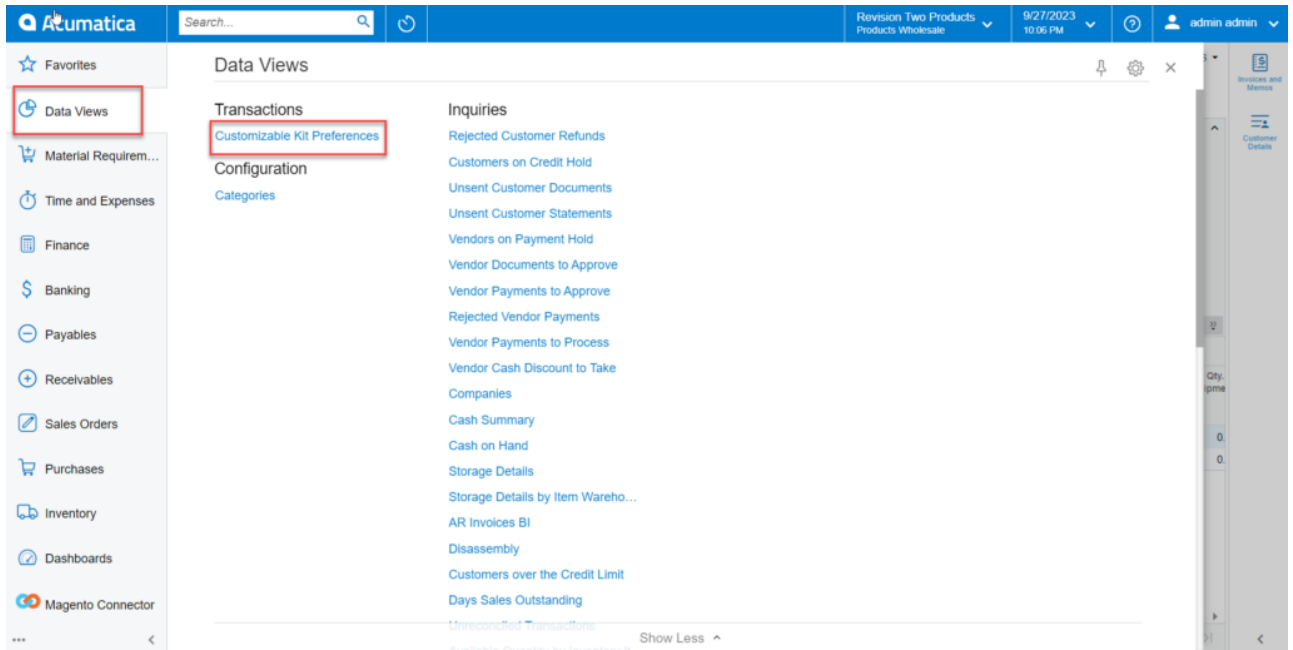


# Viewing Reports

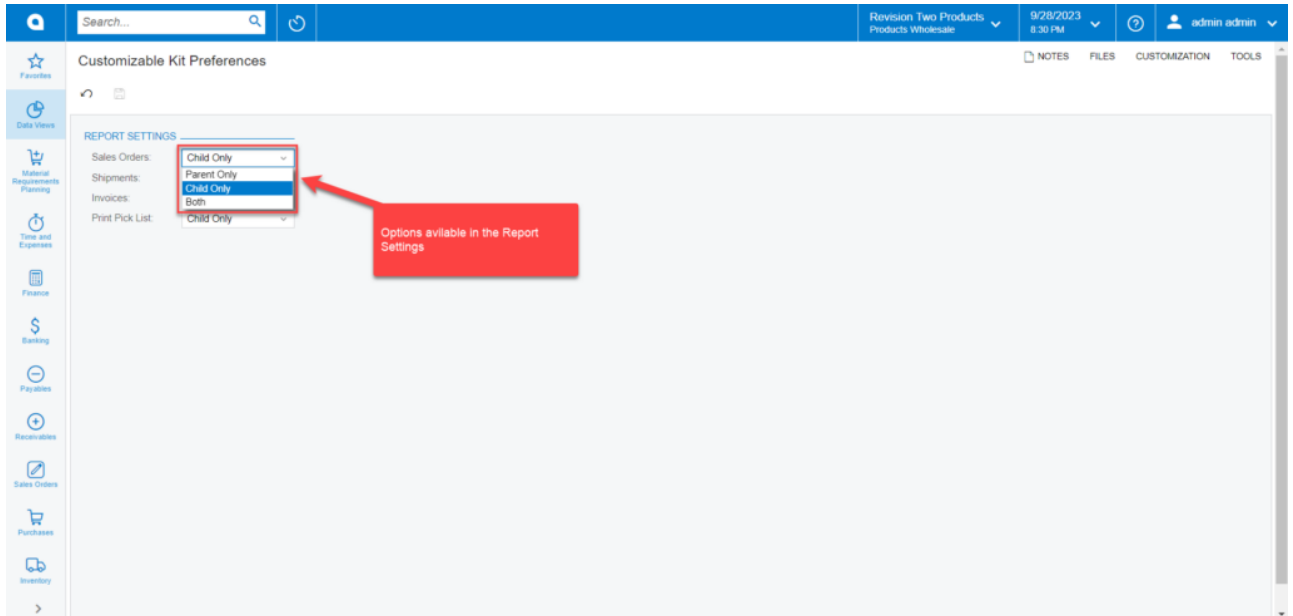


1. To view the Reports, go to the **[Data Views]** section on the left panel. Click on the **[Data Views]**.
2. Click on **[Customizable Kit Preferences]** under Transactions.



## Data View

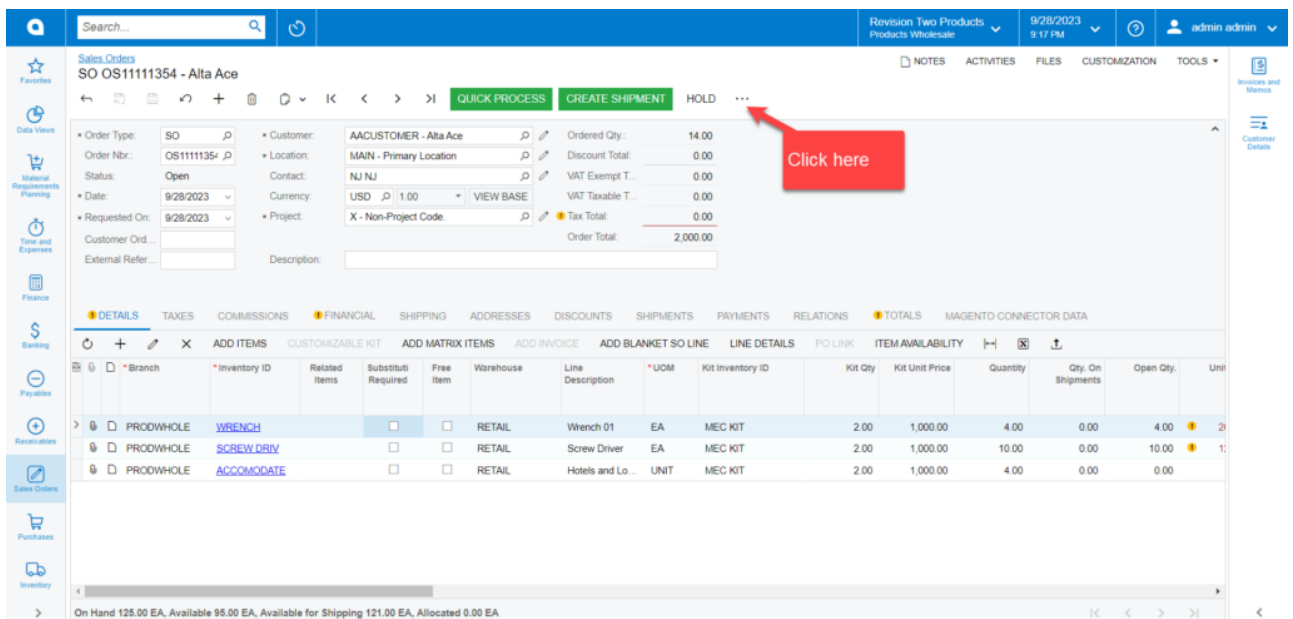
- On Clicking **[Customizable Kit Preferences]**, you will have Report Settings with Sales Order, Shipments, Invoices, and Print Pick List.
- To this we have three Report options.
  - Parent Only
  - Child Only
  - Both.
- To generate reports one of the options should be selected as shown in the figure.



The screenshot shows the 'Customizable Kit Preferences' screen. On the left is a sidebar with icons for Favorites, Data Views, Material Requirements Planning, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, and Inventory. The main area is titled 'REPORT SETTINGS' and contains a list of report settings: Sales Orders, Shipments, Invoices, and Print Pick List. Each setting has a dropdown menu. The 'Shipments' dropdown is highlighted with a red box, and a red arrow points to it with a text box that says 'Options available in the Report Settings'. The dropdown menu for 'Shipments' shows the following options: Child Only, Parent Only, Child Only (highlighted), Both, and Child Only.

## Customizable Kit Preferences

- On Selecting the Report options, navigate to the sales order screen.
- Click on [...] as shown in the figure.

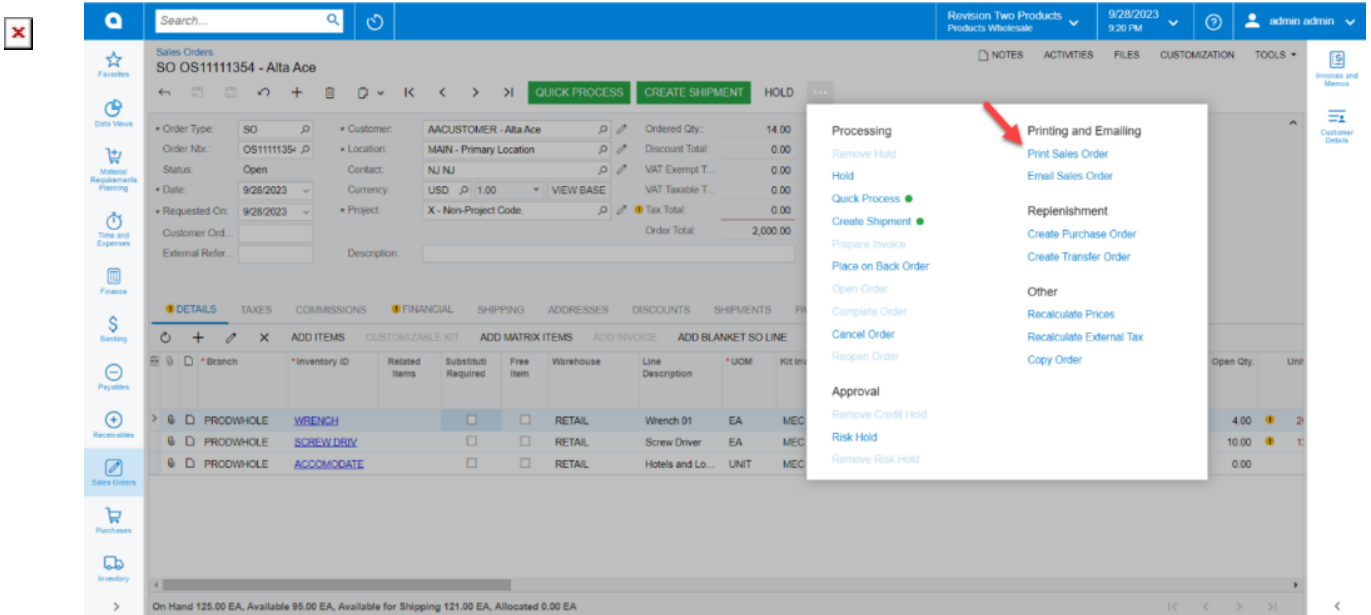


The screenshot shows the 'Sales Order' screen for 'SO OS11111354 - Alta Ace'. The top bar includes a search bar, a refresh icon, and a user profile. The main area is divided into two sections: 'Order Details' and 'Item Details'. The 'Order Details' section contains fields for Order Type, Order Nbr., Status, Date, Requested On, Customer, Location, Contact, Currency, Project, and Description. The 'Item Details' section contains a table with columns for Branch, Inventory ID, Related Items, Substituted, Free Item, Warehouse, Line Description, UOM, Kit Inventory ID, Kit Qty, Kit Unit Price, Quantity, Qty. On Shipments, Open Qty., and Unit. A red arrow points to the 'HOLD' button in the top right corner of the 'Order Details' section, with a text box that says 'Click here'.

Branch	Inventory ID	Related Items	Substituted	Free Item	Warehouse	Line Description	UOM	Kit Inventory ID	Kit Qty	Kit Unit Price	Quantity	Qty. On Shipments	Open Qty.	Unit
PRODWHOLE	WRENCH				RETAIL	Wrench 01	EA	MEC KIT	2.00	1,000.00	4.00	0.00	4.00	21
PRODWHOLE	SCREW DRIV				RETAIL	Screw Driver	EA	MEC KIT	2.00	1,000.00	10.00	0.00	10.00	11
PRODWHOLE	ACCOMODATE				RETAIL	Hotels and Lo...	UNIT	MEC KIT	2.00	1,000.00	4.00	0.00	0.00	

## Sales Order screen to print Report

3. On clicking **[Print Sales Order]** you will get a report.



The screenshot displays the Fusion Software interface for a Sales Order (SO OS11111354 - Alta Ace). The interface includes a top navigation bar with a search bar, a status bar showing 'Revision Two Products' and 'Products Wholesale', and a user profile 'admin admin'. A left sidebar contains various navigation icons. The main area shows order details, including Order Type (SO), Order Number (OS11111354), Status (Open), Date (9/28/2023), and Customer (AACUSTOMER - Alta Ace). A dropdown menu is open, showing options under 'Processing' (Remove Hold, Hold, Quick Process, Create Shipment, Prepare Invoice, Place on Back Order, Open Order, Complete Order, Cancel Order, Reopen Order) and 'Printing and Emailing' (Print Sales Order, Email Sales Order). The 'Print Sales Order' option is highlighted with a red arrow. Below the dropdown, a table lists items with columns for Branch, Inventory ID, Related Items, Substituted, Free Item, Warehouse, Line Description, UOM, and Kit. The table shows three items: WRENCH, SCREW DRIV, and ACCOMMODATE. At the bottom, a status bar indicates 'On Hand 125.00 EA, Available 95.00 EA, Available for Shipping 121.00 EA, Allocated 0.00 EA'.

Print Sales Order Screen

