REPORTING

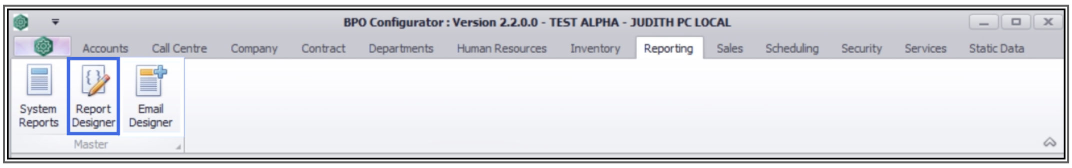
INTRODUCTION TO REPORT DESIGNER

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

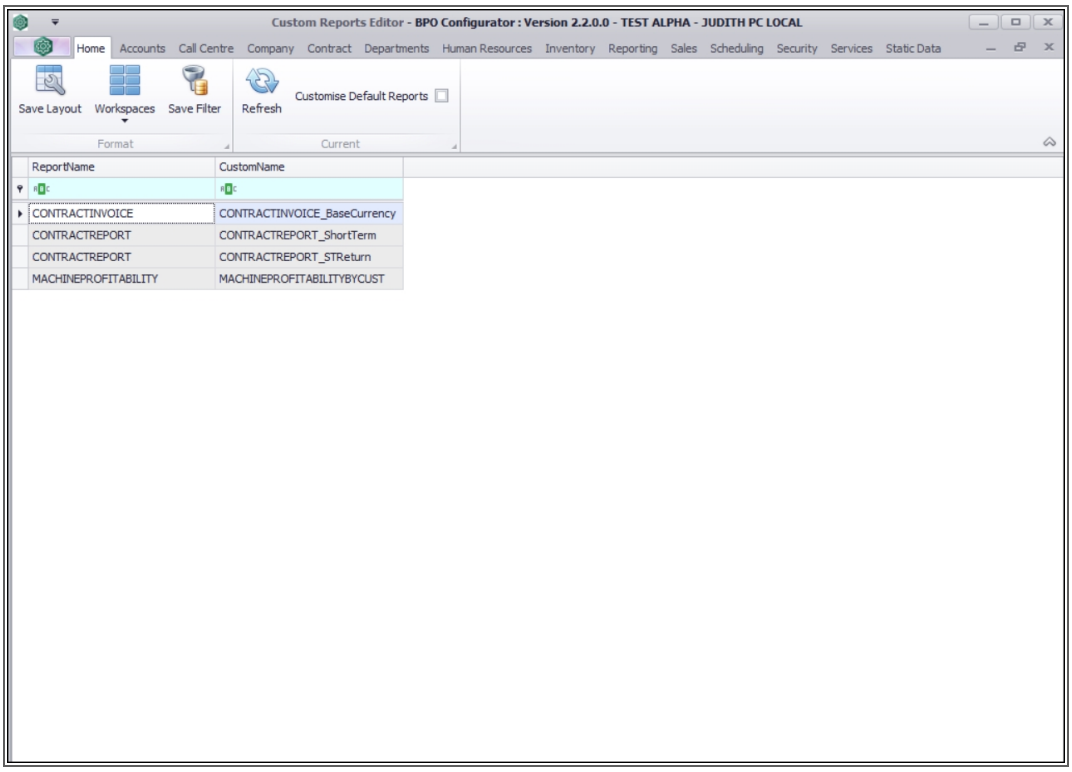
You are also able to create client specific sales documents that can be linked to a specific customer. These client specific documents are noted in the Customer Invoice Delivery Method screen and are limited to the following reports:

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

Ribbon Access: *Configurator > Reporting > Report Designer*

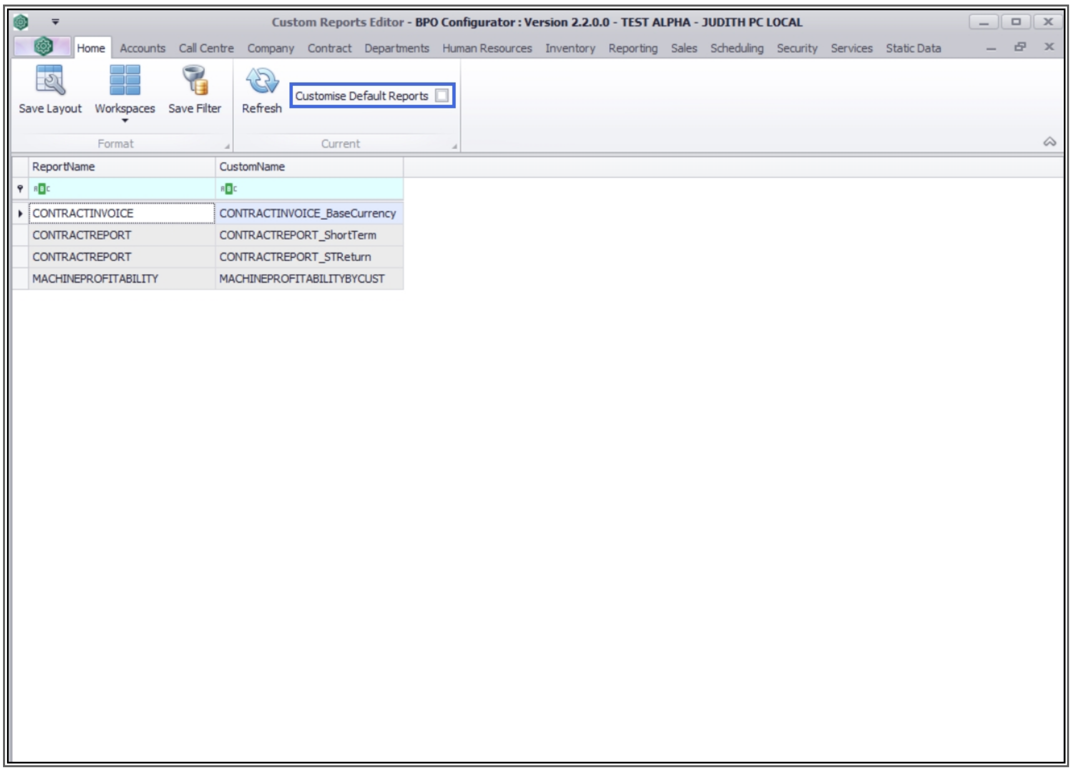


The ***Custom Reports Editor*** screen will be displayed.

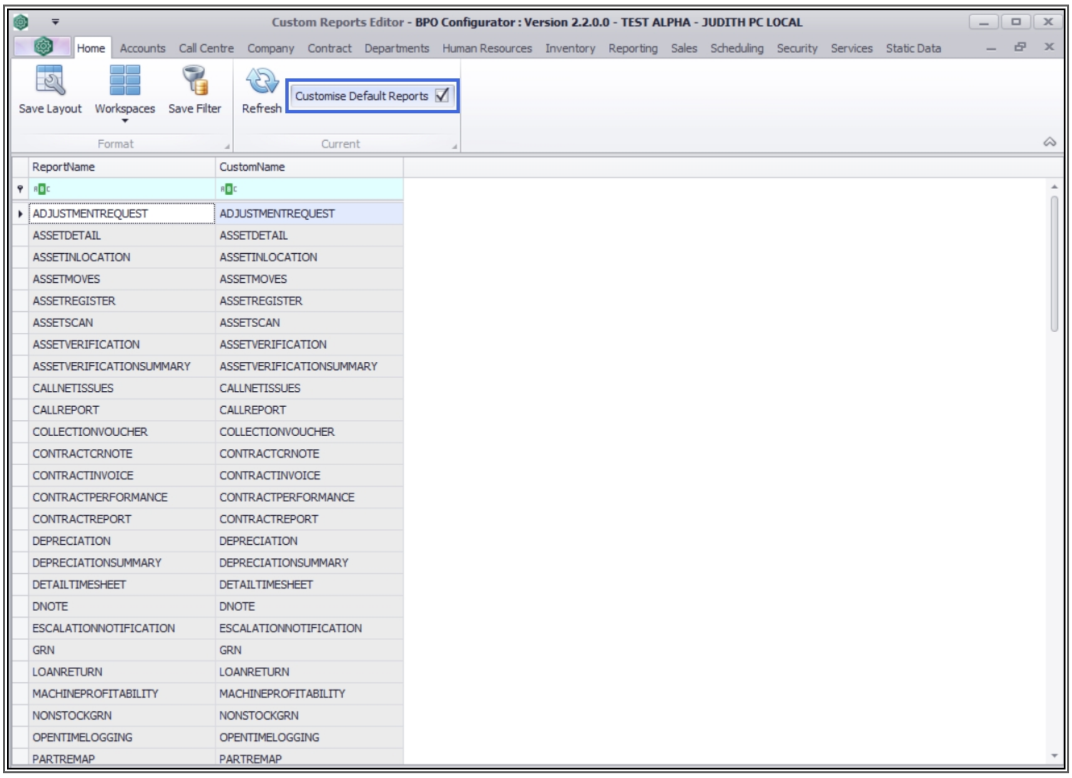


CUSTOMISE DEFAULT REPORT CHECK-BOX

- 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.

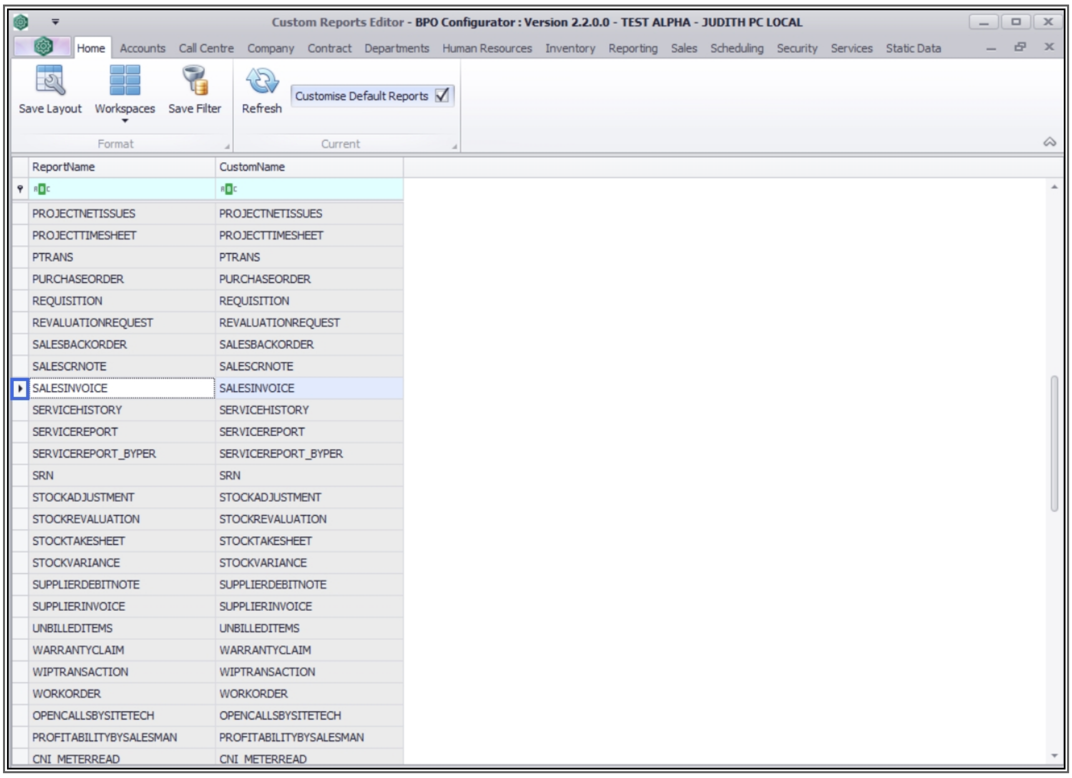


- If the ***Customise Default Reports*** check box is selected, all ***BPO*** documents will be displayed.

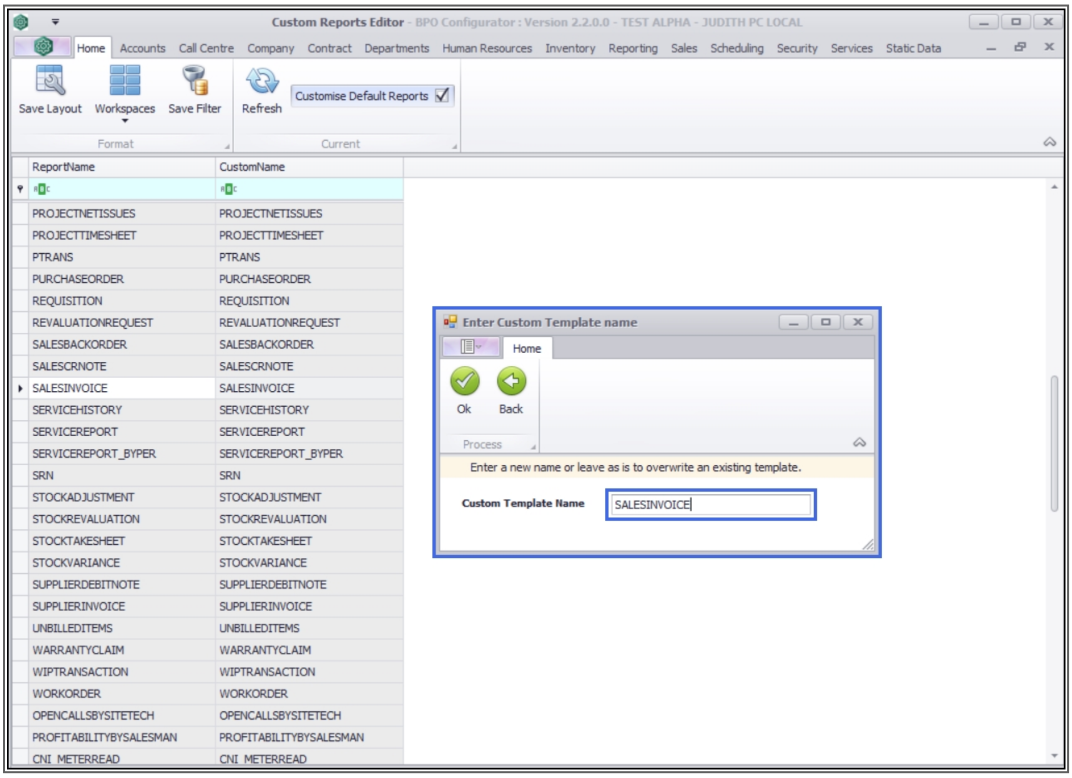


CUSTOMISING A DEFAULT REPORT

- ***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.


Custom Reports Editor - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL
Home
Accounts
Call Centre
Company
Contract
Departments
Human Resources
Inventory
Reporting
Sales
Scheduling
Security
Services
Static Data
Save Layout
Workspaces
Save Filter
Refresh
Customise Default Reports
Format
Current
ReportName
CustomName
PROJECTNETISSUES
PROJECTTIMESHEET
PTRANS
PURCHASEORDER
REQUISITION
REVALUATIONREQUEST
SALESBACKORDER
SALESCRNOTE
SALESINVOICE
SERVICEHISTORY
SERVICEREPORT
SERVICEREPORT_BYPER
SRN
STOCKADJUSTMENT
STOCKREVALUATION
STOCKTAKESHEET
STOCKVARIANCE
SUPPLIERDEBITNOTE
SUPPLIERINVOICE
UNBILLEDITEMS
WARRANTYCLAIM
WIPTRANSACTION
WORKORDER
OPENCALLSBYSITETECH
PROFITABILITYBYSALESMAN
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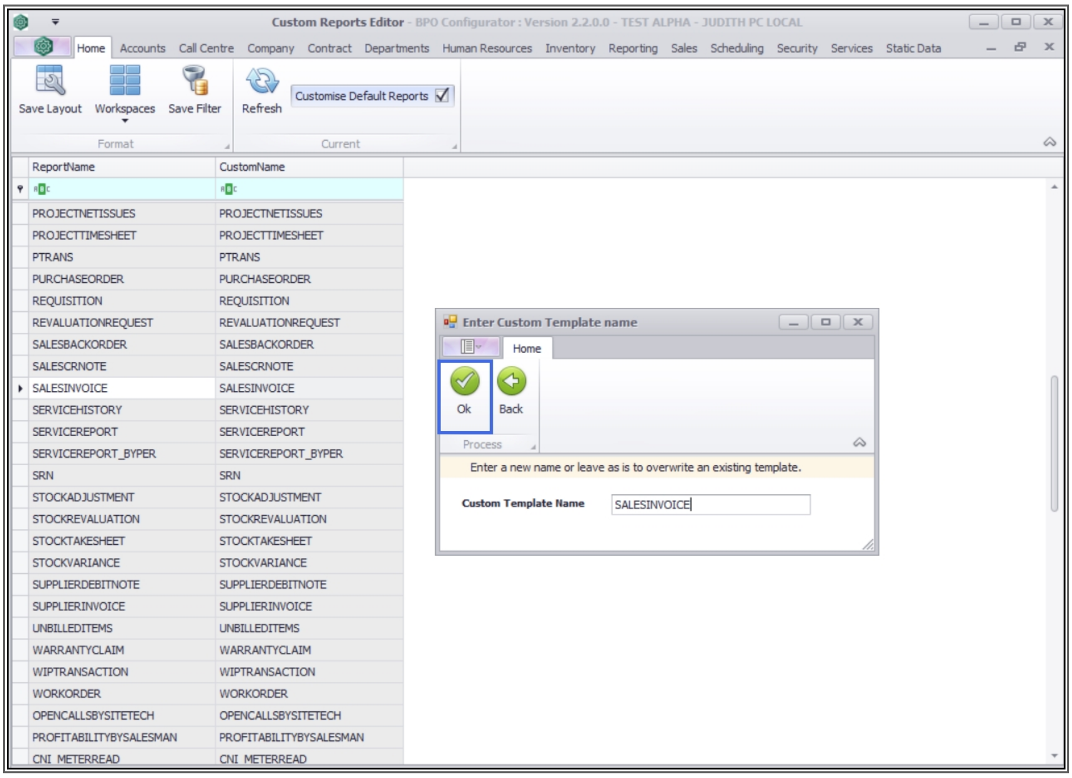
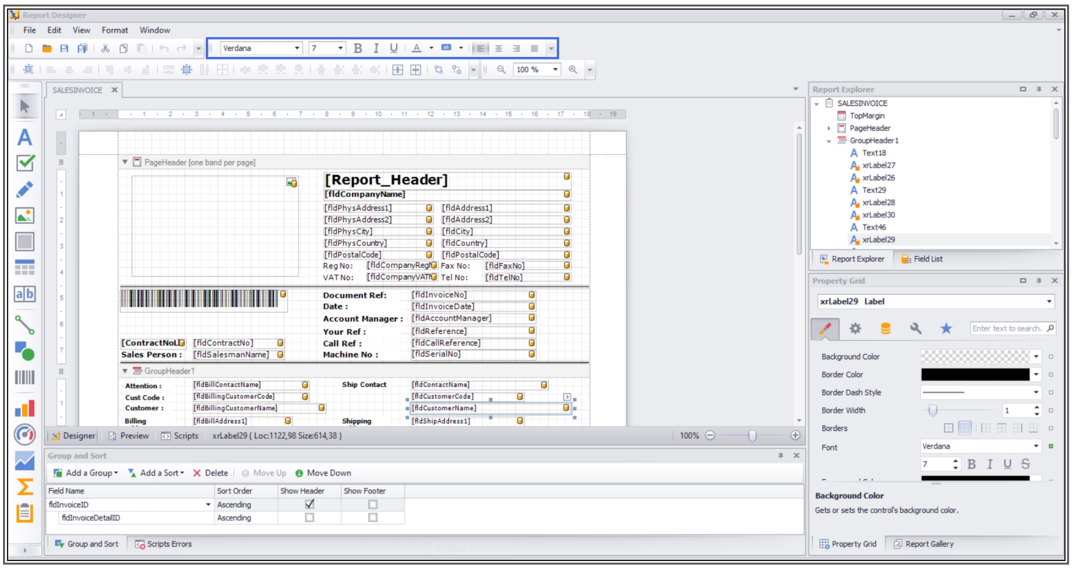
Enter Custom Template name
Home
Ok
Back
Process
Enter a new name or leave as is to overwrite an existing template.
Custom Template Name
SALESINVOICE

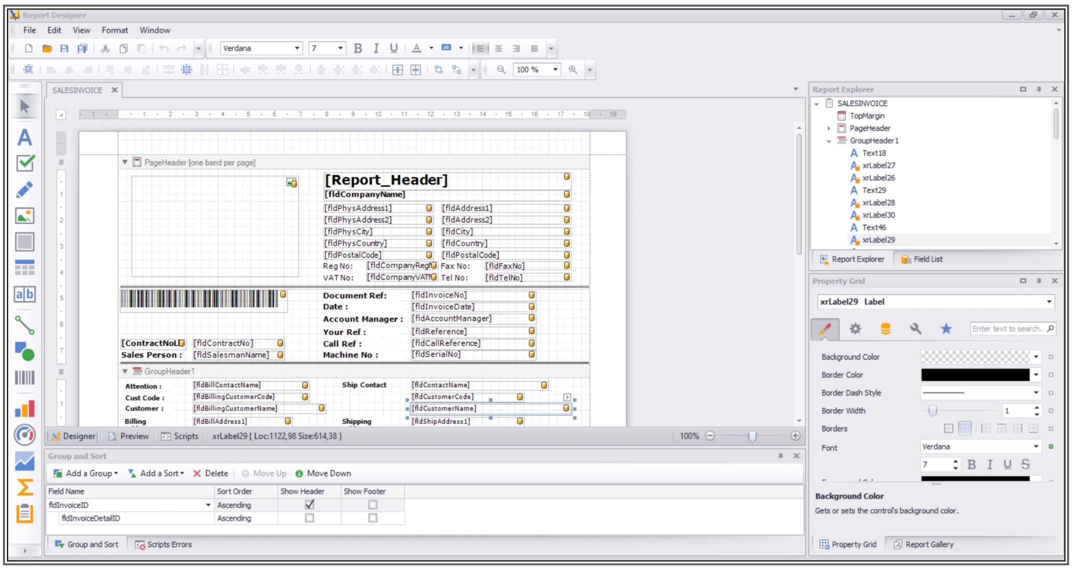
- Click on ***Ok***.



- 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.

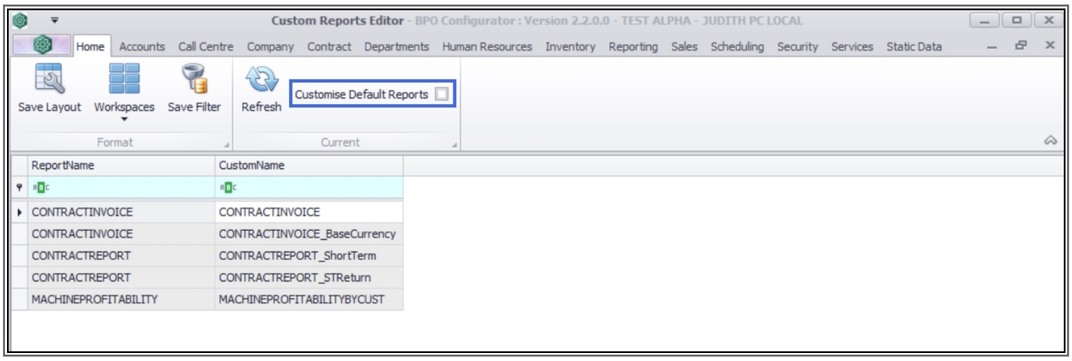


- When you are done, click on ***Save***.

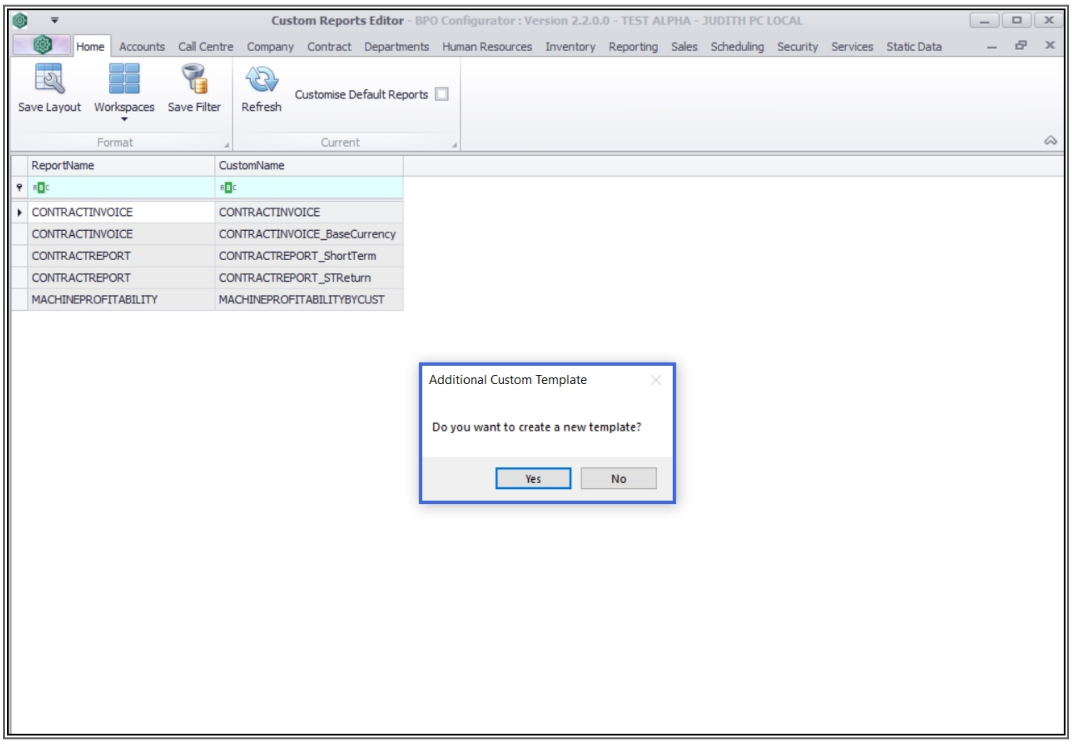


EDIT AN EXISTING CUSTOM REPORT

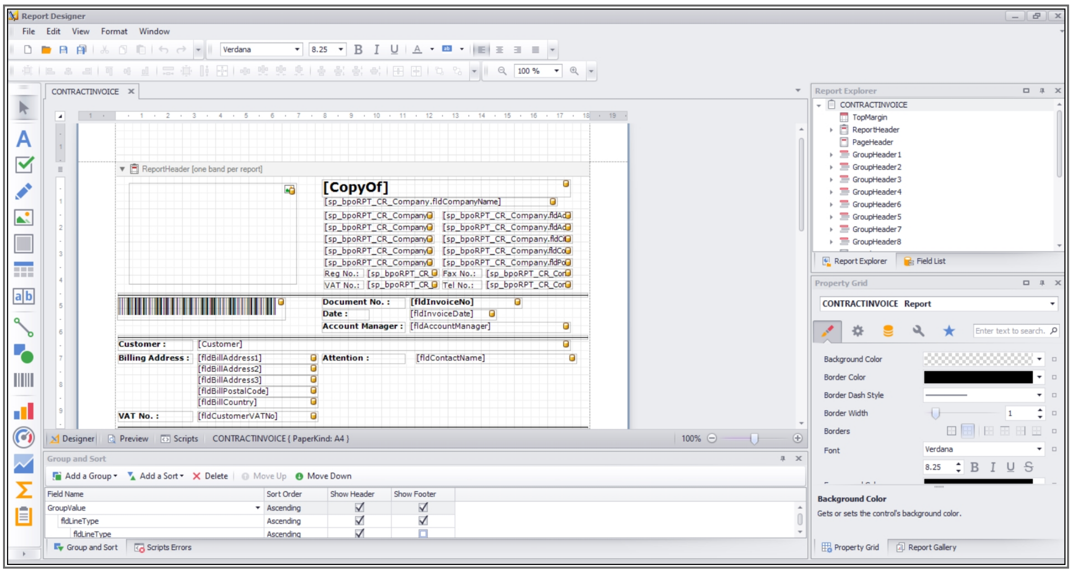
- For the list of custom reports to be displayed, ensure that the ***Customise Default Reports*** check box is unselected.
- Double click on the custom report you wish to edit.



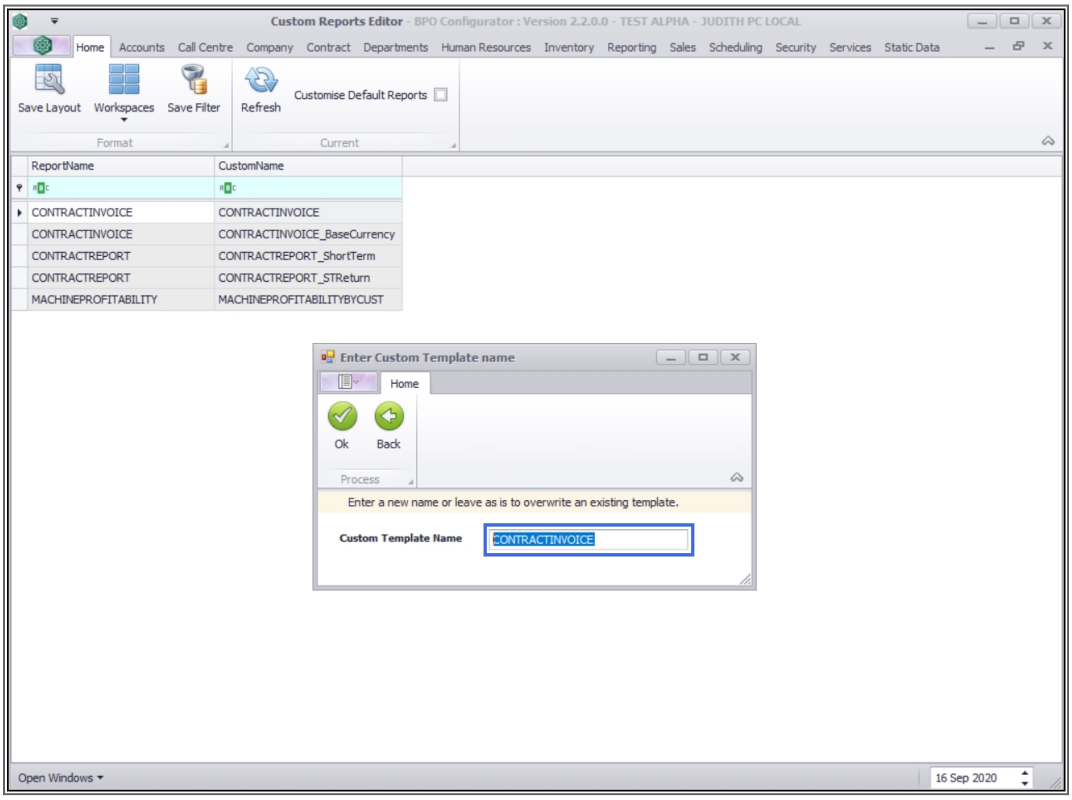
- An ***Additional Custom Template*** message box will pop up asking you;
  - ***Do you want to create new template?***
- Click on ***No*** if you wish to edit the current template.
- Click on ***Yes*** if you wish to create a new custom document.



- 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.


Custom Reports Editor - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL
Home
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Contract
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Human Resources
Inventory
Reporting
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Security
Services
Static Data
Save Layout
Workspaces
Save Filter
Refresh
Customise Default Reports
Format
Current
ReportName
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CONTRACTINVOICE
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CONTRACTINVOICE_BaseCurrency
CONTRACTREPORT
CONTRACTREPORT_ShortTerm
CONTRACTREPORT
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MACHINEPROFITABILITY
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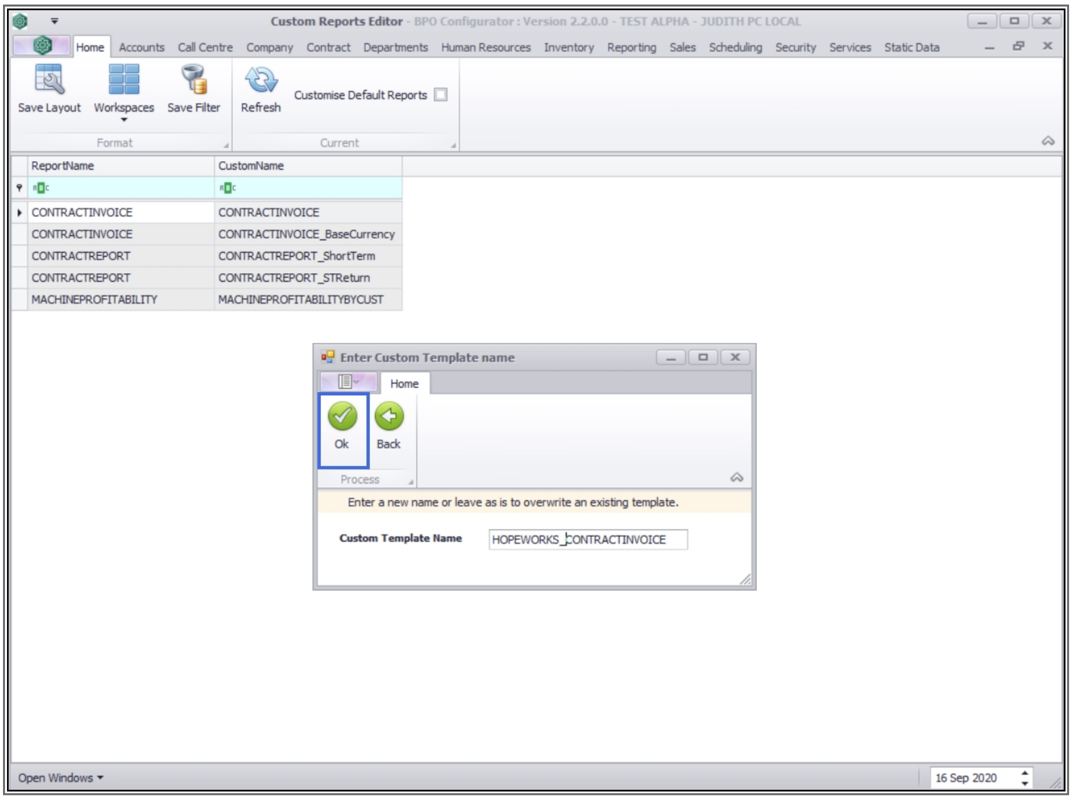
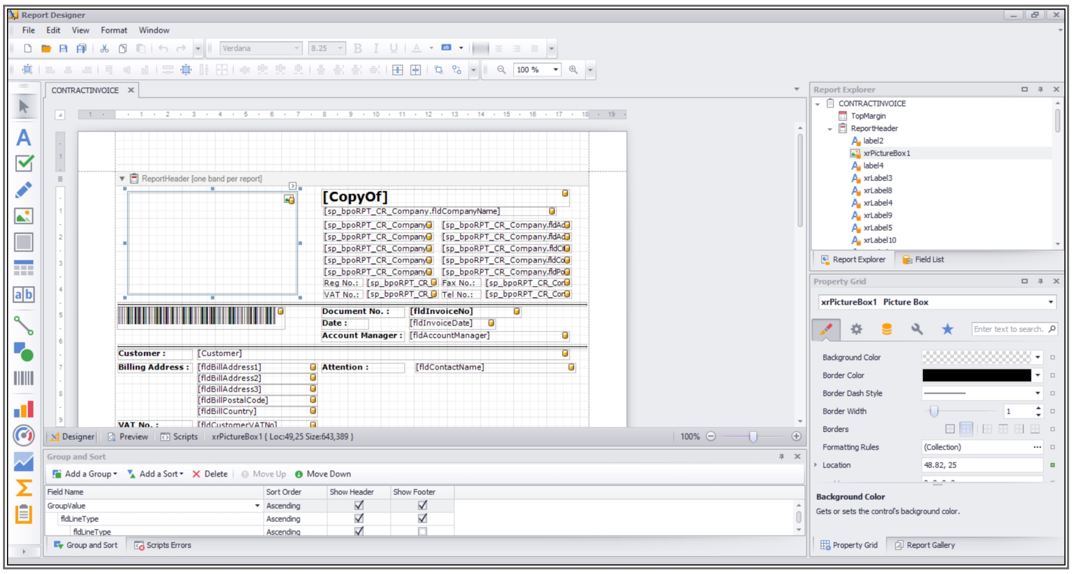
Enter Custom Template name
Home
Ok
Back
Process
Enter a new name or leave as is to overwrite an existing template.
Custom Template Name
CONTRACTINVOICE
Open Windows
16 Sep 2020

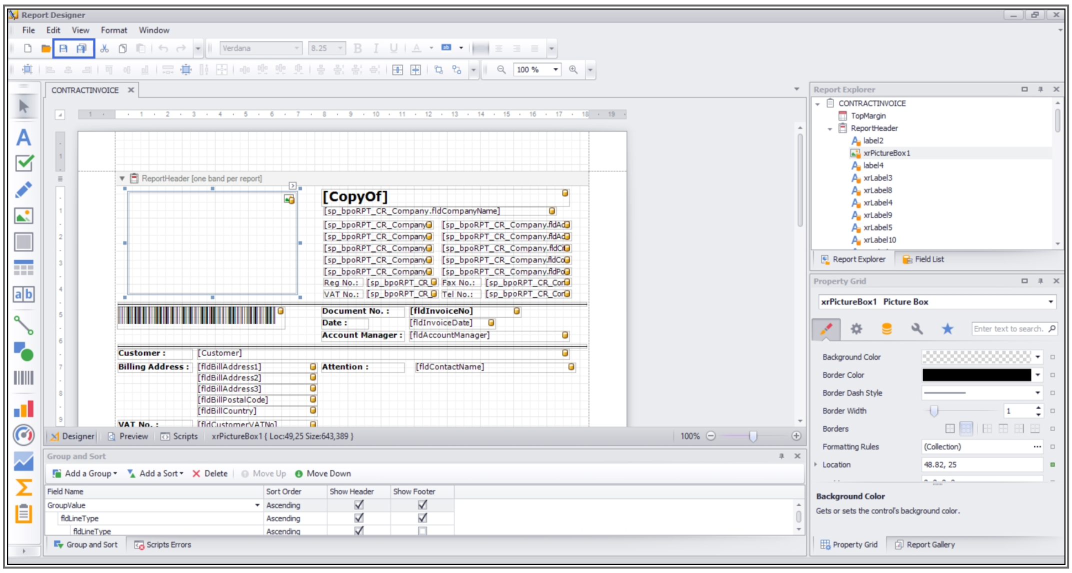
- Click on ***Ok***.



- 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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