

Default Report No. of Copies

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Purpose of this document

This document explains how to set a default number of copies to print for specific reports.

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Purpose

Food banks have requested the ability to define a default number of copies to print for specific commonly printed reports. To meet this request, a No of Copies field was added to the Report Selection Table.

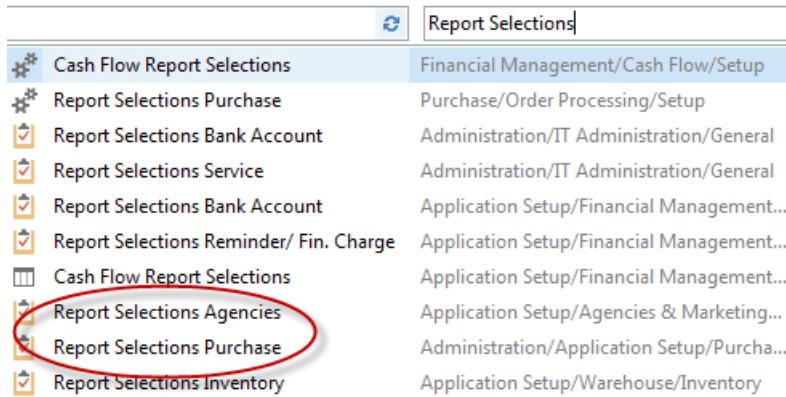
Ceres object release 4.00.00 is required for the functionality documented in this procedure.

The reports that are supported include:

| Usage | Report Id | Report Name |
|-----------------------|-----------|------------------------------|
| D. Inv. | 14012269 | Posted Donor Invoice |
| D.Order | 14012256 | Donation Receipt |
| D.Rcpt. | 14012268 | Posted Donation Receipt |
| P. Arch. Return Order | 418 | Arch.Purch. Return Order |
| P.Arch. Order | 416 | Archived Purchase Order |
| P.Arch. Quote | 415 | Archived Purchase Quote |
| P.Blanket | 10119 | Purchase Blanket Order |
| P.Cr.Memo | 10120 | Purchase Credit Memo |
| P.Invoice | 10121 | Purchase Invoice |
| P.Order | 10122 | Purchase Order |
| P.Quote | 10124 | Purchase Receipt |
| P.Receipt | 10124 | Purchase Receipt |
| P.Ret.Shpt. | 10127 | Return Shipment |
| P.Return | 6641 | Return Order |
| S. Arch. Return Order | 418 | Arch. Sales Return Order |
| S.Arch. Order | 216 | Archived Agency Order |
| S.Arch. Quote | 215 | Archived Agency Quote |
| S.Blanket | 10069 | Sales Blanket Order |
| S.Cr.Memo | 10073 | Agency Credit Memo |
| S.Cr.Memo | 14012523 | Agency Credit Memo |
| S.Invoice | 10074 | Agency Invoice |
| S.Invoice | 14012524 | Agency Invoice |
| S.Invoice | 14012533 | Agency Invoice w/ Grant Det. |
| S.Invoice | 14012534 | Agency Order w/ Grant Det. |
| S.Order | 10075 | Agency Order |
| S.Order | 14012273 | Agency Order |
| S.Order | 14012525 | Ceres Agency Order |
| S.Ret.Rcpt. | 10082 | Return Receipt |
| S.Return | 10081 | Return Authorization |
| S.Shipment | 10077 | Agency Shipment |
| S.Shipment | 14012280 | Agency Shipment Order |

Report Selections

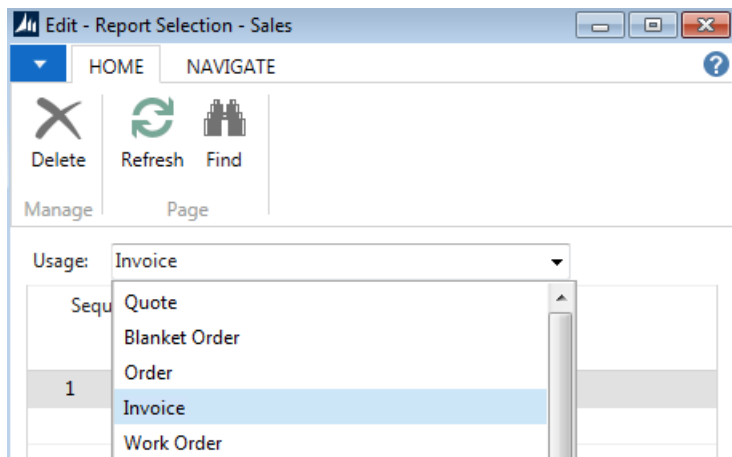
1. To access the Report Selection setup, input Report Selections in the Search field. A drop down will display a list of the Report Selections by module. Select the Report Selection you want to update, such as Distributions for Agency related documents or Donor for Donation related documents. Report Selections can also be accessed from Administration → Setup in each module. Once you select Report Selections you will be in edit mode.



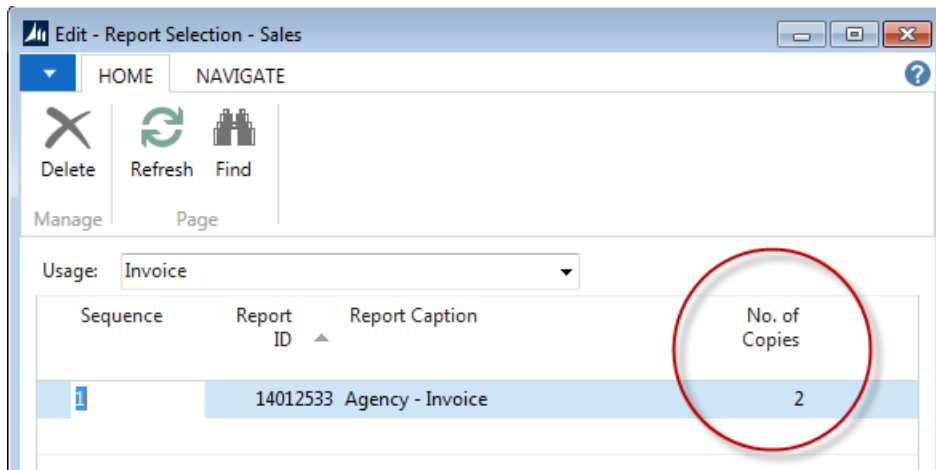
A screenshot of a search results page. The search bar at the top contains the text 'Report Selections'. Below the search bar is a list of results. The first result is 'Cash Flow Report Selections' with the path 'Financial Management/Cash Flow/Setup'. The second is 'Report Selections Purchase' with the path 'Purchase/Order Processing/Setup'. The third is 'Report Selections Bank Account' with the path 'Administration/IT Administration/General'. The fourth is 'Report Selections Service' with the path 'Administration/IT Administration/General'. The fifth is 'Report Selections Bank Account' with the path 'Application Setup/Financial Management...'. The sixth is 'Report Selections Reminder/ Fin. Charge' with the path 'Application Setup/Financial Management...'. The seventh is 'Cash Flow Report Selections' with the path 'Application Setup/Financial Management...'. The eighth is 'Report Selections Agencies' with the path 'Application Setup/Agencies & Marketing...'. The ninth is 'Report Selections Purchase' with the path 'Administration/Application Setup/Purcha...'. The tenth is 'Report Selections Inventory' with the path 'Application Setup/Warehouse/Inventory'. The 'Report Selections Agencies' and 'Report Selections Purchase' items are circled in red.

| Report Selection | Module Path |
|---|--|
| Cash Flow Report Selections | Financial Management/Cash Flow/Setup |
| Report Selections Purchase | Purchase/Order Processing/Setup |
| Report Selections Bank Account | Administration/IT Administration/General |
| Report Selections Service | Administration/IT Administration/General |
| Report Selections Bank Account | Application Setup/Financial Management... |
| Report Selections Reminder/ Fin. Charge | Application Setup/Financial Management... |
| Cash Flow Report Selections | Application Setup/Financial Management... |
| Report Selections Agencies | Application Setup/Agencies & Marketing... |
| Report Selections Purchase | Administration/Application Setup/Purcha... |
| Report Selections Inventory | Application Setup/Warehouse/Inventory |

2. From the Edit – Report Selection Page, click on down arrow to the right of the Usage field and select which report (document) you would like to update. In the below Report Selection – Sales (Distributions) screen shot, Invoice was selected from the drop down list.



3. In the No. of Copies field, input the default number of report copies you would like to print. Keep in mind that one original will print in addition to the No. of Copies specified. In the below example, three Agency Invoices will print. Thus if you only want a total of three Agency Invoices to print, input 2 in the No. of Copies field.



4. Repeat steps 1 – 3 above for each report you want to define a default number of copies.
5. To test, print the report for each Report Selection you updated. Confirm that the correct number of copies printed based on the setup. In the above example, go to a Posted Agency Invoice and select Print and confirm that three Agency Invoices printed.
6. When printing reports, you can override the default by inputting an amount in the No. of Copies field on the Options FastTab of the report request screen. In the below example, two Agency Invoices will print; one original and one copy. Please note that 0 in the Number of Copies field designates the default to the system to print the default number of copies as defined in the Report Selections.

