

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:

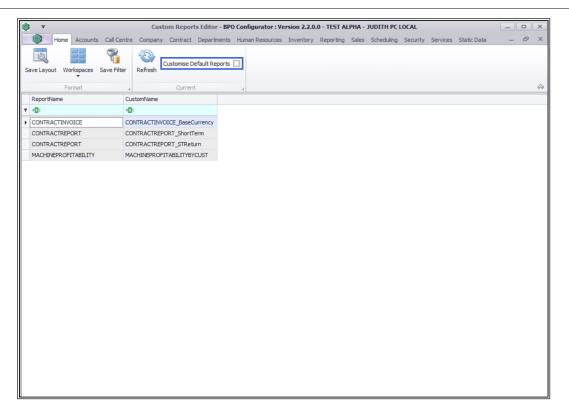
- Sales Invoice
- Back Order
- Sales Credit Note
- Sales Quote
- Sales Order
- Contract Invoice
- Contract Credit Note

Ribbon Access: Configurator> Reporting> Report Designer



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

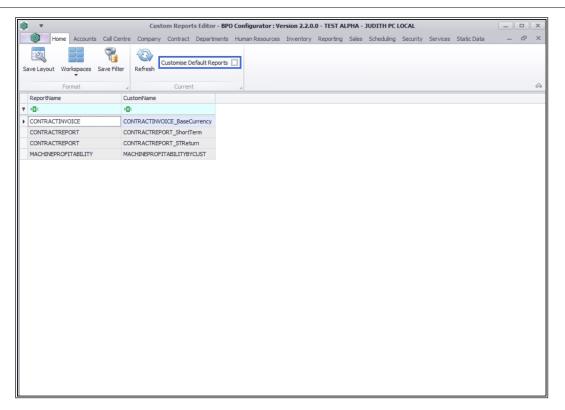




CUSTOMISE DEFAULT REPORTS CHECK-BOX

- 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.

Help v2024.5.0.7/1.0 - Pg 3 - Printed: 21/08/2024



ø	₩	Custom Reports Editor	- BPO Configurator : Version	2.2.0.0 - TEST AI	LPHA - JUDITH PC	LOCAL)(
	Home Accounts Call Ce	entre Company Contract Departm	ents Human Resources Inver	ntory Reporting	Sales Scheduling	Security	Services	Static Data	_ 8	
Sa	ave Layout Workspaces Save Filt	Refresh Customise Default Re	orts 🔽							
	Format	4 Current	4							
	ReportName	CustomName								
٩	a 🛛 c	RBC								
۲	ADJUSTMENTREQUEST	ADJUSTMENTREQUEST								
	ASSETDETAIL	ASSETDETAIL								
	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

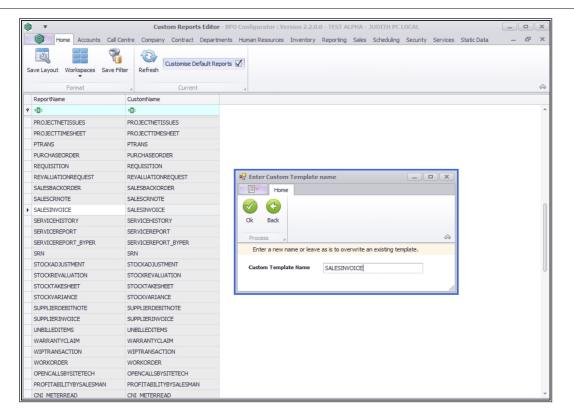
- **Double click** on a report you wish to customise.
- For the progress of this manual, a default report will be customized and a **Sales Invoice** has been selected.
 - Note: For you to be able to access the default reports, the Customize Default Reports check box must be selected.



💿 🔻 Custom Reports Editor - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL						
Home Accounts Call	Centre Company Contract Depart	nts Human Resources Inventory Reporting Sale	es Scheduling Security Services Static Data	_ & ×		
Save Layout Workspaces Save F	Customise Default Re	ts 🔽				
Format	4 Current	*		~		
ReportName	CustomName					
₽ 88C	R 🛛 C					
PROJECTNETISSUES	PROJECTNETISSUES					
PROJECTTIMESHEET	PROJECTTIMESHEET					
PTRANS	PTRANS					
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					
SUPPLIERDEBITNOTE	SUPPLIERDEBITNOTE					
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.





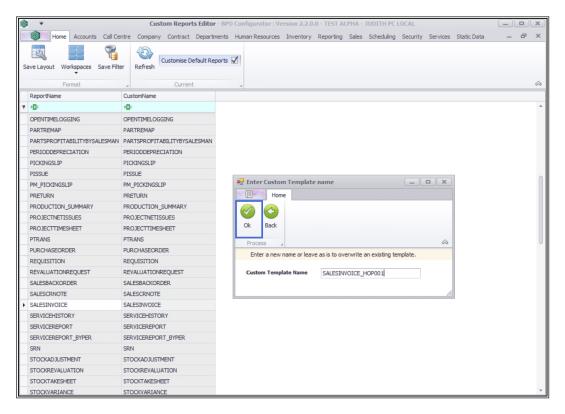
- Since you are creating a custom document template, enter a new name.
 - Note 1: Use a descriptive name for the new document template.
 - Note 2: Please do not use spaces, rather use underscores.
- In this example, the customer code has been added to the same document name (SALESINVOICE_HOP001) so that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

Help v2024.5.0.7/1.0 - Pg 6 - Printed: 21/08/2024



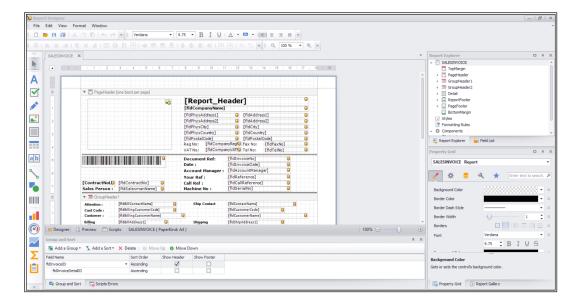
6		Custom Reports Editor	- BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL	
	Home Accounts Call Cer	ntre Company Contract Departm	ents Human Resources Inventory Reporting Sales Scheduling Security Services Static Data -	- & x
9	Save Layout Workspaces Save Filte	Customise Default Rep		
_	Format	⊿ Current	4	\diamond
	ReportName	CustomName		
٩	. n⊡c	A D C		^
	OPENTIMELOGGING	OPENTIMELOGGING		
	PARTREMAP	PARTREMAP		
	PARTSPROFITABILITYBYSALESMAN	PARTSPROFITABILITYBYSALESMAN		
	PERIODDEPRECIATION	PERIODDEPRECIATION		
	PICKINGSLIP	PICKINGSLIP		
	PISSUE	PISSUE		0
	PM_PICKINGSLIP	PM_PICKINGSLIP	Enter Custom Template name	
	PRETURN	PRETURN	Home	
	PRODUCTION_SUMMARY	PRODUCTION_SUMMARY		
	PROJECTNETISSUES	PROJECTNETISSUES		
	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		
ŀ	SALESINVOICE	SALESINVOICE		
	SERVICEHISTORY	SERVICEHISTORY		
	SERVICEREPORT	SERVICEREPORT		
	SERVICEREPORT_BYPER	SERVICEREPORT_BYPER		
	SRN	SRN		
	STOCKADJUSTMENT	STOCKADJUSTMENT		
	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**.

Report Designer									
File Edit View Format Window									
0	D D P P P ↓ C C C C V Verdana • 9.75 • B I U A • 100 • 100 ≈ 30 = •								
1 10									
385	第1日本出日本出日本出日本(日本)(中本)(本)(日田)(小公本)(本)(本)(本)(本)(本)(本)(本)(本)(+)(+)(+)(+)(+)(+)(+)(+)(+)(+)(+)(+)(+)								
-	salesinvoice ×	Report Explorer 🗖 🖡 🗙							
		SALESINVOICE TopMargin							
		PageHeader							
A		GroupHeader 1							
	E PageHeader [one band per page]	GroupHeader2							
		Detail Detail ReportFooter							
		Report-ooter PageFooter							
	[fldCompanyName] 0 [fldPhysAddress] 0 [fldAddress] 0	BottomMargin							
	- [[fidPhysAddress]]	Styles							
	[fidPhysCity] G [fidCity] G	Formatting Rules							
	3 [fldPhysCountry] 9 [fldCountry]								
	[fidPostalCode]	🖳 Report Explorer 🛛 🔒 Field List							
	4 Kegino, <u>Diocomparingen as No.</u> (Indexing) • VATNO, (Indexing) • VATNO, Indexing) • VATNO, Indexing • VATNO, Indexi	Property Grid 🗖 🕸 🗙							
a b	5 Document Ref: [ftdInvoiceNo]	SALESINVOICE Report							
Q	Account Manager: [fld.rvoiceDate]								
~	6 Your Ref: (fildReference)	💉 🎄 🌻 🔍 🛧 Enter text to search. 🔎							
	[ContractNol] [fldContractNo] G Call Ref : [fldCallReference] G								
-	Sales Person : [fldSalesmanName] Hachine No : [fldSerialNo]	Background Color							
	The second secon	Border Color 🔹 🗆							
	Attention : [fidbillContactNam] G Ship Contact [fidContactNam] G Cout Code : [fidbillContactNam] G	Border Dash Style							
.1	Customer: [fiddillingCustomerizani] G [fidCustomerizani] G	Border Width							
	Billing [fidbillAddress1] G Shipping [fidShipAddress1] G								
	M Designer © Preview Im Scripts SALESINVOICE { PaperKind: A4 }								
	a x	Font Verdana 👻 🗆							
\sim	🛱 Add a Group - 📡 Add a Sort - 🗙 Delete 💿 Move Up 📵 Move Down	9.75 🕻 B I 🛛 S							
2									
	Field Name Sart Order Show Header Show Pooter fd/mviceID Ascending Image: Ascending //> // Image: Ascendin	Background Color							
	nauvoceb Acceding V	Gets or sets the control's background color.							
	📭 Group and Sort 🛛 🖓 Sorjots Errors	Property Grid 😥 Report Gallery							
		JL							

- 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

MNU.155.003