Creating a Pivot Table Report

Last Modified on 08/21/2020 3:36 pm EDT

Here's a quick set of instructions for creating a Pivot style Report in Order Time.

- Go to the REPORTS Tab, Click on the NEW REPORT button. Then select the type of Report you're making like an ITEMS Report.
- Add your Tables by dragging them over to the TABLES tab. Then make sure to set your Report Type in the top-right to Pivot.
- When you're doing the Columns, drag your Columns of choice over and make sure to select the PIVOT TYPE. It can only be a ROW, PIVOT, or DATA. More on that below.

ROW is what goes on the left

PIVOT is what goes on the top and it is pivoted by

DATA is the info in the columns

The DATA column MUST have a Summary Function.

TABLE	COLUMN	CAPTION	SEC
Ship Doc/Customer Return Line Items	Ext.		
Customers & Leads	Full Name	Customer	
Ship Doc & Customer Return	Date		

Tables   **Columns**   **Filters**   **Sort By**

Table Ship Doc/Customer Return Line Items

Summary Function Sum

~~Show prior year~~ ☐

Column Ext.

Caption

Pivot type Data

As you're going along make sure to hit the SAVE button at the top-right every so often to save the progress of your selections.

Click the VIEW button to see the results of your Pivot Table. If you have any questions, send us a ticket by emailing support@ordertime.com