

How to create a Stock Activity Report

Issue 1: November 2004

Objective:

This document describes how to create a new Stock activity report in Sage Line 50. This example will show all stock scanned and loaded to a delivery vehicle, which is shown with the reference 'Van A' when booked-out via the barcode scanner.

Description:

Process:

Open Sage, and click on '[Reports](#)' icon to start the Sage Report Designer

Click on File / New.

The Report Designer Wizard will appear as below (Fig1):

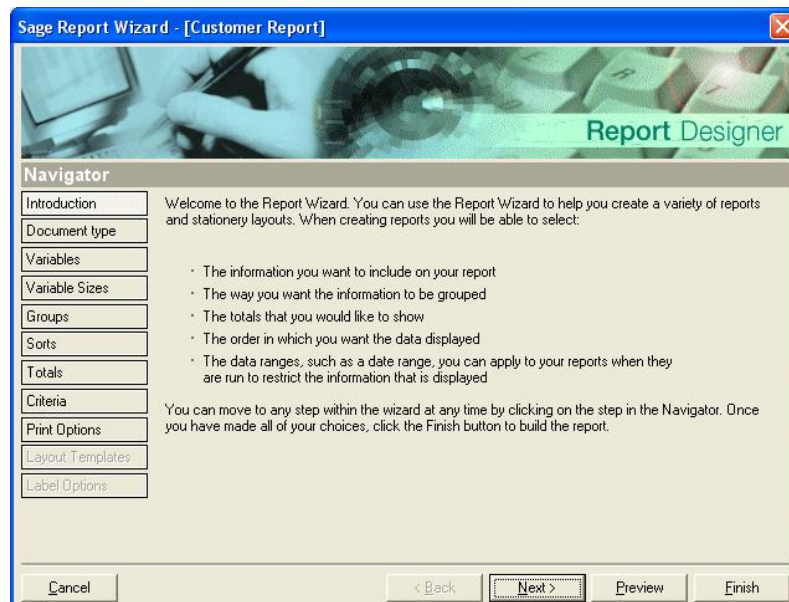
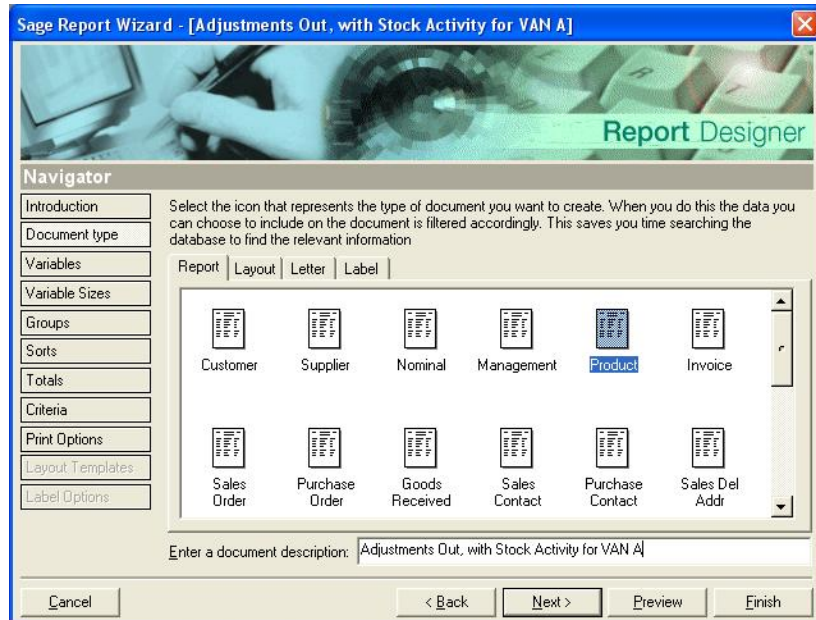


Fig 1

Click '**Next**'

Select a '**Product Report**' and (as shown below [Fig 2](#)) change the description to "**Adjustments Out, with Stock Activity for VAN A**".



[Fig 2](#)

Click '**Next**'

Select "**STOCK_TRAN**" from the drop-down list of Tables

Add the following columns to the report:

STOCK_TRAN.STOCK_CODE
STOCK_TRAN.TYPE
STOCK_TRAN.DATE
STOCK_TRAN.REFERENCE
STOCK_TRAN.DETAILS
STOCK_TRAN.QUANTITY

Click '**Next**' through successive screens until prompted for selection criteria (see below [Fig 3](#)).

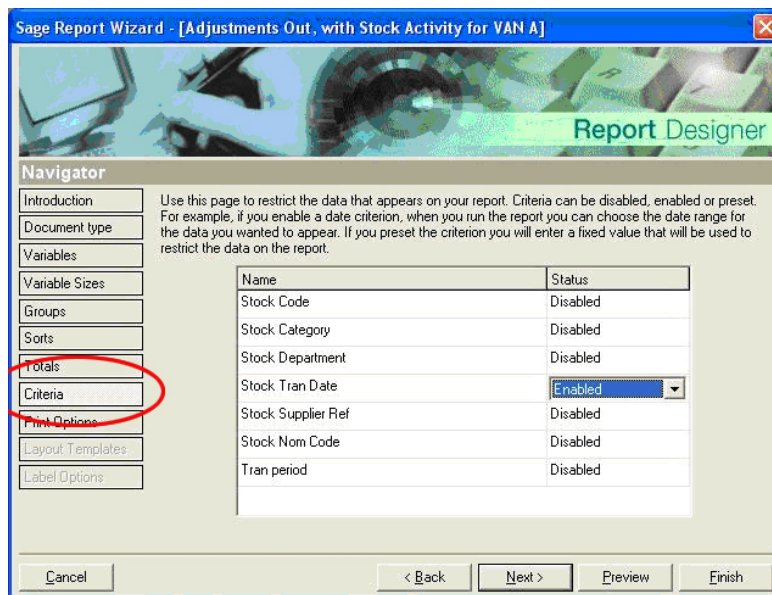


Fig 3

Change the status of STOCK TRAN DATE to 'Enabled'. This will ensure the user is prompted to input a Start and End Date when running the report.

Click '**Finish**'.

The screen will close and open the Report Designer. In the Report Designer, Select '**Format**' and '**Filter**'

Type in the Filter expression as shown below Fig 4, or use the Build...' button to compile this same expression.

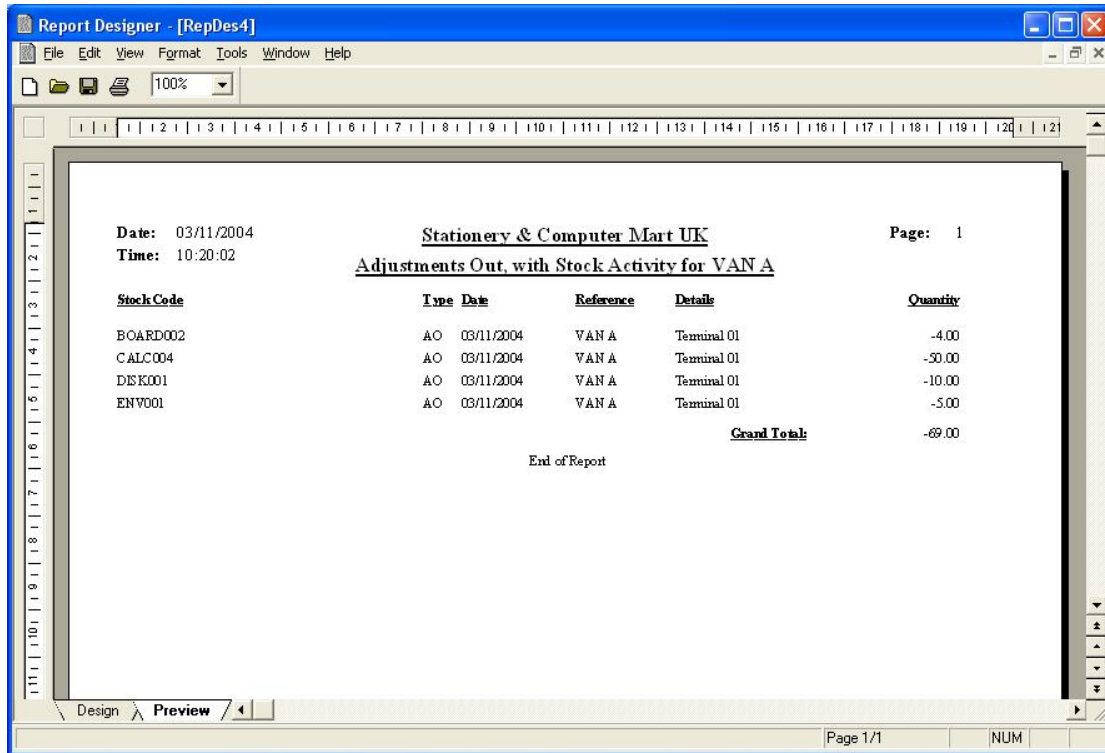
This expression ensures that report only includes Stock Transactions of the Type AO (Adjustment Out) and the Reference is 'VAN A'.



Fig 4

Click **OK** to close the Filter window.

You can now preview the data. With a little re-adjustment of the report layout, the report will look similar to this example [Fig 5](#):



Date: 03/11/2004
Time: 10:20:02

Stationery & Computer Mart UK
Adjustments Out, with Stock Activity for VAN A

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<u>Stock Code</u>	<u>Type</u>	<u>Date</u>	<u>Reference</u>	<u>Details</u>	<u>Quantity</u>
BOARD002	AO	03/11/2004	VAN A	Terminal 01	-4.00
CALC004	AO	03/11/2004	VAN A	Terminal 01	-50.00
DISK001	AO	03/11/2004	VAN A	Terminal 01	-10.00
ENV001	AO	03/11/2004	VAN A	Terminal 01	-5.00
Grand Total:					-69.00

End of Report

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[Fig 5](#)

Finally, select '**File**' and '**Save As**' to save your new report. Default save directory should be '[My Reports](#)'.

Close the report designer down and return back to your Sage Line 50. You will now be able to use your report by selecting the **products** icon / **Reports** and then '[My Reports](#)'.

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