## Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

## Adding Sales Analysis Reports to the Navigator

Release 3.00 users can take advantage of the new easy way to add frequently used Sales Analysis Reports to the navigator eliminating the need for loading them each time.

1. First Load or create your SA report. In this example we will use a pre created SA report.

Reports > Sales Analysis > Analysis Report Designer

Click LOAD then double click on your Report



2. Your report definition will be loaded. Now click on 'Add to Navigator' ightarrow



	Fields	Sort/Limit	Output Selection	s Document Select	tions Data Selections	Comment	SQL Query	
Analysis Ty	pe							
Invoic	es		Orders					
Analyse								
AR Cust	tomers							
IC Produ	ucts							
=								
Analysis Ra	ange			Crosstab				
Analysis Ra Analysis	ange —	Year		Crosstab	b Report			
Analysis Ra Analysis X As At Pe	ange is eriod	Year Sep 20	08	✓ Crosstab Crosstal ✓ ✓	b Report ✓ per Co	plumn		
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Analysis Ra Analysis Analysis As At Po From P To Peri	ange is eriod Period	Year Sep 20	08	Crosstab Crosstal	o Report ✓ per Co ⊚ Start of Range ◯ End of Range	olumn		
Analysis Ra Analysis As At Pe From P To Peri X From D	ange is eriod Period iod )ate	Year Sep 20	08	Crosstab Crosstal	o Report ✓ per Co ⊚ Start of Range ○ End of Range	olumn		

The Script Shortcut window will open with Navigator details filled in for you so that your report will appear when you click on: Reports > Sales Analysis > Top 5 Products Per Customer – Year

Before saving, you can select your User Code so the report will only show in the navigator when you are logged in.

You can also assign a keyboard shortcut and\or glyph. If you choose a glyph, make sure you tick 'Available on Toolbar' so that you can click the glyph to run the report. If you have selected your user code, the glyph will only display when you are logged in. If you don't want your report to appear under the Reports Tab, you can select another Tab, or create your own just by typing in the name you wish the Tab to display.

See the F1 help for more details  $\rightarrow$ 

Shortcut Type	SA Report
Report Name	Top 5 Products Per Customer.pfn
User Code	
Shortcut Key	
Glyph	
Available on T	oolbar
Button details Button Order	
Button Hint	
Available in Na Navigator det Tab Name Action Name Navigator Orde	avigator aails Reports Sales Analysis\Top 5 Products per Customer - Year er 10
	Save Cancel



Tip: If you want to change something on the report before you run it, just right click the report and click 'Edit Shortcut Source'  $\rightarrow$ 



This will open the report up in SA. Make the necessary changes then save.

You can also edit or delete the shortcut.

Add to Navigator is also available in other places in Accredo, such as Report Lists, JA Reports, GL Financial Reports, Custom Reports, Accredo Forms, Custom Forms.