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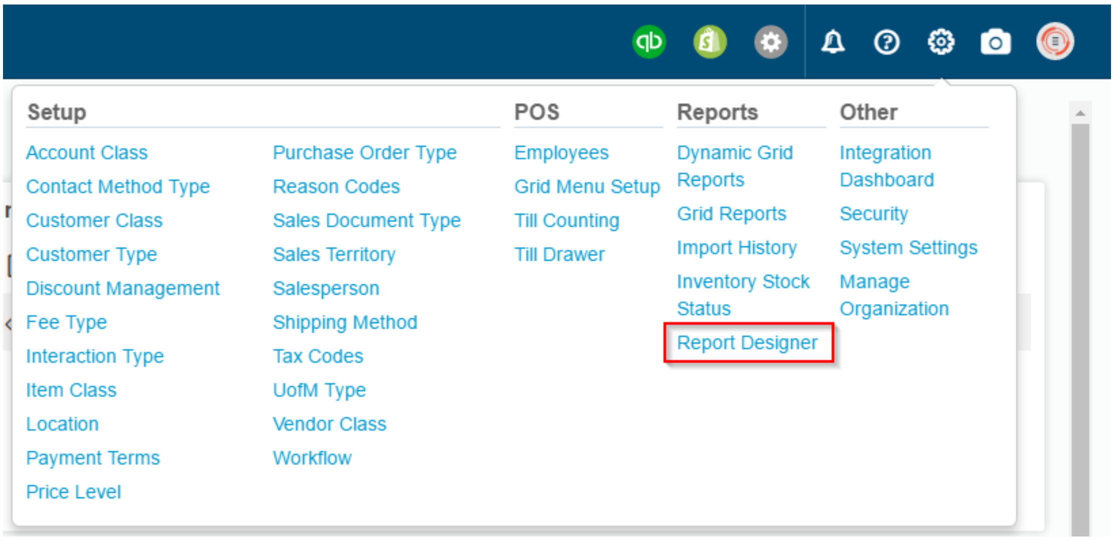
Report Designer

Megan De Freitas - 2025-06-10 - [Settings](#)

Overview

Report Designer is a powerful tool that allows you to create detailed and highly customizable reports.

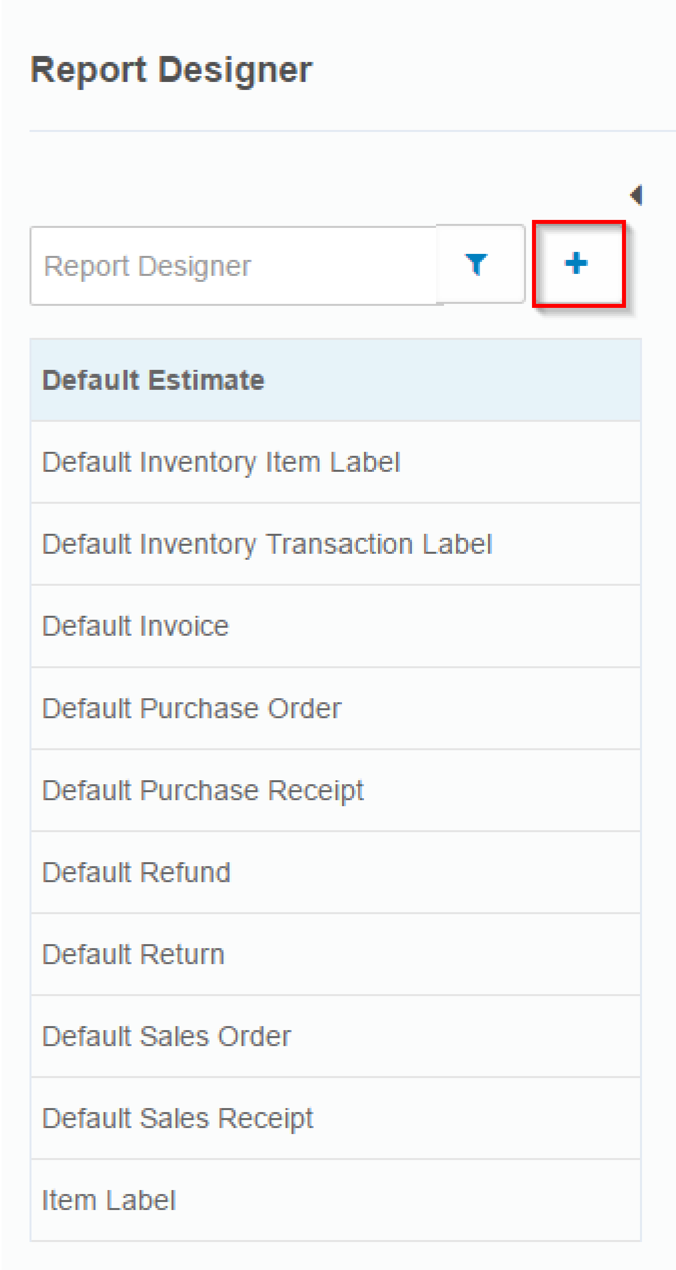
To get started, select **Report Designer** from the Settings menu.



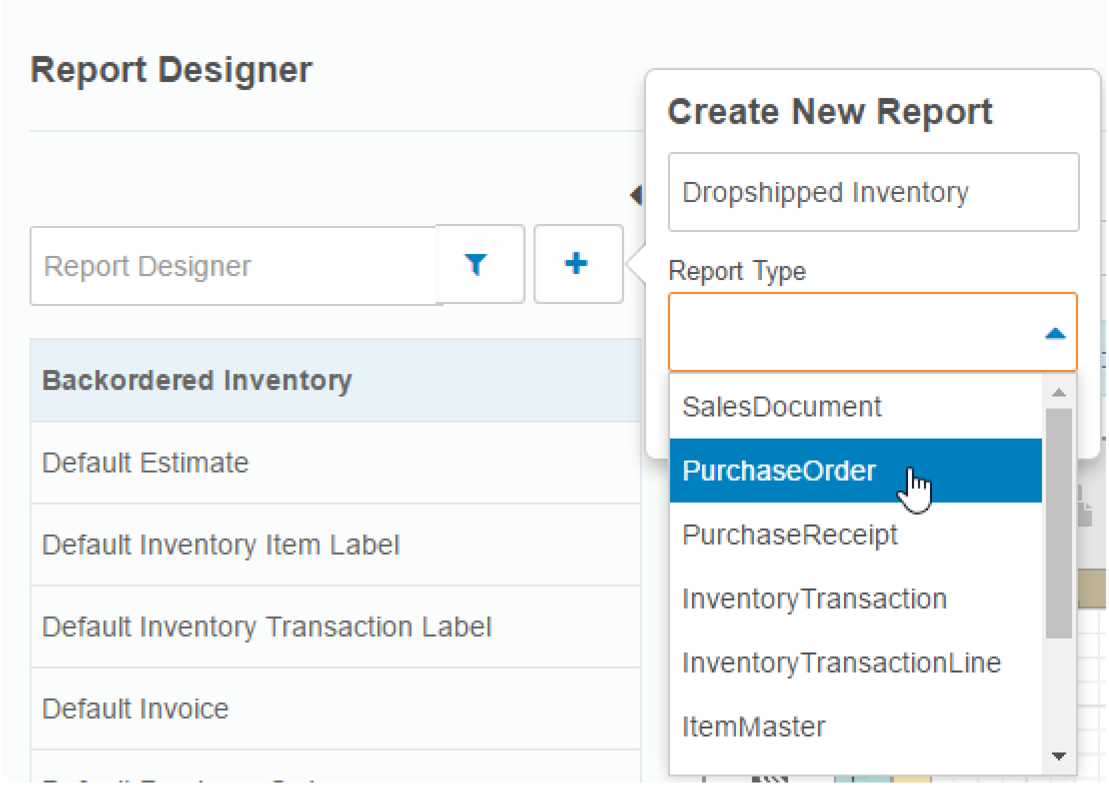
Reports

Create a Report

To create a report, click the **+** button above the list of reports on the left-hand side of the screen.



Give your new report a name and select a Report Type from the dropdown. The Report Type determines what data is available for your report.

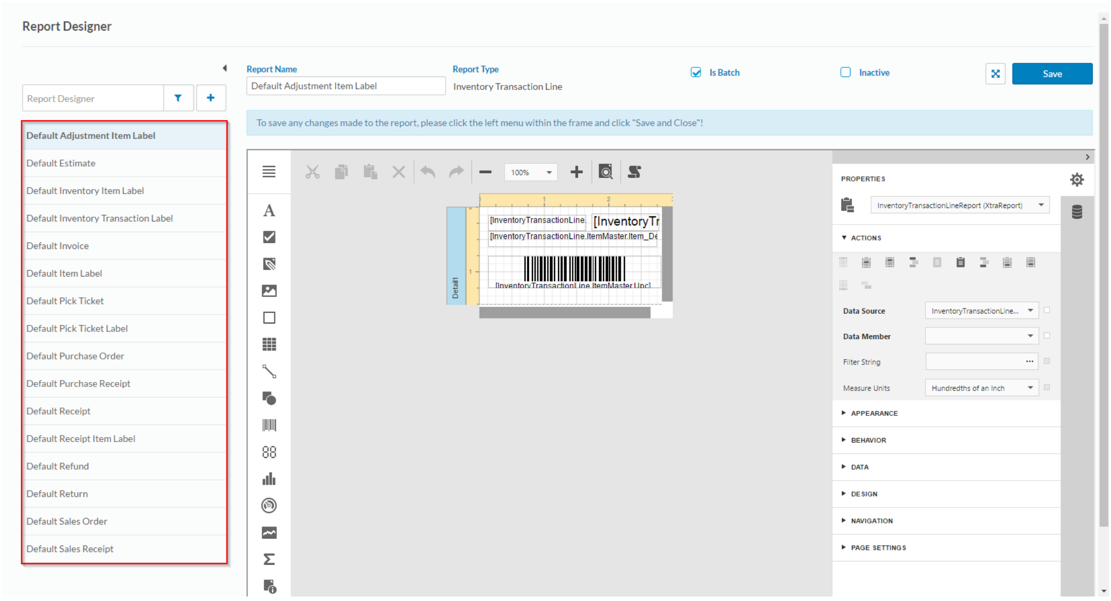


Click **Save** to add your new report to the reports list.

Your new, blank report will load into the edit window.

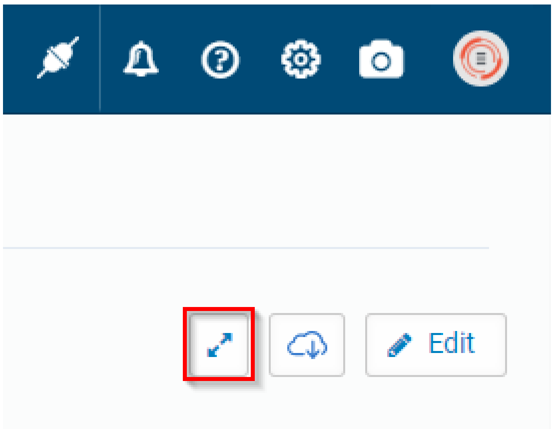
Edit a Report

To make changes to an existing report, first select a report from the list on the left-hand side of the screen to load it into the edit window.

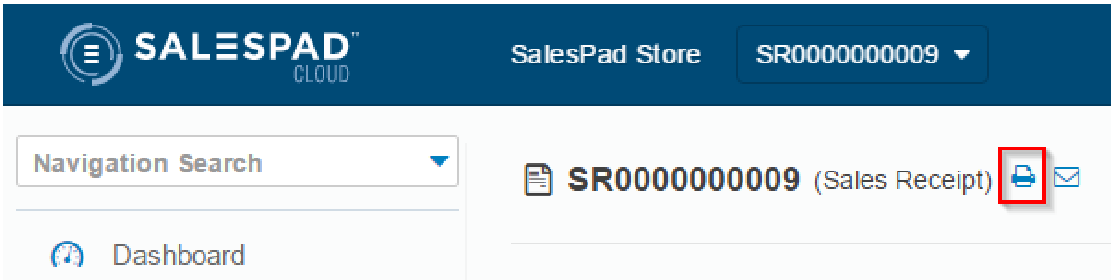


Make changes to the report by utilizing the various tools found in the toolbars on the edges of the edit window or above the window. For more help on navigating the Report Designer, please reference the [DevExpress support entry](#).

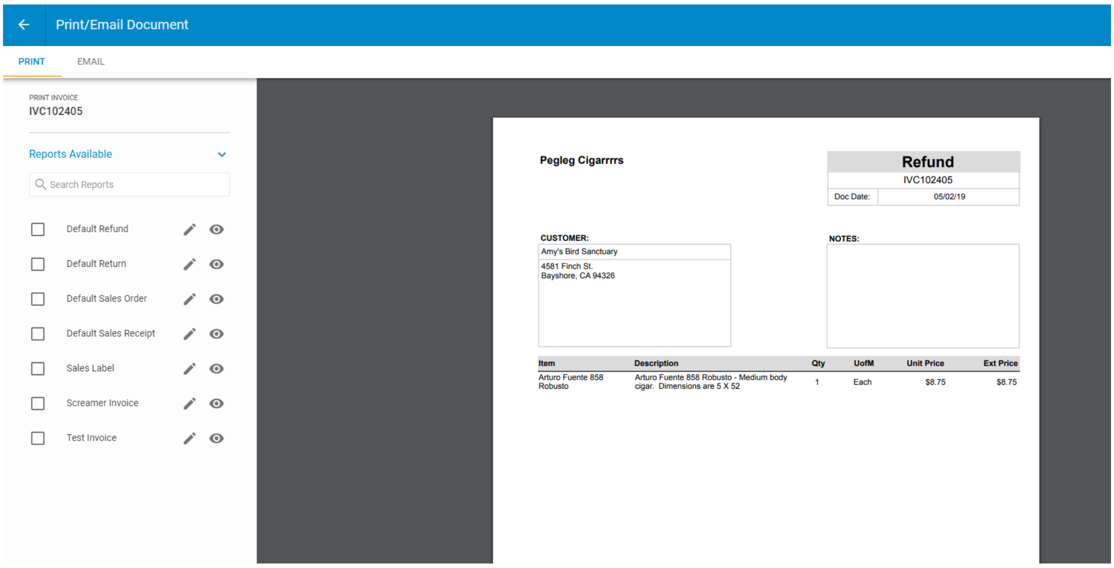
To make the edit window full-screen, click the **expand** button in the upper right-hand corner of the screen.



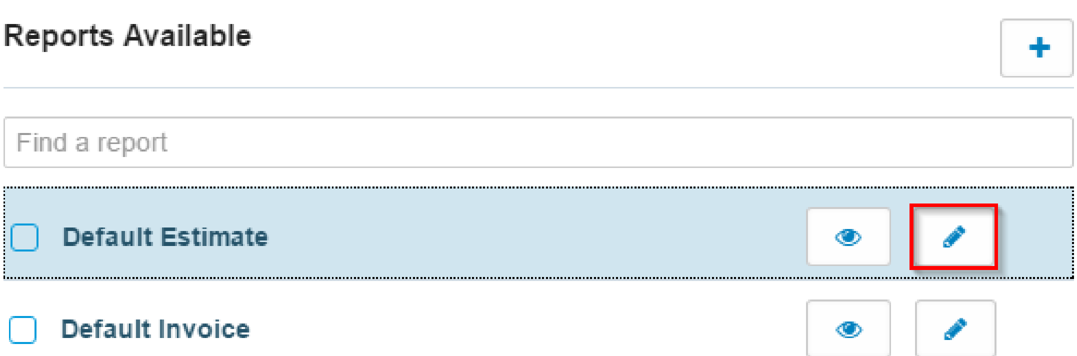
Another way to edit a report is to click **Print** on an open sales document.



This will bring up the Print window. Select the report you want to print, and you will see a preview of the end result in the Print Preview window.



If you see something you want to edit about the report, click the **Pencil** button next to the name of the report.

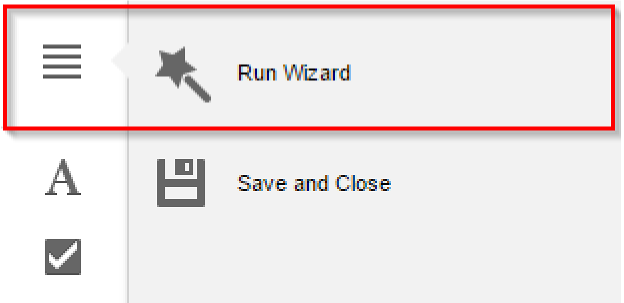


This will send you to the Report Designer edit window. Make your changes and click **Finished** in the lower left-hand corner to return to the Print window and preview the changes you made in the Print Preview window.

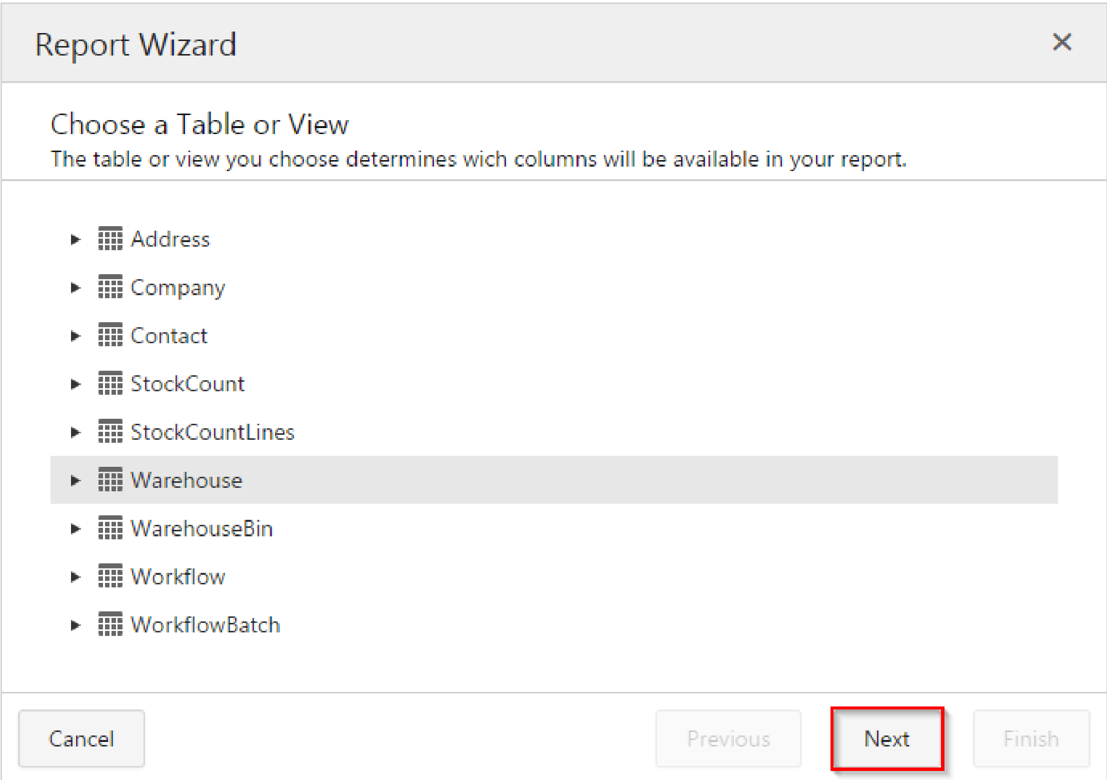
Build a Report Using the Run Wizard

To build a report, you can either select each component manually, or you can use the Run Wizard.

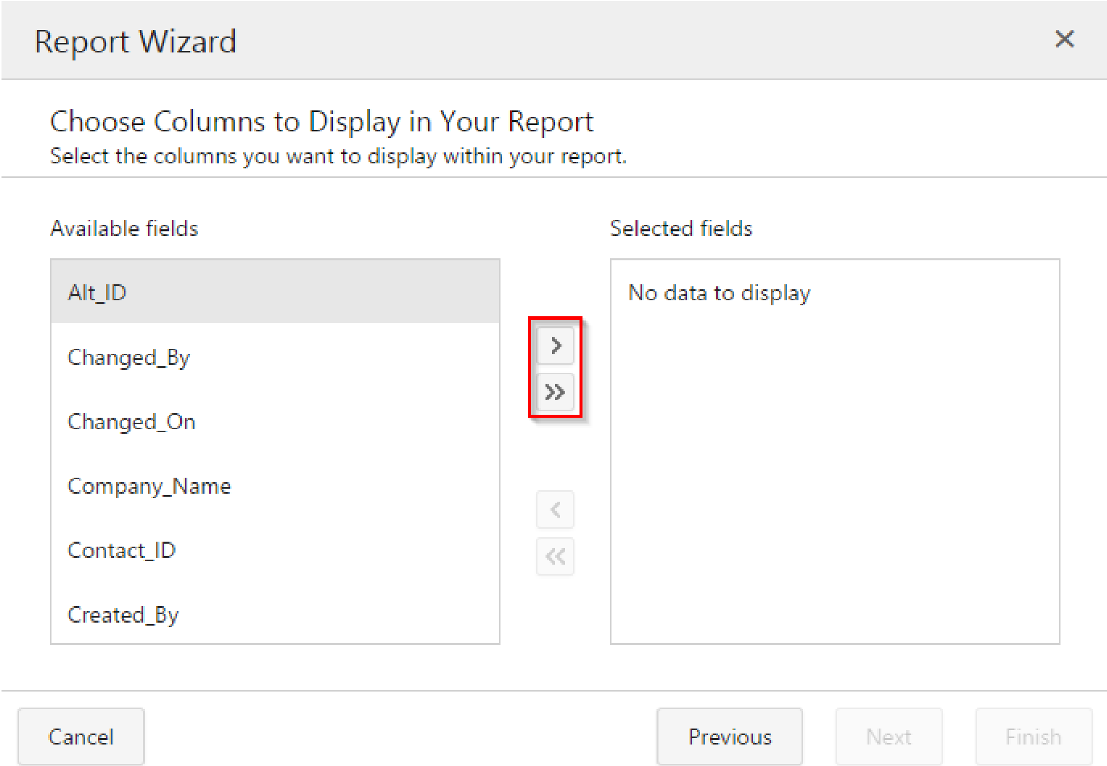
To open the Run Wizard, click the Menu icon (four horizontal bars) and select **Run Wizard**.



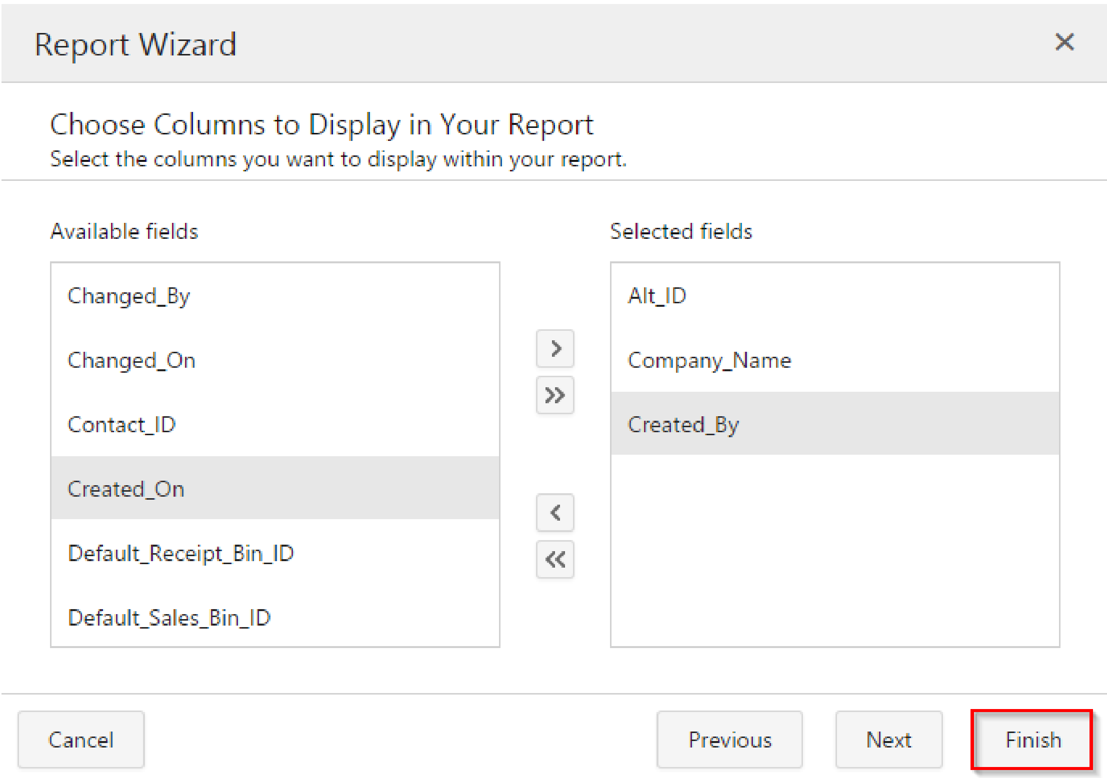
The Report Wizard window will appear. Select the Table you wish to pull you data from for this report and click **Next**.



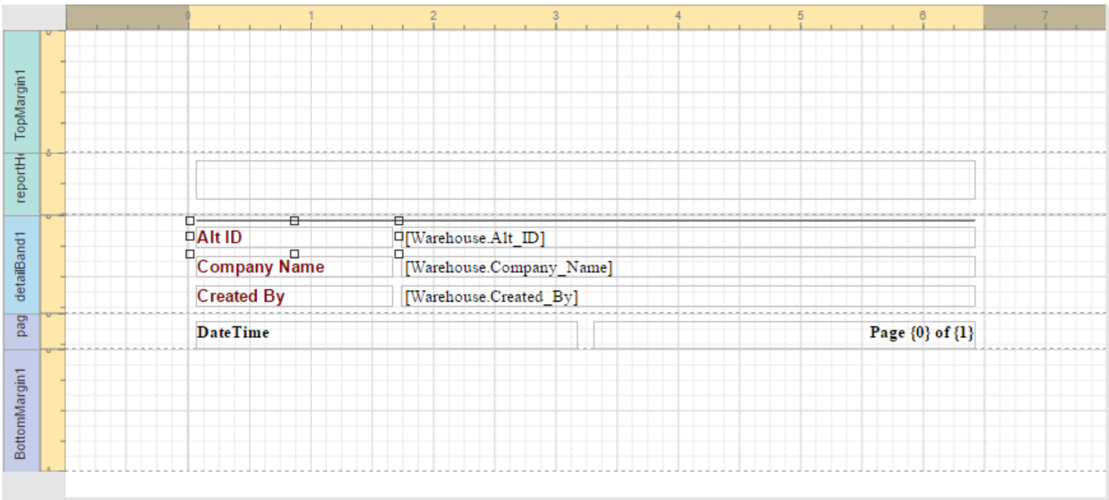
Now select the columns you want to include in your report. To move the field(s) you want included from the Available Fields list into the Select Fields list, first click on the field you want moved, then click the single arrow. To move all available fields into the Selected Fields list, click the double arrow.



When you've finished assembling the list of fields to include in your report, click **Finish**.



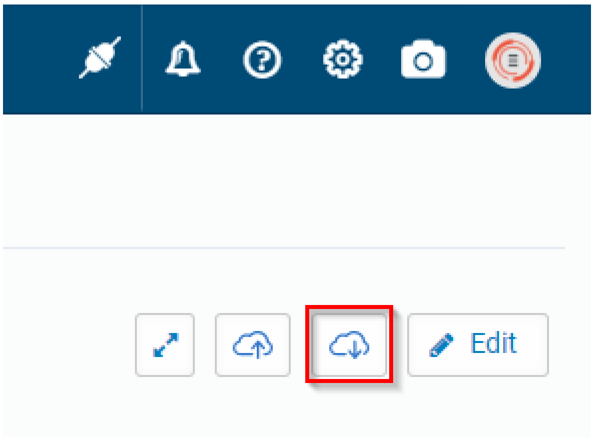
The Run Wizard will place the fields you've chosen onto your report.



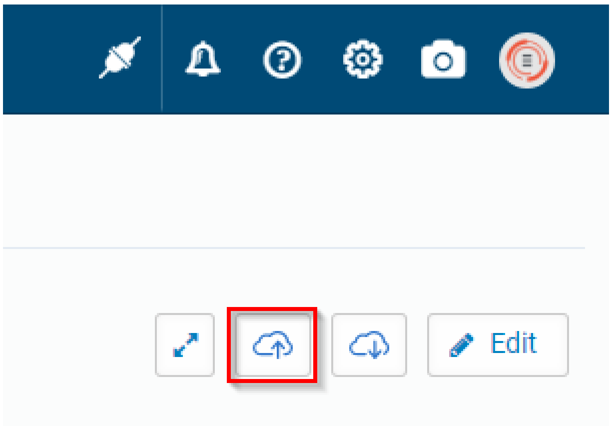
Drag and drop to rearrange the layout, and use the tools on the edges of the edit window to further customize your report.

Export or Overwrite a Report

To export a report to a .JSON file, click the **Export** button in the upper right-hand corner of the screen.

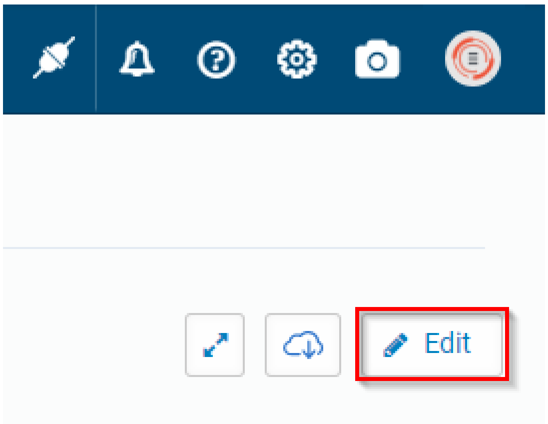


To import a report, overriding the current one, click the **Overwrite** button in the upper right-hand corner of the screen.

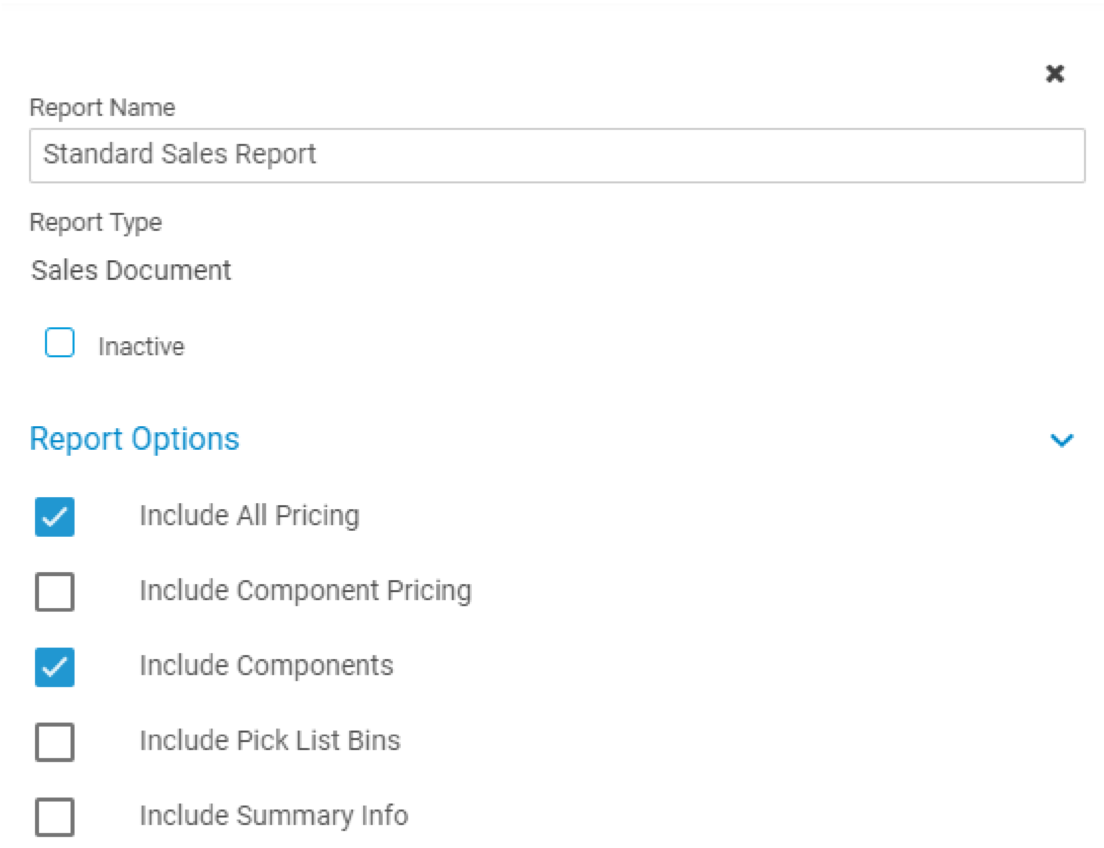


Report Printing Options

To customize the printing options for a report, click the **Edit** button in the upper right-hand corner.



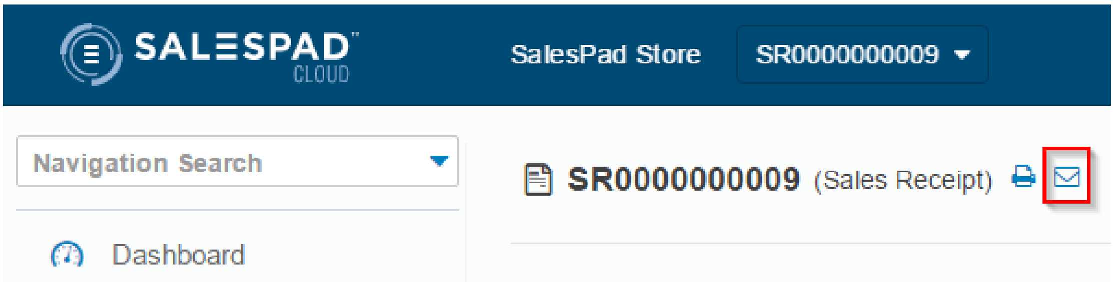
In the drawer that appears, check the boxes for what should be included in a printed version of this report.



Click **Save** in the lower right-hand corner to save your changes and close the drawer.

See it in Action

Reports appear on the list of print options for sales documents. To print a sales document, click the little printer icon next to the document number.



In the window that appears, a list of reports available to print for this document will appear on the left-hand side of the screen.