How do I Run a Report for Individual Vendors with Over $100,000 in Invoice Payments in A Calendar Year?
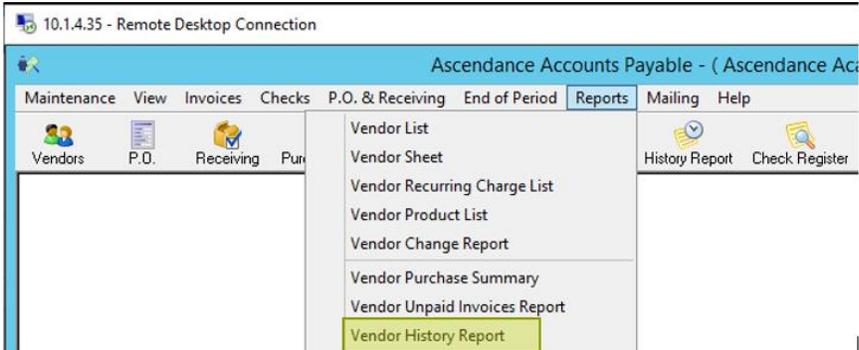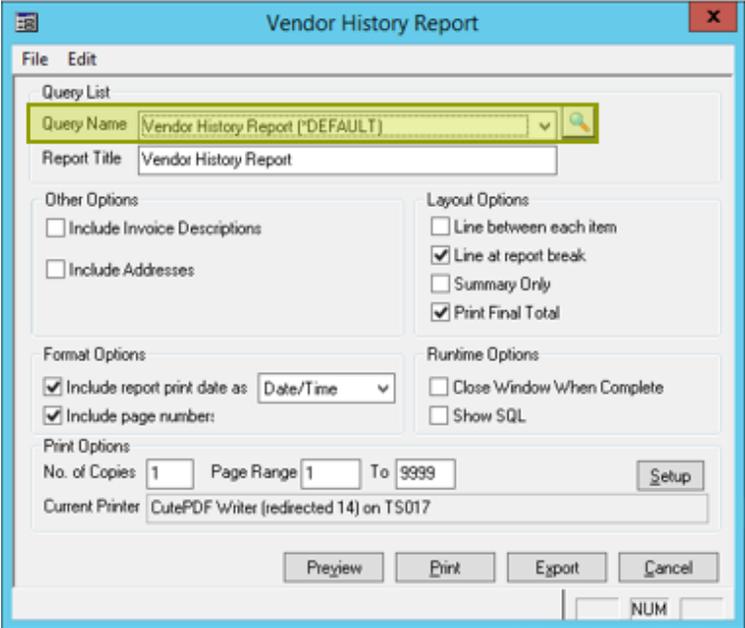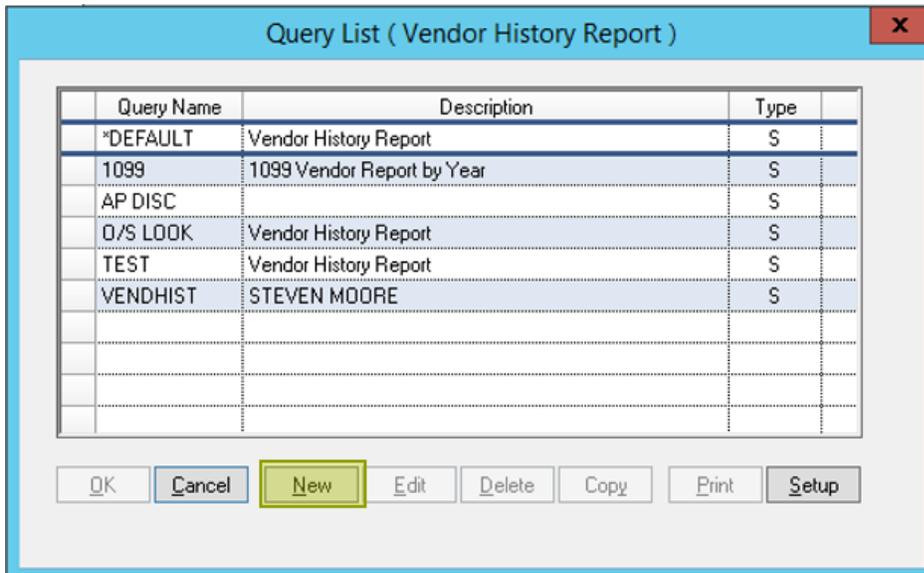
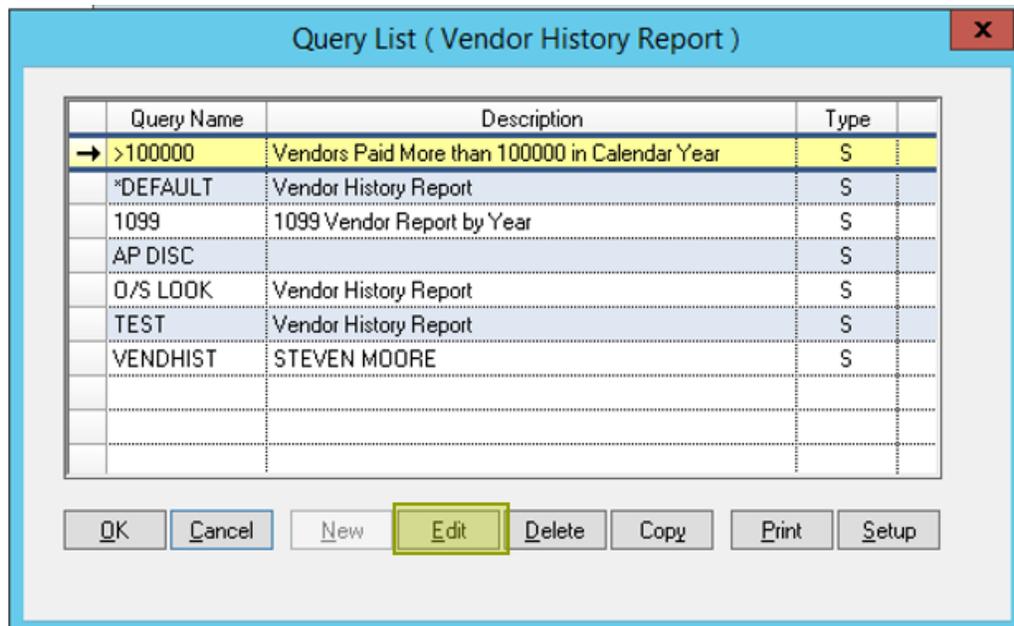Go to Accounts Payable>Reports>Vendor History Report

Go to the Query Name section, and click on the magnifying glass, to view the list of Queries available to this report:

Click on the New button, to create the Query.

Give the query a name that will make sense to the user, then highlight the row and select Edit, to add the query conditions.

Use the Add Before button to add the first criteria for the query (this will be the **first** day of the CALENDAR year for which you are running the report:
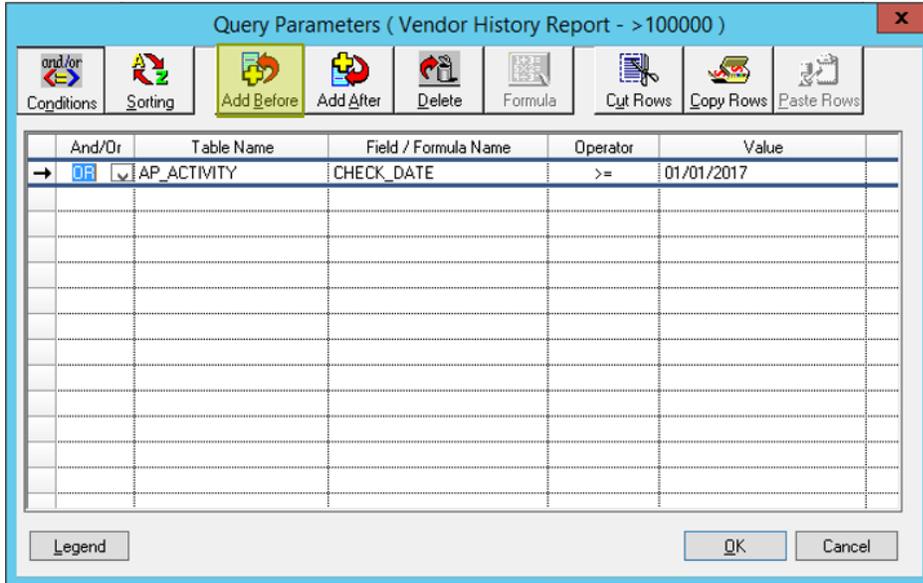
User the Add After button to add the next query criteria (in this case, the **last** day of the CALENDAR year for which you are running the report):

The third line of the query will be a FORMULA. Creating the FORMULA will indicates to the system that for Checks dated within the specified time-frame, there is a little more advanced processing that needs to be included.

Click the Add After button, then select **FORMULA** as the Table Name.
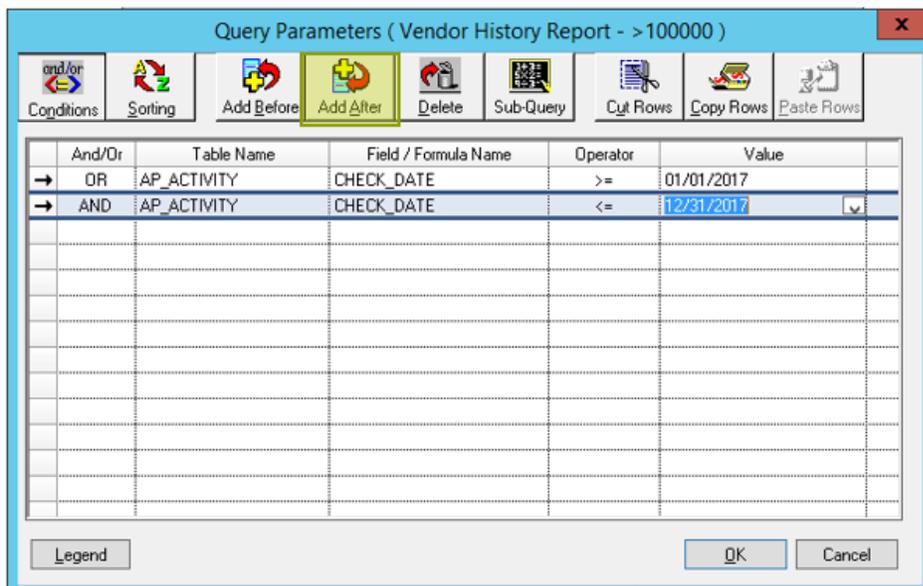
Click into the Field/Formula Name section to activate the Formula button at the top of the screen
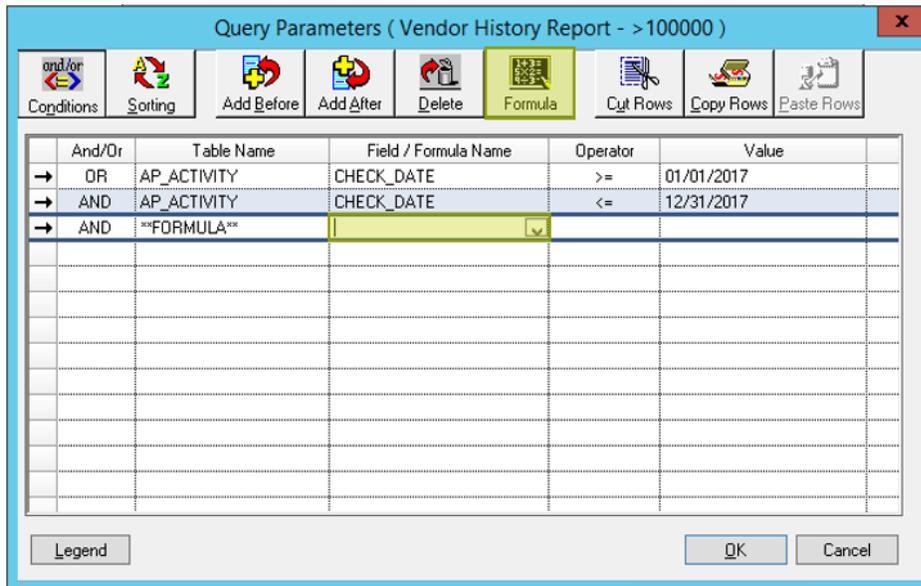
Give the Formula a Name, then use the Table and Type drop-lists to build the Formula (select the AP_ACTIVITY table, and set the Type to Sum. For the Calculation line, use the drop-list to select the AP_ACTIVITY.INVOICE_AMT. This will indicate that the information you desire (Invoice amounts) is found on the AP_ACTIVITY table, and the invoices selected should be added (summed) together as part of the query criteria).
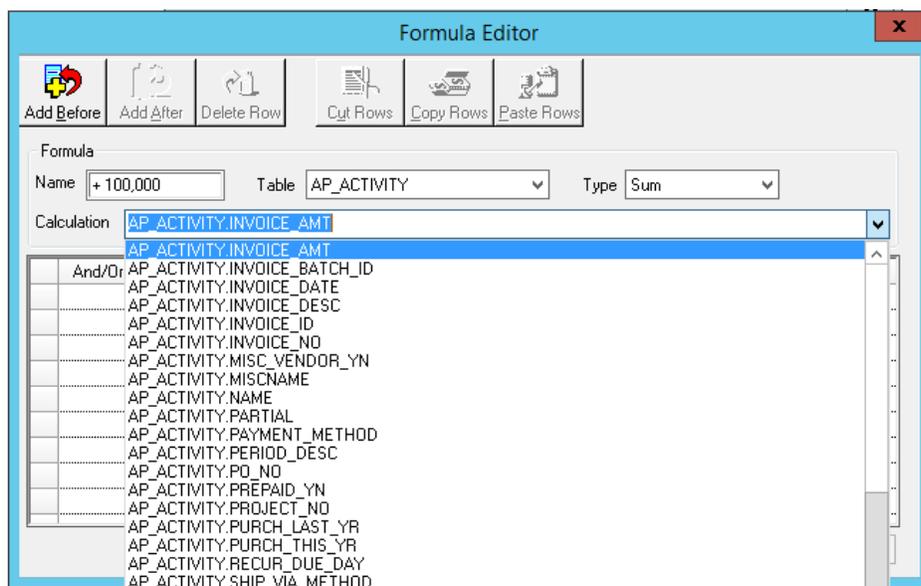
Again, use the Add Before/Add After buttons to enter the date range for the invoices you will be totalling in a specific CALENDAR year (these will be the same dates as entered in the actual query, 01/01/2017 and 12/31/2017)

Click OK to save the FORMULA, and return to the original query.

Add the Operator >= (greater than or equal to) and a Value to complete the FORMULA line for the query ($100,000, indicating use the FORMULA to sum all invoices from Jan 1, 2017 to Dec 31, 2017, and return results for any Vendor who's total spend is Equal To or Greater than $100,000).

Click OK to return to the report criteria, then select Preview the review the report.

Provided the query is set up correctly, the only Vendors to appear on the report will be ones with whom more than $100,000 was spent in the chosen CALENDAR year:

Vendors Paid More than 100000 in Calendar Year

VENDOR I.D. / NAME INVOICE NO.	DATE	P.O.	BATCH	NO.	DATE	CLEARED	INVOICE AMT.	DISC.	PARTIAL
DAV58 DAV58									
4004/2015	01/22/17		AP008126	0002886	01/22/17	Y	13,201.87	0.00	
4106/2015	01/22/17		AP008126	0002886	01/22/17	Y	9,298.91	0.00	
4126/2015	01/22/17		AP008126	0002886	01/22/17	Y	9,150.52	0.00	
4120/2015	01/22/17		AP008126	0002886	01/22/17	Y	8,102.71	0.00	
10163/2015	01/22/17		AP008126	0002886	01/22/17	Y	8,727.01	0.00	
10215/2015	01/22/17		AP008126	0002886	01/22/17	Y	10,874.20	0.00	
4112/2015	01/22/17		AP008126	0002886	01/22/17	Y	10,690.70	0.00	
4010/2015	01/22/17		AP008126	0002886	01/22/17	Y	5,176.79	0.00	
4020/2015	01/22/17		AP008126	0002886	01/22/17	Y	9,102.52	0.00	
4024/2015	01/22/17		AP008126	0002886	01/22/17	Y	8,927.79	0.00	
4030/2015	01/22/17		AP008126	0002886	01/22/17	Y	9,702.12	0.00	
4036/2015	01/22/17		AP008126	0002886	01/22/17	Y	9,889.19	0.00	
DOWDY/2015	01/21/17		AP008124	0104381	01/22/17	Y	356.31	0.00	
Total for DAV58: 13							**113,200.64**	**0.00**	
DIRECT7 DIRECT7									
143650023045784	12/31/16		AP008087	0104140	01/06/17	Y	40,008.92	0.00	
02/2015	02/02/17		AP008143	0104552	02/02/17	Y	33,873.99	0.00	
150510023505747	02/02/17		AP008204	0104977	03/03/17	Y	35,845.06	0.00	
150830023787858	03/24/17		AP008257	0105321	03/31/17	N	32,444.16	0.00	
151110024030832	04/21/17		AP008346	0105770	04/30/17	N	32,365.54	0.00	
151410024316000	05/21/17		AP008416	0106209	05/28/17	N	32,348.53	0.00	
Total for DIRECT7: 6							**206,886.20**	**0.00**	
FIRST01 FIRST01									
01/2015	01/16/17		AP008111	0104296	01/16/17	Y	39,789.99	0.00	
02/2015	02/17/17		AP008168	0104770	02/17/17	Y	29,621.73	0.00	
03/2015	03/18/17		AP008221	0105119	03/18/17	Y	33,072.19	0.00	
04/2015	04/17/17		AP008313	0105606	04/17/17	N	28,192.32	0.00	
05/2015	05/15/17		AP008393	0106041	05/15/17	N	26,380.85	0.00	
06/2015	06/09/17		AP008437	0106390	06/09/17	N	16,152.67	0.00	
Total for FIRST01: 6							**173,209.75**	**0.00**	
SAGE52 SAGE52									
729575	01/06/17		AP008113	0104305	01/16/17	Y	113,494.00	0.00	
733825	02/09/17		AP008161	0104733	02/10/17	Y	136,202.00	0.00	
738275	03/02/17		AP008239	0105234	03/24/17	Y	96,338.00	0.00	
04/2015	04/15/17		AP008304	0105571	04/15/17	N	100,161.00	0.00	
748167	05/13/17		AP008388	0106035	05/15/17	N	4,971.00	0.00	
Total for SAGE52: 5							**451,166.00**	**0.00**	
ST006 ST006									
12/2014	02/25/17		AP008185	0104862	02/25/17	Y	67,738.85	0.00	
01/2015	03/25/17		AP008242	0105255	03/25/17	N	38,872.95	0.00	
02/2015	03/25/17		AP008242	0105255	03/25/17	N	40,778.44	0.00	
03/2015	04/16/17		AP008307	0105603	04/16/17	N	40,140.87	0.00	

Vendors Paid More than 100000 in Calendar Year

VENDOR I.D. / NAME INVOICE NO.	DATE	P.O.	BATCH	NO.	DATE	CLEARED	INVOICE AMT.	DISC.	PARTIAL
05/2015	05/19/17		AP008401	0106087	05/19/17	N	40,789.57	0.00	
06/2015	06/24/17		AP008470	0106561	06/24/17	N	46,761.10	0.00	
Total for ST006: 6							**275,081.78**	**0.00**	
Total Number in List: 36							**1,219,544.37**	**0.00**	

NOTE: Total Number in List indicates number of INVOICES, not number of Vendors.