<u>Knowledgebase</u> > <u>Settings</u> > <u>Report Designer</u>

# **Report Designer**

Megan De Freitas - 2025-06-10 - <u>Settings</u>

### Overview

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

To get started, select  ${\bf Report \ Designer}$  from the Settings menu.

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Setup		POS	Reports	Other	
Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level	Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow	Employees Grid Menu Setup Till Counting Till Drawer	Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer	Organization	

# Reports

## Create a Report

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

# **Report Designer**

		•
Report Designer	•	+
Default Estimate		
Default Inventory Item Label		
Default Inventory Transaction La	abel	
Default Invoice		
Default Purchase Order		
Default Purchase Receipt		
Default Refund		
Default Return		
Default Sales Order		
Default Sales Receipt		
Item Label		

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.

# **Report Designer Create New Report** Dropshipped Inventory ÷ Report Designer ۲ Report Type Backordered Inventory ...... SalesDocument Default Estimate PurchaseOrder PurchaseReceipt Default Inventory Item Label InventoryTransaction Default Inventory Transaction Label InventoryTransactionLine Default Invoice ItemMaster

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

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

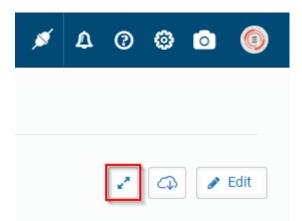
#### Edit a Report

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.

	Report Name     Default Adjustment Ite	n Label Inventory Transaction Line	S Is Batch	Inactive	Save
eport Designer T	To save any changes n	ade to the report, please click the left menu within the frame an	d click "Save and Close"!		
Vefault Estimate	× ∎	iiiiii ×   ↔ ≁   − 1005 →   +   8	i s	PROPERTIES	
Default Inventory Item Label		1	2	۵.	
Default Inventory Transaction Label	A	[InventoryTransactionLine]	ventoryTr	InventoryTransactionLineReport (XtraReport)	*
Default Invoice		[InventoryTransactionLine.item]	Master.ltem_D6	▼ ACTIONS	
efault Item Label					-
efault Pick Ticket			nMasterLincl	1 N N	
Default Pick Ticket Label					• •
efault Purchase Order					
Default Purchase Receipt	- N			Measure Units Hundredths of an Inch	•
Default Receipt	-			► APPEARANCE	
Default Receipt Item Label	88			► BEHAVIOR	
Vefault Refund				► DATA	
efault Return				► DESIGN	
Default Sales Order	<b>W</b>			► NAVIGATION	
efault Sales Receipt	Land			PAGE SETTINGS	

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 <u>DevExpress</u> 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.

	SalesPad Store	SR000000009 -
Navigation Search	🖹 SR000000	0009 (Sales Receipt) 🖶 🖂
⑦ Dashboard		

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.

EMAIL					
INT INVOICE C102405					
ports Available	~	Pegleg Cigarrrrs		Refund	
2, Search Reports			Doc Date:	IVC102405 05/02/19	
Default Refund	/ 0	CUSTOMER:	NOTES:		
Default Return	/ 0	Amy's Bird'Sanchuary 4581 Finch SL Baybhere, CA 94326			
Default Sales Order	/ 0				
Default Sales Receipt	/ 0				
Sales Label	/ 0	Item Description Arturo Fuente 858 Arturo Fuente 858 Robusto - Medium body	Qty UofM		Ext Price
Screamer Invoice	/ 0	Arturo Fuente 858 Arturo Fuente 858 Robusto - Medium body Robusto	1 Each	\$8.75	\$8.75
] Test Invoice	/ 0				

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

Reports Available		+
Find a report		
Default Estimate	۲	
Default Invoice	۲	

This will send you to the Report Designer edit window. Make your changes and click **Finished** in the lower lefthand 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.

	∗	Run Wizard
Α	₽	Save and Close
$\checkmark$		

The Report Wizard window will appear. Select the Table you wish to pull you data from for this report and click  ${\bf Next}.$ 

Report Wizard	×
Choose a Table or View The table or view you choose determines wich columns will be available in your report.	
<ul> <li>Address</li> <li>Company</li> <li>Contact</li> <li>StockCount</li> <li>StockCountLines</li> <li>Warehouse</li> <li>WarehouseBin</li> <li>Workflow</li> <li>WorkflowBatch</li> </ul>	
Cancel Previous Next F	Finish

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.

# **Report Wizard**

# Choose Columns to Display in Your Report Select the columns you want to display within your report.

Available fields		Selected fields		
Alt_ID		No data to display		
Changed_By				
Changed_On	»>			
Company_Name	<			
Contact_ID	<			
Created_By				
Cancel		Previous	Next	Finish

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

Report Wizard	×

# Choose Columns to Display in Your Report Select the columns you want to display within your report.

Available fields		Selected fields
Changed_By		Alt_ID
Changed_On	>	Company_Name
Contact_ID	>>	Created_By
Created_On	<	
Default_Receipt_Bin_ID	~	
Default_Sales_Bin_ID		
Cancel		Previous Next Finish

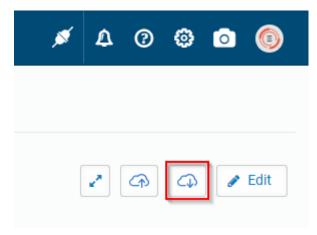
The Run Wizard will place the fields you've chosen onto your report.

		2 3 4	5 6 7
v	0	0	
-	Alt ID	[Warehouse.Alt_ID]	
	Company Name	[Warehouse.Company_Name]	
	Created By	[Warehouse.Created_By]	
	DateTime		Page {0} of {1}
	Date Thire		1 age (0) 01 (1)
-			

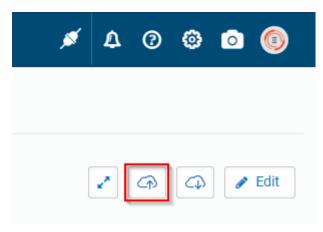
Drag and drop to rearrange the layout, and use the tools on the edges of the edit window to further customize your report.

## 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.

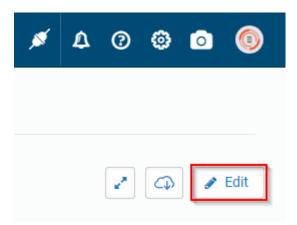


To import a report, overriding the current one, click the **Overwrite** button in the upper right-hand corner of the screen.



#### **Report Printing Options**

To customize the printing options for a report, click the  ${\bf Edit}$  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.

Poport N	lama	×		
Report Name Standard Sales Report				
Report T	уре			
Sales Document				
🗌 In:	active			
Report Options				
$\checkmark$	Include All Pricing			
	Include Component Pricing			
$\checkmark$	Include Components			
	Include Pick List Bins			
	Include Summary Info			

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.

SALESPAD	SalesPad Store	SR000000009 -	
Navigation Search	🖹 SR000000	0009 (Sales Receipt) 🖶 🖂	
⑦ Dashboard			

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.

# Select Reports to Include

Name:	New Report	New Report	
Filter:	Find a report		
Default Es	stimate	Edit	Preview
Default In	voice	Edit	Preview
Default Re	efund	Edit	Preview
Default Re	eturn	Edit	Preview
Default Sa	ales Order	Edit	Preview
Default Sa	ales Receipt	Edit	Preview
Report		Edit	Preview