



April, 2014

Register a Custom V9 Sales Tax Report

In this article we will show how to install a Sales Tax Report by Store. This report is not a standard report found in the base Retail Pro reports. This is a custom SQL package with a report configured to access the custom package. Use this link to download the files referred to in this article.

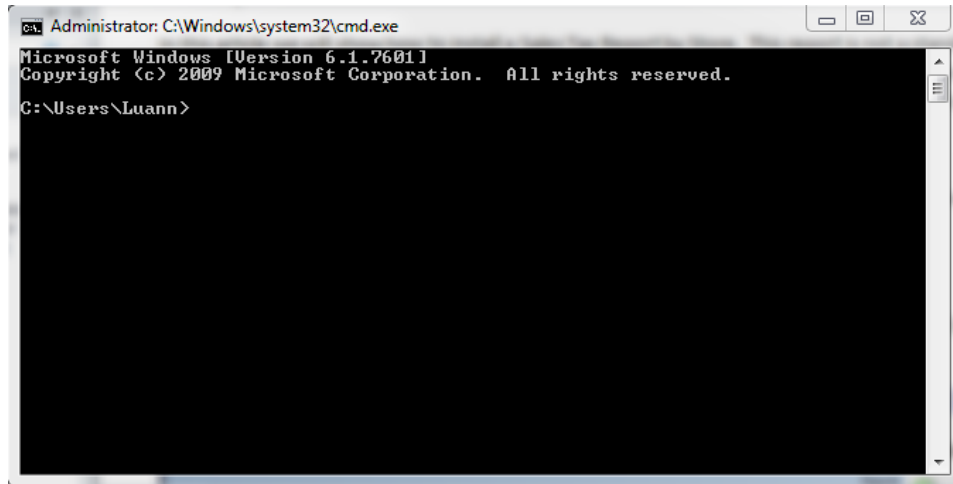
http://www.bighairydog.com/DOWNLOADS/V9_TAX_REPORT_FILES.rar

After unzipping the TAX REPORT. Zip to your desktop, copy the **REPORT_MERCHANDISE_BP.PCK** file to the drive where your Retail Pro9 is installed. Copy the **!M1_Tax_report-Str-Tax.rpt** to the RetailPro9\Reports\Custom directory.

First step is to install the custom SQL package for this report. There is also a short video that demonstrates this process at this link

<http://www.bighairydog.com/training/self-training-videos-v9.php>

Open a DOS window with the CMD command. (click on the WINDOWS START menu icon, type CMD in the search box) You will see a window like this.



```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Luann>
```

Change drives to the place where you copied the REPORT_MERCHANDISE_BP.PCK. In this case, Retail Pro9 is installed on C: drive, yours may be R: or D:.

Type **sqlplus** and press ENTER, at the “enter user name” prompt, type **reportuser@rproods**, and the password **report**

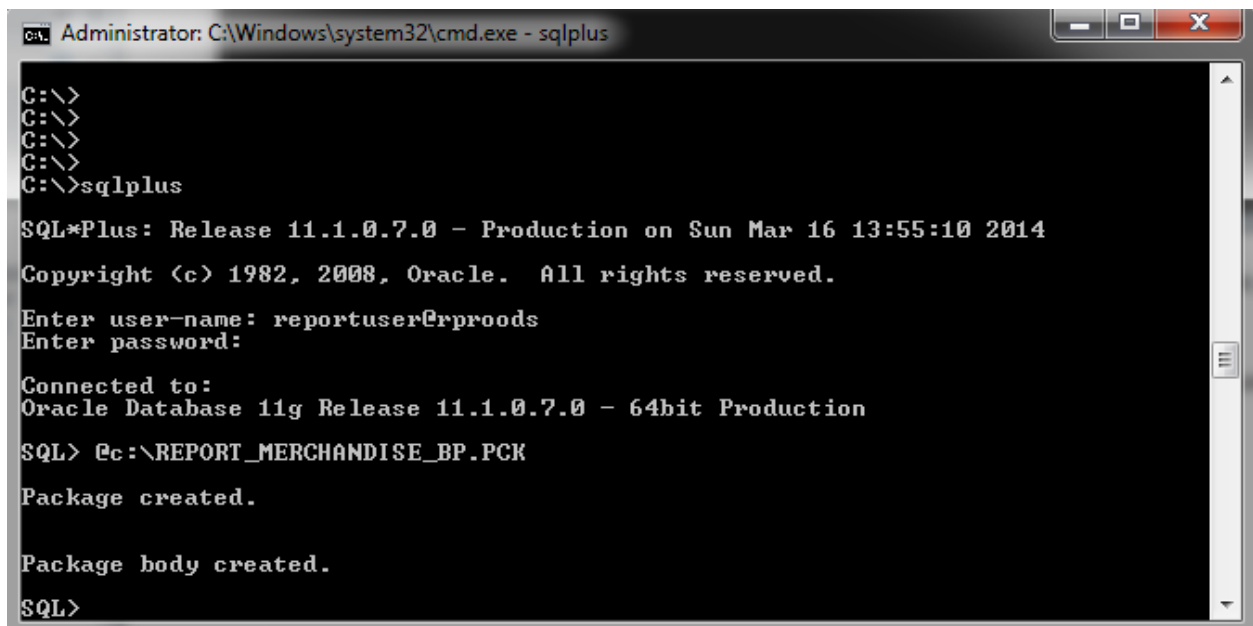
If you have logged in successfully, you will see this prompt :

SQL>

Type this command:

@c:\REPORT_MERCHANDISE_BP.PCK

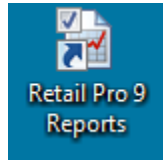
And press ENTER. If you are successful, you will see PACKAGE BODY CREATED.



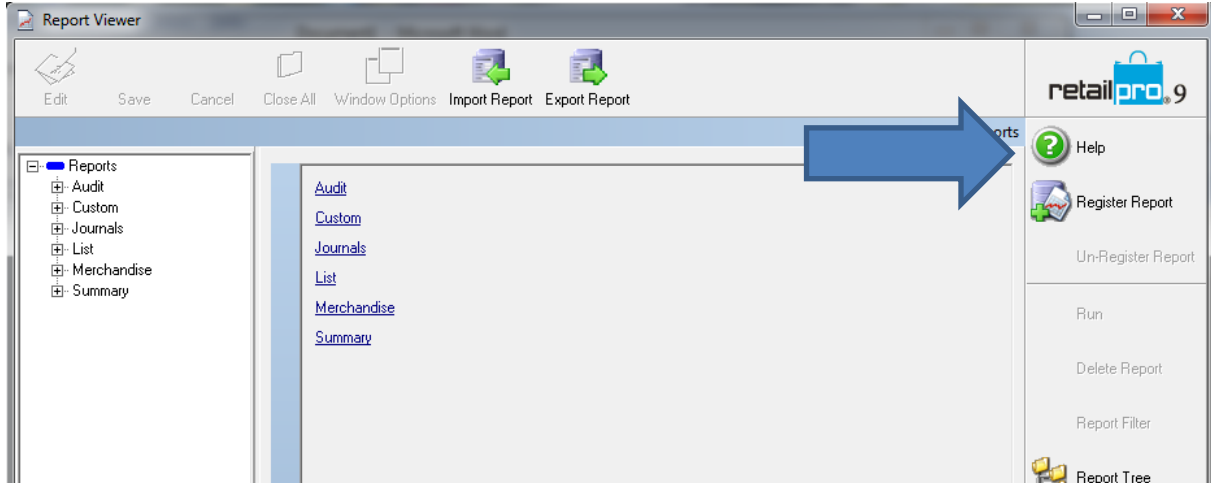
```
Administrator: C:\Windows\system32\cmd.exe - sqlplus
C:\>
C:\>
C:\>
C:\>
C:\>sqlplus
SQL*Plus: Release 11.1.0.7.0 - Production on Sun Mar 16 13:55:10 2014
Copyright (c) 1982, 2008, Oracle. All rights reserved.
Enter user-name: reportuser@rproods
Enter password:
Connected to:
Oracle Database 11g Release 11.1.0.7.0 - 64bit Production
SQL> @c:\REPORT_MERCHANDISE_BP.PCK
Package created.
Package body created.
SQL>
```

Type **exit** to leave sqlplus.

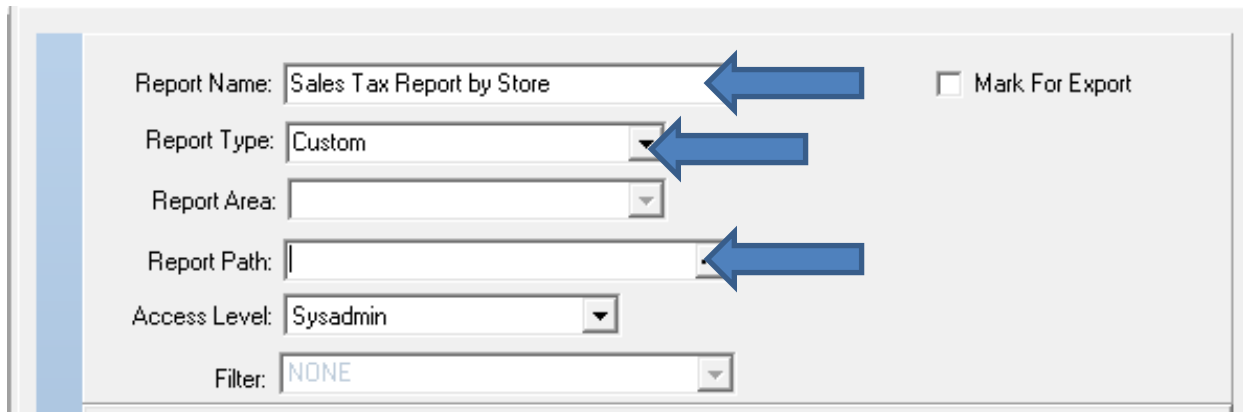
Now you can register the report. Start the RETAIL PRO9 REPORTS from the icon on the desktop.



And click on REPORTS in the upper left corner. You will see this screen. Click on REGISTER REPORT on the side menu.

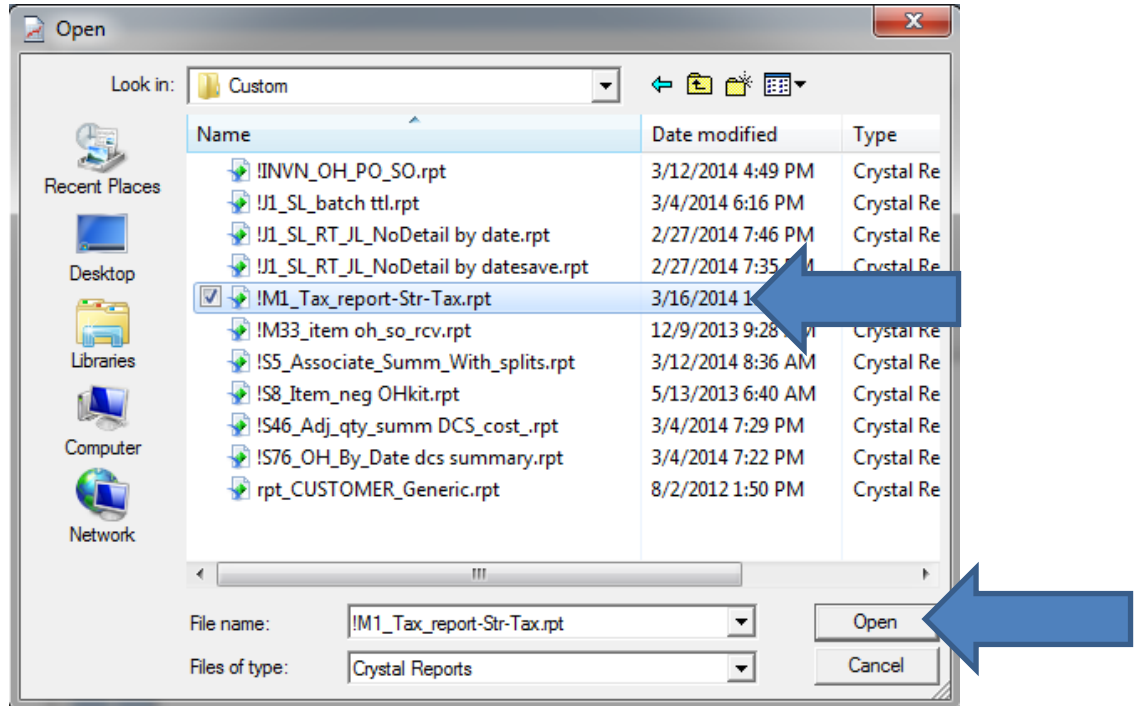


Fill in the REPORT NAME (You can use any name you want on your system). Select CUSTOM in the REPORT TYPE box.



And use the browse in the REPORT PATH box to navigate to the report and click OPEN when it is selected.

IM1_Tax_report-Str-Tax.rpt

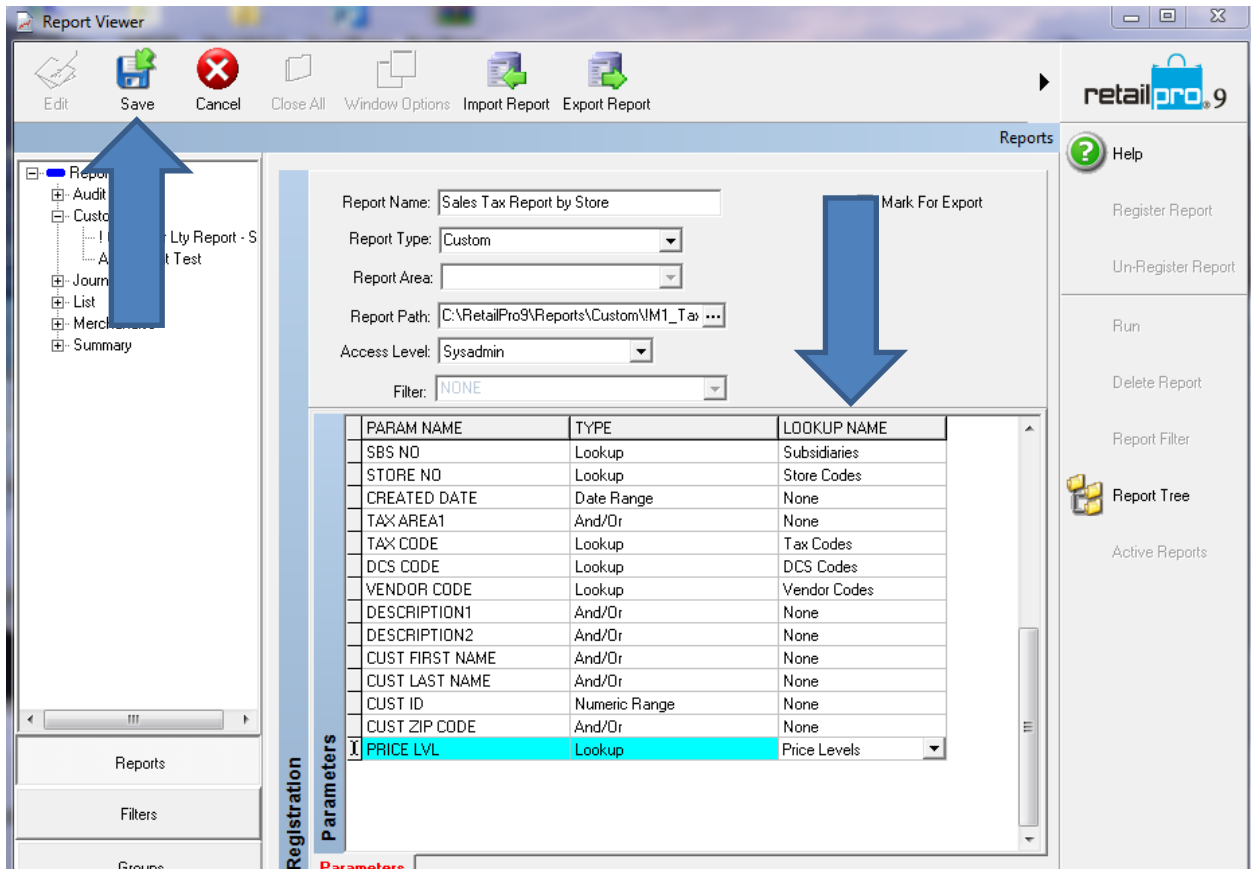


Now you must link each LOOKUP field with the appropriate field in the database. Use the pulldown in the LOOKUP NAME column on each row.

PARAM NAME	TYPE	LOOKUP NAME
SBS NO	Lookup	None
STORE NO	Lookup	None
CREATED DATE	Date Range	None
TAX AREA1	And/Or	None
TAX CODE	Lookup	None
DCS CODE	Lookup	None
VENDOR CODE	Lookup	None
DESCRIPTION1	And/Or	None
DESCRIPTION2	And/Or	None
CUST FIRST NAME	And/Or	None
CUST LAST NAME	And/Or	None
CUST ID	Numeric Range	None
CUST ZIP CODE	And/Or	None
PRICE LVL	Lookup	None

Parameters

When you are finished, the screen should look like this.



Click the SAVE button at the top and then answer NO to REGISTER ANOTHER REPORT?

You can now run the report with the RUN button on the side menu.

Report Name: Mark For Export

Report Type:

Report Area:

Report Path: ...

Access Level:

Filter:

PARAM NAME	TYPE	LOOKUP NAME
▶ SBS NO	Lookup	Subsidiaries
STORE NO	Lookup	Store Codes
CREATED DATE	Date Range	None
TAX AREA1	And/Or	None
TAX CODE	Lookup	Tax Codes
DCS CODE	Lookup	DCS Codes
VENDOR CODE	Lookup	Vendor Codes
DESCRIPTION1	And/Or	None
DESCRIPTION2	And/Or	None
CUST FIRST NAME	And/Or	None
CUST LAST NAME	And/Or	None
CUST ID	Numeric Range	None
CUST ZIP CODE	And/Or	None
PRICE LVL	Lookup	Price Levels

Side menu options: Register Report, Un-Register Report, Run, Delete Report, Report Filter, Report Tree, Active Reports

Fill in the date you want for the report, and click OK.

Sales Tax Report by Store(Sales Tax Report by Store)

Field	Criteria	Included	Include Nulls
SBS NO	(None)	Include	
STORE NO	(None)	Include	
CREATED DATE	<input type="text" value="1/1/2013"/> to <input type="text" value="12/31/2013"/>	Include	
TAX AREA1		Include	
TAX CODE	(None)	Include	
DCS CODE	(None)	Include	
VENDOR CODE	(None)	Include	
DESCRIPTION1			
DESCRIPTION2			
CUST FIRST NAME			
CUST LAST NAME			
CUST ID	... to ...	Include	
CUST ZIP CODE			
PRICE LVL	(None)	Include	

Buttons: OK, Cancel, Clear All

* Denotes the parameters that are present in the Report

Your report should look something like this.



Report Date: 3/16/2014

Report Time: 16:07

Sales Tax Report by Store

Sales Tax Report by Store

Sbs	Str #Code	Tax Area	Tax Code	Tax Code Name	Ext Price	Ext Tax	Sold Qty
1	0	001					
		CONTRACOSTA	0	TAXABLE	50,502.20	4,292.69	93.00
1	0	001					
		CONTRACOSTA	1	EXEMPT	498.60	0.00	5.00
		CONTRACOSTA					
				Subtotal :	50,998.80	4,292.69	98.00
1	0	001					
				Subtotal :	50,998.80	4,292.69	98.00
1	1	005					
		ALAMEDA	0	TAXABLE	26,496.55	2,252.21	355.00
1	1	005					
		ALAMEDA	1	EXEMPT	1,022.35	0.00	23.00
		ALAMEDA					
				Subtotal :	27,518.90	2,252.21	378.00
1	1	005					
				Subtotal :	27,518.90	2,252.21	378.00
1	2	010					
		SACRAMENTO	0	TAXABLE	56,358.00	4,649.54	101.00
1	2	010					
		SACRAMENTO	1	EXEMPT	1,489.80	0.00	15.00
		SACRAMENTO					
				Subtotal :	57,847.80	4,649.54	116.00
1	2	010					
				Subtotal :	57,847.80	4,649.54	116.00
				Subtotal for Subsidiary Number :1	136,365.50	11,194.43	592.00
				Grand Total :	136,365.50	11,194.43	592