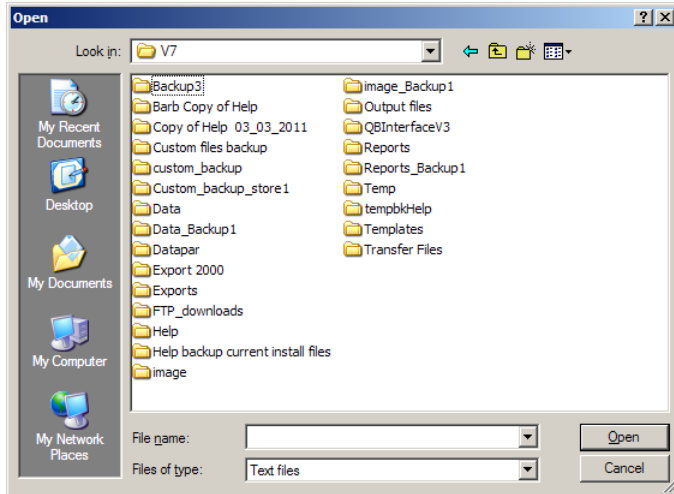
5. The **Sam4s Report File** has additional settings. The FTP Settings section also has additional options.

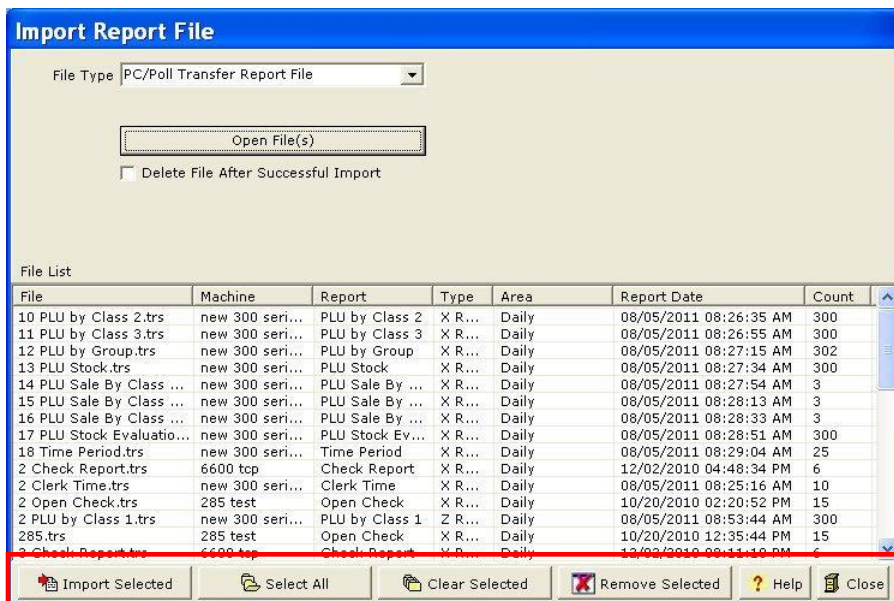   A. The **Sam4s Report File** option will also open a **Machine** drop down menu.

    B. Select the appropriate machine.

6. The **Delete File After Successful Import** will remove the report file once successfully imported. Click on the check box to select it.

7. After selecting the file type, click the **Open Files(S)** button. *Note: A machine must be selected for use with the Casio and Sam4s options.*

Open

Look in: V7

Backup3
Barb Copy of Help
Copy of Help 03_03_2011
Custom files backup
custom_backup
Custom_backup_store1
Data
Data_Backup1
Datapar
Export 2000
Exports
FTP_downloads
Help
Help backup current install files
image
image_Backup1
Output files
QBInterfaceV3
Reports
Reports_Backup1
Temp
tempbkHelp
Templates
Transfer Files

My Recent Documents
Desktop
My Documents
My Computer
My Network Places

File name:
Files of type: Text files

Open
Cancel

8. For manual imports an Open screen will appear, then browse to the report file location and select the files to import.

Import Report File

File Type: PC/Poll Transfer Report File

Open File(s)

☐ Delete File After Successful Import

File List

File	Machine	Report	Type	Area	Report Date	Count
10 PLU by Class 2.trs	new 300 seri...	PLU by Class 2	X R...	Daily	08/05/2011 08:26:35 AM	300
11 PLU by Class 3.trs	new 300 seri...	PLU by Class 3	X R...	Daily	08/05/2011 08:26:55 AM	300
12 PLU by Group.trs	new 300 seri...	PLU by Group	X R...	Daily	08/05/2011 08:27:15 AM	302
13 PLU Stock.trs	new 300 seri...	PLU Stock	X R...	Daily	08/05/2011 08:27:34 AM	300
14 PLU Sale By Class ...	new 300 seri...	PLU Sale By ...	X R...	Daily	08/05/2011 08:27:54 AM	3
15 PLU Sale By Class ...	new 300 seri...	PLU Sale By ...	X R...	Daily	08/05/2011 08:28:13 AM	3
16 PLU Sale By Class ...	new 300 seri...	PLU Sale By ...	X R...	Daily	08/05/2011 08:28:33 AM	3
17 PLU Stock Evaluatio...	new 300 seri...	PLU Stock Ev...	X R...	Daily	08/05/2011 08:28:51 AM	300
18 Time Period.trs	new 300 seri...	Time Period	X R...	Daily	08/05/2011 08:29:04 AM	25
2 Check Report.trs	6600 tcp	Check Report	X R...	Daily	12/02/2010 04:48:34 PM	6
2 Clerk Time.trs	new 300 seri...	Clerk Time	X R...	Daily	08/05/2011 08:25:16 AM	10
2 Open Check.trs	285 test	Open Check	X R...	Daily	10/20/2010 02:20:52 PM	15
2 PLU by Class 1.trs	new 300 seri...	PLU by Class 1	Z R...	Daily	08/05/2011 08:53:44 AM	300
285.trs	285 test	Open Check	X R...	Daily	10/20/2010 12:35:44 PM	15
3 Check Report.trs	6600 tcp	Check Report	X R...	Daily	12/02/2010 08:11:18 PM	6

Import Selected   Select All   Clear Selected   Remove Selected   ? Help   Close

9. Once the files are selected, use the buttons at the bottom of the screen.
   A. **Import Selected** imports the files picked.
   B. **Select All** will select all files in the File List to import.
   C. **Clear Selected** will unselect files highlighted in the File List.
   D. **Remove Selected** will remove all files that have been highlighted from the File List.
10. Click the **Close** button, when done to close the Import Report File screen.

PLU Report Module
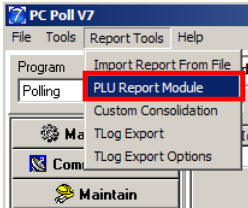
The PLU Report Module allows the user to view previously collected PLU/Scan PLU/UPC data in different formats. Users can select how the report will be sorted (ascending or descending order), start and end date of the consolidation, and which stores and machines will be included.
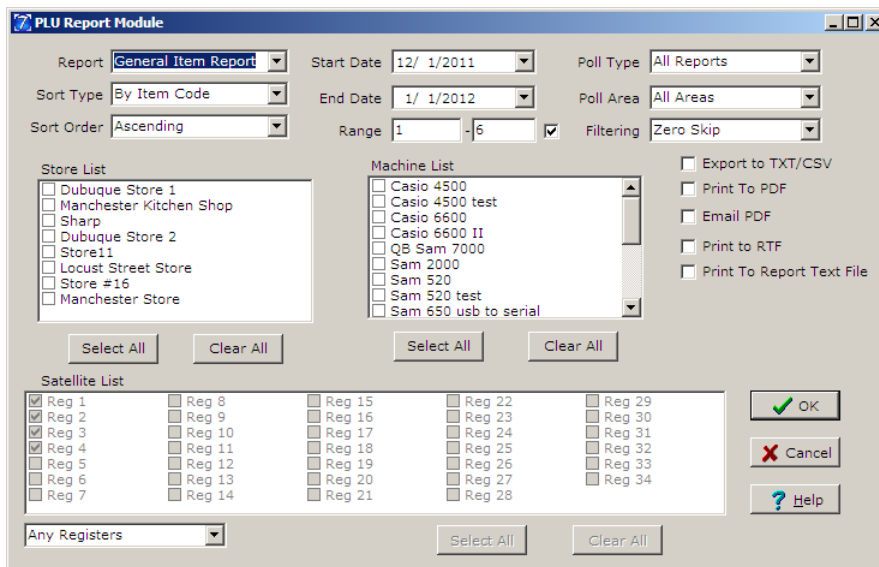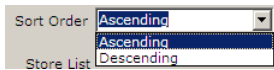

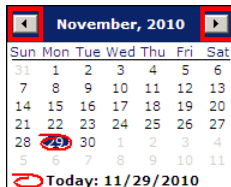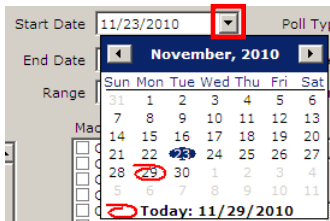1. On the Report Tools menu, the **PLU Report Module** option opens the screen above.
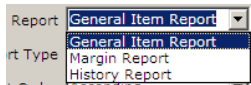
2. The Report type can be set at **General Item Report**, **Margin Report**, or **History Report**.
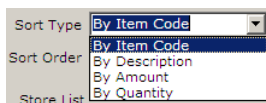
3. Set the Sort Type to **By Item Code**, **By Description**, **By Amount**, or **By Quantity**.

4. Pick a Sort Order **Ascending** or **Descending**.

5. Enter a Start Date by typing it into the entry box or by clicking the down .button. A calendar will appear allowing the user to click on a date. The months of the year can be advanced or digressed by clicking on the back arrow and the forward arrows.
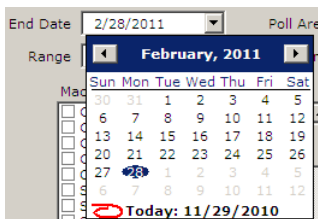
6. Enter an End Date the same way as a Start Date above.

7. To make the Range entry boxes active click in the check box then enter the PLU code range.
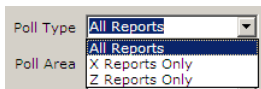
8. Pick a Poll Type.
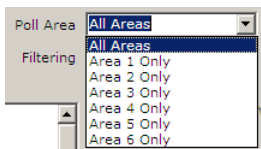
9. Choose a Poll Area.
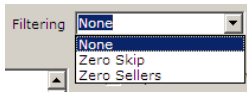
10. Pick a type of filter.
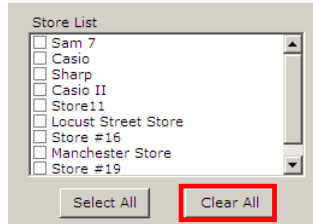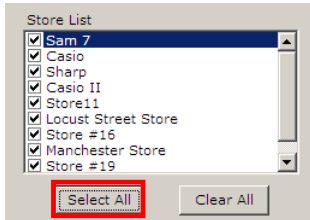
11. From the Store List, pick the appropriate store or stores. To pick all stores in the list, click the **Select All** button. To remove all stores from the list, click the **Clear All** button.
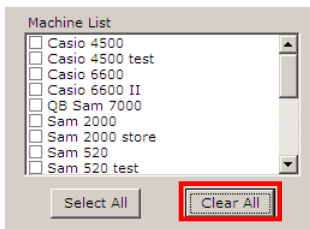
12. The Machine List works the same as the Store List above. Select one machine at a time by clicking on it or click on the **Select All** button to check off all machines in the list. To clear the entire list, click the **Clear All** button.
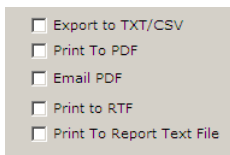
13. Choose the desired export options: TXT/CSV file, or Print/Email to a PDF, RTF or to a Report Text File.
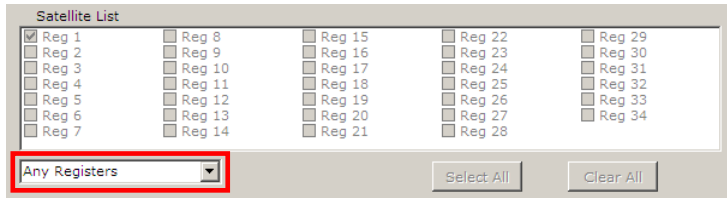
14. To activate the Satellite List, use the drop down menu to pick **Inclusive Register List** or **Exclusive Register List**. Picking **Inclusive Register List** will cause the consolidation to include any reports that contain data from any of the selected registers. Picking **Exclusive Register List** will cause the consolidation to include only reports that contain data from the exact set of registers selected.
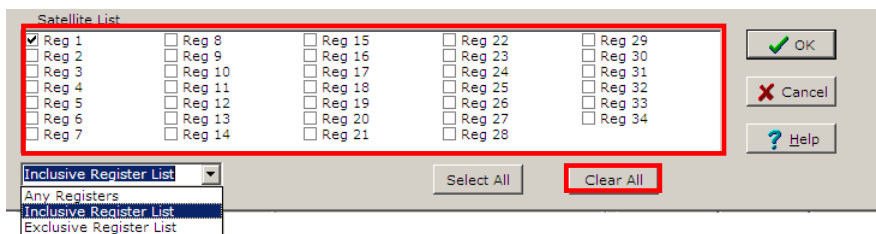
15. The satellites can now be picked by clicking on them. The **Select All** button will check off all satellites in the list where as the **Clear All** button will remove all check marks from the list.
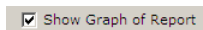
16. The **Show Graph of Report** option, which is available only on the History Report, will use the selections made on the PLU Report Module screen to create a graph of the report information. The graph will open after Step 18 if **Show Graph of Reports** is checked off.
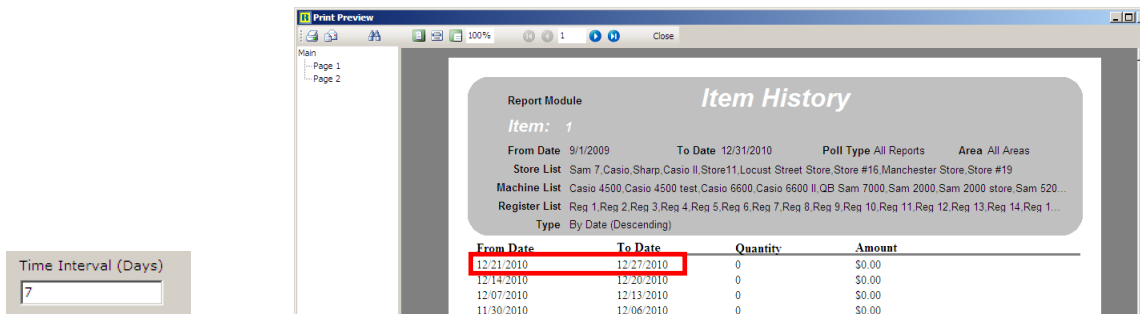
17. The date range for each line on the Item History report is set by the **Time Interval (Days)**. In the example above, the **Time Interval (Days)** is set to "7" and is only available on the Item History Report. The first line of the report shows that the **From Date** is 12/21/2010 and the **To Date** is 12/27/2010, which is an interval of 7 days. 7 days worth of data is combined for each line.
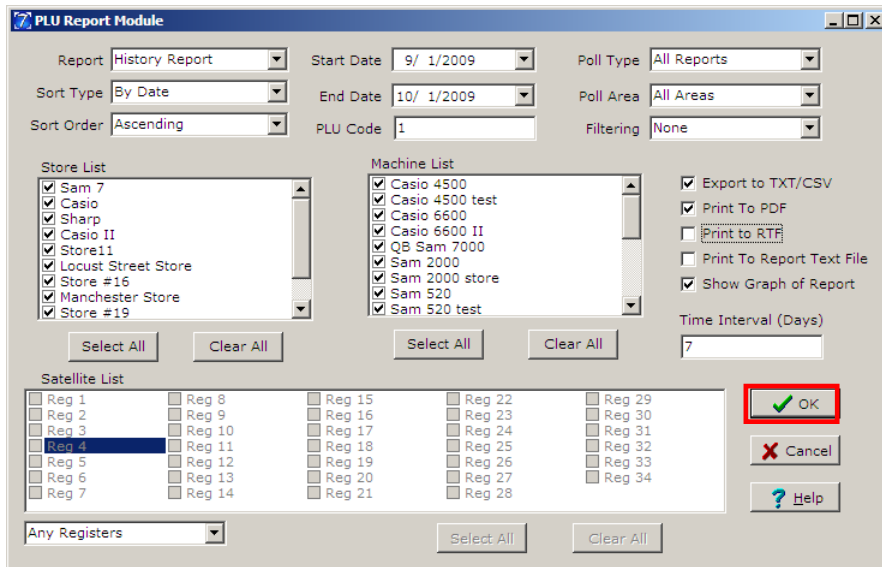
18. When all options are selected, click the **OK** button.
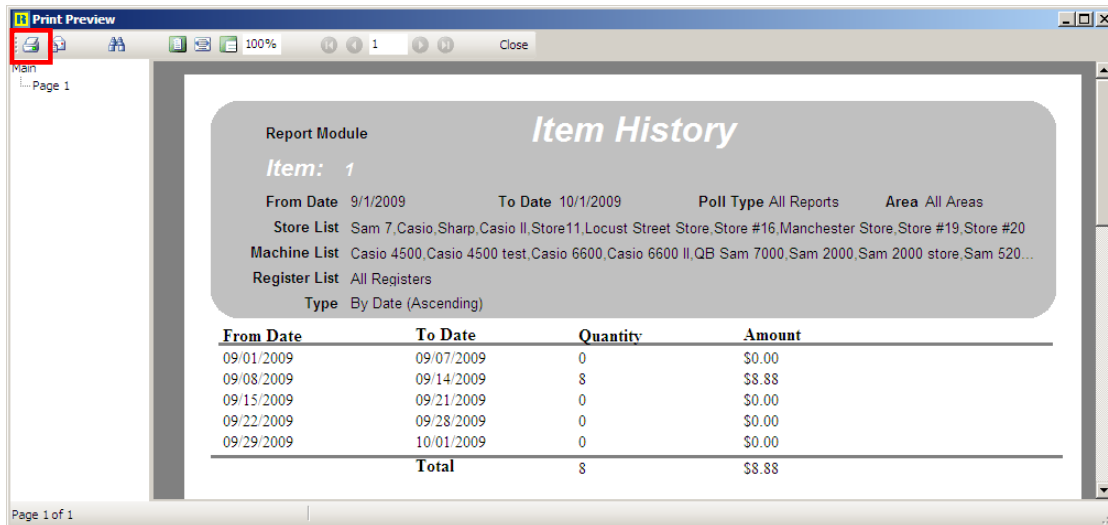
19. The report will open. The report can be printed from this screen by clicking the **Printer** button in the top left corner of the screen. Close the screen by clicking the **X** in the top right corner.
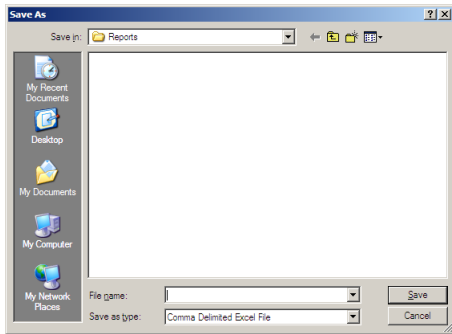
20. When the report is closed and export options have been selected, a **Save As** screen will open allowing the user to save the report to a desired location. Click **Save** when ready.

Note: For the Margin Report to calculate a profit value, users will need to populate the cost field within the PLU Maintenance area.

Custom Consolidation
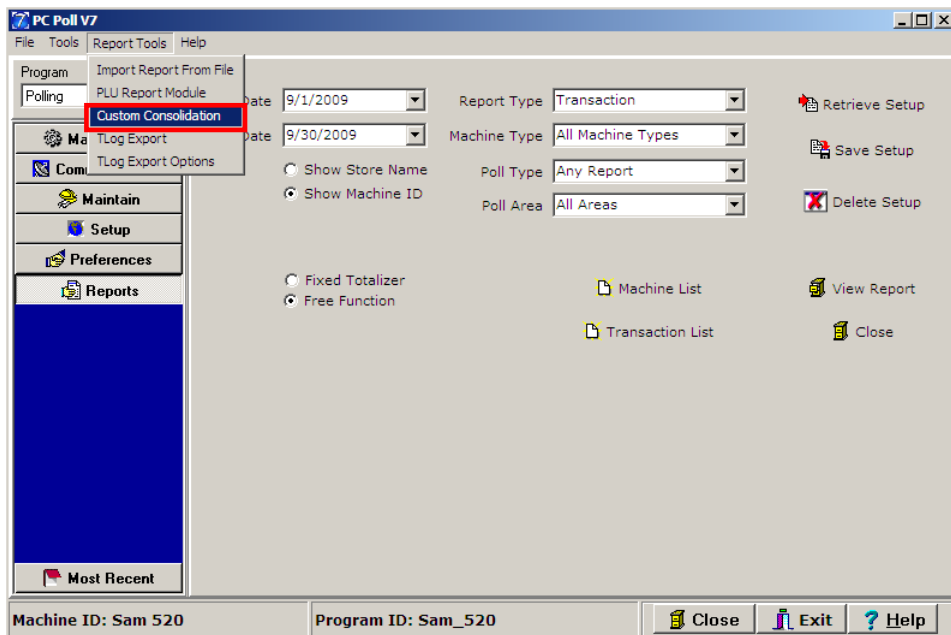
21. The third option on the **Report Tools** menu in the Reports area is **Custom Consolidate**.
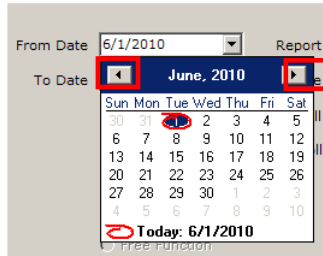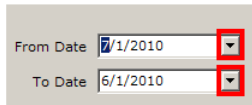
22. Set the **From Date** and **To Date** by clicking on the month, day, or year to change it or by clicking the down arrows ☒ at the end of the date boxes to open the calendar at the right. Click on the day on the calendar to select it. Move the calendar forward or back by using the arrows on the top left and right corners of the calendars.
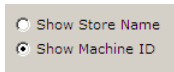

23. Pick either **Show Store Name**, which will display the name of the store on the report or **Show Machine ID** will display the machine id on the report.
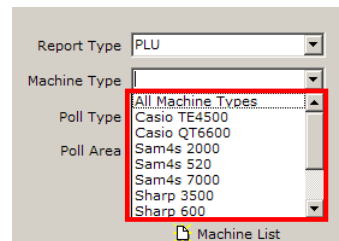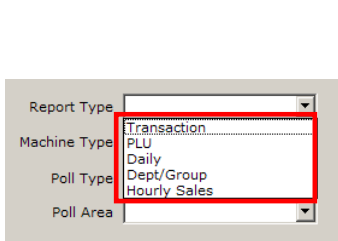
24. Above left, pick the report from the **Report Type** drop down menu. The report type picked changes the options on the rest of the screen.
25. Select the machine for the **Machine Type** drop down menu.
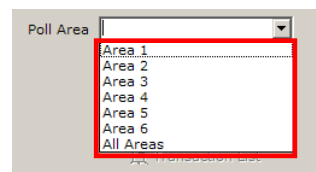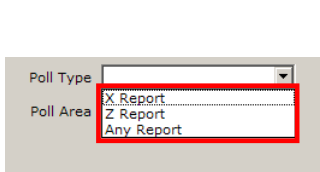
26. Pick the **Poll Type** as shown in the image above left.
27. Next, pick a **Poll Area** from the menu shown in the image above right.
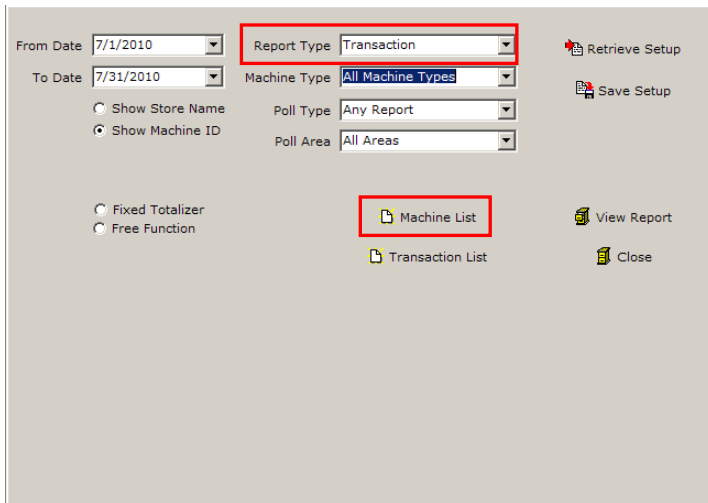
28. With the **Report Type** picked as **Transaction**, the **Machine list** button is available.
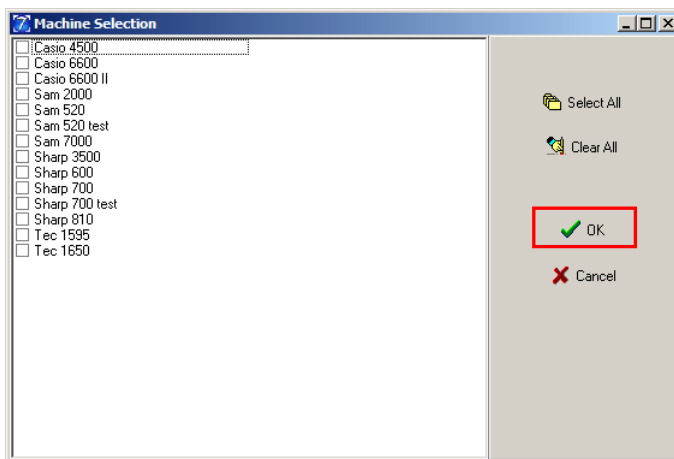

29. Clicking the **Machine List** button opens the screen above. Use the **Select All** button to check off all machines in the list. The **Clear All** button will uncheck all checked off machines.
30. When the appropriate machines are selected, click on the **OK** button or **Cancel** to cancel any changes and to close the window.
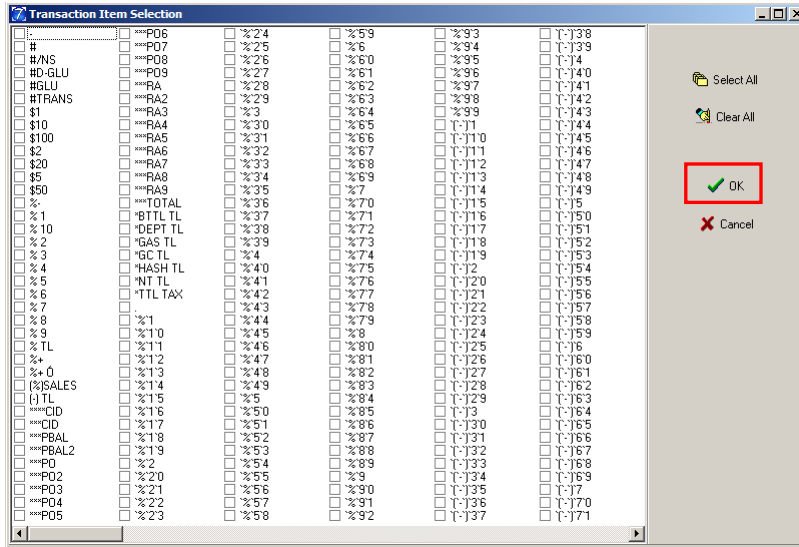
31. The **Transaction List** button opens the screen above, which allows the user to select all transaction line items with the **Select All** or uncheck all items with the **Clear All** button. Click **OK** when the appropriate selections are made, or **Cancel** to cancel any changes and close the screen.
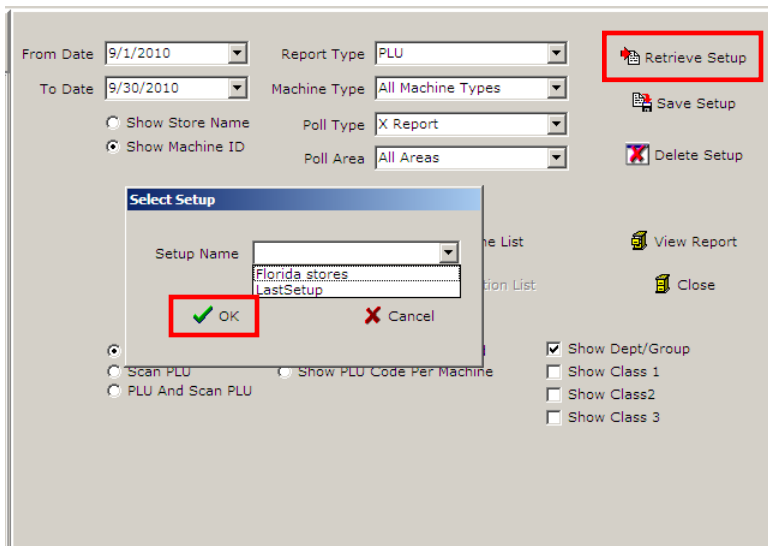

32. The **Retrieve Setup** button opens a Select Setup screen to allow the user to pick a previously saved setup. Select a setup from the list then click **OK**.
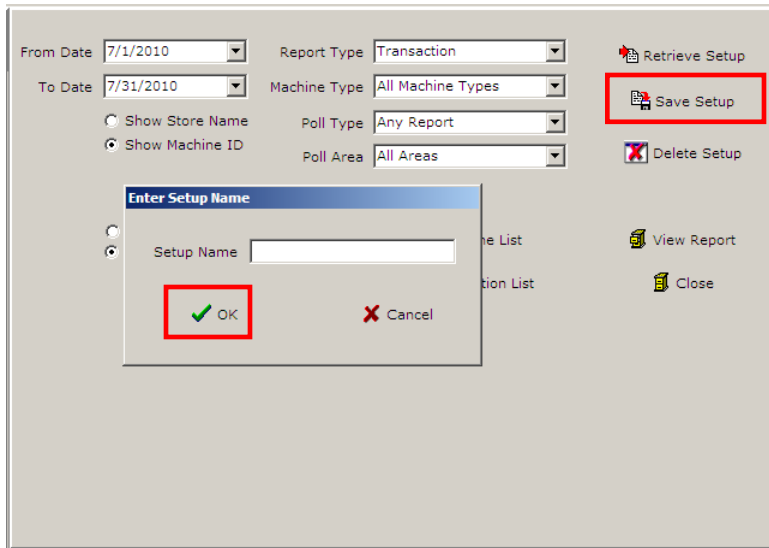
33. The **Save Setup** button allows the user to save a report consolidation setup for future use or update a saved setup. It opens the Enter Setup Name screen. Type in a name for the setup and then click **OK**.
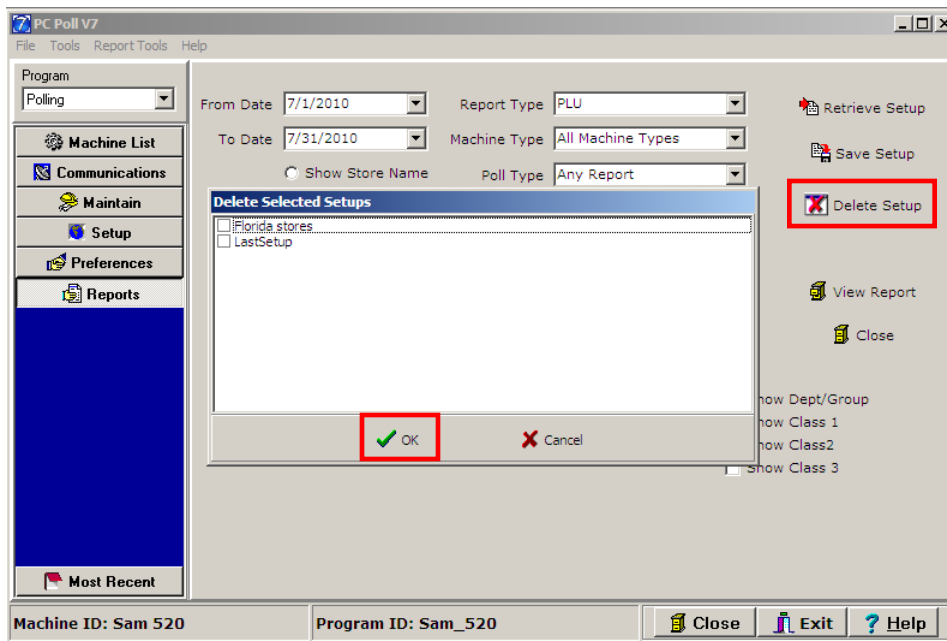
34. To delete a previously saved Setup, click the **Delete Setup** button and pick from the list to delete. Click **OK**.
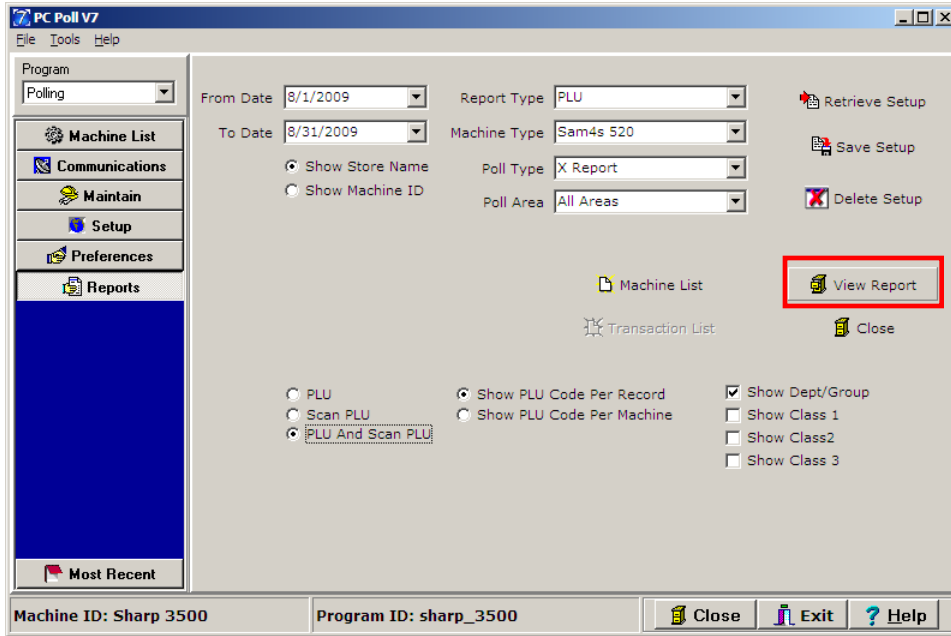
35. When ready, click the **View Report** button and a progress bar appears automatically. It will close when the report is processed and open. *Note: The lower screen options vary based on the report type selected.*

36. The report will open automatically.

37. This is the same report with **Zero Skip** checked.

The tools on the top portion of the report screen above can be used to customize the report.

Zero Skip   Hides all records that only contain zero valued data.
Zero Sellers   Removes all but the zero selling items.
**Display Count**   Controls how many stores are displayed on one view screen.

Move to First Record   Returns the cursor to the top record.

Move Back a record   Moves the cursor up one record.

Move Down a Record   Moves the cursor down one record.

Move to Last Record   Moves the cursor to the last record in the report.

Filter Records button   This allows the user to filter the records in the listing to their specifications. Clicking this button brings up the Filter by Field selection window from which users can custom define their filtering options. For more information, view additional documentation online at www.technology4retailers.com.
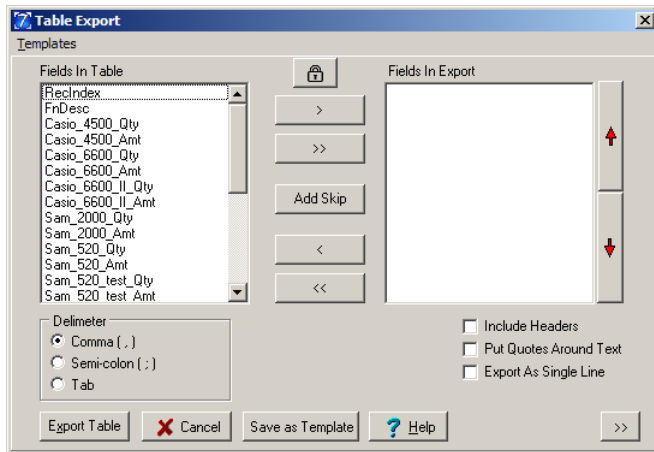
Export Report Opens the Table Export screen to allow users to choose the fields and other options to export. For more information, see the additional documentation online at www.technology4retailers.com.

|	
Print	Prints the report.
Close	Closes the Report View screen.
Previous	Moves the viewable portion of the report back a page.
Next	Moves the viewable portion of the report ahead a page.
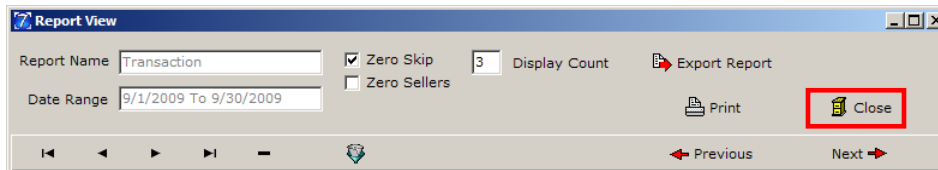
38. To close the Report View screen when finished, click the **Close** button near the top of the screen.
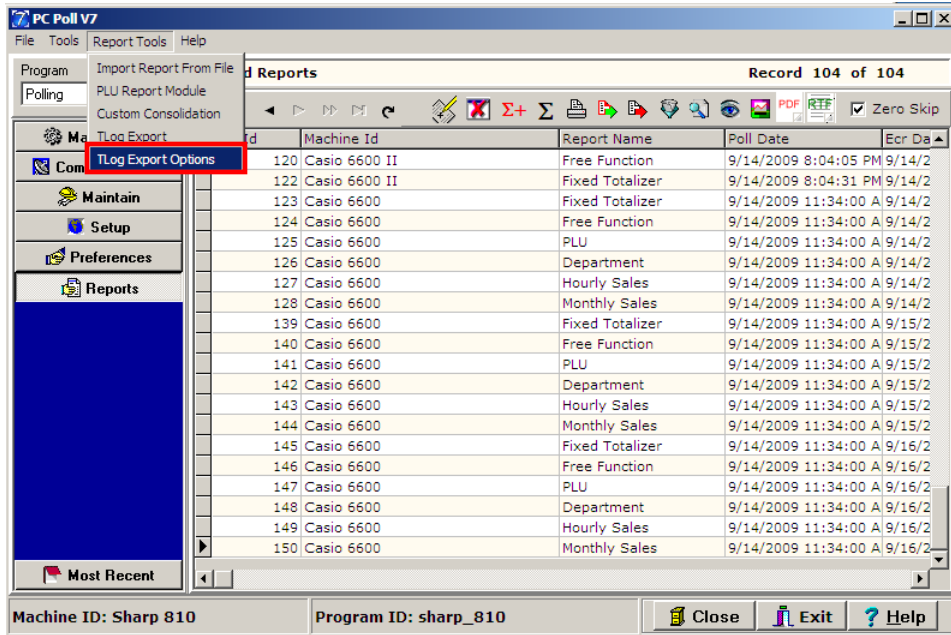
TLog Export
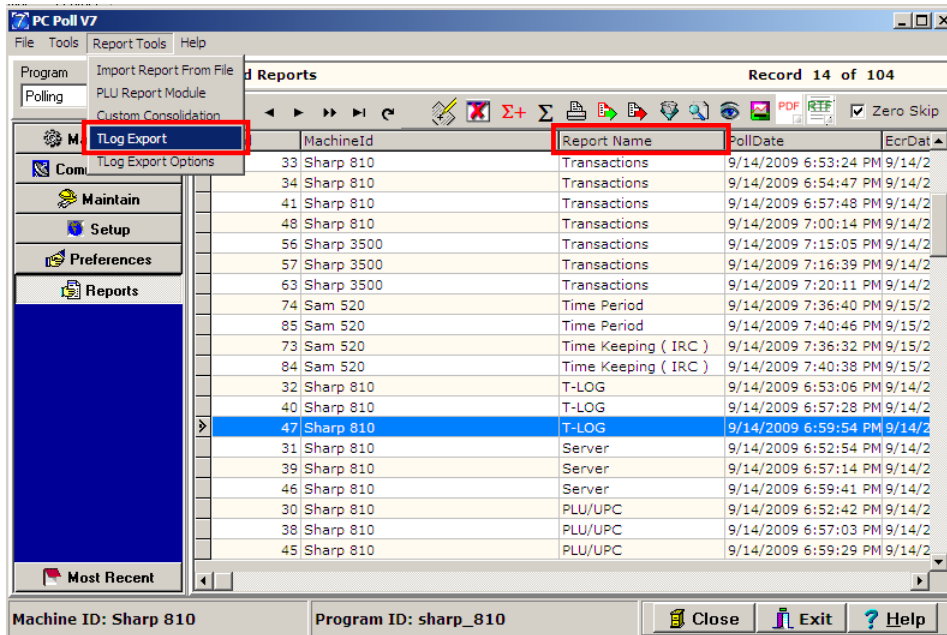
1. To use the TLog Export feature in the Reports area, select a T-Log Report from the grid by highlighting it. To make it faster to find the TLog Reports in the list of reports in the grid above, click on the column heading **Report Name**. This will sort the reports in alphabetical order. From the Report Tools menu, pick **TLog Export**.
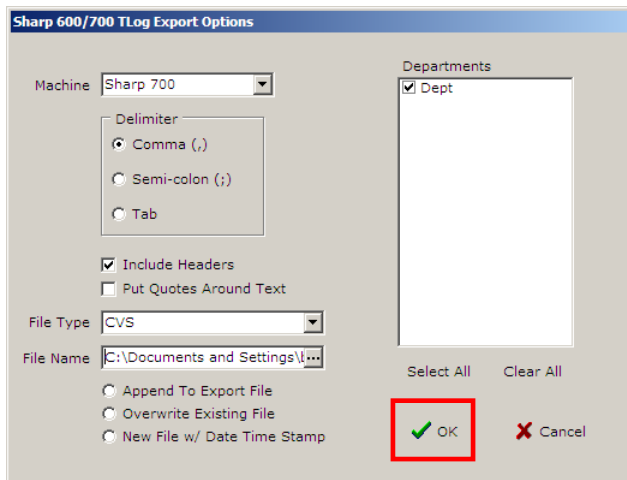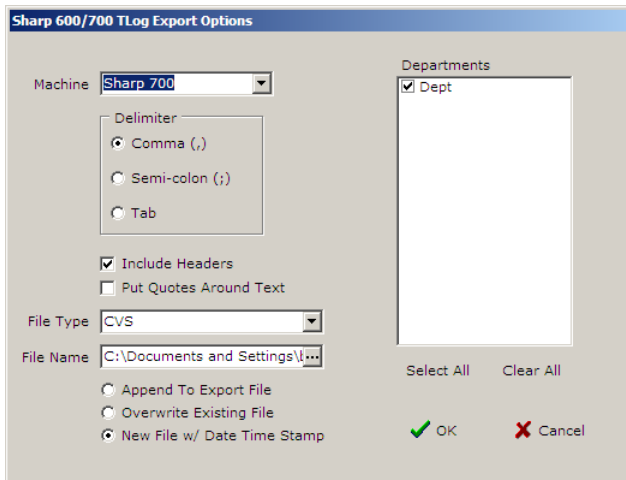

2. When **TLog Export** is picked from the **Report Tools** menu, the screen above opens. Pick the appropriate options and click **OK** to process the export.
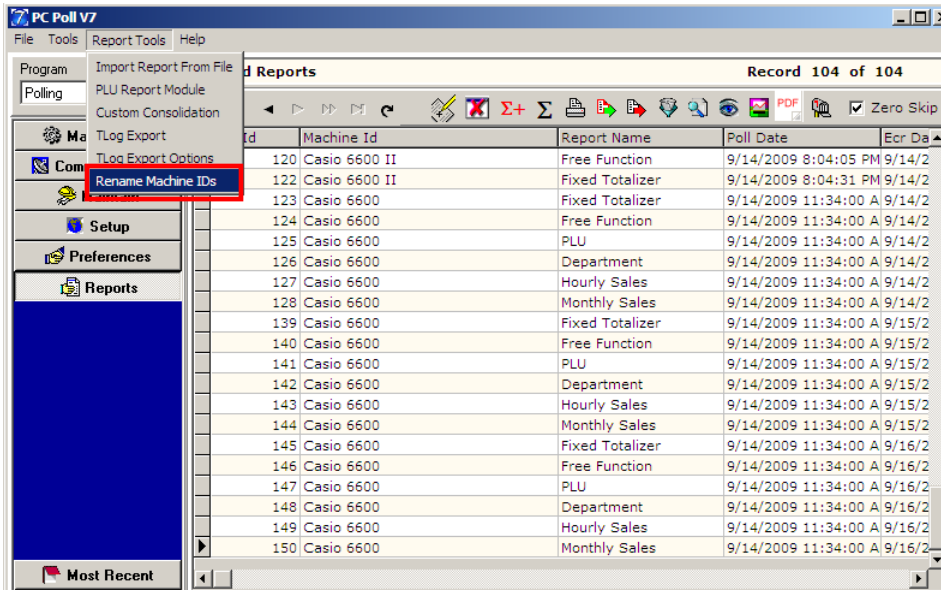
TLog Export Options

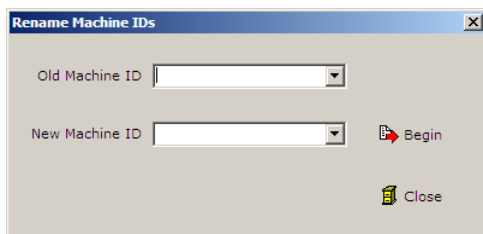1. The TLog Export Options screen can be opened from the Report Tools menu.

2. This will open with the last saved settings. If more information is needed on this feature, please contact Tri-Technical Systems.
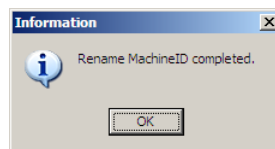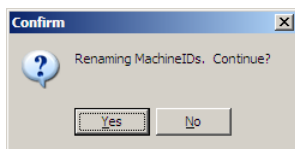
Rename Machine IDs

The **Rename Machine IDs** option can be opened from the Report Tools menu.

1. The Rename Machine IDs screen will open. Select the machine id to change from the **Old Machine ID** drop down menu. Then select the new machine id from the **New Machine ID** drop down menu. Click the **Begin** button to start the process. Click the **Close** button to close the screen.

2. The Confirm screen above in the image on the left will open. To continue click **Yes**.
3. When the process is complete the Information screen in the image above right will open. Click **OK** to finish.