

We are currently updating our site; thank you for your patience.

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:

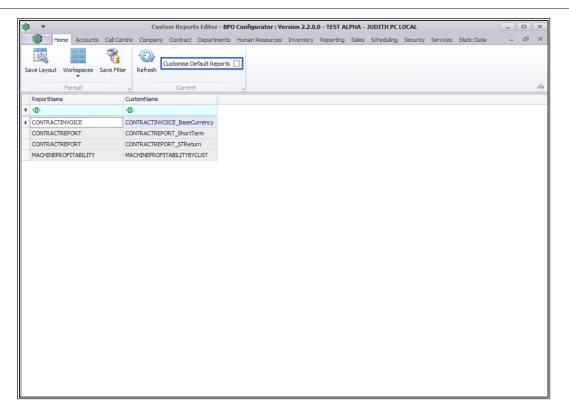
- Sales Invoice
- Back Order
- Sales Credit Note
- Sales Quote
- Sales Order
- Contract Invoice
- Contract Credit Note

Ribbon Access: Configurator> Reporting> Report Designer



The **Custom Reports Editor** screen will be displayed.

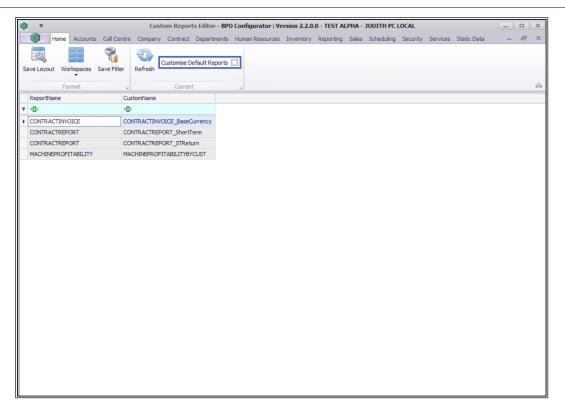




CUSTOMISE DEFAULT REPORTS CHECK-BOX

- 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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| | ASSETINLOCATION | ASSETINLOCATION | | | | | | | | |
| | ASSETMOVES | ASSETMOVES | | | | | | | | |
| | ASSETREGISTER | ASSETREGISTER | | | | | | | | |
| | ASSETSCAN | ASSETSCAN | | | | | | | | |
| | ASSETVERIFICATION | ASSETVERIFICATION | | | | | | | | |
| | ASSETVERIFICATIONSUMMARY | ASSETVERIFICATIONSUMMARY | | | | | | | | |
| | CALLNETISSUES | CALLNETISSUES | | | | | | | | |
| | CALLREPORT | CALLREPORT | | | | | | | | |
| | COLLECTIONVOUCHER | COLLECTIONVOUCHER | | | | | | | | |
| | CONTRACTCRNOTE | CONTRACTORNOTE | | | | | | | | |
| | CONTRACTINVOICE | CONTRACTINVOICE | | | | | | | | |
| | CONTRACTPERFORMANCE | CONTRACTPERFORMANCE | | | | | | | | |
| | CONTRACTREPORT | CONTRACTREPORT | | | | | | | | |
| | DEPRECIATION | DEPRECIATION | | | | | | | | |
| | DEPRECIATIONSUMMARY | DEPRECIATIONSUMMARY | | | | | | | | |
| | DETAILTIMESHEET | DETAILTIMESHEET | | | | | | | | |
| | DNOTE | DNOTE | | | | | | | | |
| | ESCALATIONNOTIFICATION | ESCALATIONNOTIFICATION | | | | | | | | |
| | GRN | GRN | | | | | | | | |
| | LOANRETURN | LOANRETURN | | | | | | | | |
| | MACHINEPROFITABILITY | MACHINEPROFITABILITY | | | | | | | | |
| | NONSTOCKGRN | NONSTOCKGRN | | | | | | | | |
| | OPENTIMELOGGING | OPENTIMELOGGING | | | | | | | | |
| | PARTREMAP | PARTREMAP | | | | | | | | |

CREATING A CUSTOM DOCUMENT TEMPLATE

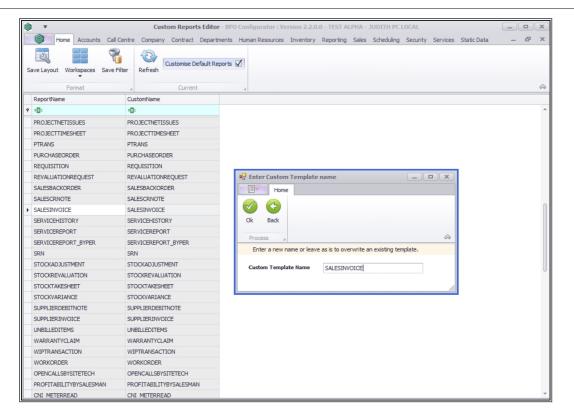
- **Double click** on a report you wish to customise.
- For the progress of this manual, a default report will be customized and a **Sales Invoice** has been selected.
 - Note: For you to be able to access the default reports, the Customize Default Reports check box must be selected.



| 💿 🔻 Custom Reports Editor - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL | | | | | | |
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| PURCHASEORDER | PURCHASEORDER | | | | | |
| REQUISITION | REQUISITION | | | | | |
| REVALUATIONREQUEST | REVALUATIONREQUEST | | | | | |
| SALESBACKORDER | SALESBACKORDER | | | | | |
| SALESCRNOTE | SALESCRNOTE | | | | | |
| SALESINVOICE | SALESINVOICE | | | | | |
| SERVICEHISTORY | SERVICEHISTORY | | | | | |
| SERVICEREPORT | SERVICEREPORT | | | | | |
| SERVICEREPORT_BYPER | SERVICEREPORT_BYPER | | | | | |
| SRN | SRN | | | | | |
| STOCKADJUSTMENT | STOCKADJUSTMENT | | | | | |
| STOCKREVALUATION | STOCKREVALUATION | | | | | |
| STOCKTAKESHEET | STOCKTAKESHEET | | | | | |
| STOCKVARIANCE | STOCKVARIANCE | | | | | |
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| SUPPLIERINVOICE | SUPPLIERINVOICE | | | | | |
| UNBILLEDITEMS | UNBILLEDITEMS | | | | | |
| WARRANTYCLAIM | WARRANTYCLAIM | | | | | |
| WIPTRANSACTION | WIPTRANSACTION | | | | | |
| WORKORDER | WORKORDER | | | | | |
| OPENCALLSBYSITETECH | OPENCALLSBYSITETECH | | | | | |
| PROFITABILITYBYSALESMAN | PROFITABILITYBYSALESMAN | | | | | |
| CNI METERREAD | CNI METERREAD | | | | | |

- 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.





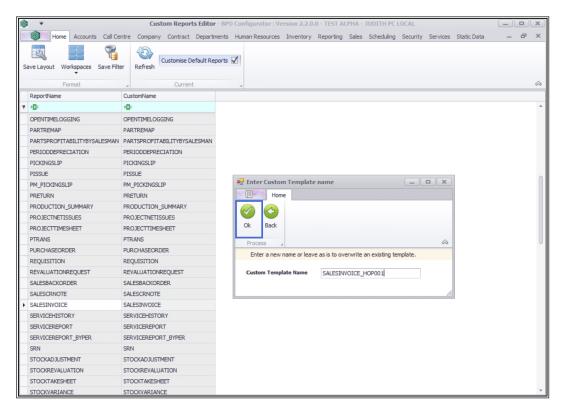
- Since you are creating a custom document template, enter a new name.
 - Note 1: Use a descriptive name for the new document template.
 - Note 2: Please do not use spaces, rather use underscores.
- In this example, the customer code has been added to the same document name (SALESINVOICE_HOP001) so that it can be clearly seen that the report belongs to the customer with customer code - HOP001.

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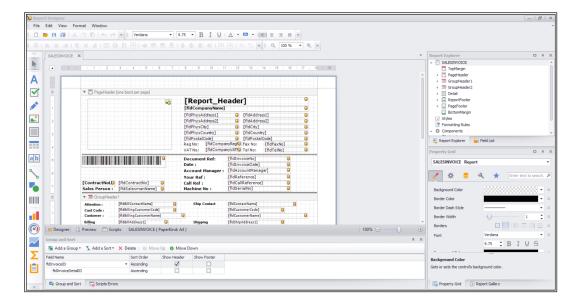
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| | PROJECTTIMESHEET | PROJECTTIMESHEET | Ok Back | |
| | PTRANS | PTRANS | Process | U |
| | PURCHASEORDER | PURCHASEORDER | Enter a new name or leave as is to overwrite an existing template. | |
| | REQUISITION | REQUISITION | | |
| | REVALUATIONREQUEST | REVALUATIONREQUEST | Custom Template Name SALESINVOICE_HOP001 | |
| | SALESBACKORDER | SALESBACKORDER | | |
| | SALESCRNOTE | SALESCRNOTE | | |
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| | STOCKREVALUATION | STOCKREVALUATION | | |
| | STOCKTAKESHEET | STOCKTAKESHEET | | |
| | STOCKVARIANCE | STOCKVARIANCE | | - |

• 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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