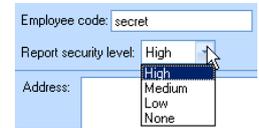# How do I...

RoboVet

Run a list sales report (FP19)

RoboVet Version: Feature Pack 19 but will be appropriate for any versions of RoboVet 5. Some earlier versions may not have all the filters and columns in the output grid.

Security Permissions: To run a sales report users must have the **High** level of **Report security**.
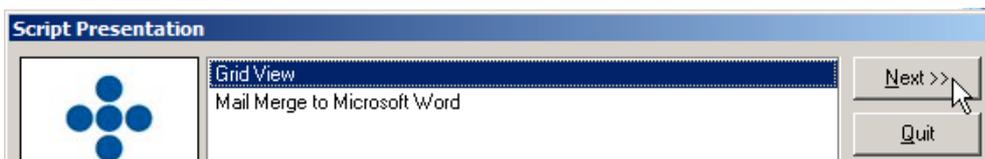
Running the List Products Sales Report

Click on **System** button then on **All Reports** and select **List Product Sales** found in under the **Financial** tab

In this example we are going to create and save a report on the sales of all **Frontline** products in the first 6 months of 2015 across all branches.

You can double click on the report or click on **Run** to start running the report.

Click on **Next** so that the report will be in **Grid View**.
You will see a large number of filters that can be set. In brackets after most of the entries there is an askerisk (*). This means that no filter is set and all the data is required.

Double click on **Date Range** and enter the start date and then click on **Next** to enter the **End date**. Note that time can be entered – it is assumed that you want to have all the data from the beginning of the first day to the very end of the last day.
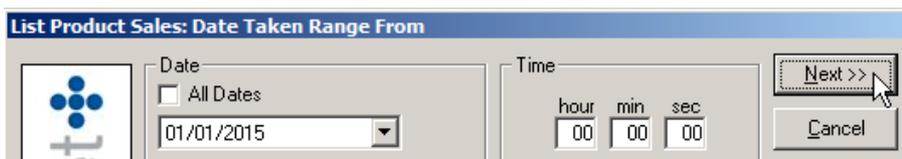
The dates entered will be displayed in brackets.
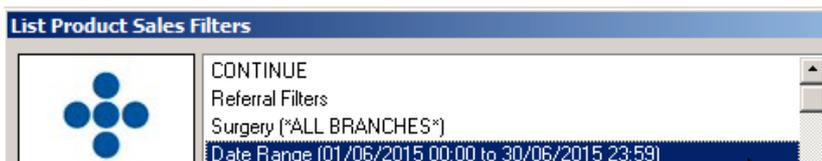
Now set the other filters.
For product name it is **very important** to leave the * at the end of the name entered. If you did not leave the * the report would give you the sales for a product called **front**!

There are 2 other important filters to consider.

1. **Use Stock Name**
   If left as **(No)** the product name will be displayed as the name the client saw (display name) and not necessarily the proper name in the **Product List**. If you want to see all the sales of a product on one line then set the filter to **(Yes)**. If left as **(No)** you will get one line for each display name – the name will have an askertisk at the beginning.

2. **Report on sales sold**
   If left as **Parent Product Only** secondary sales on the product will be included in the sales total. For example, if there are dispensing or injection fees on a stock item they will be included. If the product selected is also sold a secondary product the sales will not be included if this filter is not changed to **As any product**.

Note: If selecting more than one entry when selecting filters hold down the **Control** key to select more than one option.

When you have set the filters select **Continue** and then click on **Next**. Leave the **Summary Option** as highlighted and click on **Finish**.

The grid appears with a large number of rows – one for each sale of the product and a large number of columns.
The report can be exported to a csv (best version) or Excel format.

A column can be hidden by right clicking and selecting **Hide**. The column can be unhidden by clicking on **Display** and **Show Column**.

A column can be totalled by right clicking and selecting **Total**.

A column can be dragged into a new position.

There is a more information in using the grid in the **Help** file entitled **How Do I use the grid in RoboVet reports**.

In this example we are going to produce a sub-totalled report.

Creating a Sub-totalled Report

Click on **Display** (top left) and select **Groups and Sub Totals**.

Hold the mouse down with a left click and drag **Product Name** into the **Group By** section at the top.

Drag the following items into the **Sub Total On** section: **Units Quantity** (not Sales Quantity), **Sale Net, Sale VAT, Sale Total** and **Discount Given**.
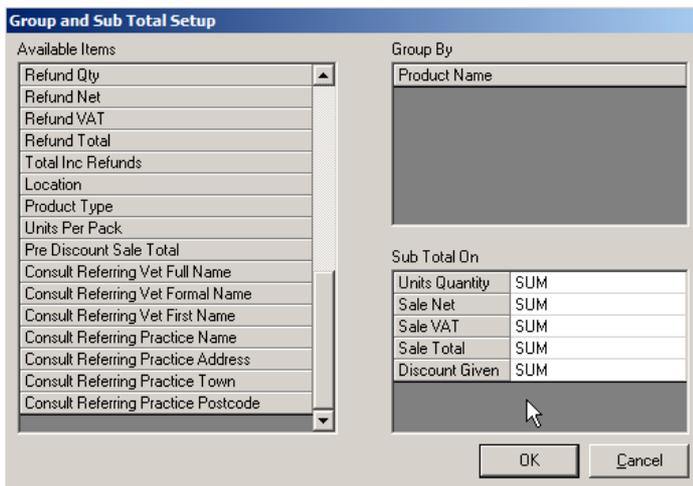
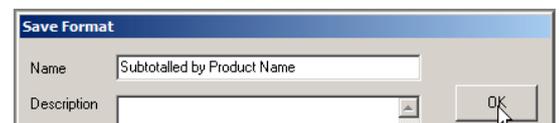Click on **OK** and the data is displayed as totals. Right click on each of the last four column headers and total the columns.


This is a format of the grid. There are many possible formats. The formats can be saved and used again to save you time.

Click on **File** and select **Save Format**. Give your format a name, for example **Subtotalled by Product Name**.


The report can be exported as a csv file by clicking on **File** and selecting **To Comma Separated File (CSV)**. Do not save subtotalled reports directly to **Excel** – they are better saved in csv format and then opened and saved in **Excel**.
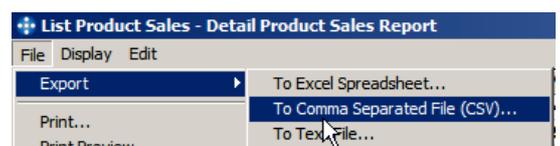
Saving the report to use again

Saving the report will save the filters you have set and to select which format you would like to use for the report.

Close the report with the X on the top right or go to **File** and **Exit**. Select **Save Report Choices**.
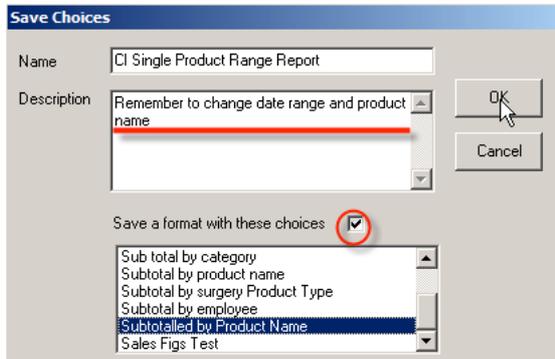
Give the report a name. It is a good practice to put your initials at the beginning of a report as once created everyone with permission to run the report will have access to your report!

Rather than calling the report something like **Frontline Sales Report** you can use a more generic name as you may want to run the report for another product next time.

Add a description to remind you to change the date range and product name.

Put a tick in the **Save a format with these choices** and select the appropriate format. You have to do this even if you only have one format available.

After clicking **OK** click and then exiting the report click on one of the other tabs at the top and then back on to the **Financial** tab. Click on the + to the left of the **List Product Sales** report and you will see the new report in the list.

When you run the report you can change any of the filters. Unless you click on **Save Report Choices** when you have finished running the report the original filters will appear next time you run the report.

If you set up standard reports where the only filter you change is the date range then it is a good idea to save the report choices each time. This way the new date range will be saved