



# REPORTING

## CLIENT SPECIFIC CUSTOMIZED SALES REPORTS

With Reports Designer, you have the ability to customize **BPO** documents. You can create client specific sales documents if you want a single client to receive an sales document e.g. an invoice that looks different.

When creating these customized templates, you have to save the template under a different name. You will need to link the customized document to the specific client in the customer screen's **Invoice Delivery Method** section.

The reports that can be customized in this way are:

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

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

•	≠ BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL												
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The *Custom Reports Editor* screen will be displayed.





#### **CUSTOMISE DEFAULT REPORTS 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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	CONTRACTPERFORMANCE	CONTRACTPERFORMANCE		
	CONTRACTREPORT	CONTRACTREPORT		
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	DETAILTIMESHEET	DETAILTIMESHEET		
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	ESCALATIONNOTIFICATION	ESCALATIONNOTIFICATION		
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	LOANRETURN	LOANRETURN		
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#### **CREATING A CUSTOM DOCUMENT TEMPLATE**

- **Double click** on a report you wish to customise.
- For the progress of this manual, a default report will be customized and a *Sales Invoice* has been selected.
  - Note: For you to be able to access the default reports, the *Customize Default Reports* check box must be 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.





- Since you are creating a custom document template, enter a new name.
  - Note 1: Use a descriptive name for the new document template.
  - Note 2: Please do not use spaces, rather use underscores.
- In this example, the *customer code* has been added to the same document name (*SALESINVOICE\_HOP001*) so that it can be clearly seen that the report belongs to the customer with customer code *HOP001*.



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• Click on Ok.





- The *Reports Designer* maintain screen for the selected documented will be displayed.
- Most of the fields are retrieved from the database . For more information on how to edit these, refer to related topics.



• When you are done, click on *Save*.

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- You will return to the *Custom Reports Editor* screen.
- Un-select the *Customise Default Reports* check box.



• You will see the newly created report or template in the *Custom Report List*.

### EDITING THE CUSTOMER INVOICE DELIVERY METHOD

#### Ribbon Access: Sales > Customers

- Edit the *Invoice Delivery Method* on the customer you customised a specific document for.
- Add the document name exactly as you set in up in *Reports Designer*.
  - Note 1: If you leave the template field blank, the default or global document template will be used.
  - Note 2: The *Escalation Notification* is not a client specific customisable report at the moment.

For more information on customising reports, refer to the following topics:

- Introduction To Reports Designer
- 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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