Reporting in Anthology

Paper reports, and much, much more

Reports are vital tools for measuring the performance of your business. Anthology offers a wealth of print reports to give you cogent information on sales, purchasing and receiving, and much more. Many Anthology reports are highly customizable, allowing you to specify the exact information you need in the format best suited. And all Anthology reports can be sent not just to the printer, but to spreadsheet files, pdf files, preview on the screen and other formats you can use.

Anthology reporting doesn't stop there. You can create your own custom reports (Queries) that allow you to dynamically select records in your Inventory, Customer, or Vendor files; records that you can then send to other documents like Purchase Orders or Overstock Return Invoices.

Finally, Anthology gives you report-type information at your fingertips when you need it—when creating POs or other documents—in the InfoPanels that give you detailed information about the item you are considering.

So read on to find out about all the ways Anthology gives you reports…and much more.

Pre-defined Reports

Anthology has dozens of built-in reports, many highly customizable, for sales history, inventory status, purchasing and receiving history, etc., a sample of which are shown below.

Accounts Receivable Sales Summary Report

The A/R Sales Summary Report allows you to see those **sales made on account** to a customer.

A/R sales summary
For period beginning 2/5/2003 thru 2/28/2003
Totals By Customer Name, Title/Descript

SKU	Description	Units	Retail $	OH	OO
0064472299	Extra Innings	1	5.99	9	0
0060291613	Meow : Cat Stories From Around The World	1	20.01	9	0
0023150602	Personal Financial Planning : Your Guide To A	1	21.95	-1	0
	Totals for Customer Name: Adams Larry	3	47.95		
1563708558	200 Best Jobs For College Graduates	1	16.95	9	0
	Totals for Customer Name: Maule Tom	1	16.95		
Total books sold:		4	64.90		

Sales History report

The Sales History report is one of the most powerful and customizable reports in Anthology. Perhaps better described as a sales history report generator, it allows for filtering by department, section, customer, vendor, user defined fields, and many other options; specifying sorts with sub-totals up to three levels deep; and a host of other filtering and

formatting options.   As with other Anthology reports, its results can either be printed or exported to a spreadsheet or Anthology purchase order, or pdf.

Sales History Report
For period beginning 12/1/2007 thru 12/31/2011
Totals By Section1, Department, Date

Dept	Sect1	Media	SKU	Description	Author	Units	Retail $	Cost	Profit	Margin %	Markup %	OH	OO	YR
BOOK		PAP	1563709112	Expert Resumes For	Enelow, Wendy/	3	50.85	30.51	20.34	40.00	66.67	4	3	0
BOOK			047013819X	Frommer's England 2008	Porter, Darwin	2	40.02	23.61	16.40	41.00	69.49	4	3	0
BOOK		HRD	1579120504	Webster's New Compact		7	90.86	54.51	36.34	40.00	66.67	4	7	0
BOOK		PAP	1588180506	Dog Lovers Crossword	Tissenbaum,	1	12.00	7.20	4.80	40.00	66.67	4	4	0
BOOK		PAP	1589230574	Cottage Style	Farris, Jerri/	2	39.90	23.94	15.96	40.00	66.67	4	2	0
BOOK		PAP	1892514370	African American		3	36.00	21.60	14.40	40.00	66.67	4	3	0
BOOK		HRD	9810245637	Asset Pricing	Mei, Jianping	1	52.00	31.20	20.80	40.00	66.67	4	1	0
BOOK		HRD	0062516078	Meausre of a Man: A	Poitier, Sidney	1	26.00	15.60	10.40	40.00	66.67	0	1	0
			Totals for Department: Book			169	4,325.19	2,547.75	1,777.43	41.09	69.76			

Customer Back Orders report

The Customer Back Orders report can report on one customer or all customers; on customer order back orders or special orders only, or both.

Date: *1/26/2012*   **Customer Back Orders**

Customer	Type	Tran #	Date	SKU	Title / Description	B/O	Deposit	OH	OO	Item Ststus	PO #	Vendor
Brown, Sue	SPO	12	11/16/2011	1576072118	Encyclopedia Of World Mythology	1	137.50	4	1	OnOrder	0000002	Ingram Book
Clarke,	SPO	7	7/10/2010	0448432692	A Fire in Their Hearts	0	0.00	4	0	Complete		
Clarke,	SPO	11	7/16/2010	9780765345974	Lord of the Silent Kingdom	0	0.00	-1	0	Complete		
Clarke,	SPO	10	7/11/2010	0030650364	United States : Change And Challenge	1	0.00	1	7	In	000046	Baker &
Furn, Rosie	SPO	8	7/10/2010	630687545X	Rough Guide to Reggae	1	10.58	8	0	In	000046	Baker &

Daily Sales report

The Daily Sales report gives a quick snapshot of the day's sales. It can be sorted by vendor, section, ISBN, etc, with optional sub-totals at each level.

Daily Sales Report
Totals By Section, Department
Date: 4/29/2011

ISBN/SKU	Title/Descrip	Author	Pub	Sect	Media	OH	OO	Day	Retail	CrrMnth	LstMnth	YR	LYR
1852333561	Internet Programming in C++	Walmsley, Mark	Springer Verlag	COMP3	PAP	2	0	1	34.95	0	0	2	0
	Totals for Section: **COMP3**					2	0		34.95	0	0	2	0
0486424774	Mandarin Chinese Dictionary :	Wang, Fred	Dover Pubns	DICT2	PAP	-5	0	9	269.55	0	0	9	0
	Totals for Section: **DICT2**					-5	0		269.55	0	0	9	0
0486424782	Mandarin Chinese Dictionary :	Wang, Fred	Dover Pubns	LANG2	PAP	-1	0	5	149.75	0	0	5	0
	Totals for Section: **LANG2**					-1	0		149.75	0	0	5	0
0750695633	Clinical Neurology Casebook	Walshe, Thomas	Elsevier Science	MEDI2	PAP	-2	0	6	299.70	0	0	6	0
	Totals for Section: **MEDI2**					-2	0		299.70	0	0	6	0
0007133073	Rosslyn : Guardians Of The	Wallace-murphy,	Element Books	RELIG	PAP	0	5	1	16.95	1	0	3	0
	Totals for Section: **RELIG**					0	5		16.95	1	0	3	0

Inventory Status report

Inventory Status report can produce a wide variety of reports, including **total value of inventory at both cost and retail**; out of stock books, on order books; books received after a certain date, etc.

Inventory Status Report
Totals By SKU1

SKU1	Description	Publisher	Dept	Sect	Media	Author	OH	OO	List Price	Retail Price	Ext List	Ext Retail
0060521848	Angus, Thongs And Full-frontal		BOOK		PAP	Rennison, Louise	10	0	6.99	6.99	69.90	69.90
0060530928	Graveyard Book	Harpercollins	BOOK	CHIL7	HRD	Gaiman, Neil	2	2	17.99	17.99	35.98	35.98
0060853980	Good Omens: The Nice and	HarperTorch	BOOK	FANTA	PAP	Gaiman, Neil ;	0	0	7.99	7.99	0.00	0.00
0060897317	King of Swords	Harpercollins	BOOK	MYST2	HRD	Stone, Nick	6	2	25.99	25.99	155.94	155.94
006112270X	Football Genius	Harpercollins	BOOK	CHIL4	HRD	Green, Tim	6	2	16.99	16.99	101.94	101.94
0061240354	Marley : A Dog Like No Other	Harpercollins	BOOK	CHIL8	PAP	Grogan, John	2	2	6.99	6.99	13.98	13.98
0061245607	When the Duke Returns	Harpercollins	BOOK	ROMAN	PAP	James, Eloisa	6	3	7.99	7.99	47.94	47.94
0061340642	Run	Harpercollins	BOOK	FICT4	PAP	Patchett, Ann	1	6	14.95	14.95	14.95	14.95
0061374229	Story of Edgar Sawtelle	Harpercollins	BOOK	FICT4	HRD	Wroblewski, David	3	2	25.95	25.95	77.85	77.85
0061379085	Ana's Story : A Journey of Hope	Harpercollins	BOOK	CHIL4	HRD	Bush, Jenna (COL)	6	2	18.99	18.99	113.94	113.94
0061574287	Lump of Coal	Harpercollins	BOOK	CHIL2	HRD	Snicket, Lemony	2	2	12.99	12.99	25.98	25.98
0061576719	Let's Get Fancy Together!	Harpercollins	BOOK	CHIL2	HRD	O'Connor, Jane	1	2	17.99	17.99	17.99	17.99
0061672475	Alex & Me : How a Scientist and a	Harpercollins	BOOK	NATU2	HRD	Pepperberg, Irene M.	2	2	23.95	23.95	47.90	47.90
0061950726	Orphan Train		BOOK	FICTI	PAP	Kline, Christina	0	0	14.99	14.99	0.00	0.00
0062317199	Paddington	Harper	BOOK	FICTI	HRD	Bond, Michael	0	0	17.99	17.99	0.00	0.00

Purchase Order Status report

Report on draft POs, open POs, or completed POs. Report shows quantities and dollar values at both cost and retail. Filter by vendor, department and PO status.

PO Status Report
For period beginning 12/1/2009 thru 1/26/2012
Totals By Vendor, PO #
PO Status: Open

Vendor	PO #	Shpmt	Date	Status	Qty Ord	Qty Rec	Outst	Total Cost	Open Bal
Addison-We	000042	01	07/11/10	Open	811	0	811	21380.24	21380.24
Baker &	000046	02	07/17/10	Open	163	2	161	1610.15	1591.41
Baker &	000047	01	07/17/10	Open	70	0	70	766.28	766.28
Ingram	0000002	01	11/16/11	Open	5	0	5	198.96	198.96
Random	000054	01	01/08/12	Open	17	0	17	451.90	451.90
Total :					1066	2	1064	24407.53	24388.79

Overstock Returns report

Track overstock returns; filter on draft returns, open returns (out to the vendor for approval), or completed returns. Reports show either summary or details, with units, value at cost, and value at retail.

Overstock Returns Report
For period beginning 12/1/2008 thru 12/31/2011
Totals By RI#, Date

Status	Date	RI #	Vendor	Qty	Sub-total
Complete	7/11/2010	000003	Addison-Wesley	14336	380891.76
Complete	7/16/2010	000004	Addison-Wesley	7	101.66
Total :				14343	380993.42

Historical Ztapes report

The Historical Ztapes report allows you to reprint **Ztapes for any day or any range of days; useful for sales** tax reporting, credit card tenders reporting, and research.

Historical Ztape

Printed:	11/13/2017	12:25:13
Station:	Station two	
User:	JIM	
Sales for:	1/1/2016 through 11/13/2017	

Bankable Tenders	
AMEX	$471.03
CASH	$5827.84
CHECK	$6694.55
DISCOVER	$1172.00
MASTER CARD	$3100.90
VISA	$7885.30
Total bankable tenders	**$25151.62**

Receiving History / Co-op report

The Receiving History / Co-op report can be used to report on totals received from any given vendor; it also can be used to generate direct and indirect totals for any given publisher (i.e., totals of a given publisher's books purchase directly from the publisher and indirectly through distributors); these numbers will show the size of the **co-op pool** for the publisher.

Sort

Primary	Secondary
Vendor	None
☑ Total	☐ Total

☑ Print Direct / Indirect totals

Receiving History / Co-op Report
For period beginning 1/1/2016 thru 10/31/2017
ISBN / SKU: All
Departments: All
Sections: All
Publishers: All
Vendor received from: All
Totals By Vendor

Vendor	PO #	Rev Date	Status	SKU1	Title	Department	QtyOrd	UOM	QtyRec	Unit Cost	Total Cost	Retail Price	TotSold
Baker &	000026	001 01/21/17	Ship	1885173598	Deadly Kin	Book	1	EA	1	14.37	14.37	23.95	0
Baker &	0000001	001 06/17/16	Ship	0071122087	Microsoft Word 2002	Book	10	EA	10	33.01	330.06	55.01	1
Baker &	0000001	001 06/17/16	Ship	0072470917	Microsoft Word 2002 : Introductoryo	Book	10	EA	10	22.17	221.70	36.95	0
Baker &	0000001	001 06/17/16	Ship	0130081701	Introduction To Word 2002	Book	10	EA	10	17.97	179.70	29.95	0
Baker &	0000001	001 06/17/16	Ship	0130384844	Microsoft Word 2002 : Mous Expert Level	Book	10	EA	10	23.97	239.70	39.95	0
Baker &	0000001	001 06/17/16	Ship	0130497878	Microsoftrm Word 2002 : Mous Core	Book	10	EA	10	19.20	192.00	32.00	0
Baker &	0000001	001 06/17/16	Ship	013049920X	Essentials Word 2002 Level 1	Book	10	EA	10	8.00	79.98	13.33	0
Baker &	0000001	001 06/17/16	Ship	0130664596	Select Series	Book	10	EA	10	32.00	319.98	53.33	0
Baker &	0000001	001 06/17/16	Ship	0139516662	Using Wordperfect 5.1	Book	1000	EA	1000	7.20	7200.00	12.00	0
Baker &	0000001	001 06/17/16	Ship	0194364119	English Time	Book	10	EA	10	15.00	150.00	25.00	0
Baker &	0000001	001 06/17/16	Ship	0596000847	Access Cookbook	Book	10	EA	10	29.97	299.70	49.95	0
Baker &	0000001	001 06/17/16	Ship	0619044616	New Perspectives On Microsoft Windows	Book	10	EA	10	15.57	155.70	25.95	0

Hourly Sales Graph

The Hourly Sales Graph report shows averages in terms of average number of sales, average amount of sale, and total dollars per hour for any specified range of dates. Very **useful for planning staffing**.

View
Avg. number of sales   ○ $ amount of avg. sale   ○ Total $ per hour
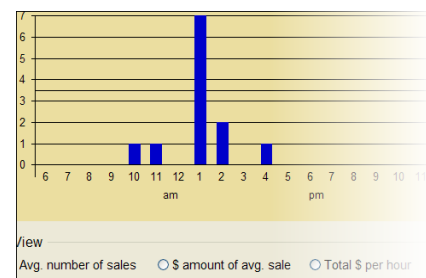
Comparative Sales History report

The Comparative Sales History report makes possible the comparison year-over-year for the sales of a given department, section, or media type.

Comparative Sales History Report

Total by Department

PERIOD	DOLLARS	UNITS	TRANSACTIONS	DAYS
Department: Allied Cards				
Monday, April 02, 2007 - Monday, April 02, 2007	$164.58	53	34	1
Saturday, April 01, 2006 - Saturday, April 01, 2006	$196.12	63	45	1
Totals for Department: Allied Cards				
Monday, April 02, 2007 - Monday, April 02, 2007	$164.58	53	34	1
Saturday, April 01, 2006 - Saturday, April 01, 2006	$196.12	63	45	1
TOTAL:	$360.70			
CHANGE:	$-31.54	-10	-11	0
PERCENT CHANGE:	-16.08%	-15.87%	-24.44%	
Department: Athletic/Sports				
Monday, April 02, 2007 - Monday, April 02, 2007	$142.46	15	9	1
Saturday, April 01, 2006 - Saturday, April 01, 2006	$387.03	24	21	1
Totals for Department: Athletic/Sports				
Monday, April 02, 2007 - Monday, April 02, 2007	$142.46	15	9	1
Saturday, April 01, 2006 - Saturday, April 01, 2006	$387.03	24	21	1
TOTAL:	$529.49			
CHANGE:	$-244.57	-9	-12	0
PERCENT CHANGE:	-63.19%	-37.50%	-57.14%	
Department: Balloons				
Monday, April 02, 2007 - Monday, April 02, 2007	$143.95	32	5	1
Saturday, April 01, 2006 - Saturday, April 01, 2006	$94.37	44	14	1
Totals for Department: Balloons				

And there are dozens of other reports, including:

- Transfers
- Status Report
- Stock Check Report
- Inventory Levels Report
- On Hand Edits Report
- Out and Overdue Loans
- Out and Overdue Rentals
- Sales and Returns Report
- Gift Cards Report
- Gift Card Balances Report
- New Books Report
- On Order Report
- Sales and Receiving Analysis Report
- Sales Transactions Summary Report
- Historical Book Fair Sales
- Publisher Listing
- Price Change Report

Create your own reports with Query tools

Anthology's uniquely powerful Query and reporting functionality allows you to create, name and save ad hoc reports on your Inventory, Customers, or Vendors. New functions include a Join statement And /Or along with Multiple selections within fields. The selected records are live: they can be edited, deleted, or exported to a PO or Overstock Returns Invoice. Or you can print to a custom report format that can be named and saved. And as with all Anthology reports, they can be printed or exported to a external file format like an Excel spreadsheet or pdf file.

On-screen information when and where you need it

Printed reports are all well and good, but when you are making decisions about buying and ordering or about returning merchandise you need up to the moment information at your fingertips.

The Business Center

For an overview of what is going on, you can't do better than the Business Center:

The InfoPanels

When you are actually at work, Anthology's unique InfoPanel displays give you detailed information on the current item you are consideration for order or return. When you move to the next item, the InfoPanel moves with you, showing you details on the next item. The Inventory tab, shown below, gives a summary of sales and receiving and other information.

Click on the Sales page (or select it with Alt-E), and you get detailed information on sales in either Weekly or Monthly format.

9780791474648 Dreamworlds of Shamanism and Tibetan Buddhism: The Third Place	5	19.95 0.000	99.75	0	Trd	SUNY SHAM
9780791473368 The Perfectibility of Human Nature in Eastern and Western Thought	1	24.95 0.000	24.95	0	Trd	SUNY RELI
9780791470848 Friedrich Schlegel and the Emergence of Romantic Philosophy	1	25.95 0.000	25.95	0	Trd	SUNY PHII

ISBN / SKU		UOM	Order	List price	Disc %	Lock	B/O OK			Sub Total	13,377.76
9780791474648	...	EA	5	19.95	0.000			Enter line		Shipping	0.00
Dreamworlds of Shamanism and Tibetan Buddhism: The Third Place			Extension		99.75					Total	13,377.76

Inventory | Sales | POs | Returns | CBOs

	Sep 09	Aug 09	Jul 09	Jun 09	May 09	Apr 09	Mar 09	Feb 09	Jan 09	Dec 08	Nov 08	Oct 08	Sep 08	Yr	OH	OO
Units	0	1	1	0	0	0	0	0	0	2	0	0	0	4	0	0
Retail $	0.00	19.95	19.95	0.00	0.00	0.00	0.00	0.00	0.00	39.90	0.00	0.00	0.00	79.80	0.00	0.00

● Monthly
○ Weekly

The POs tab can be configured with the checkboxes below to show current Draft POs containing this item, as well as its receiving history.

9780791474648 Dreamworlds of Shamanism and Tibetan Buddhism: The Third Place	5	19.95 0.000	99.75	0	Trd	SUNY SHAM
9780791473368 The Perfectibility of Human Nature in Eastern and Western Thought	1	24.95 0.000	24.95	0	Trd	SUNY RELI
9780791470848 Friedrich Schlegel and the Emergence of Romantic Philosophy	1	25.95 0.000	25.95	0	Trd	SUNY PHII

SBN / SKU		UOM	Order	List price	Disc %	Lock	B/O OK		Sub Total
9780791474648	...	EA	5	19.95	0.000			Enter line	Shipping
Dreamworlds of Shamanism and Tibetan Buddhism: The Third Place			Extension		99.75				Total

Inventory | Sales | **POs** | Returns | CBOs

Vendor	PO #	Shpmt	PO Date	Rec Date	PO Status	SKU Status	Ord	TotRecd	Open	Recd	Ext Ord	ExtRecd	Invoice	InvDate	QR#	Disc
SUNY Press	SUNY09BEA		6/30/2009	7/14/2009	Shipment		3	0	3	3	29.94	29.94	2890042	7/2/2009		50.000
SUNY Press	003662		/ /	/ /	Draft		5	0	5	0	99.75	0.00		/ /		0.000
SUNY Press	004245		/ /	/ /	Draft		5	0	5	0	99.75	0.00		/ /		0.000

☑ Draft POs   ☑ Open POs   ☑ Shipments   ☐ Completed POs

The CBOs (Customer Back Orders) tab shows any special orders that may be associated with the item you are considering, along with the status of the special order, how to contact the customer, and so on.

9780271023229 Theurgy and the Soul: The Neoplatonism of Iamblichus	6	34.95 0.000	209.70	0	Trd	PENN NEOP
9780271033778 Unlocked Books: Magic in the Medieval Libraries of Central Europe (Magic in History)	1	70.00 0.000	70.00	0	Trd	PENN HMAG
9780271033785 Unlocked Books: Manuscripts of Learned Magic in the Medieval Libraries of Central E	4	37.95 0.000	151.80	0	Trd	PENN HMAG

ISBN / SKU		UOM	Order	List price	Disc %	Lock	B/O OK		Sub Total	842.7
9780271023229	...	EA	6	34.95	0.000			Enter line	Shipping	0.0
Theurgy and the Soul: The Neoplatonism of Iamblichus			Extension		209.70				Total	842.7

Inventory | Sales | POs | Returns | **CBOs**

CustCode	Customer	Phone	Order	Qty	Date	PO #	Vendor		Status	Posted	Due		PO Qty	Item Status	Notified	BO	Notified In	Note
OLAFR	Raederer, Olaf		CO # 000012	1	8/19/2010 9:59:16 PM	PENN11BEA	Pennsylvania State Univ Press	Draft	/ /	: : AM	/ /	: : AM	6	Draft	/ /		/ /	

These InfoPanels are available throughout the program to help you with managing ordering, receiving, returning books to vendor, managing special orders, and elsewhere. They are just one more way that Visual Anthology's robust reporting capabilities give you the information you need, when you need it.

Conclusion

Anthology is all about providing you with the information you need to run your business. It does this with a large suite of standard reports (many highly customizable); with customer reporting through Queries; and through on-screen displays show focus in on giving you the information for the task at hand. And Anthology information is actionable: whether allowing you to export reports as spreadsheets or pdf files, or even (with Queries) giving you the tools to actually change the information you as you view it. With Anthology's reporting and on-screen information, it's easy to connect with the vital information you need to run your business.