

## 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 a software window titled "Transaction report" with a blue header bar. The window is divided into several sections:

- Type of report:** A list box containing various report types. "Customer ordered shortfall report" is highlighted in blue. Other visible 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:** Two radio buttons for "Confirmed Date" (selected) and "Shipping Date". Below them are input fields for "From" (2/04/2015) and "To" (2/04/2015), and a "Today" button.
- Transaction type:** A group of radio buttons. "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:** A dropdown menu showing "Description" and a button labeled "equals".
- Name filter:** A dropdown menu showing "Name" and a button labeled "contains". Below this are three rows of filters:
  - Row 1: "and" dropdown, "Category 1" dropdown, "is" button.
  - Row 2: "and" dropdown, "Category 2" dropdown, "is" button.
  - Row 3: "and" dropdown, "Customer group" dropdown, "is" button.
- Which mode?:** A label at the bottom left.

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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