

Spotlight - Reporting Tags

Preparation

Preparation if using demo data attached:

1. Import Demo Data
2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99
3. Setup Module Nominal Ledger for Login
Modules>>System>>Settings>>Access Rights>>Admin>>Change Line 1>>Module>>Nominal Ledger>>Full

Preparation for creating your own demo data:

1. Import Demo Data
2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99
3. Create New Invoices in the current period for Sales Person SJ
4. Create a New Salary Transaction in Nominal Ledger with Objects for SJ
5. Create 5 Quotations with Tag for PROM, with different Quotation Classes:
(4 with V for valid)
(1 with W for won)

Script

Welcome to this short demonstration of Reporting Tags in Standard ERP.

Reporting Tags are a useful tool for analyzing your business with multi-dimensional reports and data filtering for specific information.

Standard ERP uses tags to slice and dice your data to produce more meaningful reports by (department), product category, salesperson, branch or even sub-account in the General Ledger.

ACTION: Open General Ledger >> Reports >> Profit&Loss report and on report specification window select the Objects/Tags field and Paste Special window. Show Objects for dept, Product Category, Sales Person and Subaccount in GL.

You can easily track the profitability per product, for example, or product category, - and you can evaluate salesman and location results.

ACTION: On same Profit&Loss report select Object "SJ" then run the report and show sales.

Let's analyze the profitability of our Chicago location.

In the General Ledger, we can run the Profit and Loss report with the Report Tag BRANCH 1 to see whether we are making a profit.

ACTION: Select Report, select Profit & Loss, Enter BRANCH01 in Tags field, select Run and show profit.

We can also run the Profit and Loss Report for a product category as we have set this up as another Tag.

ACTION: Select Report, select Profit & Loss, Enter WIND in Tags field, select Run and show profit.

Tags can be used from anywhere in the system. We can get more in-depth reporting on how promotion is doing, salesmen profitability, and much more!

ACTION: Select Report AR >> Invoice Journal >> set Tag/Object from Row >> PROM and RUN - point at Tag/Object Promotional Items in the header of a report.

Stay ahead of the competition and make informed decisions about your business with Standard ERP's reporting tags.