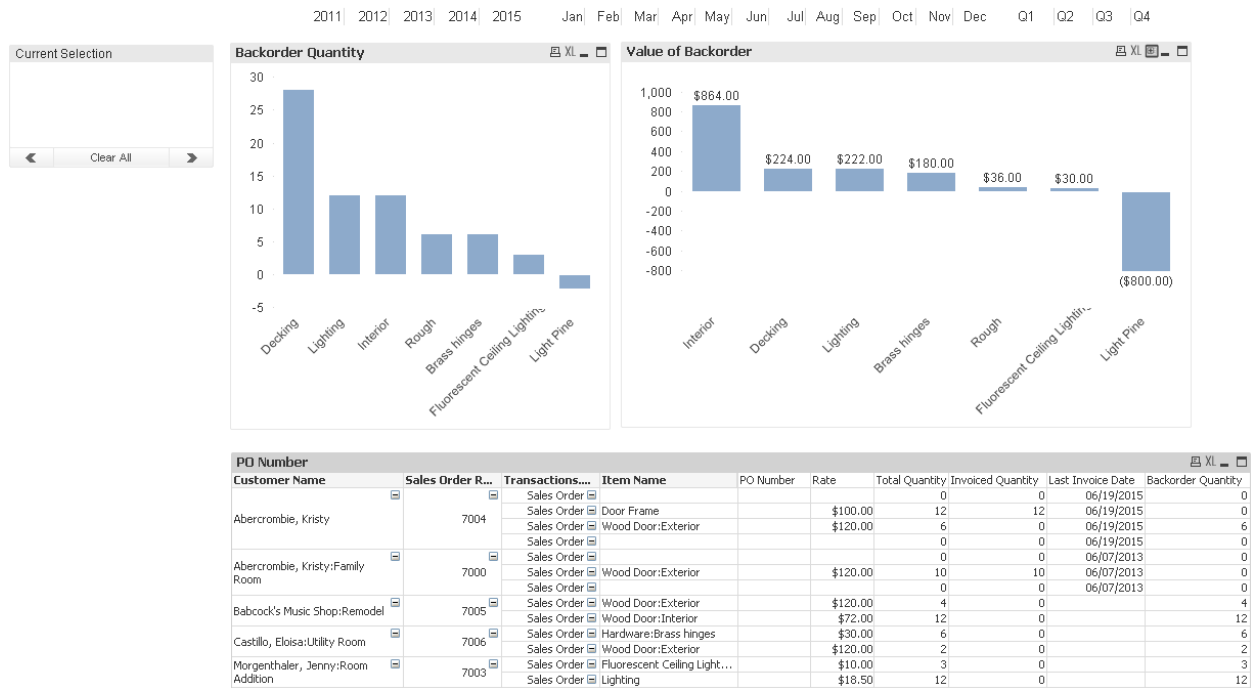


# Exercise #5: Backorder Report

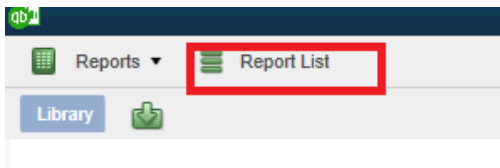
## Backorder Report



Objective – Create a report that shows all open sales orders, and the items that are placed on backorder so you can manage the sales and shipping process.

Step 1: Create a pivot table for purchase order information.

1. Click on **Report List**.



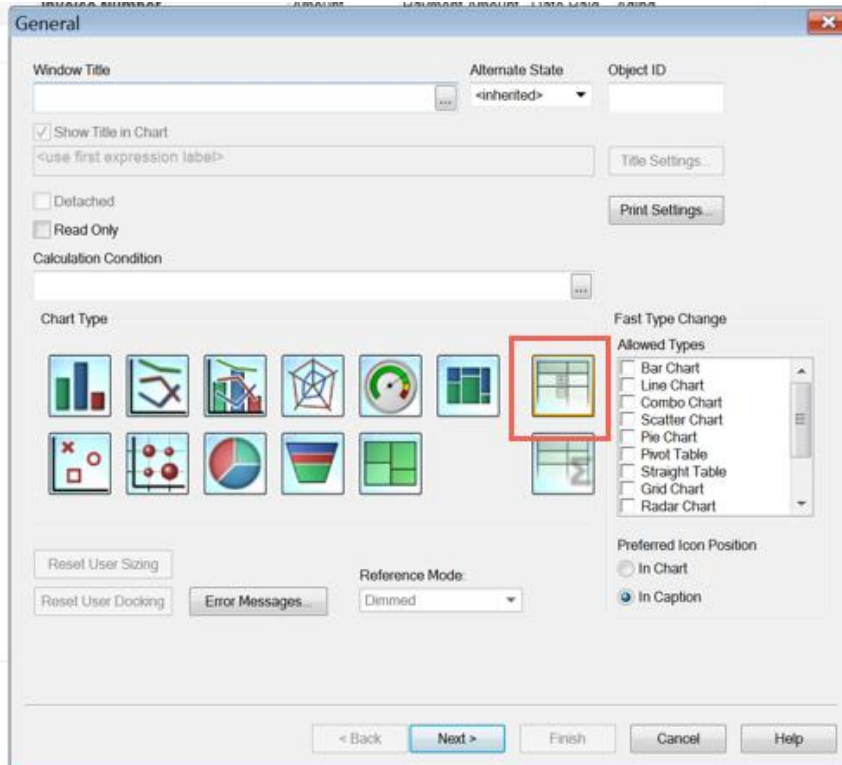
2. Open the **Start from Scratch** report template.
3. In the Library, click **Text & Utility**.
4. Double-click to add the following:
  - a. Current Selections
  - b. Report Title



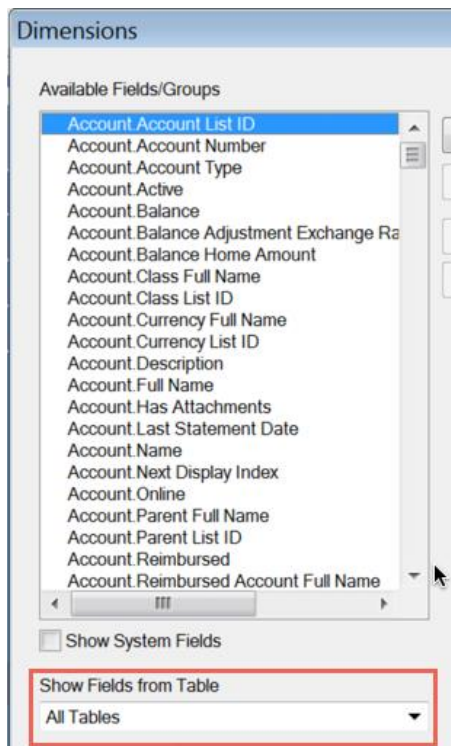
5. In the Library, click **Date**. It may be at the bottom of the Library because you opened Text & Utility.
6. Double-click Transaction to add that date ribbon.



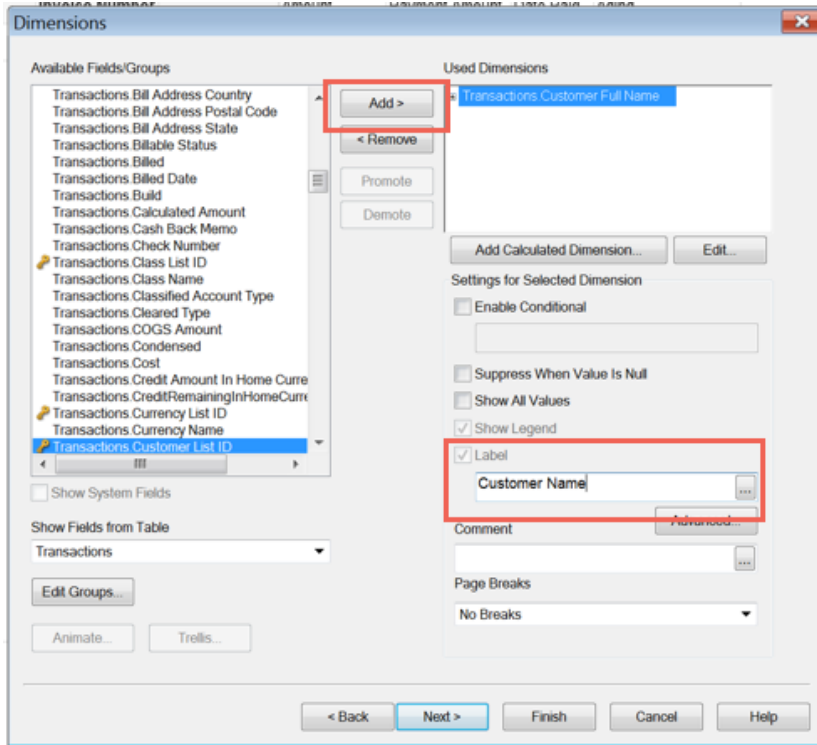
7. Right-click on **Report Title** and select **Properties**.
8. In the General tab, enter **Backorder Report** in Text.
9. Click **OK** to save.
10. Right-click on any white space and select **New Sheet Object > Chart**.
11. In the General window, select **Pivot Table** as the chart type.



12. Click **Next**.
13. In the Dimensions window, look at the list of Available Fields/Groups. Tip: Either scroll through the list or use **Show Fields from Table** to narrow down the fields you want to add as dimensions (the next step has the specific ones we'll use for this exercise).

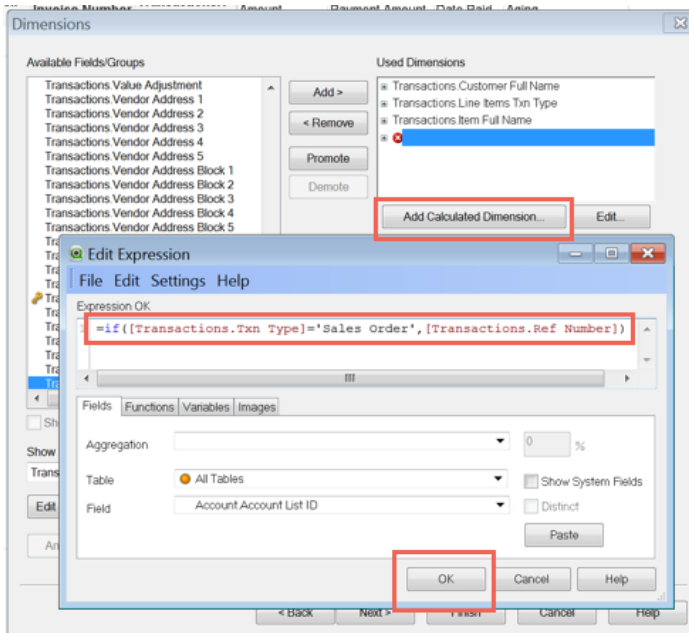


14. Add the following dimensions and label the column:



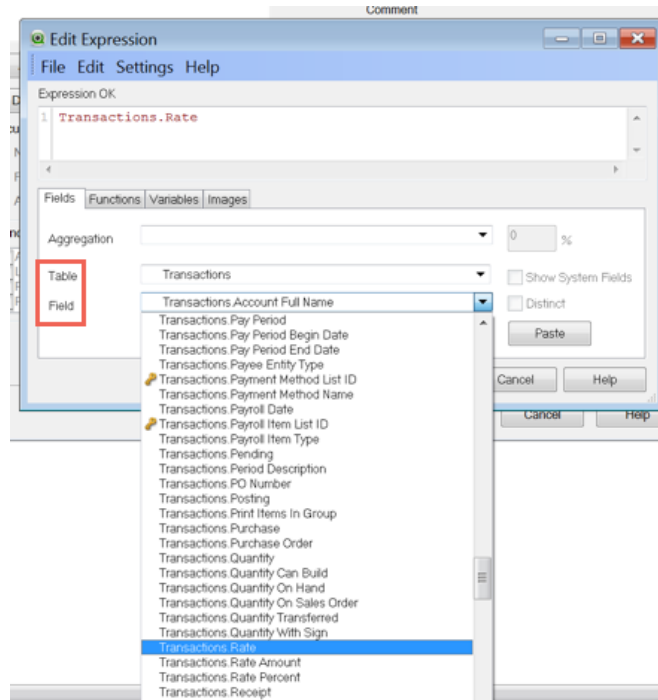
- a. Transactions.Customer Full Name
  - i. Enter **Customer Name** in Label.
- b. Transactions.Line Items Txn Type
  - i. Enter **Transaction Type** in Label.
- c. Transactions.Item Full Name
  - i. Enter **Item Name** in the Label

15. Click **Add Calculated Dimension**.

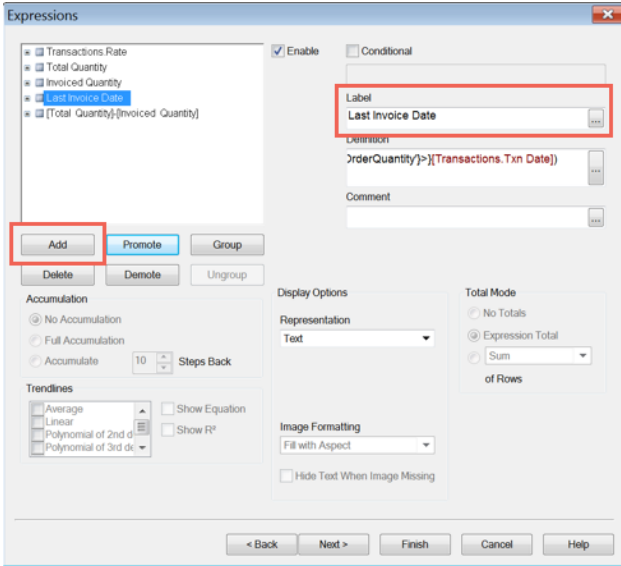


16. In the Edit Expression window that pops up, type the following:

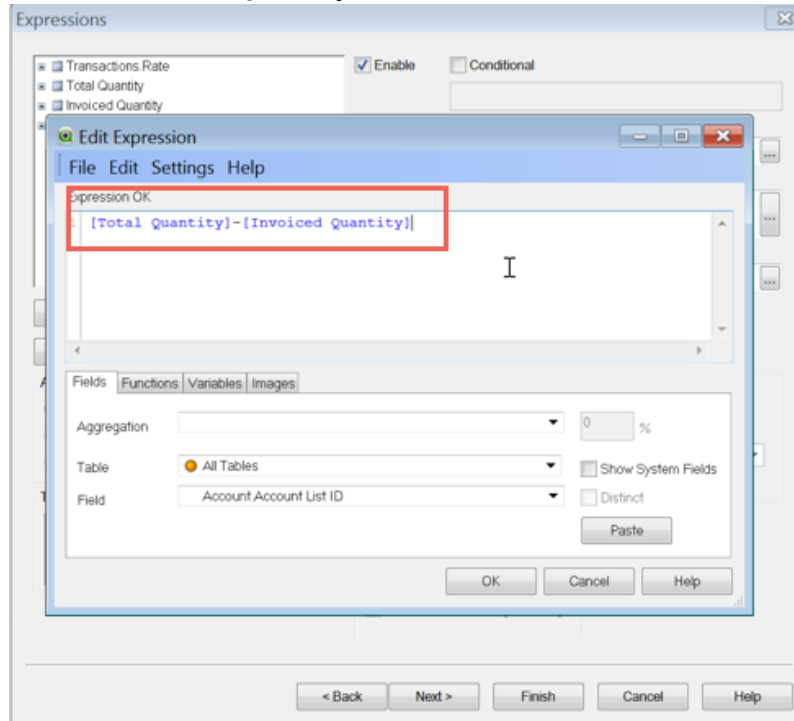
- a. =if([Transactions.Txn Type]='Sales Order',[Transactions.Ref Number])
17. Click **OK**.
  18. Enter **Sales Order Number** in Label.
  19. Click **Promote** until Sales Order Number is under Customer Name.
  20. Click **Next**
  21. In the Edit Expressions window, type the following expression:
    - a. [Transactions.Rate]
    - b. An alternative to typing in the expression is to use the drop-down menus for first Table and then Field to narrow down the data you want to see. In this case, you'd select **Transaction** in Table and then **Transactions. Rate** in Field.



22. Click **OK**.
23. Enter **Rate** in Label.
24. In the Expressions window, add the following expressions and label the columns:



- a.  $\text{sum}([\text{Transactions.Quantity With Sign}])$ 
  - i. Enter **Total Quantity** in Label.
- b.  $\text{sum}([\text{Transactions.Invoiced Quantity}])$ 
  - i. Enter **Invoiced Quantity** in Label.
- c.  $\text{max}(\{<[\text{TransactionLinks.Link Type Name}] = \{ 'InvoiceToSalesOrderQuantity' \} > \} [\text{Transactions.Txn Date}])$ 
  - i. Enter **Last Invoice Date** in Label.
- d.  $[\text{Total Quantity}] - [\text{Invoiced Quantity}]$ 
  - i. Enter **Backorder Quantity** in Label.



- ii. Here, you're taking the expressions you just created with the labels of Total Quantity and Invoiced Quantity and subtracting them. You can do

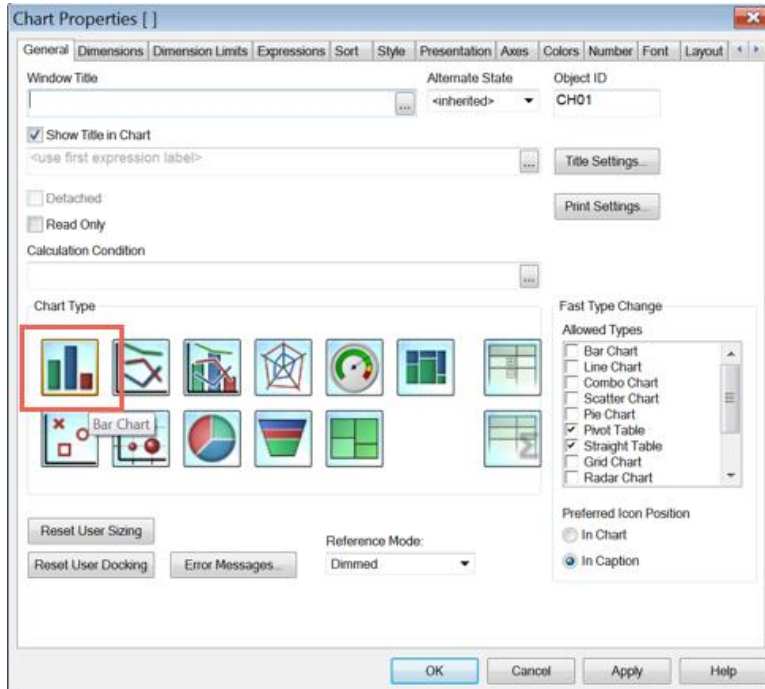
calculations with expressions you make within the same chart object. Just use the Label text for each expression to do so.

25. Click **Finish** to see your table.

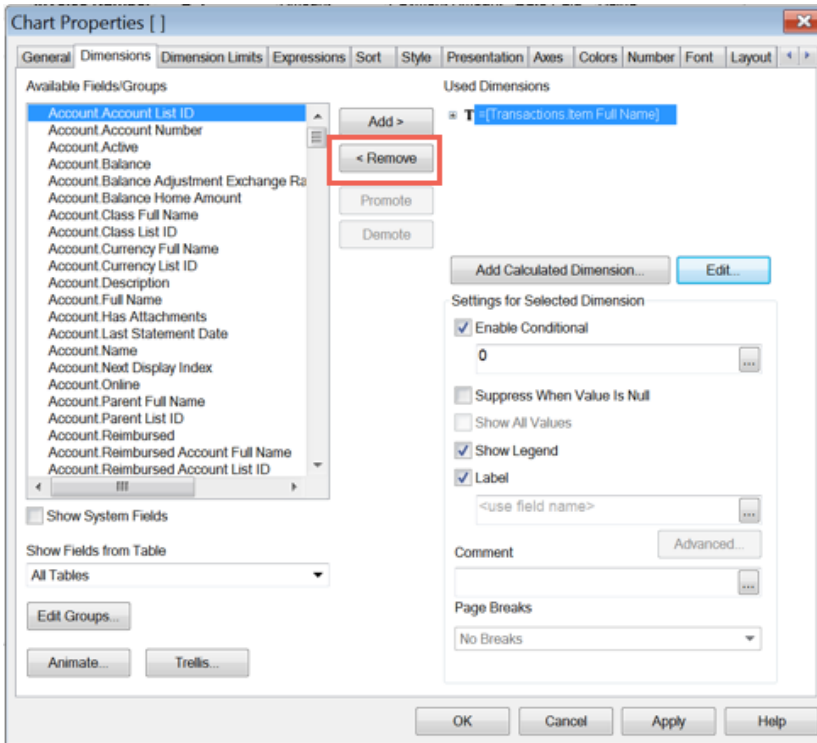
Customer Name	Sales Order Number	Transaction Type	Item Name	Rate	Total Quantity	Invoiced Quantity	Last Invoice Date	BackOrdered Quantity
Abercrombie, Kristy	7004	Sales Order	Door Frame	100	12	12	06/19/2015	0
Abercrombie, Kristy	7000	Sales Order	Wood Door:Exterior	120	6	0	06/19/2015	6
Abercrombie, Kristy	7000	Sales Order	Wood Door:Exterior	120	10	10	06/07/2013	0
Babcock's Music Shop:Remodel	7005	Sales Order	Wood Door:Exterior	120	4	0		4
Babcock's Music Shop:Remodel	7005	Sales Order	Wood Door:Interior	72	12	0		12
Castillo, Eloisa:Utility	7006	Sales Order	Hardware:Brass hinges	30	6	0		6
Castillo, Eloisa:Utility	7006	Sales Order	Wood Door:Exterior	120	2	0		2
Morgenthaler, Jenny:Room	7003	Sales Order	Fluorescent Ceiling Lighting	10	3	0		3
Morgenthaler, Jenny:Room	7003	Sales Order	Lighting	18.5	12	0		12
Roche, Diarmuid:Room	7001	Sales Order	Lumber:Decking	8	28	0		28
Roche, Diarmuid:Room	7001	Sales Order	Lumber:Rough	6	6	0		6
Vasquez, An...	7002	Sales Order	Cabinets:Light Pine	400	4	6	11/18/2013	-2

Step 2: Create a bar chart that shows the Backorder Quantity

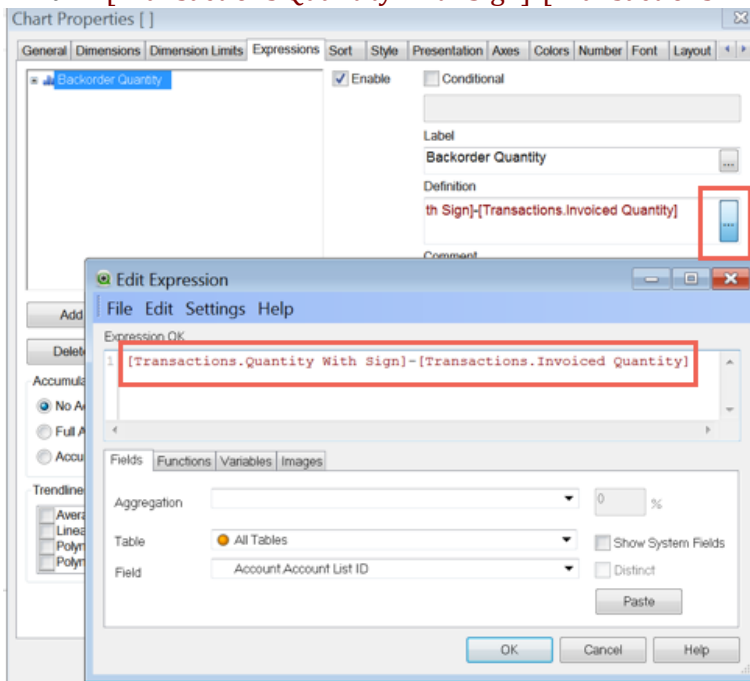
1. Right-click on the table and select **Clone**.
2. Move the new table below the original.
3. Right-click on the original table and select **Properties**.
4. In the General tab, change the chart type to **Bar Chart**.



5. In the Dimensions tab, remove all dimensions except **Item Name**.

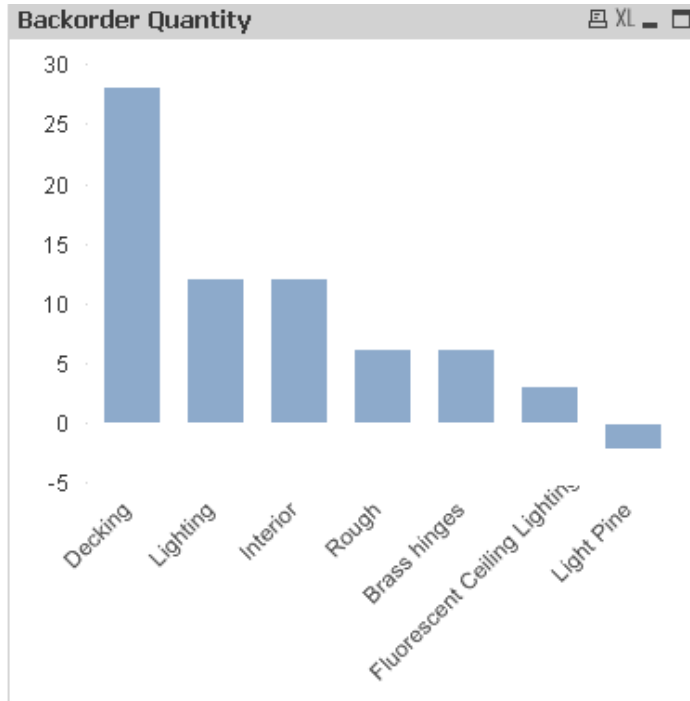


6. In the Expressions tab, remove all expressions except **Backorder Quantity**.
7. Click [...] under Definition.
8. Edit the expression to show the following:
  - a.  $[\text{Transactions.Quantity With Sign}] - [\text{Transactions.Invoiced Quantity}]$



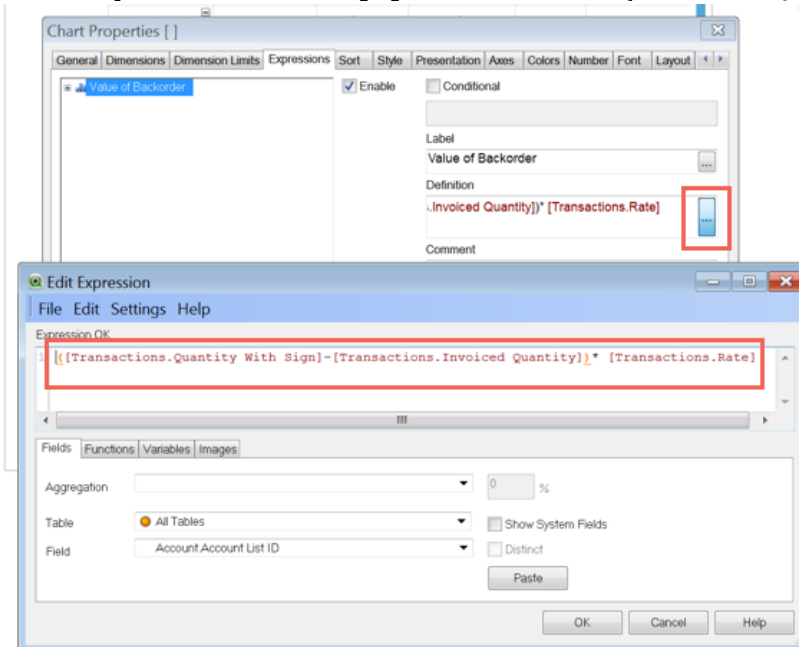
9. Make any other formatting changes you would like to see in any other tabs.
10. Click **OK**.





Step 3: Create a bar chart that shows the Value of Backorder

1. Right-click on your new bar chart and select **Clone**.
2. Move the new bar chart to the right.
3. Right-click the cloned bar chart and select **Properties**.
4. In the Expressions tab, click [...] under Definition (Backorder Quantity is already selected).



5. Edit the expression to show the following:
  - a. `[(Transactions.Quantity With Sign)-[Transactions.Invoiced Quantity])* [Transactions.Rate]`

6. Enter **Value of Backorder** in Label.

7. Make any additional formatting changes you would like to see in any other tabs.

