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.

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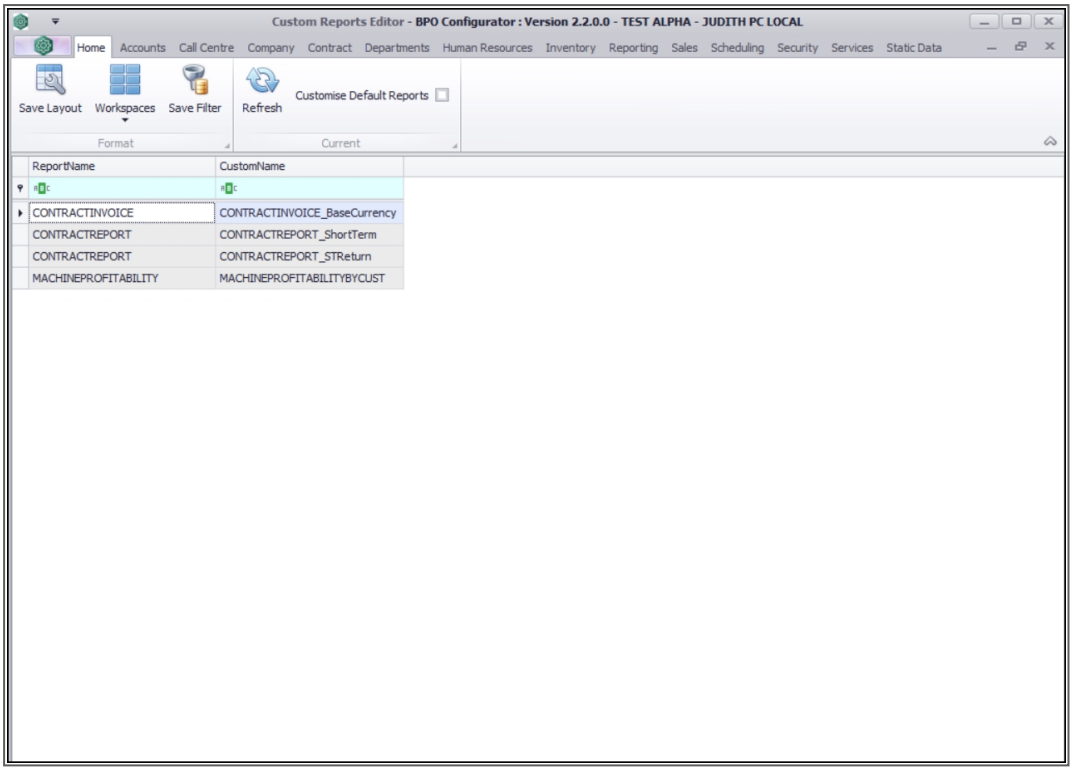

CUSTOMISE DEFAULT REPORT CHECK-BOX

- 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.

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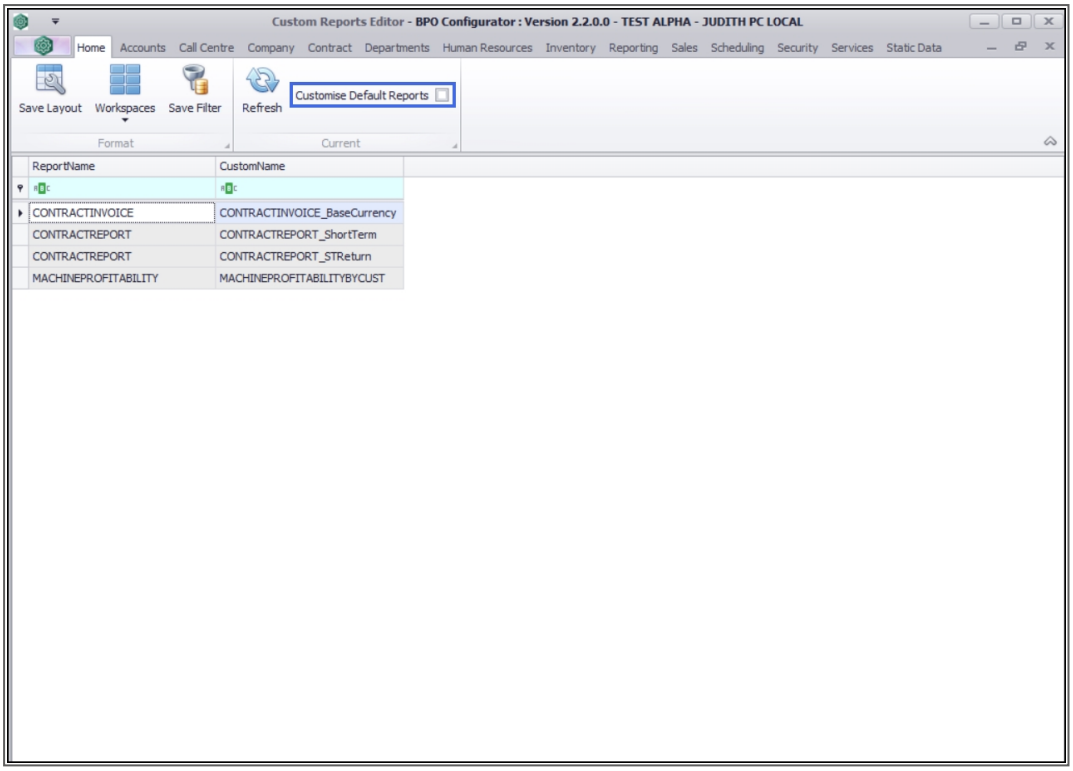

- If the ***Customise Default Reports*** check box is selected, all ***BPO*** documents will be displayed.

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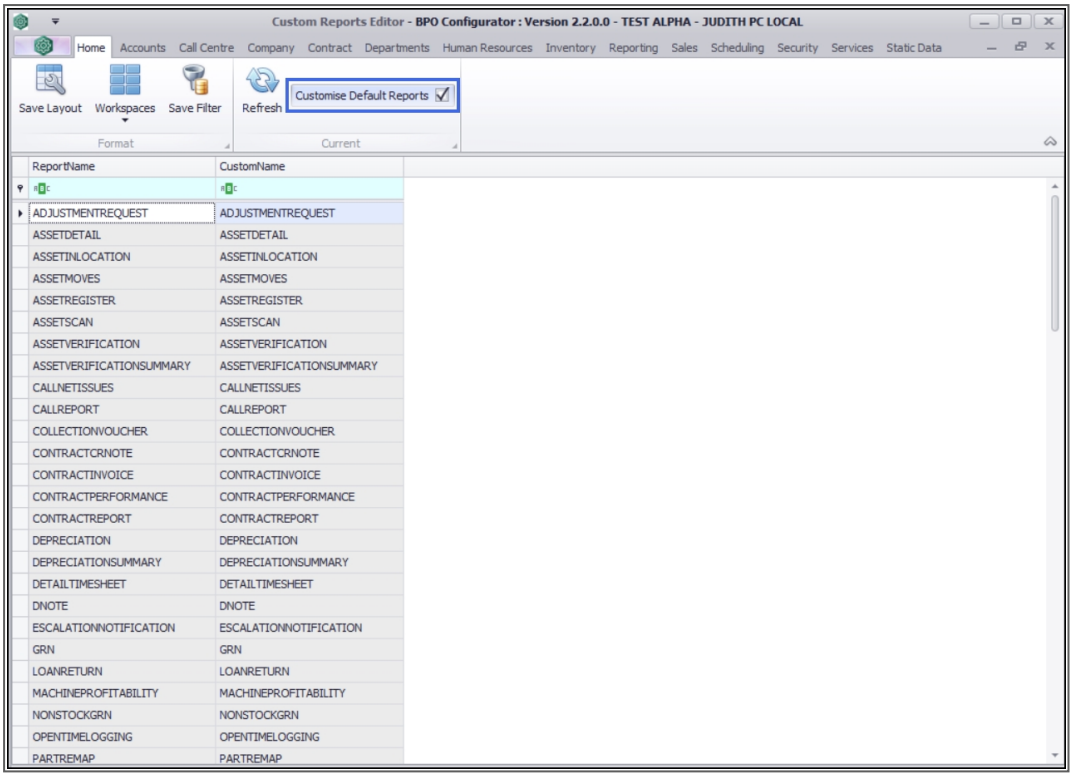

CUSTOMISING A DEFAULT REPORT

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

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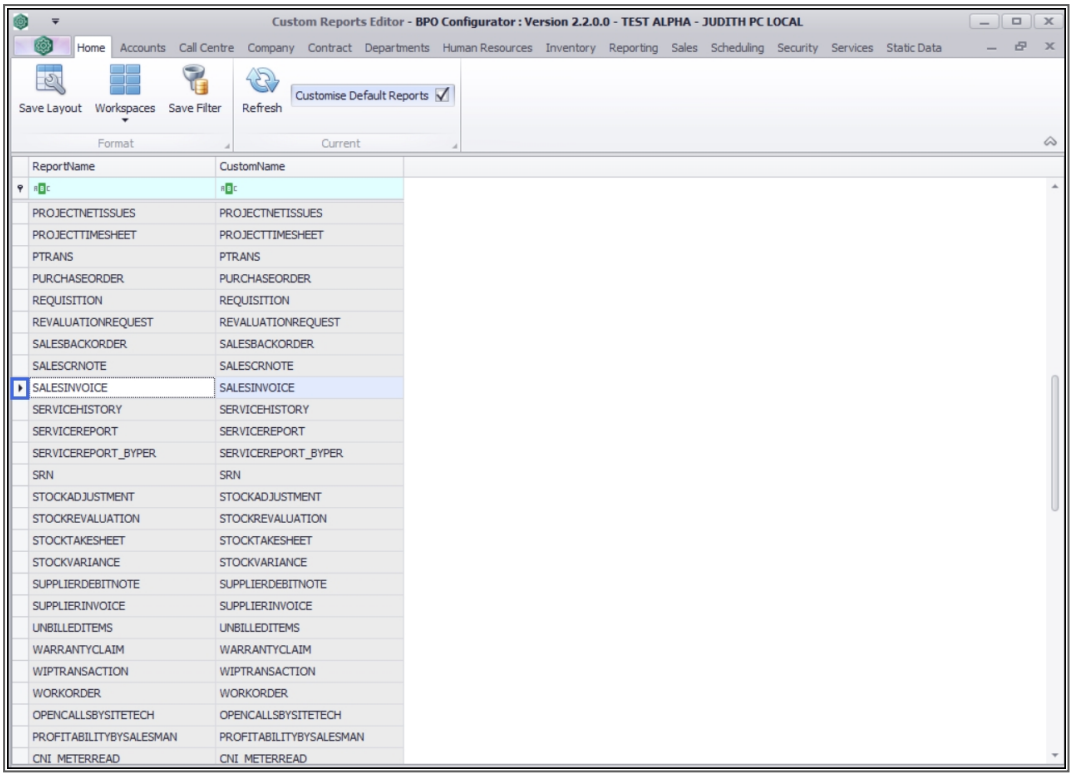

- An ***Enter Custom Template name*** message box will pop up telling you;
    - ***Enter a new name or leave as is to overwrite an existing template.***
- Keep the ***same*** name for your report or document. The only time you need to change the name of the report or document is for Client Specific Sales Documents.

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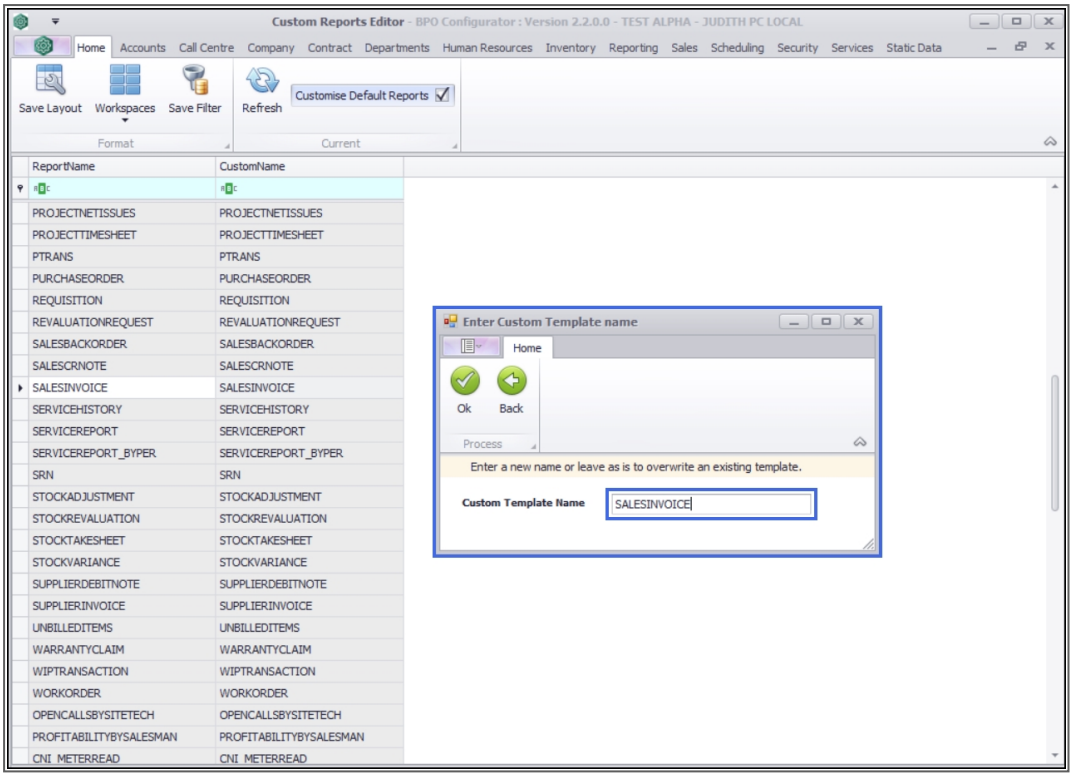

- Click on ***Ok***.

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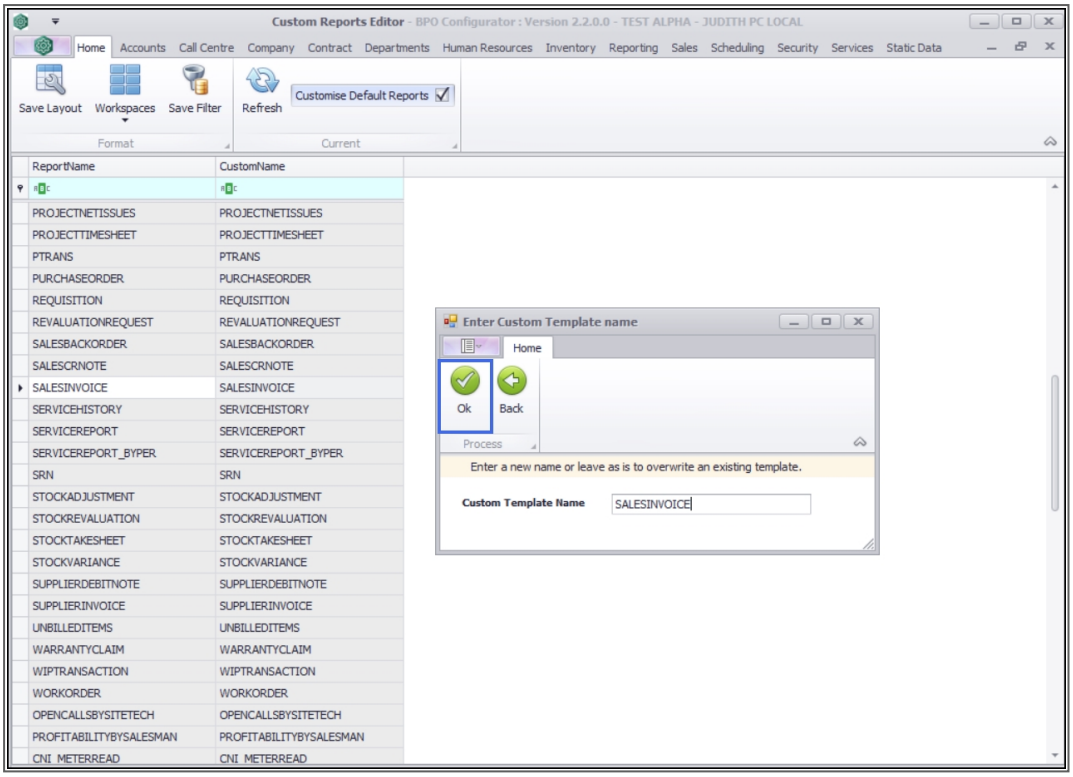

- The ***Reports Designer*** maintain screen for the selected documented will be displayed.
- Basic changes e.g. font size / colour, additional text field messages etc are easy to do.
- Most of the fields are retrieved from the database . For more information on how to edit these, refer to related topics.

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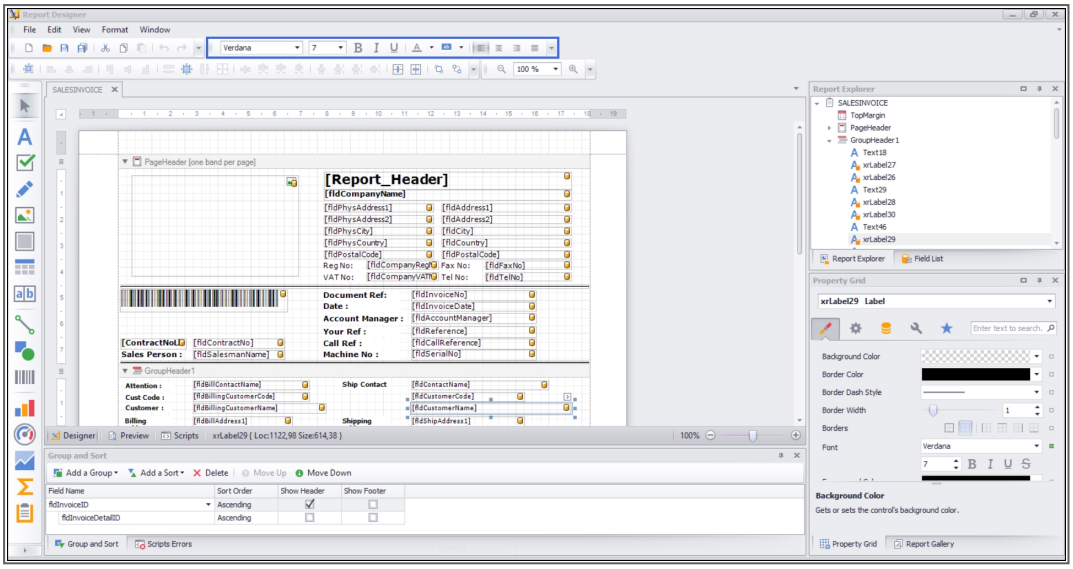
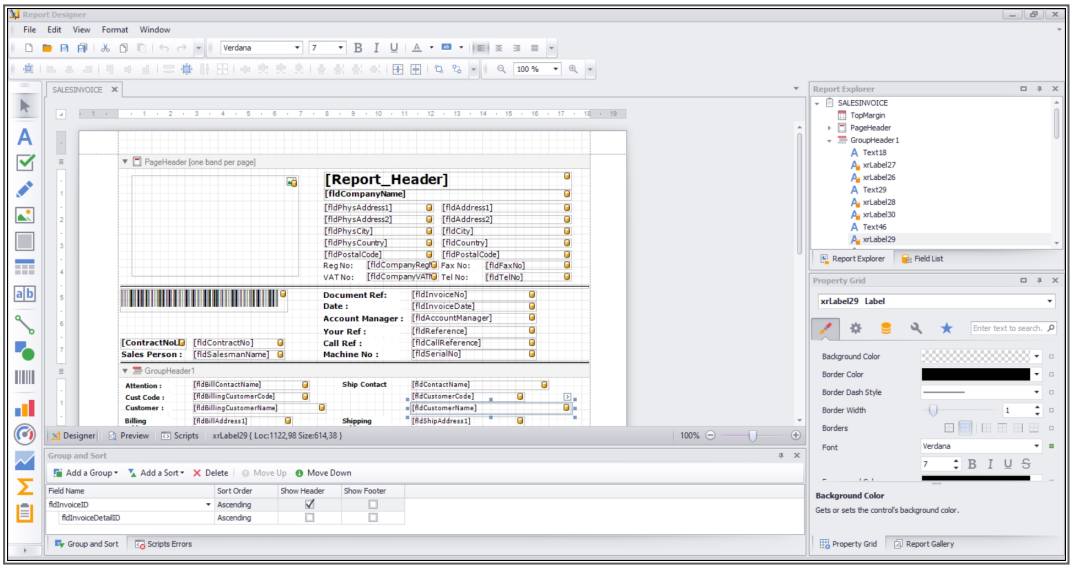


- When you are done, click on ***Save***.



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.

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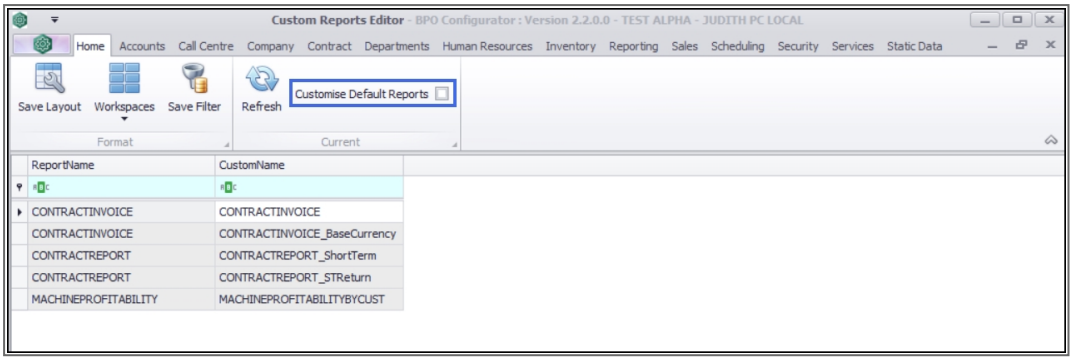
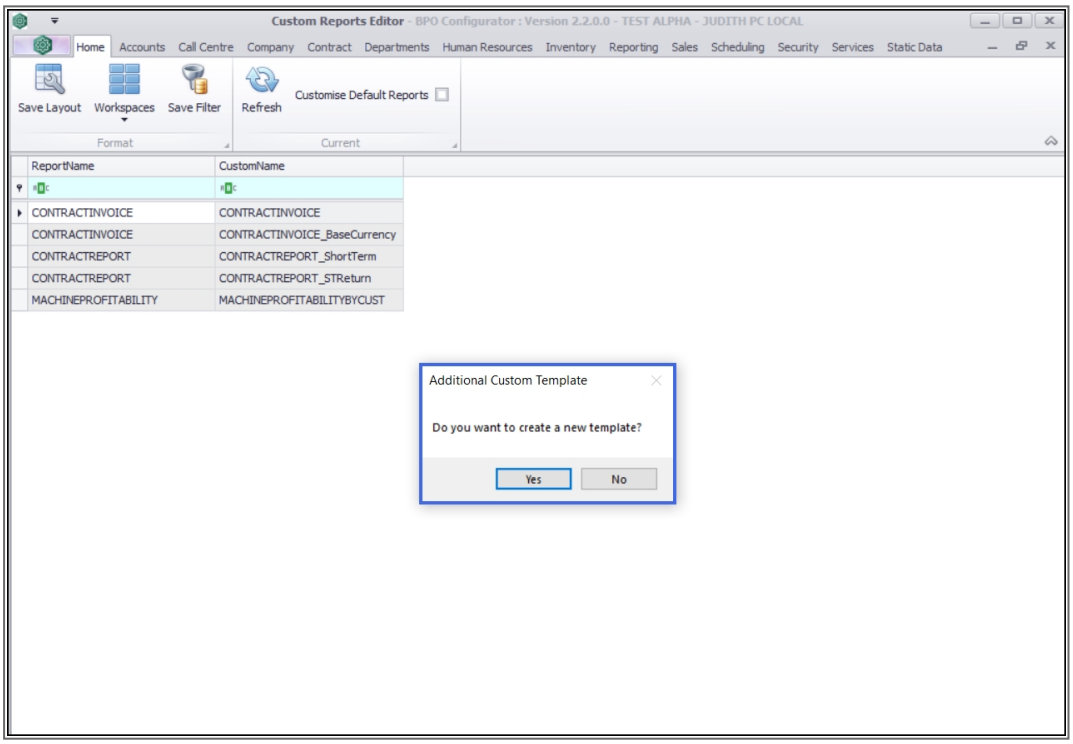


- An ***Additional Custom Template*** message box will pop up asking you;
    - ***Do you want to create new template?***
- Click on ***No*** if you wish to edit the current template.
- Click on ***Yes*** if you wish to create a new custom document.



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

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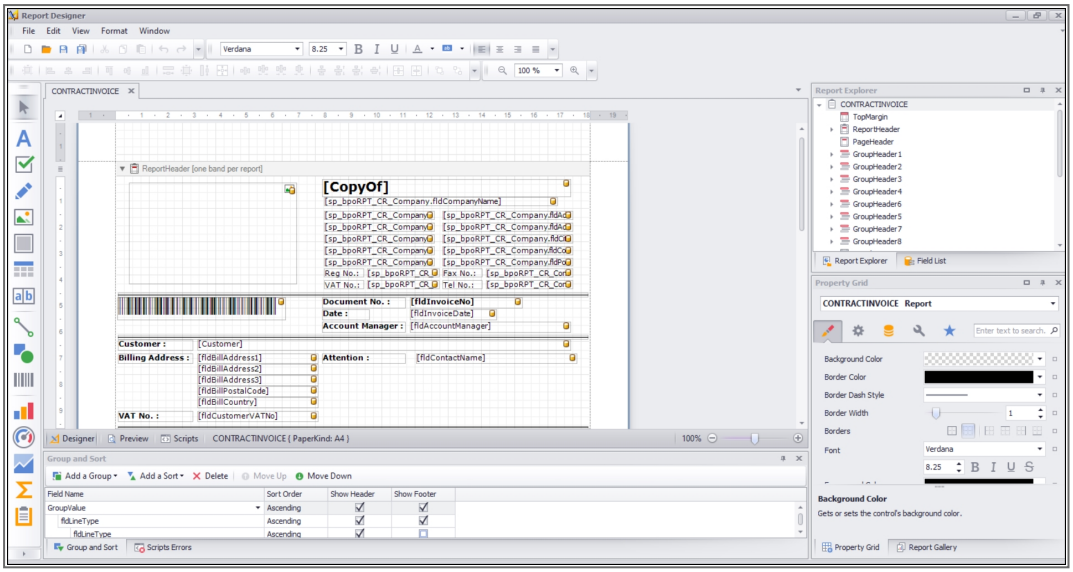

- If you click on ***Yes***, an ***Enter Custom Template name*** screen will pop up.
- Change the name of the report if the requirements are for a specific customer.
    - ***Note:*** This will create a new custom report from the existing custom report.

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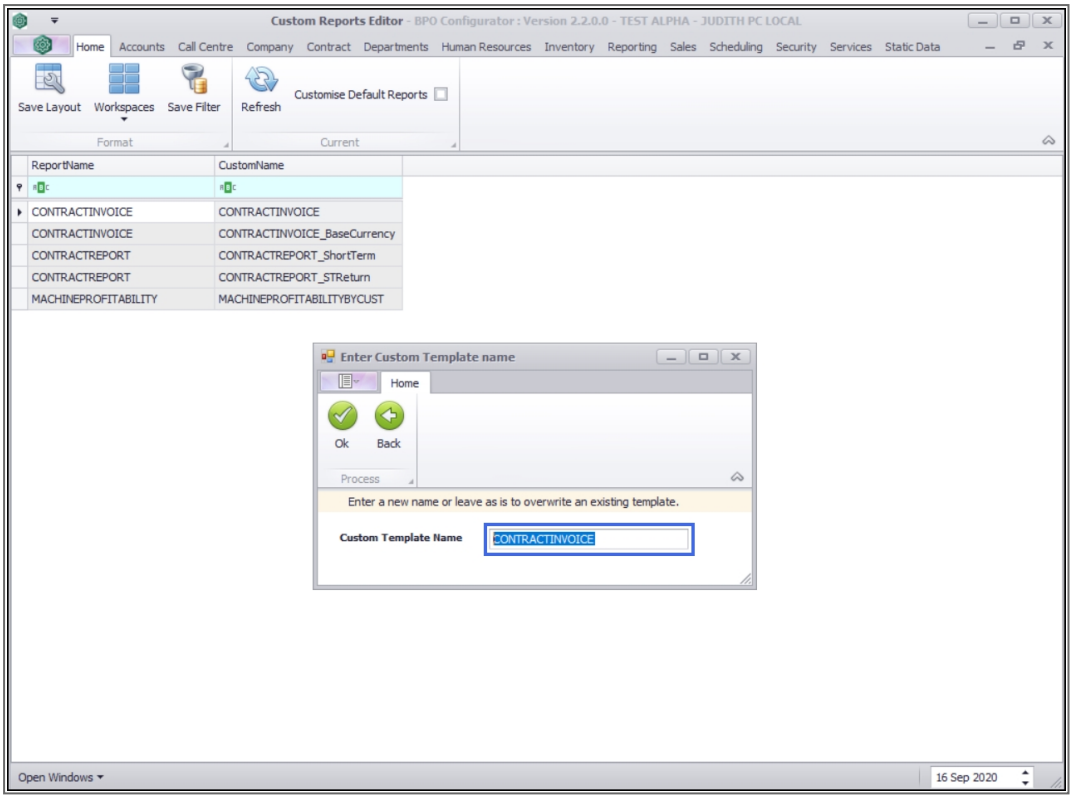

- Click on ***Ok***.

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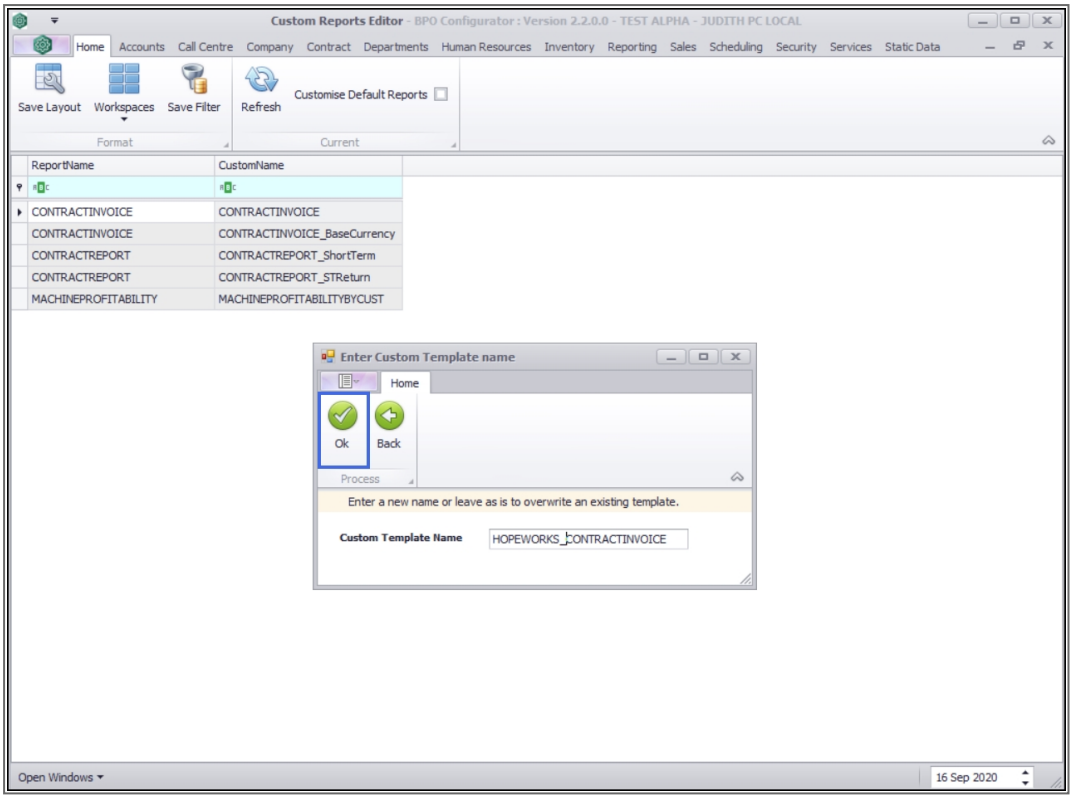
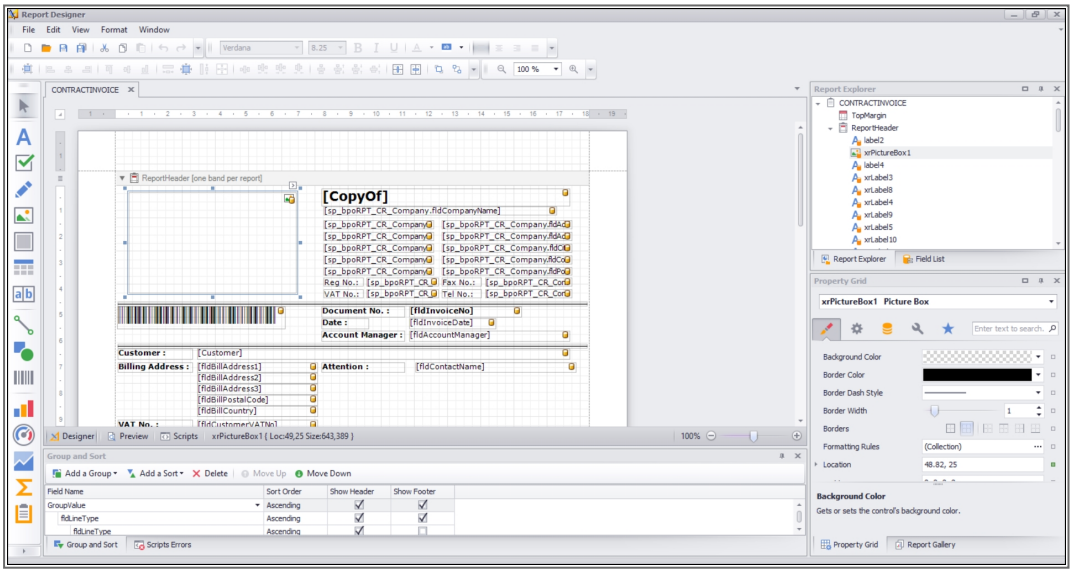


- The new custom document will be displayed.



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

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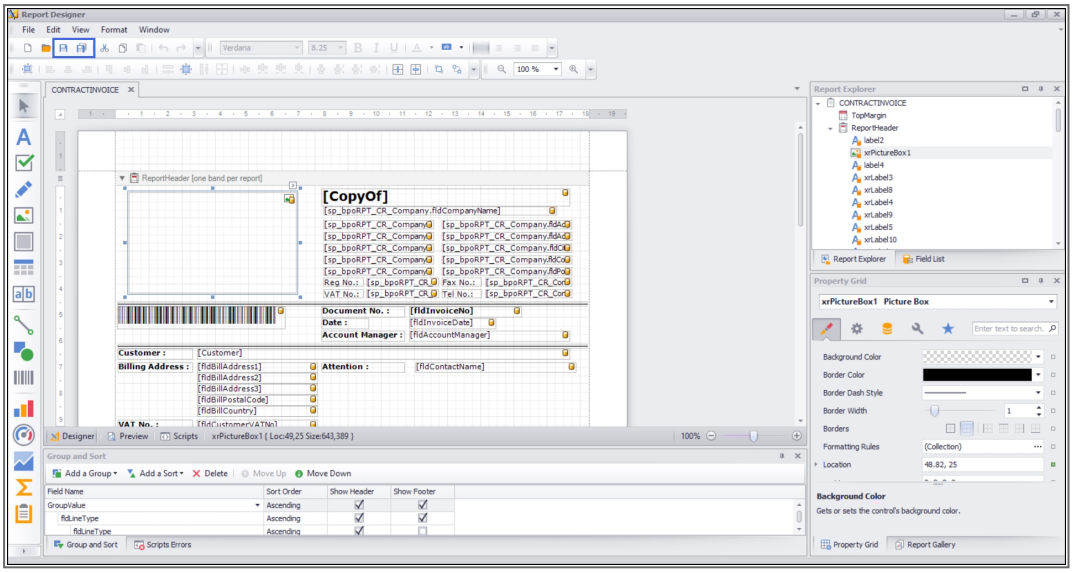

Related References

- 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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