

# How to: Use Reports

## Select My Reports



MY ORDER SHEETS MY REPORTS PRODUCT LISTS

There are 3 tabs to choose from:

### Reports

Order History Invoices Other Reports

**Order History** The orders you have placed – online, through the Sales Desk or through a store’s “Back Office”.

**Invoices** The invoices for your account activity, including billing documents and returns.

**Other Reports** Your quarterly Sales Reports.

*\*Note you can PRINT all of your Report documents.*

## Order History Tab

Order History displays orders you have placed within the last year (by quarters).

Select a date range for your Order History and your orders display.

Order History

Apr 2018 - Jun 2018

Apr 2018 - Jun 2018

Jan 2018 - Mar 2018

Oct 2017 - Dec 2017

Jul 2017 - Sep 2017

Orders are displayed for the period you select and will show if the order was done through a store, the Sales Desk or the portal (online order.)

ORDER NUMBER	ORDER DATE	ORDER TYPE	ORDER TOTAL	ORDER DETAILS
393950	2017/09/29	Store Office Order	\$271.44	Details
392252	2017/09/26	Sales Desk Order	\$346.66	Details
396240	2017/09/26	Sales Desk Order	\$467.20	Details

*\*Note that the Order Total show here is before taxes and deposits. “Details” will show your true totals.*

Select “Details” to open the order.

Order 393150 PRINT ORDER

ARTICLE	PRODUCT NAME	COMBINED QTY
1001086	CHATEAU PUYFERRASSE 750ML	3
1022077	COLDSTREAM SALTED CARAMEL 750ML	1
1022084	COLDSTREAM HOMEMADE APPLE PIE 750ML	1
1027042	STEINHART ORGANIC 750ML	1

**Order Summary**

Subtotal: \$299.40  
Discount: -\$29.96  
Tax: \$40.39  
Container Deposit: 2.00  
Bottle Deposit: 0.00  
Total: \$311.83

## Order History Tab

Select PRINT ORDER to print a PDF of the order.

At the bottom of the order you have an option to create a new order based on the order you are reviewing: ADD ALL TO CART

This will add all of these articles into a new cart/order. You will see this message:

Please note: ×  
This will not add any products that have zero quantity, or are not available currently. Are you sure you wish to continue?

YES NO

Your cart will be populated with the same quantities as the original order.

## Invoices Tab

Invoices displays account activity you have made within the last year (by quarters).

## Invoices Tab

Select your date range to display the documents:

Jul 2017 - Sep 2017

INVOICE NUMBER	INVOICE DATE	INVOICE TYPE	INVOICE TOTAL	INVOICE DETAILS
126241422	2017/09/29	Invoice	\$271.44	Details
126203326	2017/09/27	Invoice	\$467.20	Details
126203371	2017/09/27	Invoice	\$346.66	Details

You will see invoices, returns, credit memos and debit memos. Select Details to open any of these.

Accounting documents are in PDF format. You can print them for your records.

## Other Reports

Access the Top Sellers Report (top selling products by categories)

*\*Your Sales Reports, (Velocity Reports) will populate here as soon as this functionality is ready to launch.*

*Please stand by for details on the full launch of this feature.*