

Item Summary

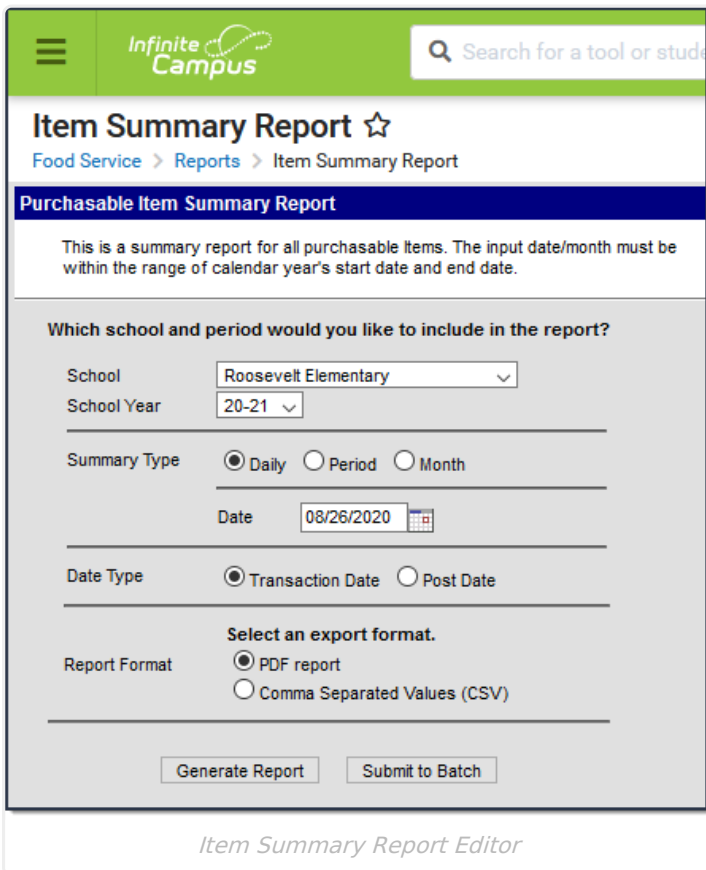
Last Modified on 03/13/2024 11:18 am CDT

Generating the Report

Tool Search: Item Summary

This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

The Item Summary Report looks at all purchasable items, noting the total amount purchased and the total sales for the item based on the date range entered.



The screenshot shows the 'Item Summary Report Editor' interface. At the top, there is a green header with the 'Infinite Campus' logo and a search bar. Below the header, the page title is 'Item Summary Report' with a star icon, and a breadcrumb trail reads 'Food Service > Reports > Item Summary Report'. A blue banner below the title says 'Purchasable Item Summary Report'. A note states: 'This is a summary report for all purchasable Items. The input date/month must be within the range of calendar year's start date and end date.' The main form area is titled 'Which school and period would you like to include in the report?' and contains the following fields:

- School:** A dropdown menu with 'Roosevelt Elementary' selected.
- School Year:** A dropdown menu with '20-21' selected.
- Summary Type:** Radio buttons for 'Daily' (selected), 'Period', and 'Month'.
- Date:** A text input field with '08/26/2020' and a calendar icon.
- Date Type:** Radio buttons for 'Transaction Date' (selected) and 'Post Date'.
- Report Format:** Radio buttons for 'PDF report' (selected) and 'Comma Separated Values (CSV)'.

At the bottom of the form are two buttons: 'Generate Report' and 'Submit to Batch'. Below the form, the text 'Item Summary Report Editor' is displayed.

Generating the Report

1. Select the **School** for which to generate the report from the dropdown list.
2. Select the appropriate **School Year**.
3. Select the **Summary Type**. Depending on the summary type chosen, the information will look at transactions for the entered date ("Daily" option), a date range ("Period" option) or a selection of dates ("Month" option).
4. Enter the **Date** in *mmdyy* format, or click the calendar icon to select a date. The current

- date will already be entered.
- Select the **Date Type**. The “Transaction Date” is the day on which the transaction occurred. The “Post Date” is the day on which the information was recorded by the server.
 - Select whether the report results should be generated as a **PDF** or **CSV**.
 - Click the **Generate Report** button OR the **Submit to Batch** button. The report will list the items purchased for the entered date range.

Users have the option of submitting a report request to the batch queue by clicking **Submit to Batch** instead of **Generate Report**. This process allows larger reports to generate in the background, without disrupting the use of Campus. For more information about submitting a report to the batch queue, see the [Batch Queue](#) article.

0347 District		Monthly Purchasable Item Summary Report for Jan. 10			
Generated on 05/18/2010 03:00:39 PM Page 1 of 3		School: Willmar Senior High Date Type: Transaction Date			
		Purchasable Items: 69 Service: 6			
		Quantity: 39542 Charged Quantity: 30650 Total Sales: \$37,403.85			
1. Ala Carte Purchasable Items: 45 Service: 5		1. Ala Carte Purchasable Items: 45 Service: 5			
Quantity: 13541 Charged Quantity: 13541 Total Sales: \$12,026.25		Quantity: 13541 Charged Quantity: 13541 Total Sales: \$12,026.25			
Purchasable Item	Service	Quantity	Charged Quantity	Total Sales	
Bagel	B300	61	61	\$61.00	Garlic Bread
Total		61	61	\$61.00	Total
Bread - 1 Slice	T300	2	2	\$0.50	Hamburger
Total		2	2	\$0.50	Total
Breadstick	T300	203	203	\$81.20	Hot Dog
Total		203	203	\$81.20	Total
Breakfast Pizza	B300	18	18	\$9.00	Juice
Total		18	18	\$9.00	B300
					G300
					P300

Example Item Summary Report