

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

## 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:

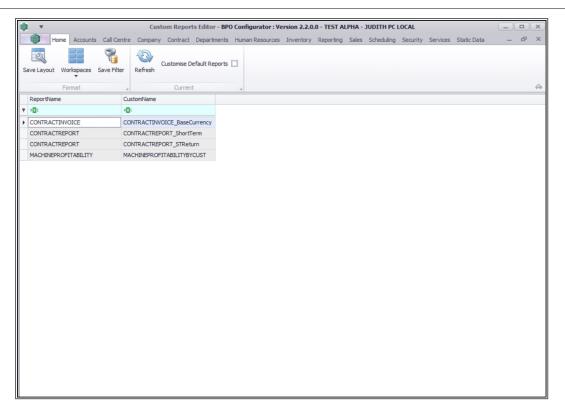
- Sales Invoice
- Back Order
- Sales Credit Note
- Sales Quote
- Sales Order
- Contract Invoice
- Contract Credit Note

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



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

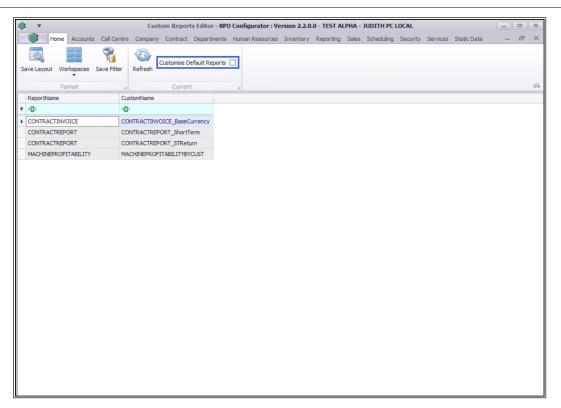




### **CUSTOMISE DEFAULT REPORT CHECK-BOX**

- 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.

Help v2024.5.0.7/1.0 - Pg 3 - Printed: 04/07/2024



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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.



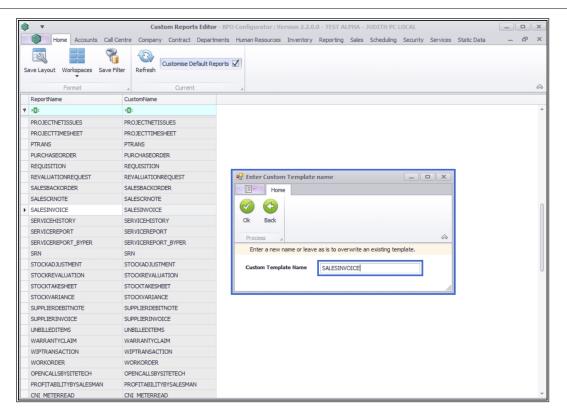
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An Enter Custom Template name message box will pop up telling you;

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

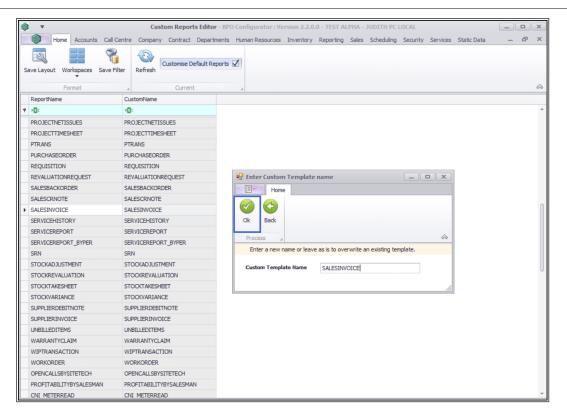
 Keep the same name for your report or document. The only time you need to change the name of the report or document is for Client Specific Sales Documents.





• Click on **Ok**.





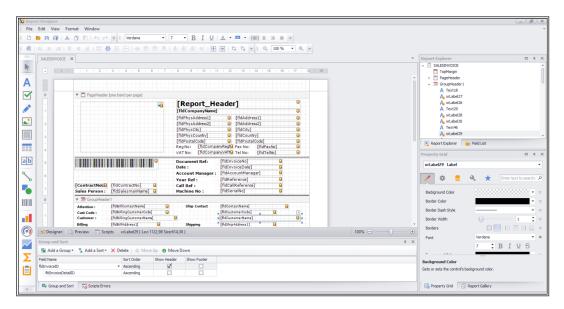
- The **Reports Designer** maintain screen for the selected documented will be displayed.
- Basic changes e.g. font size / colour, additional text field messages etc are easy to do.
- Most of the fields are retrieved from the database . For more information on how to edit these, refer to related topics.



### Introduction to Report Designer

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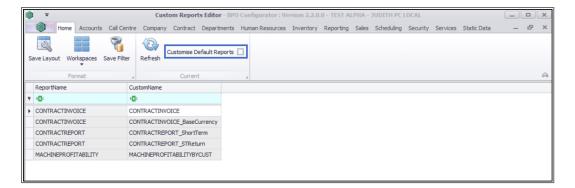
• When you are done, click on **Save**.



### **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.



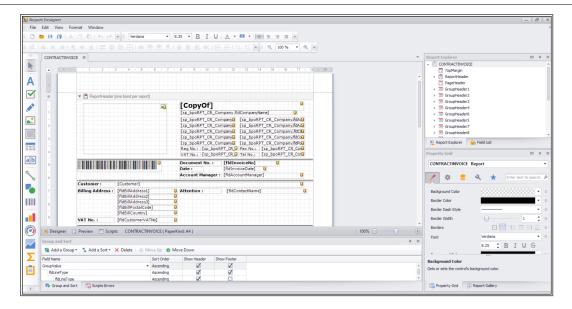


- An Additional Custom Template message box will pop up asking you;
  - Do you want to create new template?
- Click on **No** if you wish to edit the current template.
- Click on **Yes** if you wish to create a new custom document.

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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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• The new custom document will be displayed.

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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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