# Favourite Reports

# 2013

A guide to Report Designer in Horizon.

Horizon 3.357

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### 1. Introduction

Over the next couple of pages this will display how to use the basic functionality of favourite reports.

Favourite Reports is used to setup the default reports that are shown in the **Report** section on the left hand side of Horizon. This allows you quick access to the reports you run regularly rather than you having to trawl around daybooks to find the report you want to run.



## 2. Setting up Favourite Reports

To setup your favourite reports:

- 1. Select Utilities.
- 2. Select Favourite Reports.

It will then popup the window below.

| Tavonte Reports                                  |  |  |   |
|--|--|--|---|
| Bepatz   | Avenul 7162.2 col                                  | Monthlu Gross Margin - Suppon                      |   |
|  | □ KF26051 296778                                   | Monthly Gross Margin - Summary - Invoiced          |   |
| Action Activity by Assigned                      | KE26054 296794                                     | Sales Quotes                                       | Sales Ledger LIB                                    |
| Action Activity by Assigned Contact              | In Losson Loor of                                  | Dunte Conversion Analysis                          | Aged Debtors (Summary) by Ben                       |
| Overdue Actions Beport by Assigned               | Balance Sheet                                      | Unconverted Quotes                                 | Daily Bankings Till                                 |
| Ben Sales Pineline                               | Creditors Balance to Period                        | Stock Card   | Deliveries not Invoiced                             |
| Ben Sales Pineine - Management                   | Debtors Balance to Period                          | Stock Movements and Adjustments                    | Order not Invoiced                                  |
| Automate   | Internal Accounts SOBD Listing Detailed            | Stock Movement at Current Cost - by Bange          | Til Bennt   |
| Account Manager                                  | Internal Accounts SOBD Listing Detailed by Nominal | Stock Valuation At Current Cost                    | Sales Orders and Beturns LIB                        |
| Back Orders                                      | Nominal Activity                                   | Stock Valuation & Last Cost                        | All Customer Sales Trends (Detailed) by Ben         |
| Cal Manager                                      | Nominal Activity Summary                           | Stock With No Bin Location At Current Cost         | Back Order- by Beo with PO Links - Horizon V3 Only  |
| Contracts No Ben                                 | Nominal Ledger - Movement Benort                   | Stock With No Bin Location & Last Cost             | Back Orders - BullaM                                |
| Expiring Deals                                   | Nominal Ledger - Trial Balance                     | Trader   | Back Orders - By SOP                                |
| □ Linex  | Nominal Listing                                    | Branch Ton Products - By Dty                       | Customer Sales by (Ben ner entry) Aged              |
| None Spenders                                    | Profit & Loss - Budgets                            | Complete Product Listing - Bu Dtu                  | Dailu Gross Margin - Bu SOP                         |
| OS Purchase Orders                               | Purchase   edger                                   | Complete Product Listing - By Dty - Priced         | Gross Margin Summary- By Source Between Dates       |
| Product Discrepancies                            | Aged Creditors (Detailed)                          | Complete Product Listing - EOS - Priced            | Online Order Entries                                |
| Ouote Chase                                      | Aged Creditors (End Of Month)                      | Customer Address Labels By Rep Inc Contact         | Stock Card LIB                                      |
| Cal Manager                                      | Aged Creditors (Summary)                           | Customer Address Labels by Ben                     | Product Split Packs                                 |
| Call Manager                                     | Monthly Purchase Daybook Listing                   | Labels - Customer Addresses - Lopp                 | Stock Movements LIB                                 |
| Cal Off Orders                                   | Payments Due Benort                                | Meter Beadings                                     | Negative stock                                      |
| Call Off - Priced                                | Purchase Davbook Listing Between Dates             | Product Range Spend Analysis                       | Remaining Call Offs                                 |
| Call Off Bemaining                               | Purchase Orders Not Invoiced                       | Product Bange Spend Analysis By Dept               | Stock Valuation At Current Cost Inc 90 Day Movement |
| Catalogues                                       | Stock Value - Movement by Banne - Detailed         | Products Purchased - By Dty - Priced               | Stock Valuation At Current Cost by Cost             |
| Standard - Catalogue Export                      | Stock Value - Movement by Bange - Summary          | Spend Beport - By Product Bange                    | Stock Valuation At Last Cost - By Bange And Group   |
| Cherks   | Purchase Orders and Beturns                        | Spend Beport - By Product Bange - Breakdown        | Stocked out of use                                  |
| Aufit Search                                     | Outstanding Purchase Orders                        | Spend Beport - By Product Bange - EDS              | Trader LIB  |
| Check - Aged Debtors (End Of Month) Differences  | Product Discrepencies                              | Spend Report - By Product Range - Furniture        | All Customers Listing for Rep                       |
| Check - Allocations                              | Sales Ledoer                                       | Top 100 Products - By Oty                          | All Customers Listing for Bep[Detailed]             |
| Check - Detail Trader vs Entry Trader            | Aged Debtors (Detailed)                            | Top 100 Products - By Qty - Priced                 | Company Top 100 Products - By Qty - Priced          |
| Check - Nominal Postings                         | Aged Debtors (End Of Month)                        | Top 100 Products - By Value                        | Contact List - Accounts                             |
| Check - Nominal Postings Detailed                | Aged Debtors (Summarv)                             | Web Enabled Contacts Last Ordered Date             | Contact List - Sales                                |
| Check - Post Posting Discrepancies               | Daily Bankings Report                              | Web Reports  | Customer Spend By Branch By Product Range           |
| Check - Purchase Allocations                     | Debtors Due Report                                 | Web Customer Sales Trends By Range                 | Customer Spend by Branch Partial Summary            |
| Check - Purchase Transactions                    | Debtors Overdue Report                             | Web Customer Sales Trends By Range - Detailed      | Customer Spend by Branch Summary                    |
| Check - Sales Nominal Postings                   | Monthly Sales Daybook Listing                      | Web Customer Spend by Branch by Range Detailed     | Customer Spend by Branch by Range Detailed          |
| Check - Trader Balances                          | Sales Davbook Listing Between Dates                | Web Customer Spend by Department by Range Detailed | Customer Spend by Department Partial Summary        |
| Check - Transaction Dates Inside Wrong Period    | Sales Orders Not Invoiced                          | Web Customer Spend by Range Detailed               | Customer Spend by Department Summary                |
| Check - Transaction Dates Outside Correct Period | Sales Orders and Returns                           | Web History Ordered-Returned                       | Customer Spend by Department by Range Detailed      |
| Control Check                                    | Back Order Report by Cost Centre Inc PORD Ref      | Reports Library                                    | Customer Spend by Product Range Detailed            |
| Debtors Creditors Balance to Period              | Back Orders - By Rep                               | 02NET02NET   | Customers Not Ordered This Month                    |
| ContractsContracts                               | Customer Sales Trends (Branch Summary)             | Office2Net Online Price Export - SPICER            | Customers Not Ordered This Month - Last month       |
| Contracts Due to Expire                          | Customer Sales Trends (Detailed)                   | Office2Net Online Price Export - VOW               | Customers Not Ordered This Month and Not on Stop    |
| Unconverted Quotes                               | Customer Sales Trends (Detailed) by Sales Orders   | Account Checks LIB                                 | Customers Not Ordered in Three Months               |
| Credit Check                                     | Customer Sales Trends (Summary)                    | 30 Days Credit Check - Summary                     | Customers Ordered Current or Last Month Not In Six  |
| Standard - 30 Days Credit Check                  | Customer Sales Trends (Summary) by Sales Order     | Accounts With No Rep                               | Customers Ordered This Month Not In Six             |
| Standard - 60 Days Credit Check                  | Daily Gross Margin - By Rep Orders                 | Entries Where Rep On Entry Is Not Rep On Trader    | Deal Trader Export                                  |
| Standard - 90 Days Credit Check                  | Daily Gross Margin - Summary                       | Dot Matrix SDEL LIB                                | Labels - Customer Addresses - Logo                  |
| Delivery and Collection                          | Daily Gross Margin Report - By Rep                 | FX890 SDEL   | Old Meter Readings                                  |
| Marketing  | Daily Gross Margin Summary-By Source               | Order Processing LIB                               | Spend By Department (Multi Account)                 |
| Contact Check List                               | 🔲 Gross Margin Between Dates - Summary             | Posting Report (Summary)                           | Top 50 Traders by Spend                             |
| Standard Letter                                  | 📙 Linex Report - Line Detail                       | Picking List LIB                                   | Trader Audit Details By Mod Date                    |
| Marketing Labels                                 | Monthly Gross Margin - By Rep                      | Picking List - By Entry                            | Turnover List                                       |
| Avery L7159 3 col                                | Monthly Gross Margin - By Rep - Invoiced           | Picking List - By Van Route                        |   |
|  |  |  |   |
| V OK   |  |  | X Cancel  |
|  |  |  |   |

- 3. Select your favourite Reports.
- 4. Select **OK** to confirm your selection.

If you now select the **Report** section in Horizon, these reports will now displayed to be run.

