

Design Inventory Report

See: <https://support.windwardsoftware.com/a/solutions/articles/66000490285>

Overview

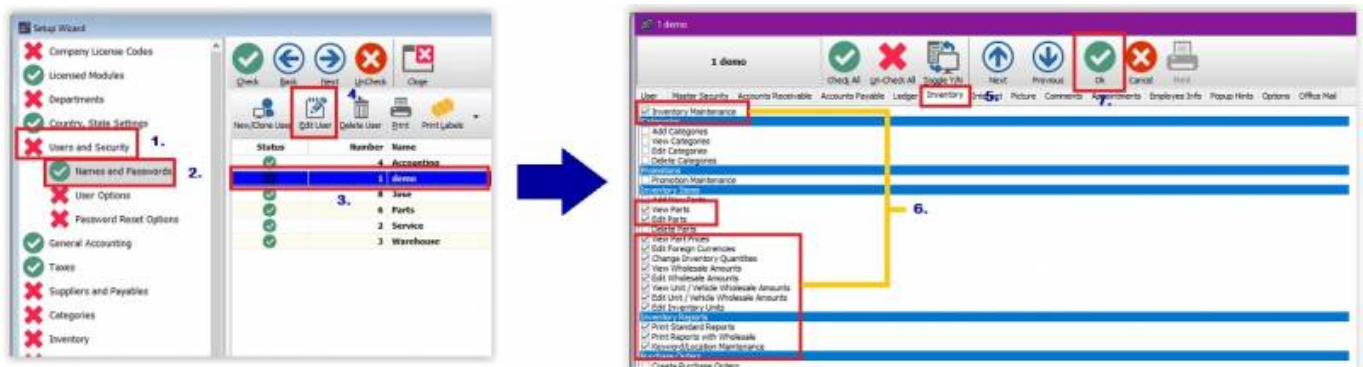
System Five has several customizable reports and one of which is the Design Inventory Report. This report gives you the ability to customize an inventory report which can be useful in tracking your current inventory quantities. It also helps you manage your inventory pricing.

Using the Design Inventory Report, you are able to design the report that you need to measure specific performance aspects of your business. With more than 40 filtering criteria and more than 200 available columns, you'll never again be without the right information. In addition, you are able to [export your entire report to Microsoft Excel](#) with the click of a button.

Requirement

To access this report, System Five User needs to check some boxes under the Users and Security.

1. [Setup Wizard](#) > [Users and Security](#) > [Names and Passwords](#)
2. Select a User.
3. Click 'Edit User'.
4. Go to 'Inventory' tab.
5. Check the following boxes provided in the screenshot below.



Common Usage of Design Inventory Report

1. Designing Inventory Report

This gives System Five user the ability to customize an inventory report such as identifying the inventory's category, list price, cost/landed price, inventory description, supplier, and etc.



2. Adjust inventory pricing

- A. Go to [Inventory and Purchases > Inventory Reports > Design Inventory Reports](#)
- B. Check on the box: **Adjust inventory included in this report**. (see figure 2)
- C. The Inventory Price Schedule window should show up. Select the price schedule, you would like to update. (see figure 2)



E. Confirm 'Update master default item with these options?', you may click 'YES' or 'NO'. (If you wanted to save the changes, you made to your default inventory item, click 'YES', otherwise, click 'NO'.)

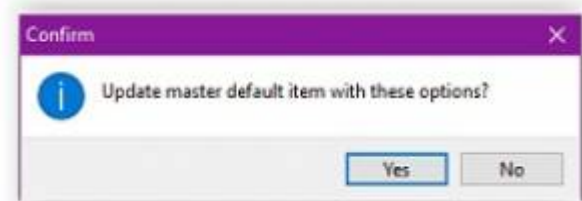


Figure 3
F. Click on 'View' and then 'Yes'



Figure 4
3. Change inventory tax

Most (if not all) inventories are subject to tax. The tax/es applied (to your inventory) is dependent on which state you're on and what is applicable to your business. The Design Inventory Report will help you enable the applicable tax/es necessary for your inventory.

- A. Go to [Inventory and Purchases](#) > [Inventory Reports](#) > [Design Inventory Reports](#)
- B. Check on the box: **Adjust inventory included in this report**. (see figure 5)
- C. The Inventory Price Schedule window should show up. Select the applicable taxes for your inventory. (see figure 5)

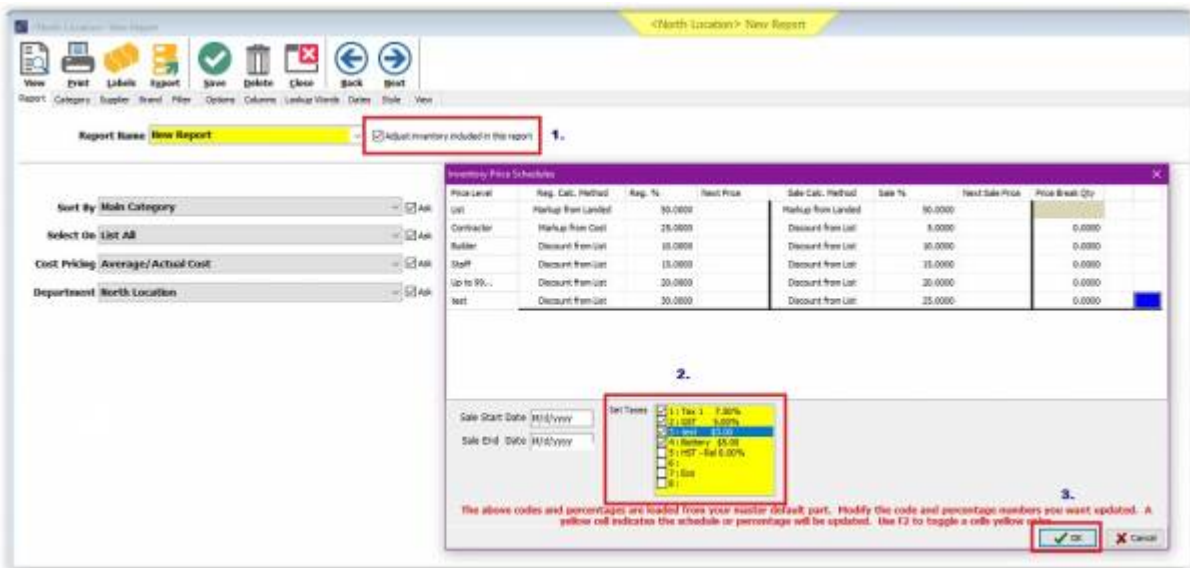


Figure 5
D. Click 'OK'.
E. Confirm 'Update master default item with these options?', you may click 'YES' or 'NO'. (If you

wanted to save the changes, you made to your default inventory item, click 'YES', otherwise, click 'NO'.) (see figure 3)

F. Click on 'View' and then 'Yes' (see figure 4)

4. Enable inventory sale date

An additional feature of the report is setting up a sale date for your inventory. This is especially helpful if all the items in a category or under a specific supplier are on sale. Activating sale dates in the design inventory report will affect all inventory items. That is why it is important to make use of the report's filtering feature (e.g. by the supplier, by category, etc.). In that way, changes will only apply according to the filters you made.

A. Go to [Inventory and Purchases](#) > [Inventory Reports](#) > [Design Inventory Reports](#)

B. Check on the box: **Adjust inventory included in this report.**

C. The Inventory Price Schedule window should show up. Put in the start and end date of the sale's effectivity.

Figure 6

D. Click 'OK'.

E. Confirm 'Update master default item with these options?', you may click 'YES' or 'NO'. (If you wanted to save the changes, you made to your default inventory item, click 'YES', otherwise, click 'NO'.) (see figure 3)

F. Click on 'View' and then 'Yes' (see figure 4)



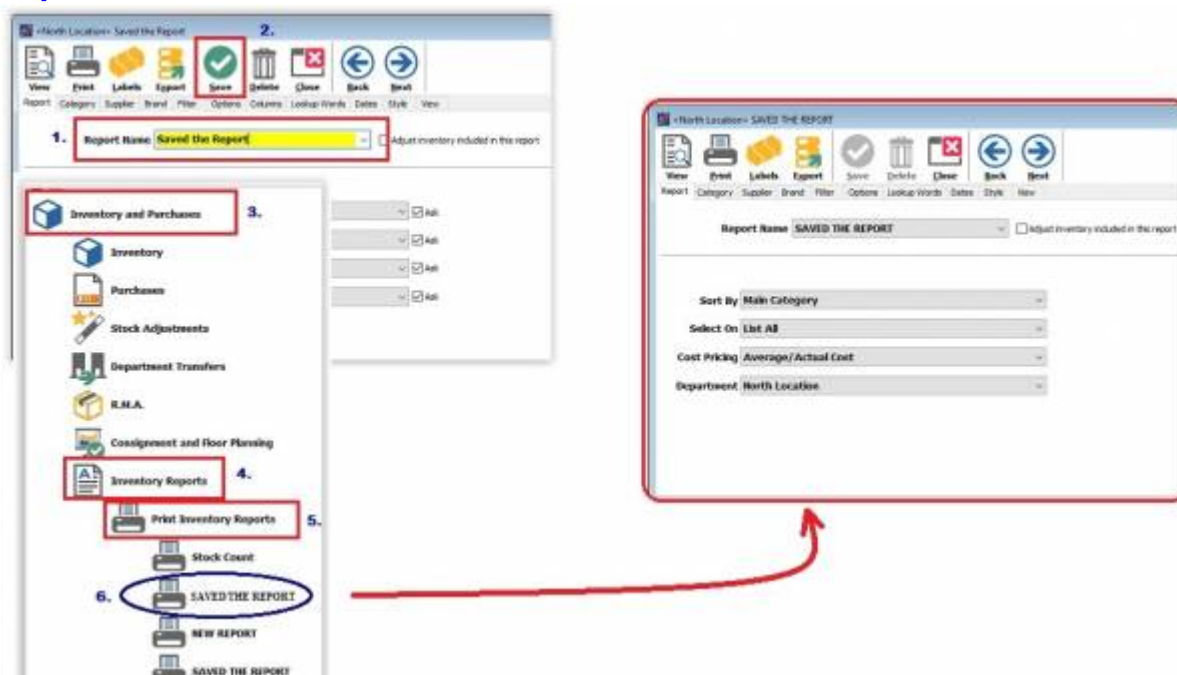
Any changes made (e.g. price percentage rate, pricing method, taxes, and etc.) should always have a **yellow** highlight as provided in the screenshots above.

Common Usage of Design Inventory Report

- Aged Inventory
- Category Analysis
- Creating Scan Sheets
- Comparative Sales by Date
- Creating Labels after Price Change

How to Save Reports in the Design Inventory Report

Once you're able to customize and build the report suitable for your business, you can 'Save' the report and make it available to staff. This saved report will be available via the **Print Inventory Reports**.



Check out this Solution Series Video

This video shows how to use the Design Inventory Report to Print Price Change Labels.



Note: You may refer to [Working with Design Inventory Reports](#) for further details and demonstrations in utilizing System Five Design Inventory Report.

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