Stock Performance Report

The Stock Performance Report (Inventory/Purchasing>Reports) creates a unique item data table IPPERFORM, which can be the base for custom reports (SRWs) created using the Titan Report Writer. The Stock Performance Report (SPR) setup screen prompts the user to select one of the SRW reports stored in the Stock Performance Reports folder (*yourdata*/FORMS/Titan Reports/IP/Stock Performance Reports) and enter a series of filters. The setup program then builds the IPPERFORM table with the appropriate item data and runs the SRW using it. The advantage of this setup is that IPPERFORM contains data that is otherwise difficult to obtain with the Report Writer SRW reports and standard Titan data tables such as ITEM or ITEMHIST.

IMPORTANT: Reports can be run using IPPERFORM outside of the setup program but the table only contains data created from the setup program so results may not be reliable. If the last run of the setup program was for just one item then any reports run from Report Writer against the IPPERFORM table will only contain that one item regardless of the filters in the SRW. Also, the data in the IPPERFORM table is user dependent. If more than one user runs a report from the setup and their reports contain the same item then two records will exist in the table, with potentially different data depending on when the reports were run. Any SRW designed to be used in this program should contain the USERNAME field, though it can be hidden. The program will then automatically know to run the SRW against only the data created for that user. If the SRW is run outside of the setup program, such as when a report is being designed and tested in the Report Writer, then the USERNAME field should be set to filter (equal) on that user.

Your Stock Performance report folder contains SRWs that can be used as is, but you are by no means limited to these. You are free to modify these reports or create new ones. The dropdown will list any reports it finds in the folder. Be certain to create new names for reports so that they are not accidently overwritten in software updates. Prefixing the names with SPR will help to identify them.

SPR reports are like any other SRW in that they can link any Titan tables with a common field. So, for example, they can link IPPERFORM to ITEM. IPPERFORM simply provides exceptional data in one table making it easier to place in reports.

The IPPERFORM table contains the following fields:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ITEM | Item ID | CLASS | Item class ID | Vendor | Primary vendor ID |
| CLASSDESC | Item class description | COMPANY | Primary vendor name | VendItem | Primary vendor item code |
| AvgMo | Not used | L12sls | Not used | L12slsDol | Not used |
| L12slsCogs | Not used | L12avgMo | Not used | SortField | Item sortcode |
| OnHand | The total on hand for the item | OnSlsOrd | The total on sales orders for the item | OnOrder | The total on purchase orders for the item |
| Min | The company (not warehouse) minimum | Max | The company (not warehouse) maximum | Desc | Item description |
| Desc2 | The second description line of the item | BIN |  | UOFMSALES | Sales UOM |
| UOFMORDER | Purchasing UOM | LYSales | Not used | LYAvgMo | Not used |
| LYSalesDol | Not used | LYCOGS | Not used | YTDSales | Not used |
| YTDAvgMo | Not used | YTDsalesDol | Not used | YTDCogs | Not used |
| POCost | The most recent item cost | SalesCost | The item standard cost | BasePrice | The top or base price level |
| Price\_A | The second or price A level | Price\_B | The third or price B level | TURNS |  |
| GrossMarPerc |  | InvValue |  | CAT |  |
| WareHouses |  | UserDef1 |  | Web |  |
| SHORTCODES |  | LYFULL |  | CatALL |  |
| USERNAME |  | Filters |  | WHID1 |  |
| WHID2 |  | WHID3 |  | FACTOR |  |
| Price1Name | User defined name for the price 1 item price | Price2Name | User defined name for the price 2 item price | Price3Name | User defined name for the price 2 item price |
| Price4Name | User defined name for the price 4 item price | Price5Name | User defined name for the price 5 item price | BasePriceName | User defined name for the base item price |
| WH1BIN |  | WH2BIN |  | WH3BIN |  |
| L12Units | The units sold in the last 12 months | L12Sales |  | L12Cogs |  |
| L12Avg |  | LCYRUnits |  | LCYRSales |  |
| LCYRCogs |  | LCYRAvg |  | LFYRUnits |  |
| LFYRSales |  | LFYRCogs |  | LFYRAvg |  |
| TCYRUnits |  | TCYRSales |  | TCYRCogs |  |
| TCYRAvg |  | TFYRUnits |  | TFYRSales |  |
| TFYRCogs |  | TFYRAvg |  | LCYTDunits |  |
| LCYTDSales |  | LCYTDCogs |  | LCYTDAvg |  |
| LFYTDUnits |  | LFYTDSales |  | LFYTDCogs |  |
| LFYTDAvg |  | P12Units | The units sold in the 12 months prior to the last 12 months | P12Sales |  |
| P12Cogs |  | P12Avg |  | TFYTDunits | Not used |
| TFYTDSales | Not used | TFYTDCogs | Not used | TFYTDAvg | Not used |