



Reports

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How To Create a Mail Merge File

Customer Reports

This is available only for the customer master file.

To create a mail merge file of customers, make the selection of customers.

Click reports, and select either report 197 (which includes all contacts for each customer) or 198 (which includes only the default contact for each customer)

The default, as shown on the Reports screen, is to create this field in your pc6data directory, but you can create it elsewhere by changing the details in the file name field, by putting in the full path. Alternatively you can copy or move the file from the pc6data directory once it has been created.

You can change the file extension (default is .rpt for report) to a different file type (eg .txt) before saving it.

When you have the details correct, click Output to Disk.

If you have selected a large number of customers, and are saving the file to a directory other than pc6data, you need to wait until the Processing message (at the lower left of the screen) has disappeared to make sure that the file is complete. If you get an error message, you should check that the file has been created where you expected it to be - if the file path you entered was not correct, the file will not be created. Try again.

What Next?

You can then use the file you have created for a mail merge using another program such as Word.



Inventory Purchase Orders Reports

Inventory Master File

Inventory Purchase Editing Buttons and Fields

The reports available for purchase orders are:

- 057 Customer History Report by Delivery Code
- 083 SALES.dat Format Report
- 104 Stock Movement Report
- 106 Purchase Order Line Report
- 124 Sales Order Master List
- 134 A/P Invoice listing by Creditor
- 136 Sales Order Master List - Sorted by Creditor
- 161 Sales Order History List - Sorted by Delivery
- 167 A/P Invoice Listing

Remember that only the records listed on the grid will appear on the report.



Suppliers Invoice Reports

Suppliers Master File

Suppliers Invoices Buttons and Fields

The reports available for supplier invoices are:

- 057 Customer History Report by Delivery code
- 083 SALES.dat format report
- 104 Stock movement report
- 105 Purchase Order Master List
- 106 Purchase Order Line Report
- 124 Sales Order Master List
- 134 A/P invoice listing by creditor
- 136 Sales Order Master List - sorted by creditor
- 161 Sales Order History List - sorted by delivery
- 167 A/P invoice listing

Note: Only the records in the grid will be shown on the report. For more information about selection of records see

How to use the Selection Filters.

Once a report has been selected, you can print it, show it on screen, send to disk, or change printer drivers for printing.



Job Delivery Reports

Job Delivery Master File

Job Delivery Editing Buttons

Click the Reports button to access the job delivery reports. As with all Printcost reports, the report shows the records selected on

list screen.

Reports available are:

- 011 Job Delivery File - Standard
- 012 Job Delivery File - Invoice Data
- 019 Department Summary report
- 021 Department Summary report by Customer
- 052 Job Delivery - Sales Data by Job
- 053 Job Delivery - Sales Data by Customer
- 054 Job Delivery - Sales Data by Job Compact
- 055 Job Delivery - Sales Data by Customer Compact
- 065 Job Delivery Performance report
- 071 Department Group report (will report only if department groups are set up)
- 072 Job Delivery Profit Margin
- 073 Job Delivery Salesman Report
- 131 Job Report - listing only
- 168 Job delivery details (Drivers report)
- 170 Job delivery Invoices per Customer



Customer Reports

How To Print a Report

Customer Master File

Customer Editing Buttons

The Reports button displays the reports applicable to customers. Those available are:

- 001 Customer details
- 002 Customer details with delivery details
- 015 Customer year to date sales (including the current 12 months)
- 044, 066, and 068 customer labels of various types
- 075 Debtors trial balance
- 077 Customer sales report (showing budgets and variances)
- 079 Customer sales by salesman year to date sales with budgets / variances for each sales person
- 080 Trial balance extended
- 085 Log notes
- 086 Popup notes
- 087 All Notes
- 090 Debtors transactions by transactions (shows posted transactions / outstanding invoices)
- 091 Debtors transactions this month
- 158 Customer Year to date sales (this financial year only)
- 163 Sales this financial year only
- 175 Customer details (including grade, industry etc)
- 197 Customer contact mail merge report (this report includes all contacts for the customer)
- 198 Export Customer information Delimited file (this file is comma delimited, and includes only the default contact)

Click the report you require or click Cancel.

Enter any Report Details you would like printed at the top of each page. Note that the report will list only those records on the display grid. Select the report destination to Printer, Screen or Disk, selected printer, fax or email.

Printcost will select the “default” printer in your Windows setup for the printer destination. Click on Select Printer to change the printer.

Note: As with all reports, you also have the option not to print the headings at the top of each page of the report.



If you select Disk you should enter the name of the folder and file you want to save it to. This facility can be used with reports 197 or 198 to save a mail merge file as a particular type of file and to a particular directory (the default is to put the file into the pc6data directory as a .rpt file). See How to create a mail merge file (earlier in this document)



Work Reports

Work Master File

Work Editing Buttons

How To Print A Report

The Reports button displays the reports applicable to the models, jobs or quotes master file (according to the area you are working on). Click on the report you require or click on Cancel. Note that the report will list only those records on the display grid.

There are configurable reports available in the system, which need to have department selections made the first time the report is

Enter the departments that are to be totalled into the columns into the question box. By default these are a copy of the department groups in System Setup. These reports are number 003 in Quotes, 009 and 195 in Jobs, and 071 in Job Deliveries.

Enter any Report Details you would like printed at the top of each page. Select the report destination to Printer, Screen or Disk.

Printcost will select the "default" printer in your Windows setup for the printer destination. Click on Select Printer to change the printer.

If you select Disk you will need to enter the file name. You will also have the option not to print the headings at the top of each page of the report.

Click on Go to print or click on Cancel.



Delivery Reports

How to Print a Report

Delivery Master File

Delivery Editing Buttons

The Reports button offers the option of printing Customer Delivery Details. Click OK to print the report, or Cancel to not print. Not the report will list only those records on the display grid.

Enter any Report Details you would like printed at the top of each page. Select the report destination to Printer, Screen or Disk.

Printcost will select the “default” printer in your Windows setup for the printer destination. Click on Select Printer to change the prin

If you select Disk you will need to enter the file name. You will also have the option not to print the headings at the top of each pag the report.

Click on Go to print or click on Cancel.

See also How to Print Delivery Dockets and Labels



How To Print A Report

[Click here to view the Reports screen](#)

How To

Click on the Master file you want to print from, make a selection of records, and then click Reports. As the report will list only those records which are on the display grid, you need to make the correct selection there first. (See How to use the selection filters). Remember to click the Show All button to make sure you have all records in the list.

For most reports there are options to print reports landscape, or to the screen, and in some cases to view or print totals only.

Very long reports can become distorted if printed to the screen. This has been overcome by installing a PDF printer in

Personal Options: when you select print to Screen a pdf file will be created, which you can then open and view, and print the pdf to your printer if you wish. Forms (eg quote letter, invoice) can also be printed to pdf.

Exporting data: you can send the selected report to a disk file. The reports which have been designed for this purpose (those with Export in the title of the report) generally export as a comma separated value (csv) file, but other reports can be exported.

Change the path and file type on the reports screen, so that the exported data is saved where you want to use it and in the format you need.

Other options include printing to a printer other than the default, and adding a comment to print on the report.

There is an option which is set up in system setup, or activated on the report printing screen, to show the selection criteria

details (filter selections) at the top of reports. It also shows the number of records on the list that have been added using Find or removed using Remove.

There is an option to set up a default report printer for individual users in Personal Options.

If Select Printer is chosen, other available printers will be listed. The drop down box lists all of the printers defined in the Windows Printers folder, as well as a pseudo printer called ".Windows Default Printer" and any "Local Printers" also preceded by a dot. The ".Windows Default Printer" is defined as the current Windows printer when the program is started.

A "Local Printer" is a pseudo printer that can be defined to allow different users to print to, say, the "Invoice Printer". The forms design can be set to print to "Invoice Printer" but that can mean different physical printers for different users.

To set up a local printer edit the file Local.Dat in the PC6 directory on the "C:" drive (ie on the local computer, not over the network). In this file there needs to be a block identifier starting in column 1 as shown [Printers}

On subsequent lines, you put the pseudo name, an =, and the actual printer name, eg



Invoice Printer=Panasonic KX-P6500.

The actual printer can reside anywhere on the network or be a local printer. This is merely a redirector method.

If the printer is changed from the default printer, Printcost will need to be restarted.