



## Default Report Copies

### **Purpose of this document**

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 5.00.39 is required for the functionality described in this document.*

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## Overview

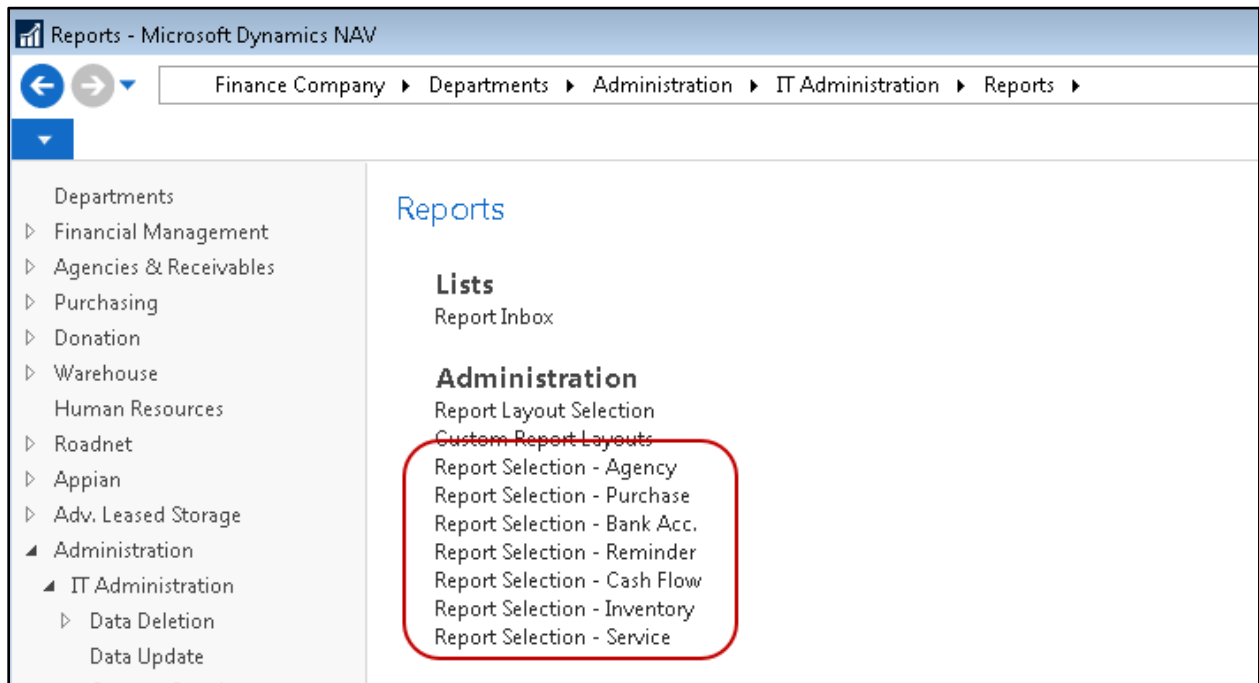
Food Banks have requested the ability to define a default number of copies to print for specific commonly printed reports. To meet this request, a No of Copies field was added to the Report Selection Table.

The reports that are supported include:

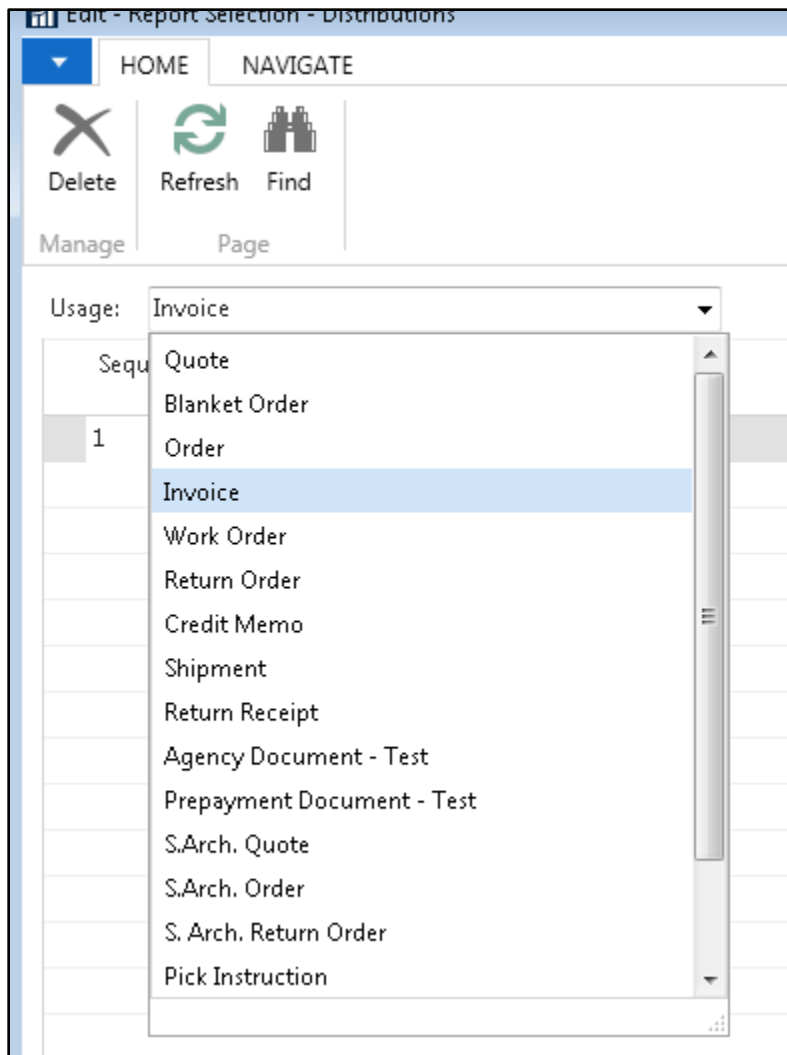
Usage	Report Id	Report Name
D. Inv.	14012269	Posted Donor Invoice
D.Order	14012256	Donation Receipt
D.Rcpt.	14012268	Posted Donation Receipt
P. Arch. Return Order	418	Arch.Purch. Return Order
P.Arch. Order	416	Archived Purchase Order
P.Arch. Quote	415	Archived Purchase Quote
P.Blanket	10119	Purchase 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.



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, 3 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.

Usage: Invoice					
Sequen...	ReportID	Report Caption	No. of Copies	Use for ...	Email Body Layout Description
1	14012574	Agency - Invoice	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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 report selection number of copies by inputting a non-zero amount in the No. of Copies field on the Options FastTab of the report request screen. In the below example, 2 Agency Invoices will print; one original plus the 1 copy specified here; the 2 copies from the default setup above is ignored because it has been overridden on the request page.

**Note:** In all cases after determining the number of copies based on the report selection or the value entered on the Invoice Request Page, any value entered on the agency page itself will be in addition to those copies. The invoice number of copies at the agency level can be useful when under normal circumstances you need only one copy for most agencies (set the report selection default copies to 1) and you have a few agencies that require an additional copy. For those agencies you can specify 1 invoice copy on the agency page.

The screenshot shows a software window titled "Edit - Agency - Invoice". At the top, there is a blue header bar with a dropdown menu labeled "ACTIONS" and a green status bar on the right that says "Ceres 5.0 Testing". Below the header, there is a "Clear Filter Page" button with a funnel icon. The main content area is divided into two sections: "Saved Settings" and "Options". The "Options" section is expanded, showing several fields: "Number of Copies" (set to 1 and circled in red), "Print Company Address" (checkbox), "Log Interaction" (checkbox), "Summarize By Item" (checkbox), and "Order Group Option" (dropdown menu set to "Order Handling Group"). A "Modify Statement" link is visible at the bottom of the "Options" section.