

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:

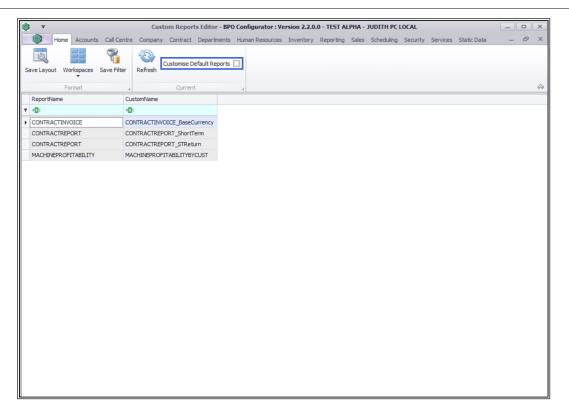
- Sales Invoice
- Back Order
- Sales Credit Note
- Sales Quote
- Sales Order
- Contract Invoice
- Contract Credit Note

Ribbon Access: Configurator> Reporting> Report Designer



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

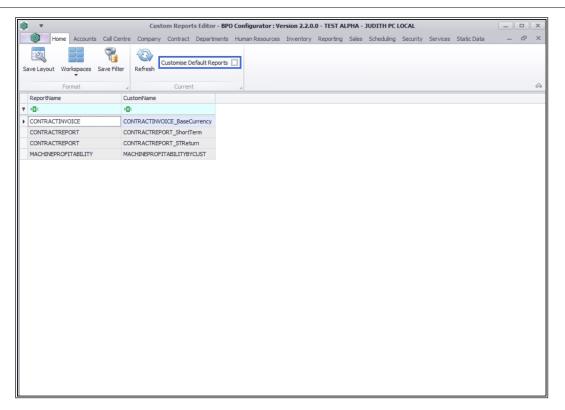




CUSTOMISE DEFAULT REPORTS CHECK-BOX

- 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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	ASSETVERIFICATION	ASSETVERIFICATION								
	ASSETVERIFICATIONSUMMARY	ASSETVERIFICATIONSUMMARY								
	CALLNETISSUES	CALLNETISSUES								
	CALLREPORT	CALLREPORT								
	COLLECTIONVOUCHER	COLLECTIONVOUCHER								
	CONTRACTCRNOTE	CONTRACTORNOTE								
	CONTRACTINVOICE	CONTRACTINVOICE								
	CONTRACTPERFORMANCE	CONTRACTPERFORMANCE								
	CONTRACTREPORT	CONTRACTREPORT								
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	DEPRECIATIONSUMMARY	DEPRECIATIONSUMMARY								
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	DNOTE	DNOTE								
	ESCALATIONNOTIFICATION	ESCALATIONNOTIFICATION								
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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.

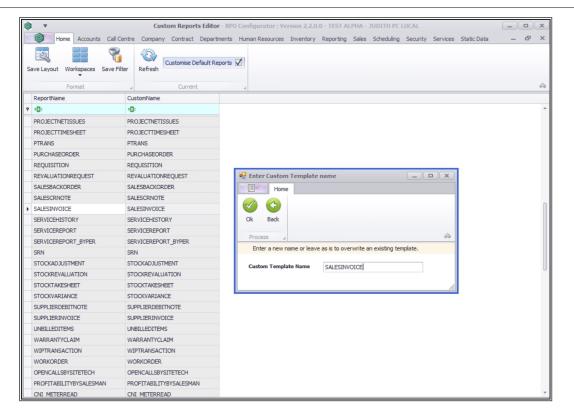


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REVALUATIONREQUEST	REVALUATIONREQUEST					
SALESBACKORDER	SALESBACKORDER					
SALESCRNOTE	SALESCRNOTE					
SALESINVOICE	SALESINVOICE					
SERVICEHISTORY	SERVICEHISTORY					
SERVICEREPORT	SERVICEREPORT					
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SRN	SRN					
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STOCKREVALUATION	STOCKREVALUATION					
STOCKTAKESHEET	STOCKTAKESHEET					
STOCKVARIANCE	STOCKVARIANCE					
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SUPPLIERINVOICE	SUPPLIERINVOICE					
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WARRANTYCLAIM	WARRANTYCLAIM					
WIPTRANSACTION	WIPTRANSACTION					
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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.

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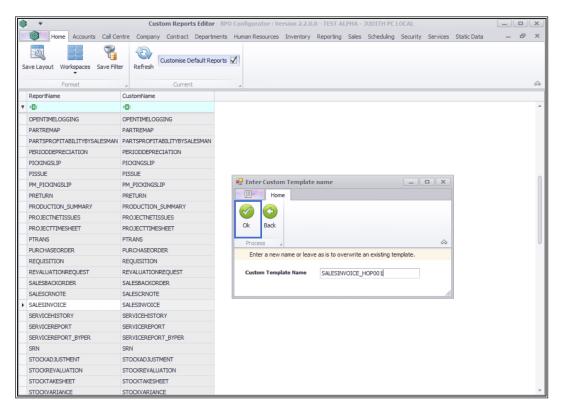
- Since you are creating a custom document template, enter a new name.
 - Note 1: Use a descriptive name for the new document template.
 - Note 2: Please do not use spaces, rather use underscores.
- In this example, the customer code has been added to the same document name (SALESINVOICE_HOP001) so that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

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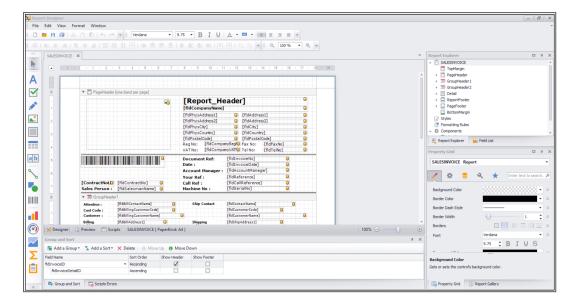
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• Click on Ok.





- 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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