

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

REPORTING

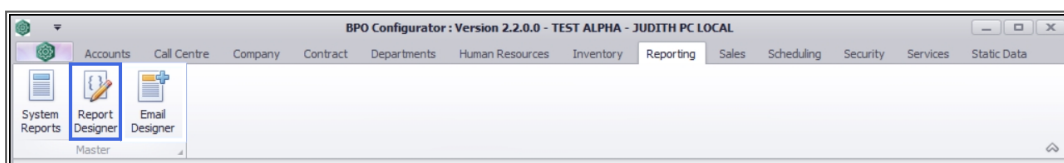
INTRODUCTION TO REPORT DESIGNER

With Reports Designer, you have the ability to customize **BPO** documents, this will become a new template that is applied globally.

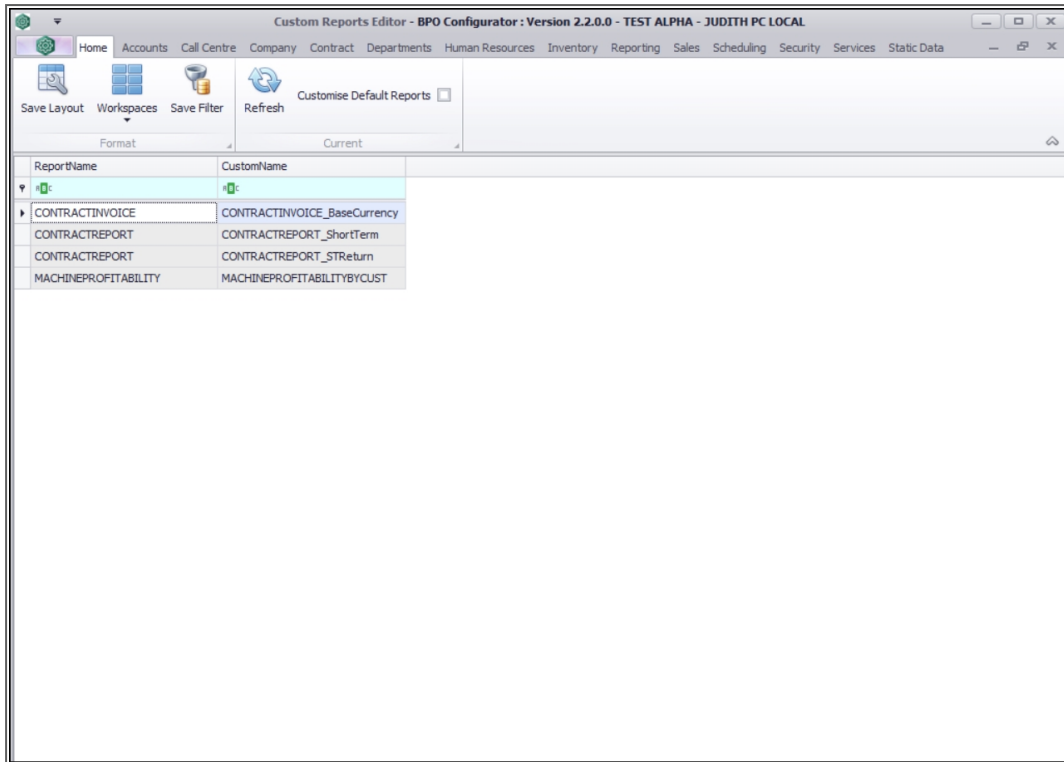
You are also able to create client specific sales documents that can be linked to a specific customer. These client specific documents are noted in the **Customer Invoice Delivery Method** screen and are limited to the following reports:

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

Ribbon Access: Configurator > Reporting > Report Designer

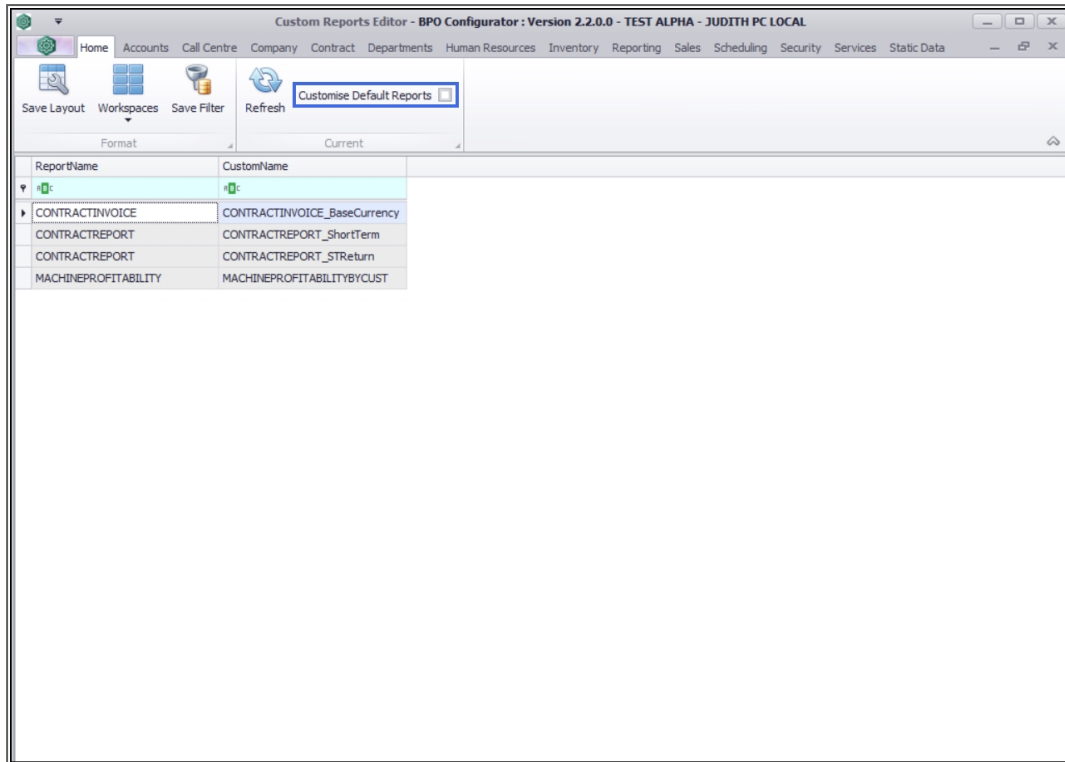


The **Custom Reports Editor** screen will be displayed.

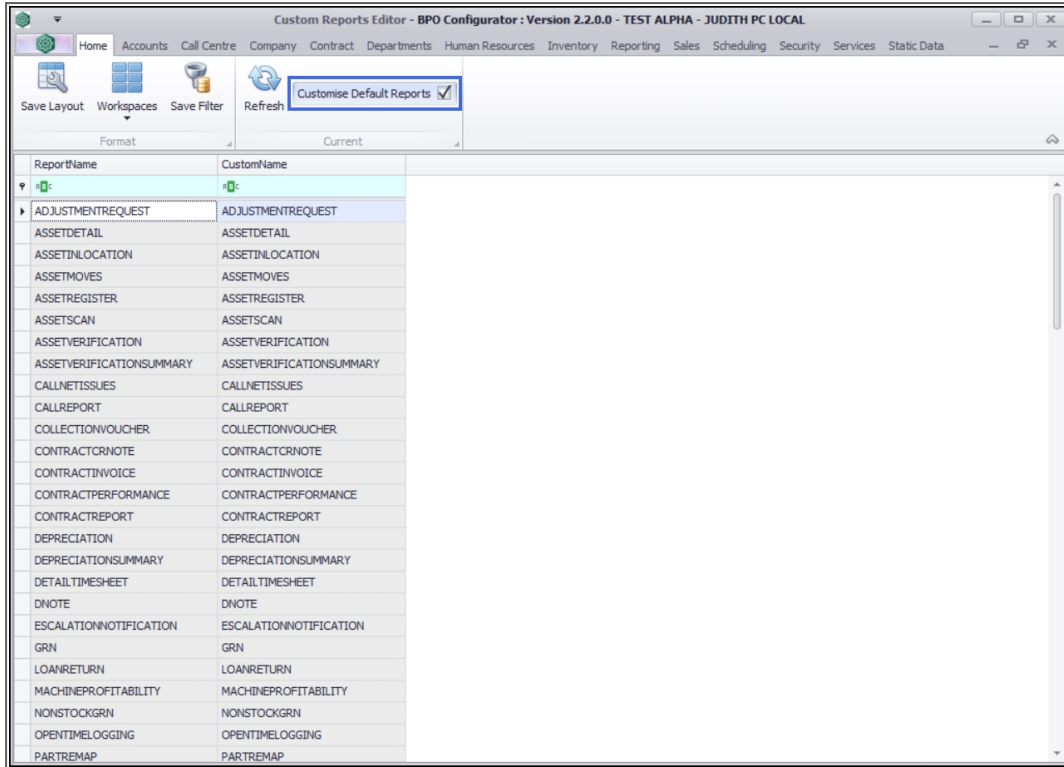


CUSTOMISE DEFAULT REPORT CHECK-BOX

- 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.

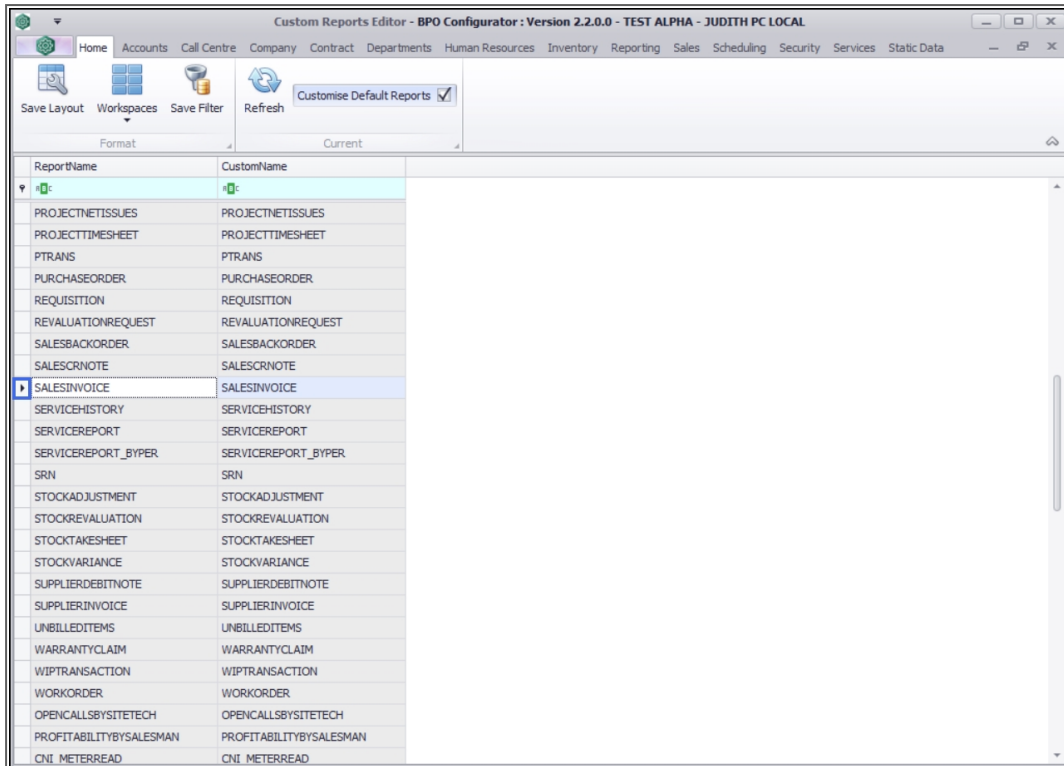


- If the **Customise Default Reports** check box is selected, all **BPO** documents will be displayed.

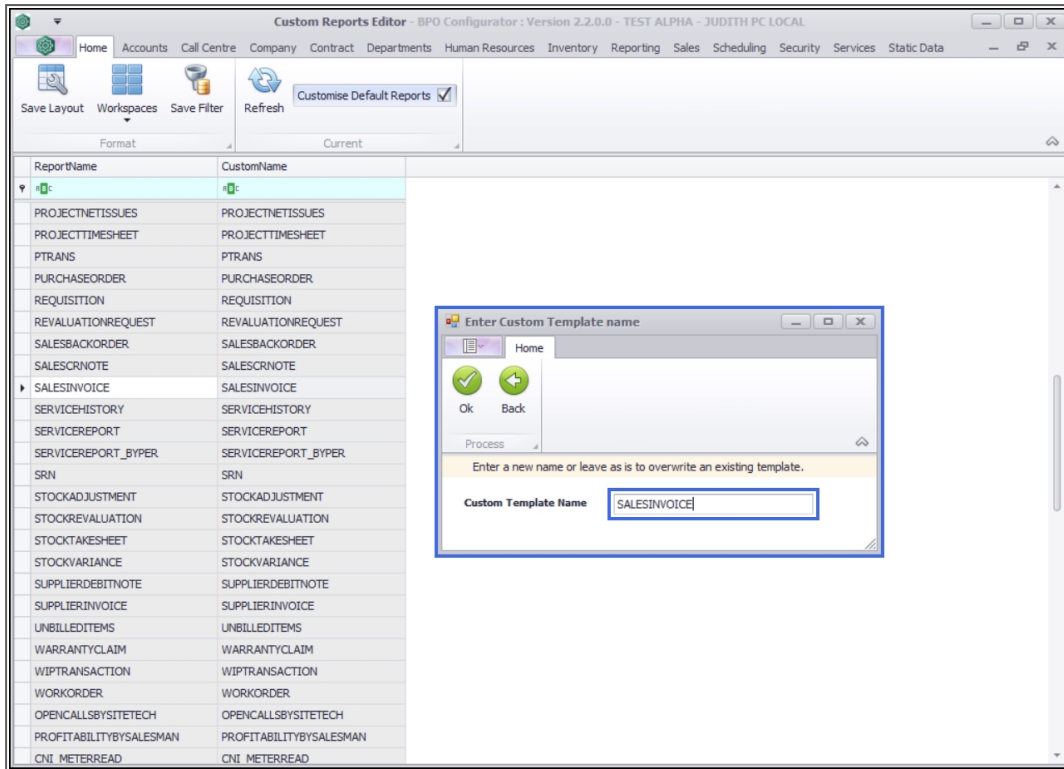


CUSTOMISING A DEFAULT REPORT

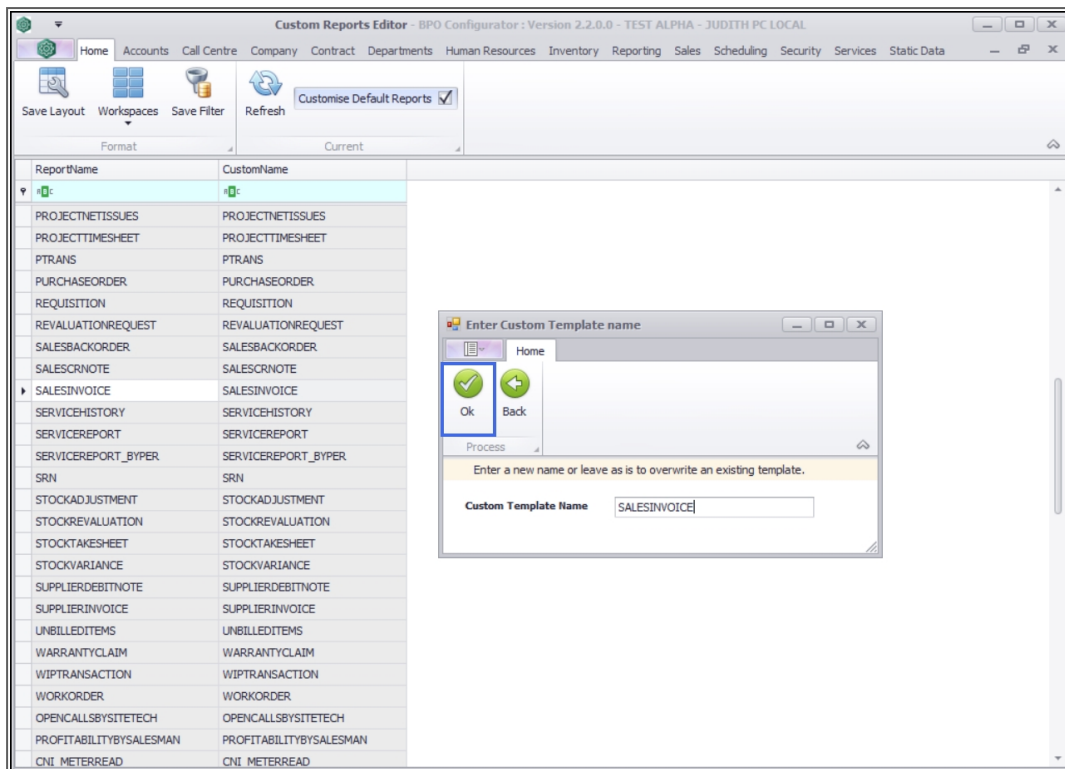
- **Double click** on a report you wish to customise.
- In this image, **Sales Invoice** has been selected.



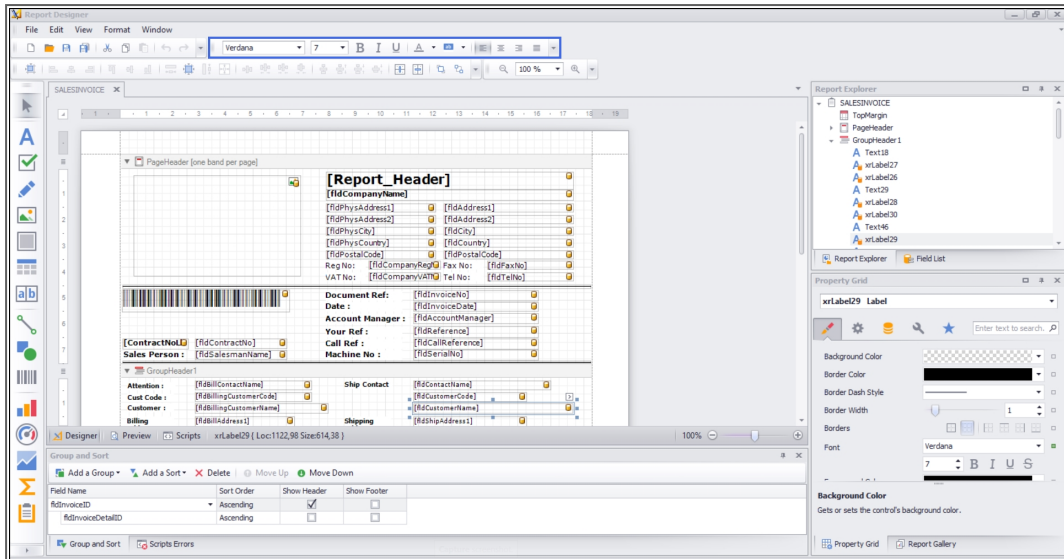
- An **Enter Custom Template name** message box will pop up telling you;
 - **Enter a new name or leave as is to overwrite an existing template.**
- Keep the **same** name for your report or document. The only time you need to change the name of the report or document is for **Client Specific Sales Documents**.



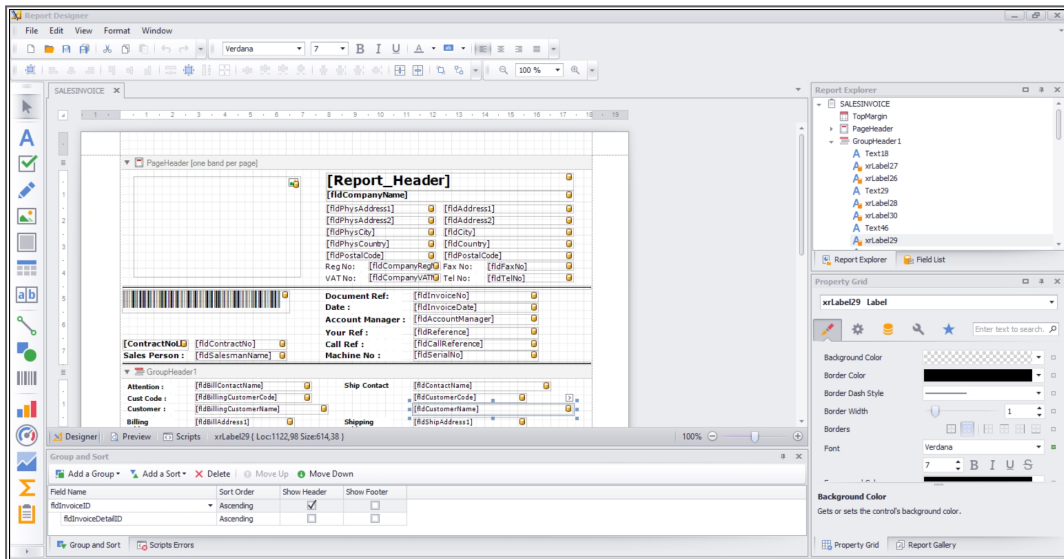
- Click on **Ok**.



- 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](#).

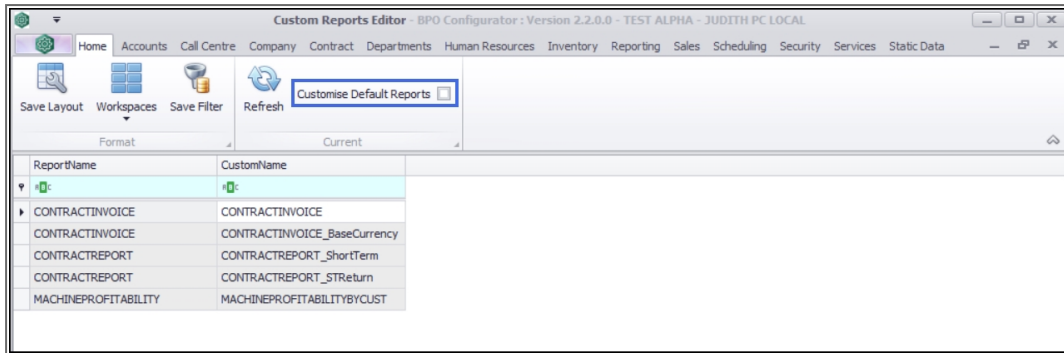


- When you are done, click on **Save**.

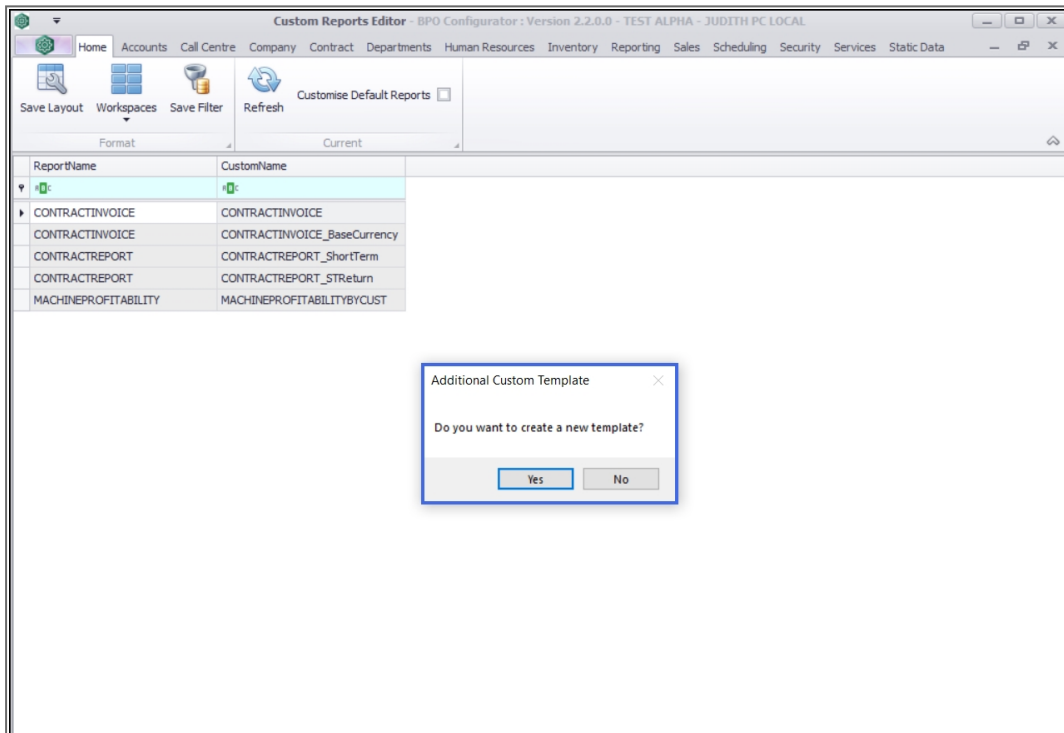


EDIT AN EXISTING CUSTOM REPORT

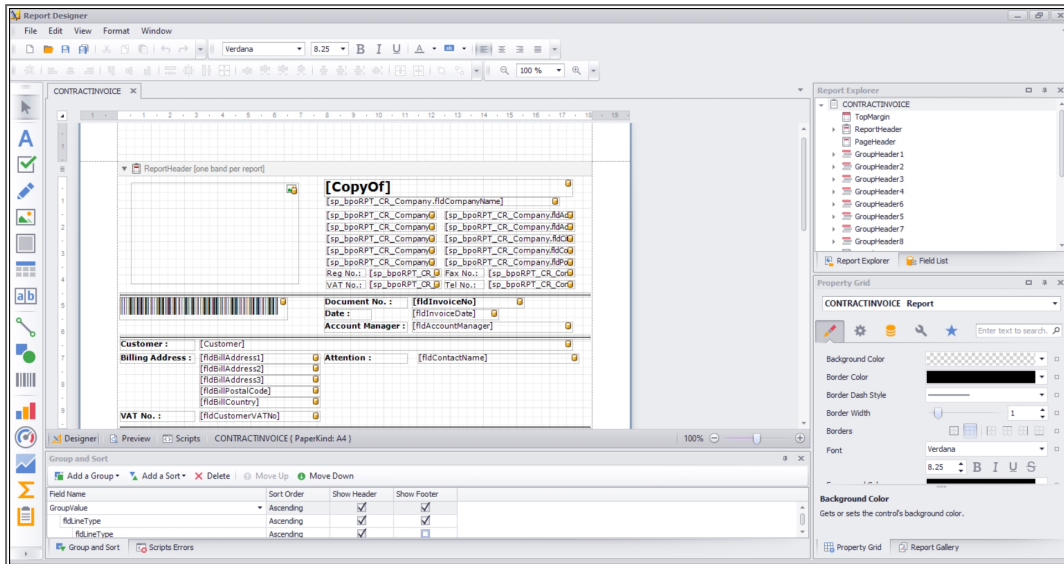
- For the list of custom reports to be displayed, ensure that the **Customise Default Reports** check box is unselected.
- Double click on the custom report you wish to edit.



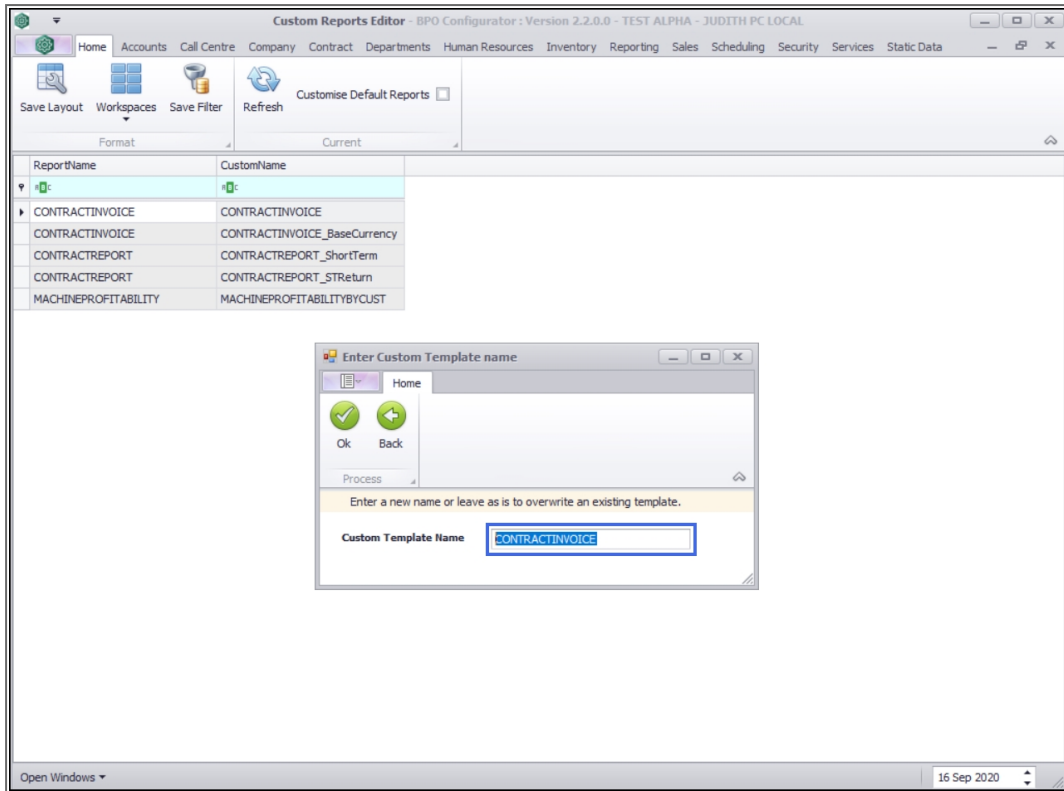
- An **Additional Custom Template** message box will pop up asking you;
 - **Do you want to create new template?**
- Click on **No** if you wish to edit the current template.
- Click on **Yes** if you wish to create a new custom document.



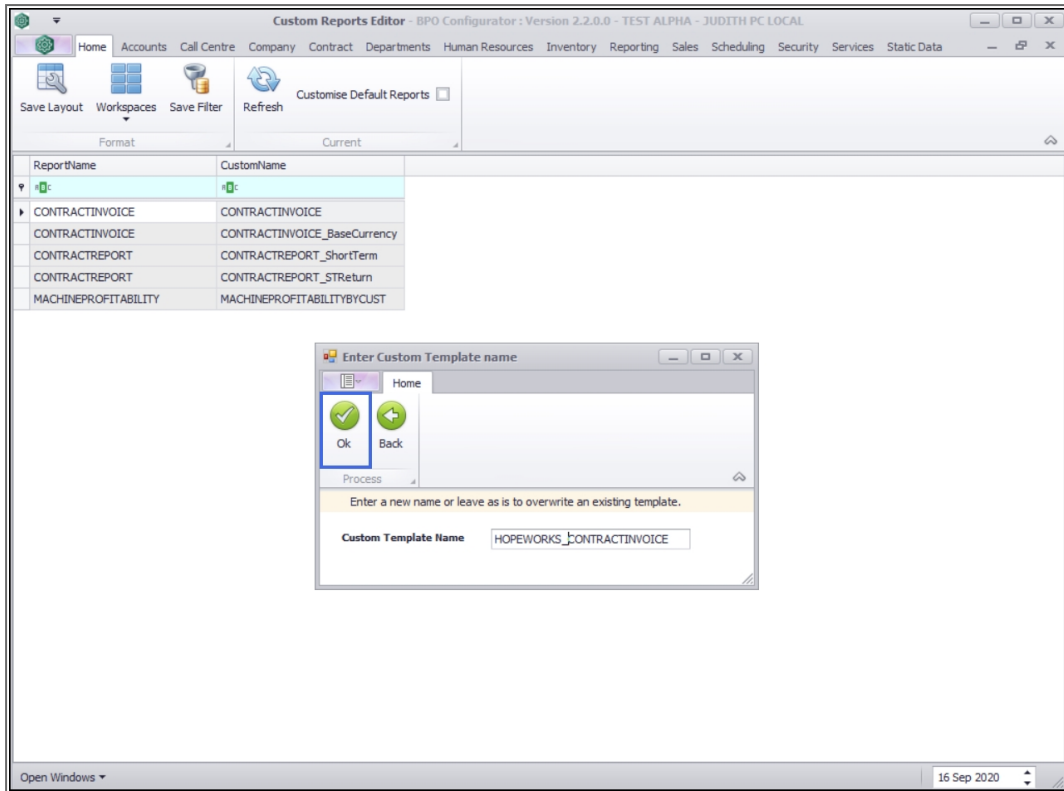
- If you click on **No**, the current document will be displayed.
- Edit the report accordingly and save when done.



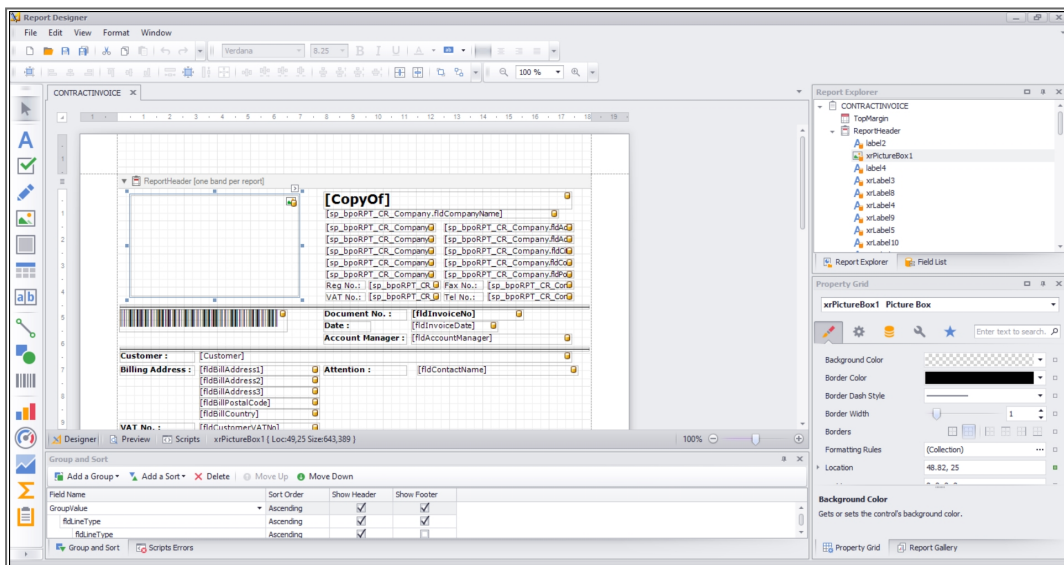
- If you click on **Yes**, an **Enter Custom Template name** screen will pop up.
- Change the name of the report if the requirements are for a specific customer.
 - **Note:** This will create a new custom report from the existing custom report.



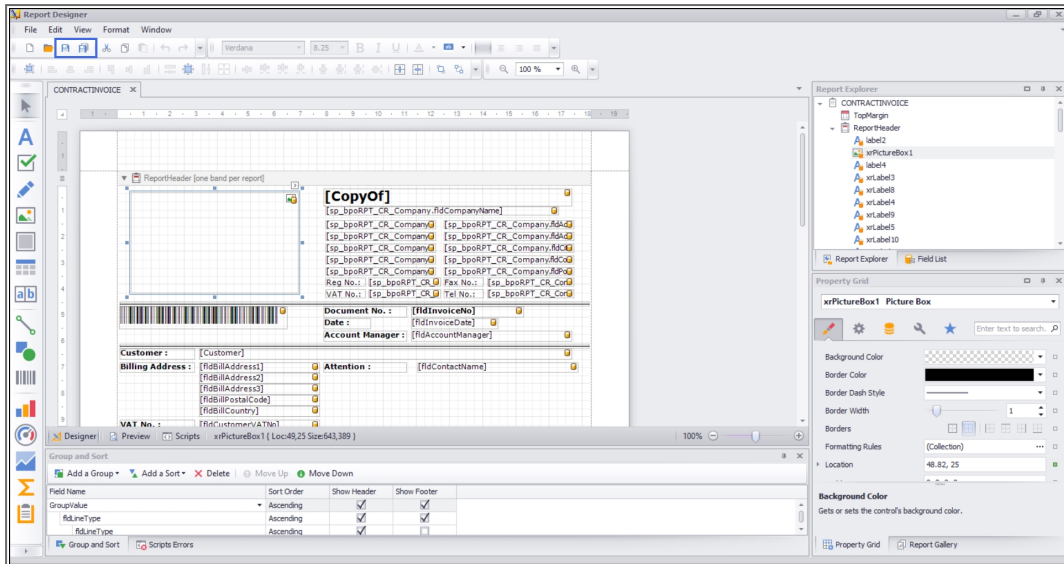
- Click on **Ok**.



- The new custom document will be displayed.



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



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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