



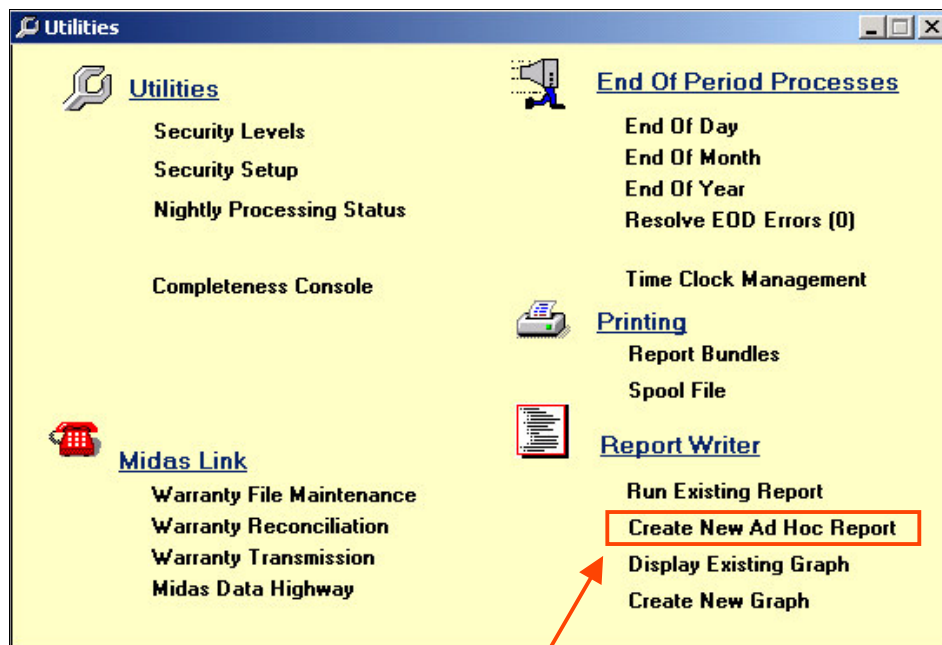
**VAST MULTI-STORE HOW TO:
*CREATE A PART SALES TRACKING REPORT***

INTRODUCTION

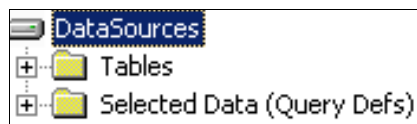
This document will provide you with instructions for creating an ad-hoc report at the office, which will provide you with part sales history and tracking information. This type of report can be useful to track sales trends, popularity and other demographics. This report could also be useful in the event of a part recall, so that you could view the sales history from all of your shops at once in order to notify your customers. For single-shop users, you can also create and utilize this report. You will need to access the ad-hoc report screen by clicking on the VAST Utilities menu, then continue with step 2 of the instructions below.

CREATING A PART TRACKING AD-HOC REPORT

1. Begin by opening the **Vast Multi-Store**. Then click on the “**Utilities**” button, you will see a screen similar to the one shown below.

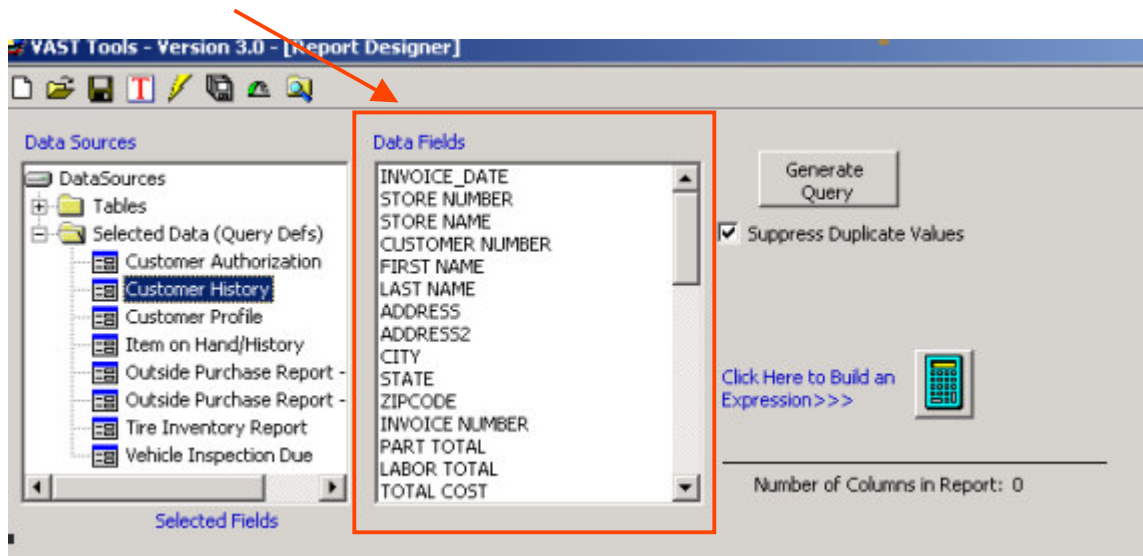


2. Under the **Report Writer** heading, click on “**Create New Ad Hoc Report**” from the menu. You will see the **Ad Hoc Report Designer** screen.
3. The first thing we need to do is select the data that we want to include in the report. Click the **Plus [+]** symbol next to the “**Selected Data (Query Defs)**” folder, in the **Data Sources** list, which is located in the upper left corner of the screen, as shown below.



4. When the folder opens you can see a list of report types, which have already been defined for you. Click on the “**Customer History**” option.

5. All of the fields associated with this data source will now appear automatically in the “**Data Fields**” box, as shown below.



6. You can double-click the data fields that you want to include in the report. They will then appear at the bottom of the screen. For this report, we will want to include the fields listed below. **Double-click** on each one of these fields to add them to the report. You may need to use the scroll bar to find each field within the list.

PART NUMBER

PART MFG CODE

STORE NUMBER

CUSTOMER NUMBER

FIRST NAME

LAST NAME

ADDRESS

ADDRESS2

CITY

STATE

ZIPCODE

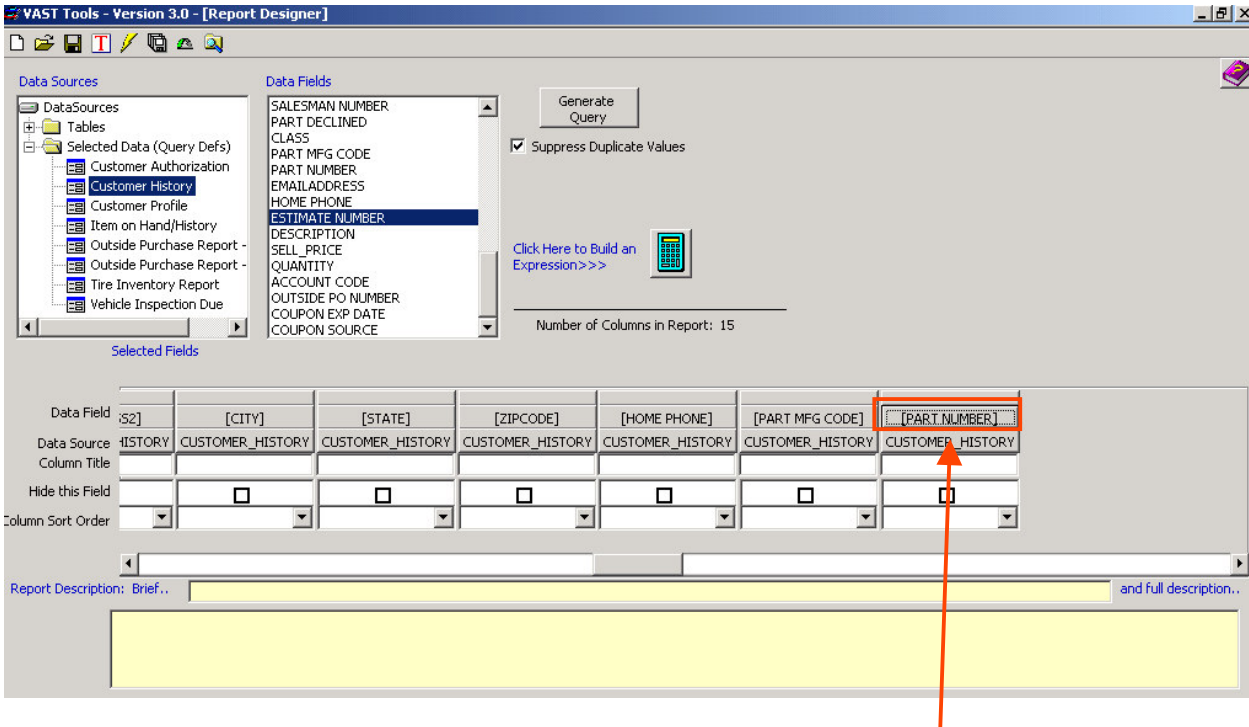
HOME PHONE NUMBER

INVOICE_DATE

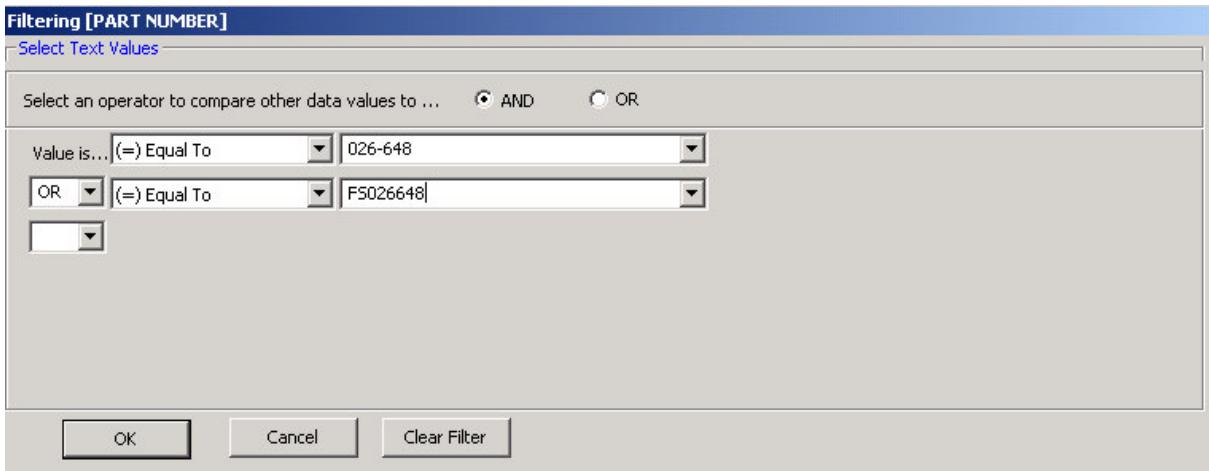
INVOICE NUMBER

ESTIMATE NUMBER

- When you have added all of the fields, you will see each column appear in the lower portion of the screen, similar to the picture shown below.



- Now you can filter the data, based on one or more part numbers so that you can see the sales history for these parts. To filter the data, click on the **[PART NUMBER]** heading in the “**Data Field**” row at the bottom of the screen (highlighted above).
- You will see the filter screen appear. Click on the dropdown menu next to “**Value is...**” and select “**(=) Equal To**” from the list. In the textbox that appears to the right, enter the **part number** that you want to view. If you would like to view more than one part number, you can click on the dropdown box below “**Value is...**” and select “**OR**” from the list. Then select “**(=) Equal To**” and enter the second part number. An example of this is shown below, where we are going to view the data for part numbers “026-648” or “FS026648”. When you are finished entering the criteria, click **OK** and you will be returned to the ad-hoc screen.



10. You also have the option of sorting the data. For this report, we will sort by store number so that all of our customer data is grouped by shop. Click on the “**Column Sort Order**” dropdown under the [STORE NUMBER] column and select “**Ascending**”, as shown below.

Data Field	[STORE NUMBER]
Data Source	CUSTOMER_HISTORY
Column Title	
Hide this Field	<input type="checkbox"/>
Column Sort Order	Ascending

11. You are then ready to view the results of your report. Click on the “**Generate Query**” button on the top right of the screen, as shown below. Keep in mind that depending on the total number of records, it may take several minutes to return the results of the report.

Generate Query
<input checked="" type="checkbox"/> Suppress Duplicate Values

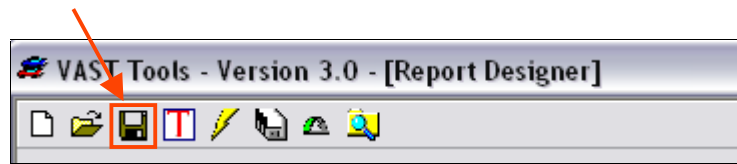
12. You will then see the results screen. To print the contents of the report, click the “**Preview Report**” button, as shown below. You will then see another window appear with a preview of what the printed report will look like. If you are satisfied with the results, click the “**Print**” button to send the information to your printer.

VAST Tools - Version 3.0 - [Results]		
	Print Selected Items Only	Export to Text

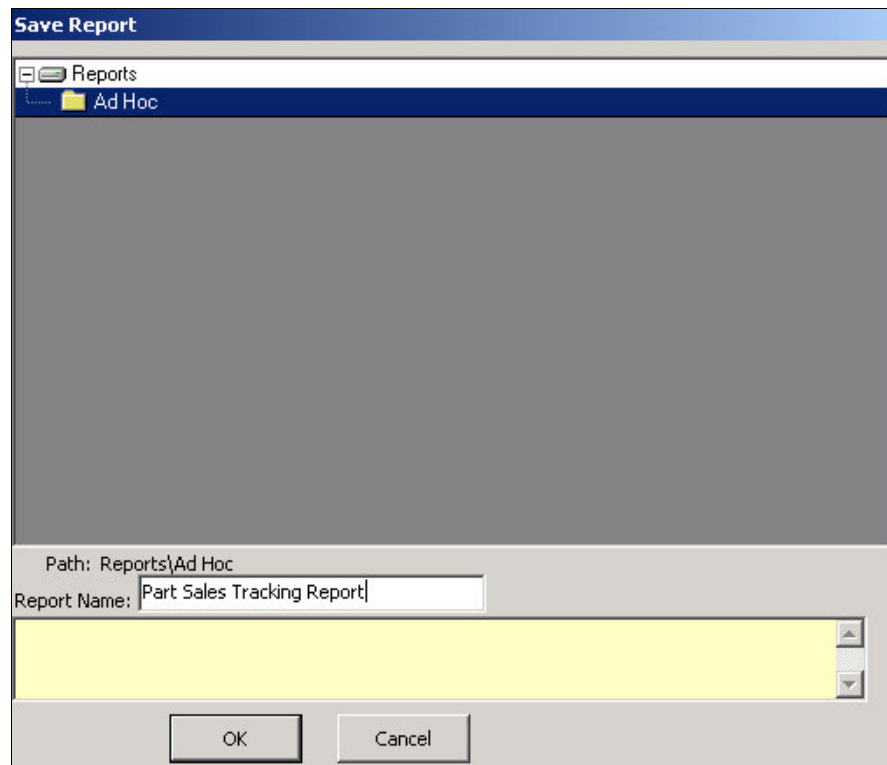
13. To save the report, click on the inner-most “**X**” in the top right-hand corner, as shown below. Be sure you do not click the upper “**X**” or the entire screen will close and you will lose all the work you have done on your report!

VAST Tools - Version 3.0 - [Results]				
	Print Selected Items Only	Export to Text		
Drag a column header here to group by that column.				
PART NUMBER	PART MFG CODE	STORE NUMBER	CUSTOMER NU...	FIRST

14. You will then be returned to the ad-hoc design screen. To save the report, click on the **disk icon** on the menu bar, as shown below.



15. When the save screen appears, click on the “**Ad Hoc**” folder and then enter a name for the report in the “**Report Name**” field at the bottom of the screen, as shown below. As an example, we used the name of “Part Sales Tracking Report”. Then click **OK**.



16. You will again be taken back to the ad-hoc design screen. You can then click on the “**X**” to close the screen and return to Vast. At any time, you can access the saved report by going to the “**Utilities**” menu and selecting “**Run Existing Report**” from the menu.