

## How to create a report of sales by GL code for a group of customers

To accomplish this task two requirements exist.

1. You can use the field "status" in the AR Master file to identify the group of customers
2. You can use the field "abc code" in the IC Master to identify the GL codes.

Assuming these conditions are met here is the procedure.

Go to **AR, 4, 5** and enter a status code to use for this report. For example we are suggesting code **G** (For good report, but use whatever character you want)

Go to **AR, 1, 1** and change the "status" of the specific customers to be grouped into this report to "status" **G**. Obviously no other customer outside the desired group can be coded as status G.

Next go to **PD** and select **FG** to set the ABC code to **5** for SKU's that are GL code 505.

1. Data file SDNAME.....: ( **INPROFLE** )
2. Flag field number.....:( **40** )
3. Flag Value.....:( **5** )
4. Conditional Field number.: ( **6** )
5. Conditional Operator ..... ( **=** )
6. Conditional Value ..... ( **505** )

Run and it will show 100% when finished.

Run it again after you change number 3 above from 5 to **6**  
And change number 6 above from 505 to **506**

When finished the second time you have now set both the customer values and the product values therefore you are ready to run the report using **OP, 5**.

On page 1 of the OP, 5 setup screen chose B for both, C for customer and chose the time period of choice. **Do a short time period first to run a test report!**

On page 2 put a **G** in the ( ) on the Customer status line under Begin.

For the 505 report put a **5** in the ( ) on the ABC code line under Begin

Run the test report to see if all is okay, then if so, run the two reports for 505 and 506 using the G status code.

Long term issues. You can keep these customers grouped as G as long as you remember to make any new member of the group status G too.

Frankly, I would not try to keep the glcodes and abc codes in sync, simply run the two file flag procedures prior to running this report in the future.