

## REPORTING

## **INTRODUCTION TO REPORT DESIGNER**

With Reports Designer, you have the ability to customize *BPO* documents, this will become a new template that is applied globally.

You are also able to create client specific sales documents that can be linked to a specific customer. These client specific documents are noted in the Customer Invoice Delivery Method screen and are limited to the following reports:

- Sales Invoice
- Back Order
- Sales Credit Note
- Sales Quote
- Sales Order
- Contract Invoice
- Contract Credit Note

**Ribbon Access:** Configurator > Reporting > Report Designer



The *Custom Reports Editor* screen will be displayed.





### **CUSTOMISE DEFAULT REPORT CHECK-BOX**

- The *Customise Default Reports* check box will be unselected by default.
- Only the current custom documents will be displayed when the *Customise Default Reports* check box is unselected.





• If the *Customise Default Reports* check box is selected, all *BPO* documents will be displayed.



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### **CUSTOMISING A DEFAULT REPORT**

- **Double click** on a report you wish to customise.
- In this image, *Sales Invoice* has been selected.



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An *Enter Custom Template name* message box will pop up telling you;

# • Enter a new name or leave as is to overwrite an existing template.

 Keep the *same* name for your report or document. The only time you need to change the name of the report or document is for Client Specific Sales Documents.





• Click on *Ok*.





- The *Reports Designer* maintain screen for the selected documented will be displayed.
- Basic changes e.g. font size / colour, additional text field messages etc are easy to do.
- Most of the fields are retrieved from the database . For more information on how to edit these, refer to related topics.



### Introduction to Report Designer

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• When you are done, click on *Save*.



### **EDIT AN EXISTING CUSTOM REPORT**

- For the list of custom reports to be displayed, ensure that the *Customise Default Reports* check box is unselected.
- Double click on the custom report you wish to edit.





- An Additional Custom Template message box will pop up asking you;
  - Do you want to create new template?
- Click on *No* if you wish to edit the current template.
- Click on *Yes* if you wish to create a new custom document.

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- If you click on *No*, the current document will be displayed.
- Edit the report accordingly and save when done.





- If you click on *Yes*, an *Enter Custom Template name* screen will pop up.
- Change the name of the report if the requirements are for a specific customer.
  - *Note:* This will create a new custom report from the existing custom report.



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• Click on Ok.



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- Make the necessary changes as required.
- When you are done, click on *Save*.



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#### **Related References**

- Client Specific Customized Reports
- Main Features
- Formatting Toolbar
- Labels
- Check-box
- Rich Text
- Picture Box
- Panel
- Lines
- Shapes
- Character Comb
- Tables
- Calculated Fields and Summaries
- Sub Reports

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