

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'.
- Date range:** 'Confirmed Date' is selected. The 'From' date is '2/04/2015', the 'To' date is '2/04/2015', and the 'Today' button is visible.
- Transaction type:** 'Sales to customers' is selected. Other options include '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:** 'Description' is selected, and the filter is set to 'equals'.
- Name filter:** 'Name' is selected, and the filter is set to 'contains'.
- and** (dropdown) **Category 1** **is** (dropdown)
- and** (dropdown) **Category 2** **is** (dropdown)
- and** (dropdown) **Customer group**
- Which mode?** (dropdown)

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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