Creating Reports

The report generator is a very powerful tool allowing you to pull your own reports based on the data available. However, this power comes with increased complexity. Although this documentation may seem long, it aims to unlock your ability to generate your own reports and pull information that otherwise isn't currently accessible to you in a meaningful way.

Report Type

The first option in the report generator is the report type. There are currently two types of reports available:

- Sales
- Inventory

These different types of reports change the available data you can pull from when building your report.

Static Columns

Once you've selected a report type lists of column names will appear, depending on which report type you selected. Each column will have a different title, based on the data associated with the report type.

These columns represent the **unique** values you want to appear in your query. For example, if you were to select *Account Number* from the customer columns for a sales report, you would get one row for each account number. However, if you select both *Account Number* from the customer columns and *Category* from the item columns, you'll get one row for each category each customer has sales for.

Aggregate Columns

Aggregate columns are the values that require calculations to be made. This is where most of the information you'll come looking for lives.

Currently there are 4 types of aggregate columns:

- SUM( ) - The sum of all the values in the rows of the data, that make up one row of your report
- AVG( ) - The average of all the values in the rows of the data, that make up one row of your report.
- COUNT( ) - The number of values in the rows of the data, that make up one row of your report.
- CALC( ) - Special values that are calculated based on predetermined formulas.

Date Range

The date range allows you to specify a date range for the data in your report, if applicable.

For inventory reports these fields are still present, however the inventory data has no date associated with it. Therefore changing these values will have no effect.

Static Column Filters

Static column filters allow you to filter your results based on the static columns. For example, if you wanted all the categories that customer '123456' has sold, you would select both the *Account Number* and the *Categories* columns, and then filter based on *Account Number is equal to 123456*.

Note that in order to have a column show up in a filter, the filter must be created after the column is selected. If you don't see the column you wish to filter on and you are sure its selected, remove the filter and add a new one.

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