REPORTING

CLIENT SPECIFIC CUSTOMIZED SALES REPORTS

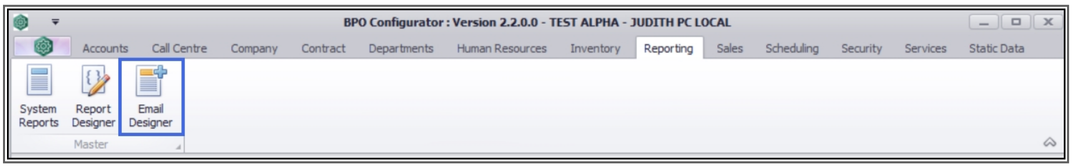
With Reports Designer, you have the ability to customize ***BPO*** documents. You can create client specific sales documents if you want a single client to receive an sales document e.g. an invoice that looks different.

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.

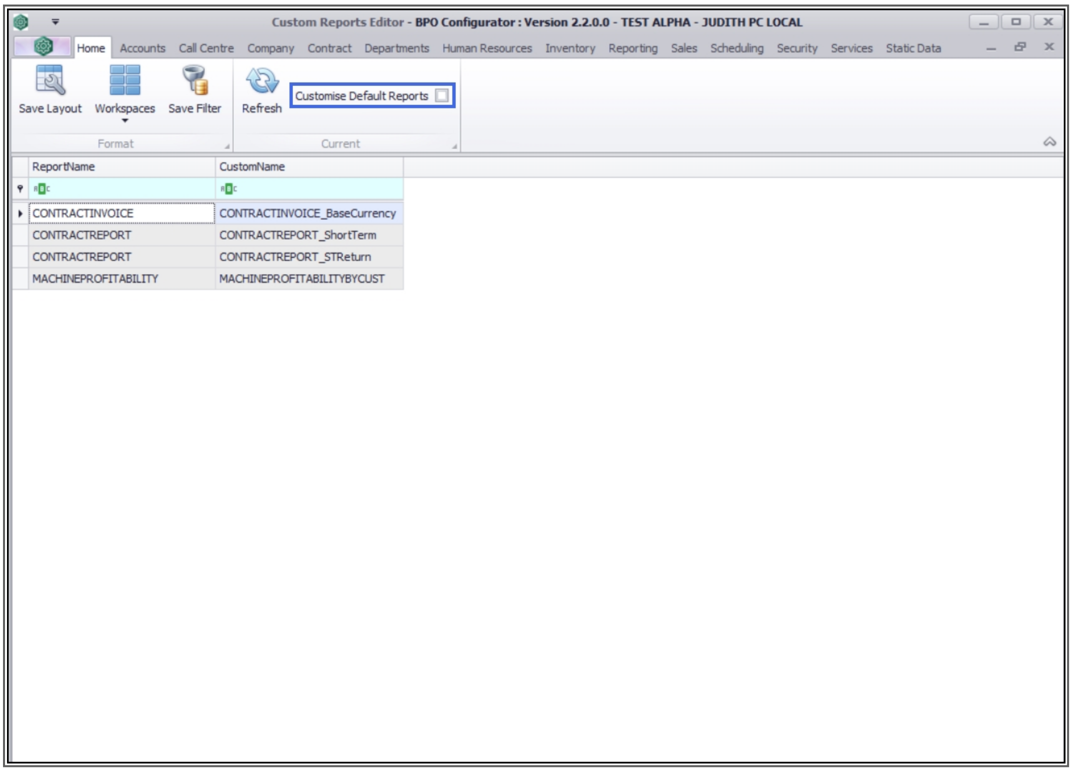
The reports that can be customized in this way are:

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

Ribbon Access: *Configurator> Reporting> Report Designer*

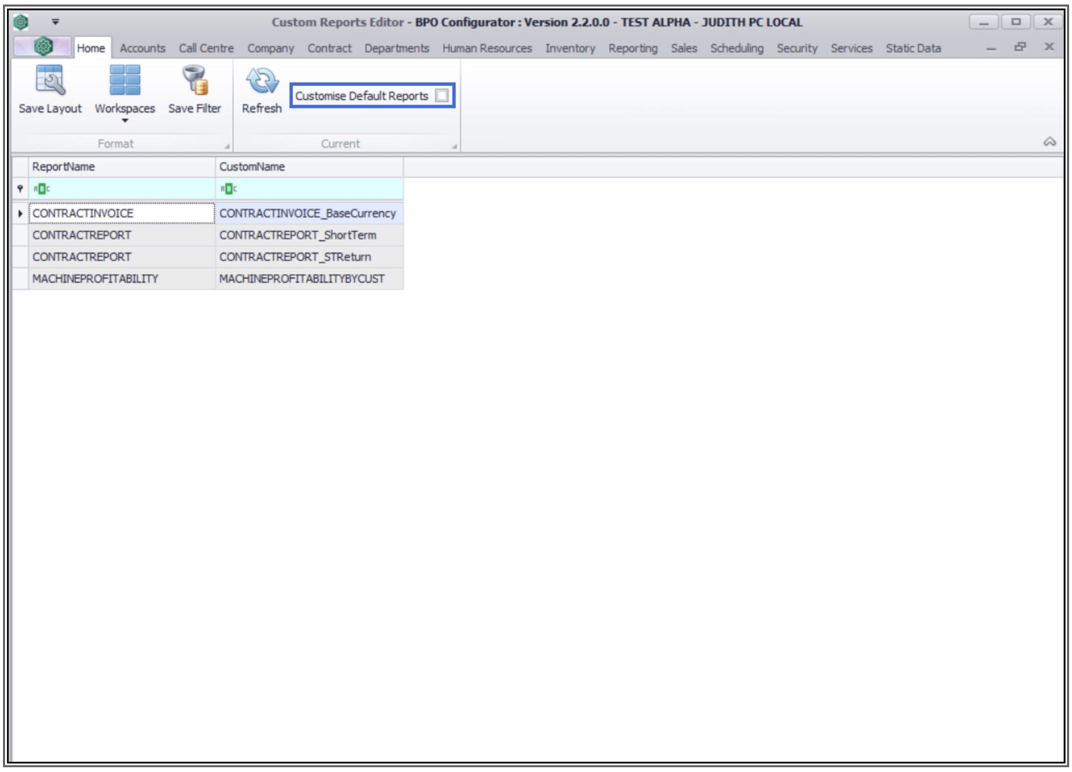


The ***Custom Reports Editor*** screen will be displayed.

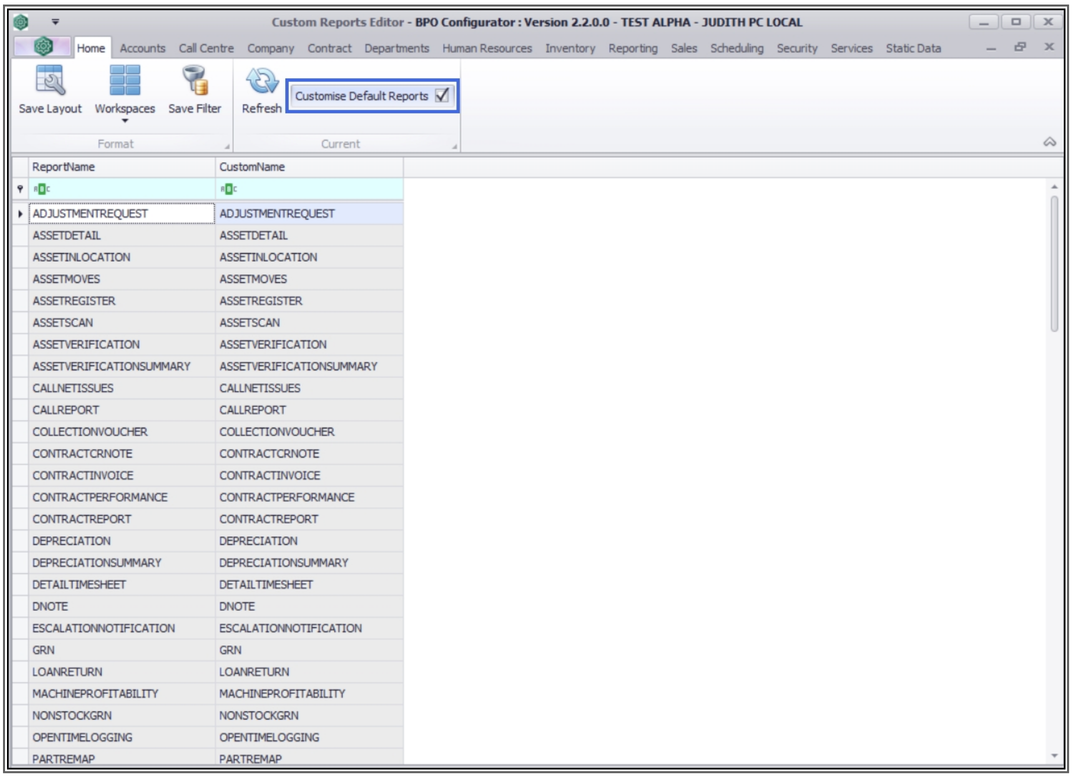


CUSTOMISE DEFAULT REPORTS CHECK-BOX

- 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.

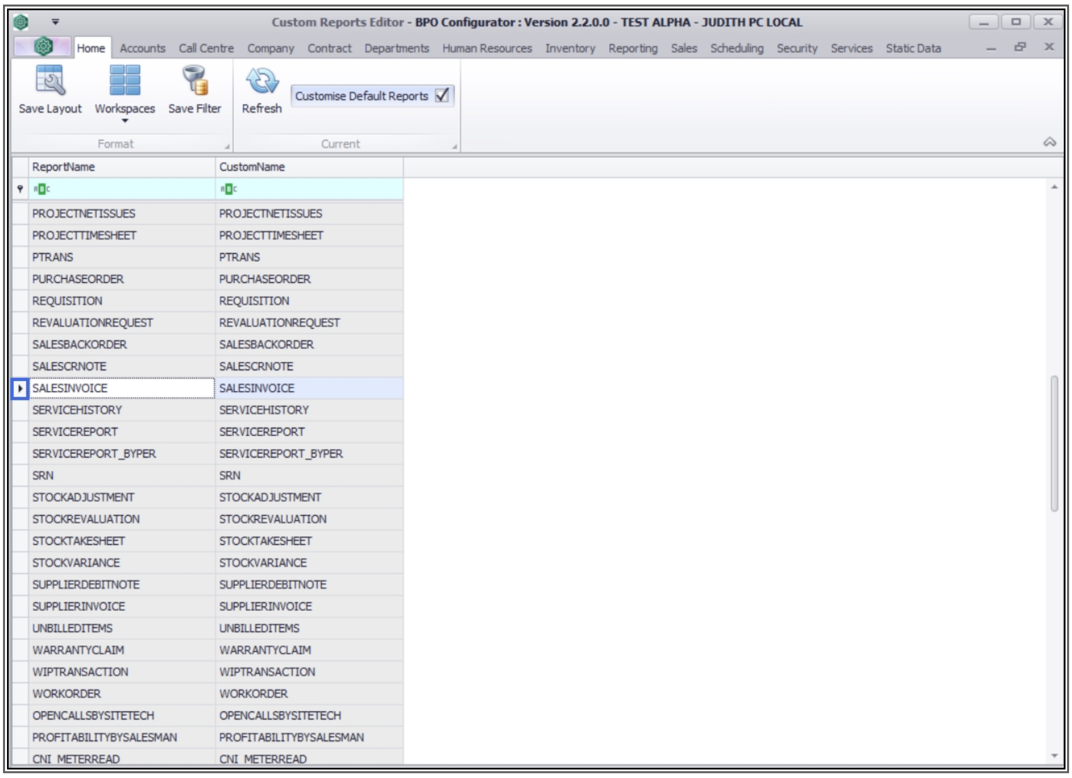


- If the ***Customise Default Reports*** check box is selected, all ***BPO*** documents will be displayed.

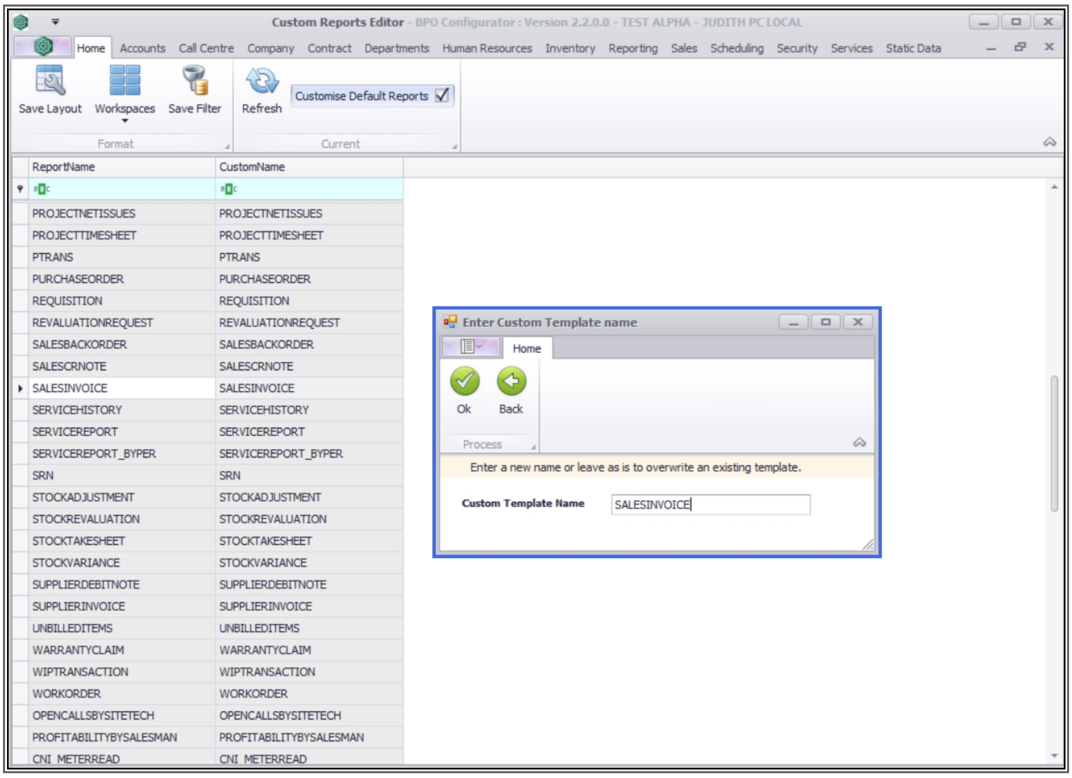


CREATING A CUSTOM DOCUMENT TEMPLATE

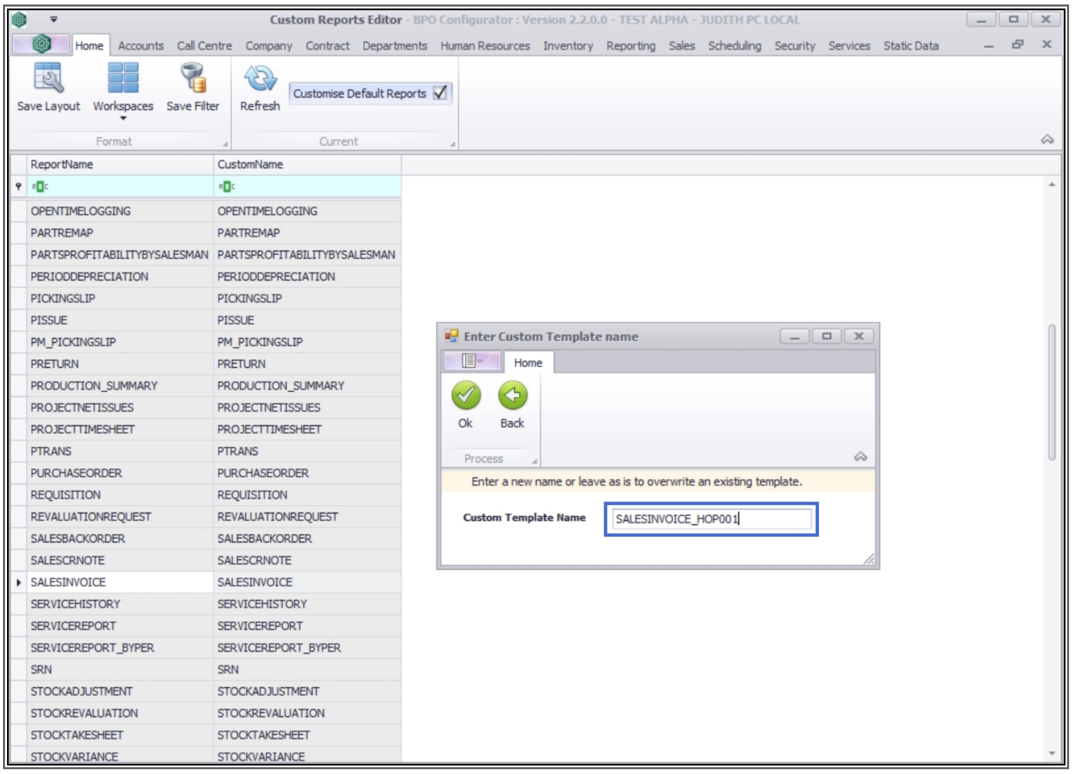
- ***Double click*** on a report you wish to customise.
- For the progress of this manual, a default report will be customized and a ***Sales Invoice*** has been selected.
  - **Note:** For you to be able to access the default reports, the ***Customize Default Reports*** check box must be selected.



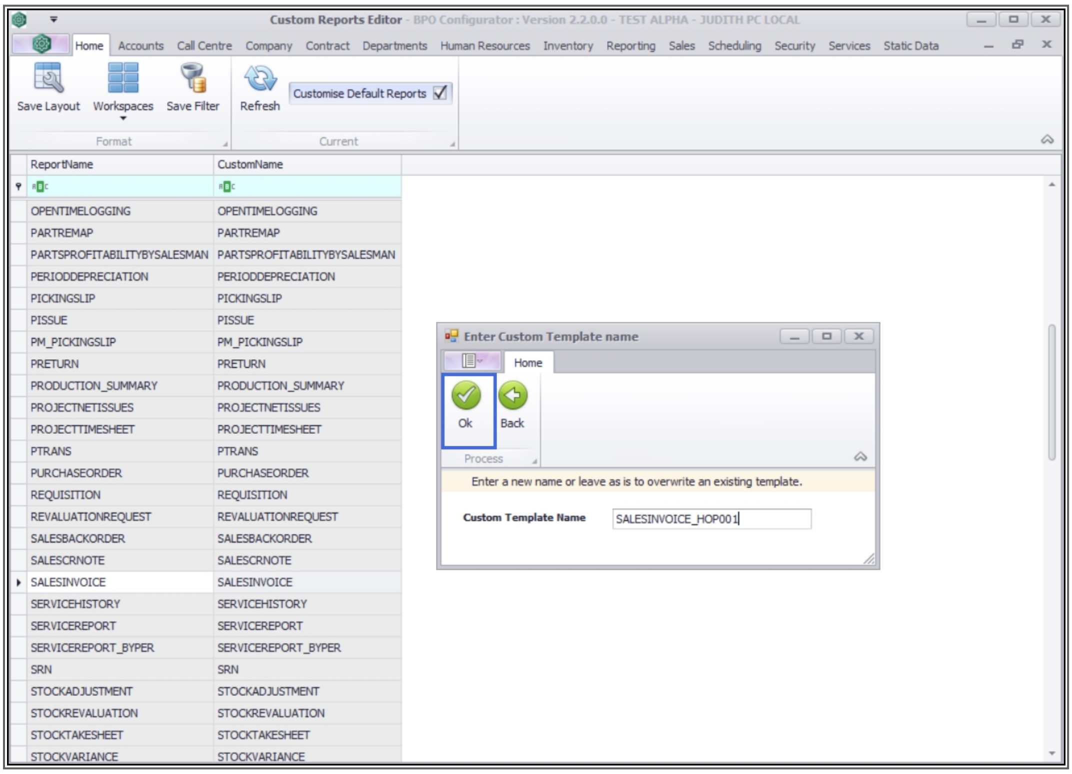
- An ***Enter Custom Template name*** message box will pop up telling you;
    - ***Enter a new name or leave as is to overwrite an existing template.***



- 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 under-scores.
- 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***.


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
OPENTIMELOGGING
PARTREMAP
PARTSPROFITABILITYBYSALESMAN
PERIODDEPRECIATION
PICKINGSLIP
PISSUE
PM_PICKINGSLIP
PRETURN
PRODUCTION_SUMMARY
PROJECTNETISSUES
PROJECTTIMESHEET
PTRANS
PURCHASEORDER
REQUISITION
REVALUATIONREQUEST
SALESBACKORDER
SALESCRNOTE
SALESINVOICE
SERVICEHISTORY
SERVICEREPORT
SERVICEREPORT_BYPER
SRN
STOCKADJUSTMENT
STOCKREVALUATION
STOCKTAKESHEET
STOCKVARIANCE
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_HOP001

- Click on ***Ok***.


Custom Reports Editor - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL
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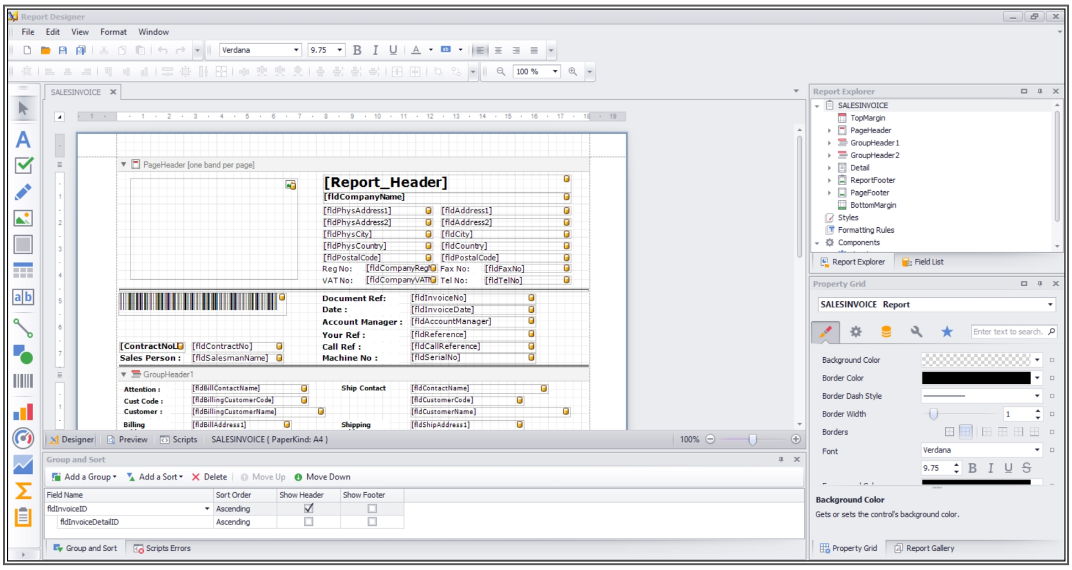
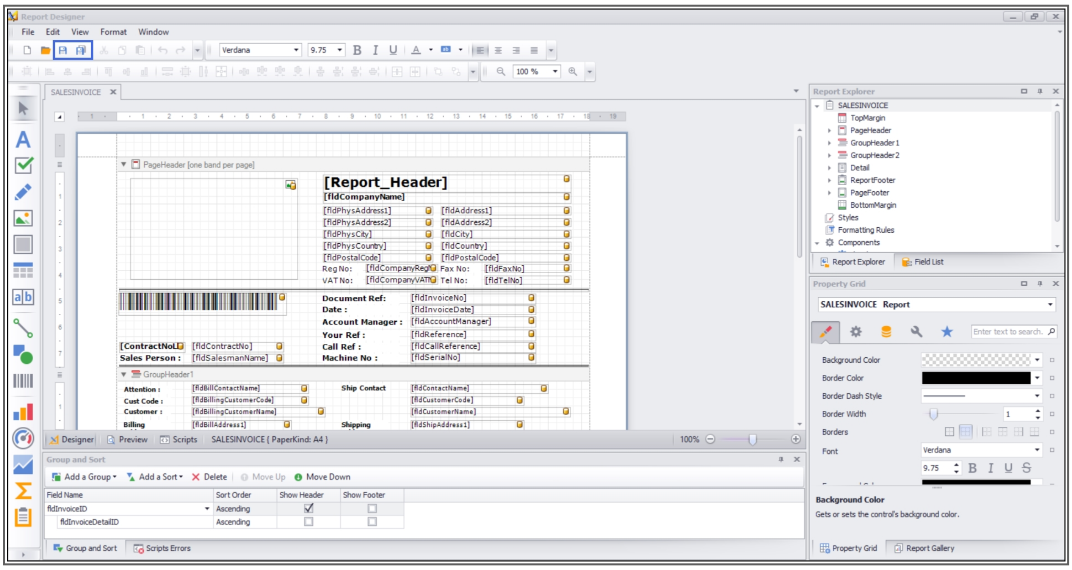
Format Current
ReportName CustomName
Enter Custom Template name
Home
Ok Back
Process
Enter a new name or leave as is to overwrite an existing template.
Custom Template Name
SALESINVOICE_HOP001

- 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***.



- 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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