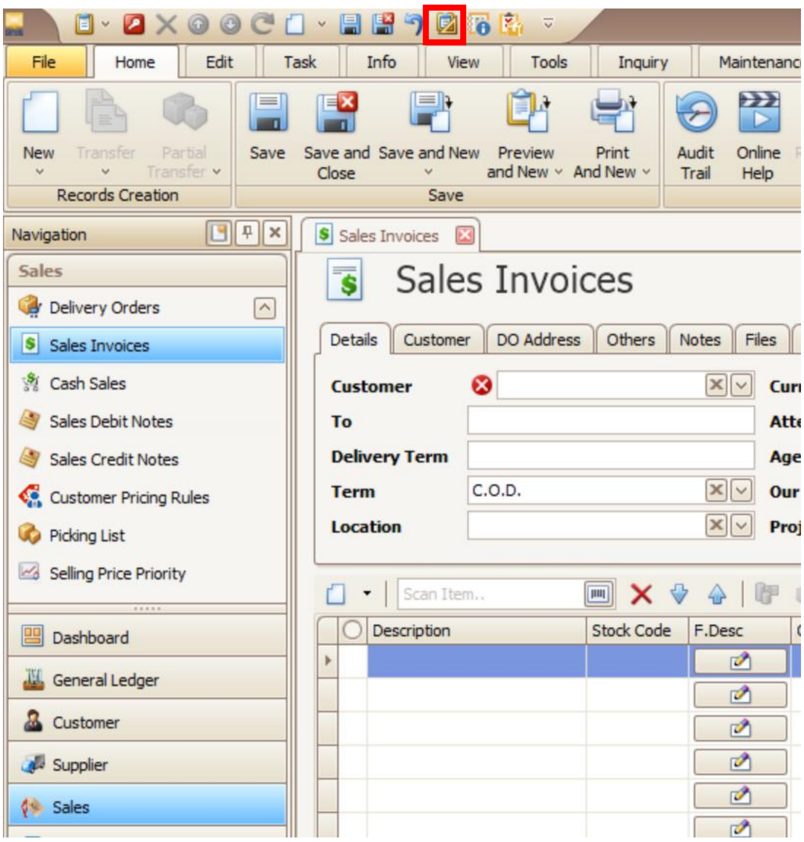
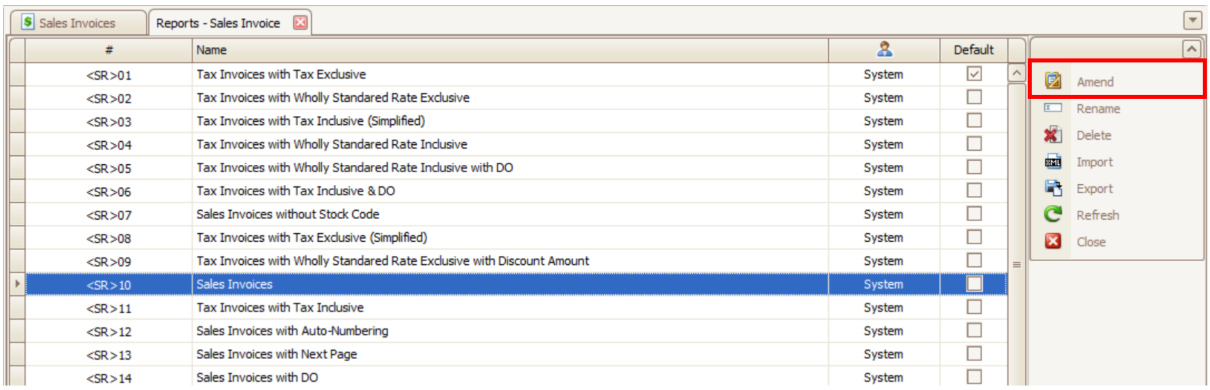
HOW TO CUSTOMIZE A FORM

In the system, there are ready-made forms that may use for different Transactions. However, these forms may also be customized based on the user preference.

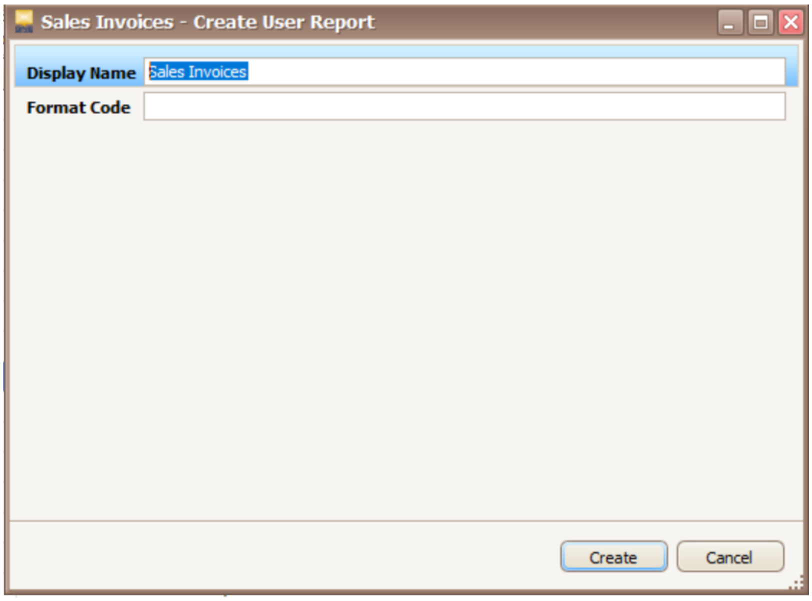
To access the Report Designer, choose a form to customize.



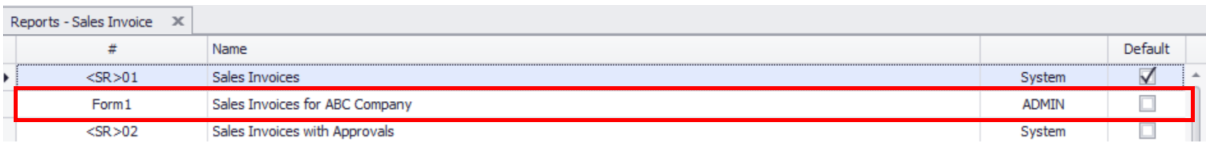
After clicking the *Designer* button, all the forms pertaining to the transaction opened (e.g. *Sales > Sales Invoices*) will be shown. Choose the form to be customized. To re-design the form based from the existing one follow the steps below:



1. Double click a form or click *Amend* button at the side.
2. If the chosen form tagged as "System", click *Create* button to create a User-defined form. After this, Report Designer will open.
    - *Display Name*: It pertains to the description of the User Report
    - *Format Code*: It pertains to a unique code that will identify the Report.

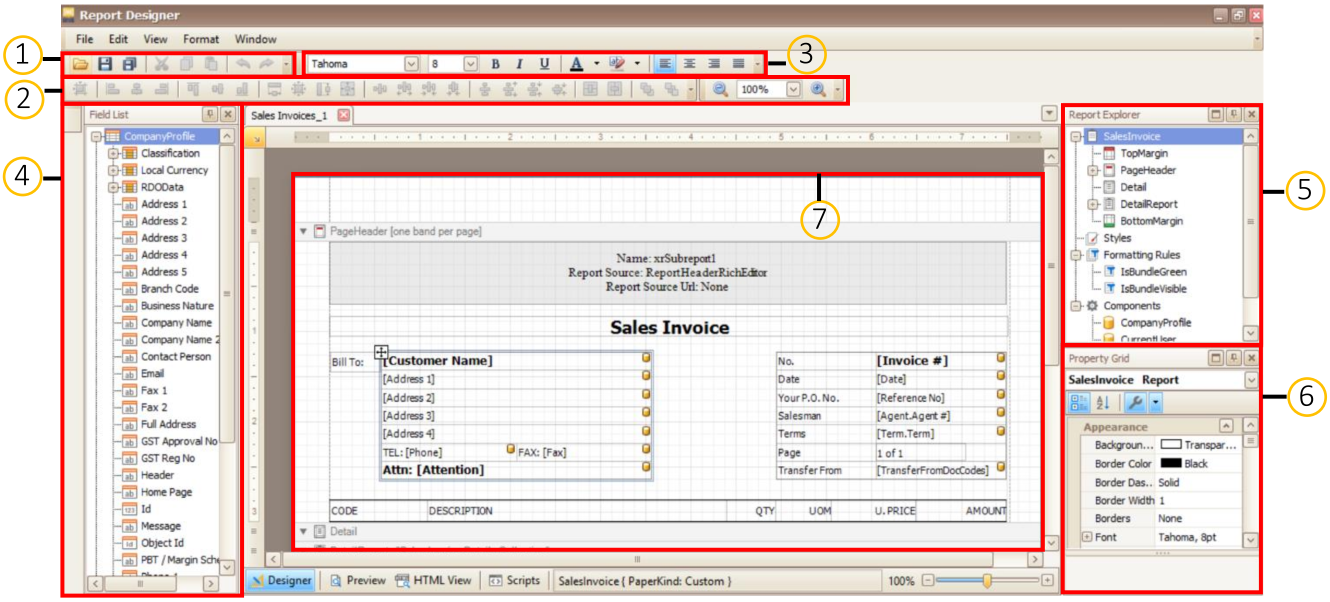


Example:
Display Name: Sale Invoices for ABC Company
Format Code: Form1



Notice in the "#" column that the Format Code the user has entered was displayed followed by the "Name" column that corresponds the Display Name. The next column shows the User who created the Form or if it's a System Form. Lastly, the "Default" column that identifies which form among the list will be the default preview during transaction.

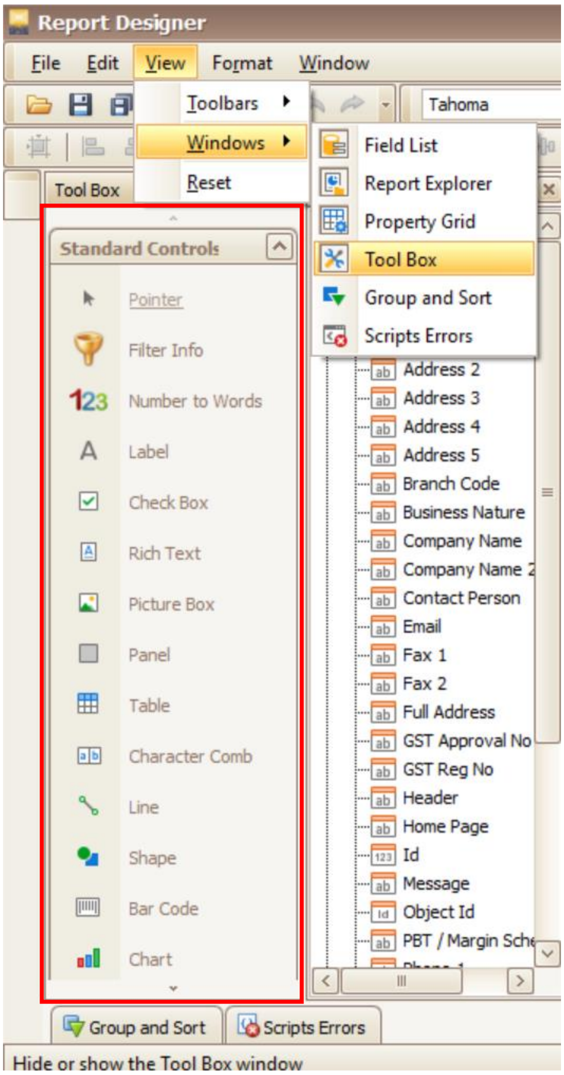
Report Designer- User Interface



1. *Toolbar* – Standard option to open, save and copy report document.
2. *Layout Toolbar* – Allows the user to control the designation of each object in the workspace.
3. *Format Toolbar* – Allows the user to defined preferred format style such as font face, font size as well as font alignment.
4. *Field List Window* – Set of available fields that contains information in a certain transaction, module or window in the database that can be displayed in the report.
5. *Report Explorer* – List of all report composition and components.
6. *Property Grid* – Allows the user to modify the behavior, the look and feel and the data source of each object.
7. *Workspace* - Allows the user to display the information of the report. It is where all data objects have been outlined and formatted based on the given format.

A. How to ***Customize the Form Content***

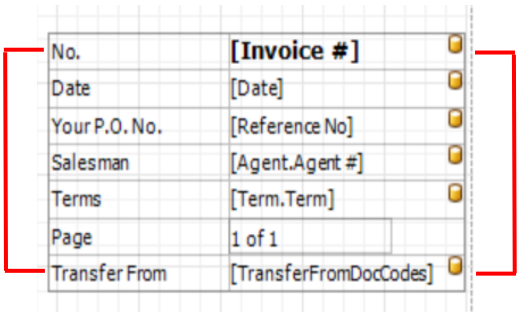
The *Toolbox Window* can be used to design the form.



Just click a tool from the *Toolbox* and drag it to the *Workspace*.

Most commonly used tool from the *Toolbox* is the label. Labels for constant text can be found on the *Toolbox* while Database Label can be found on the Field List window.

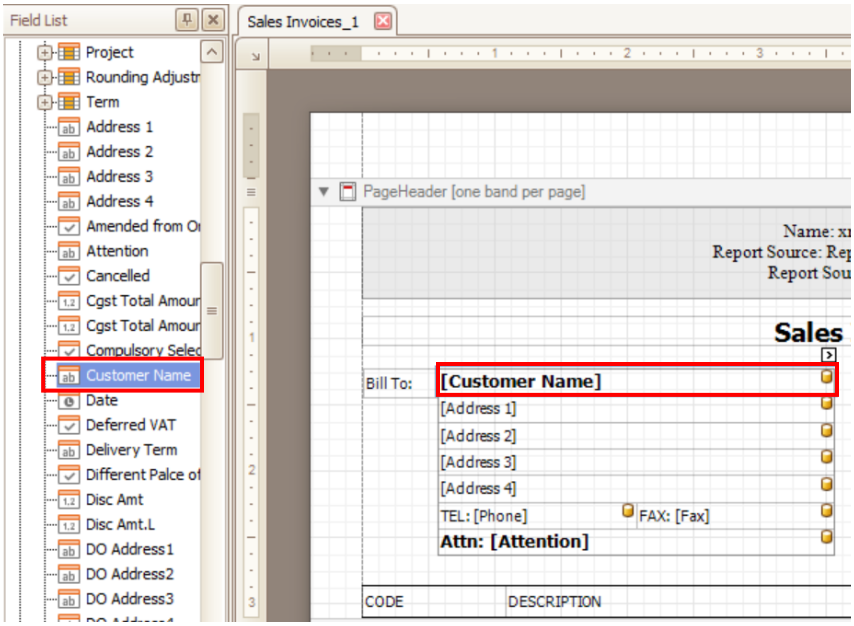
Label
(Constant)



Database Label due to
database sign in the top
right.

To use a field from the *Field List Window*, choose a field and drag it to the *Workspace.*

Example: **Field**: Customer Name

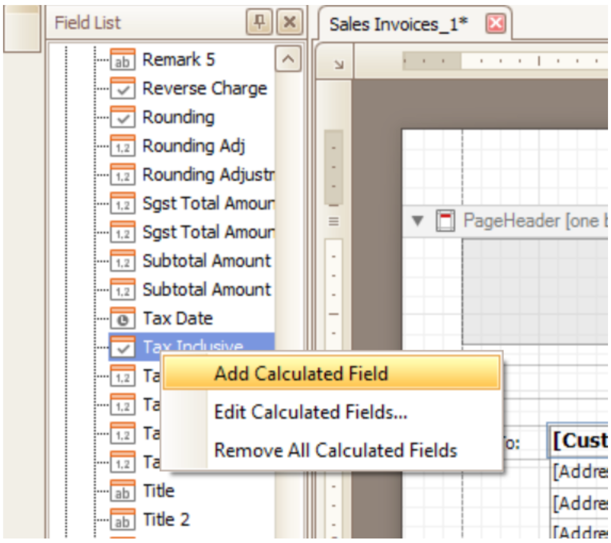


B. How to add a ***Calculated Field***.

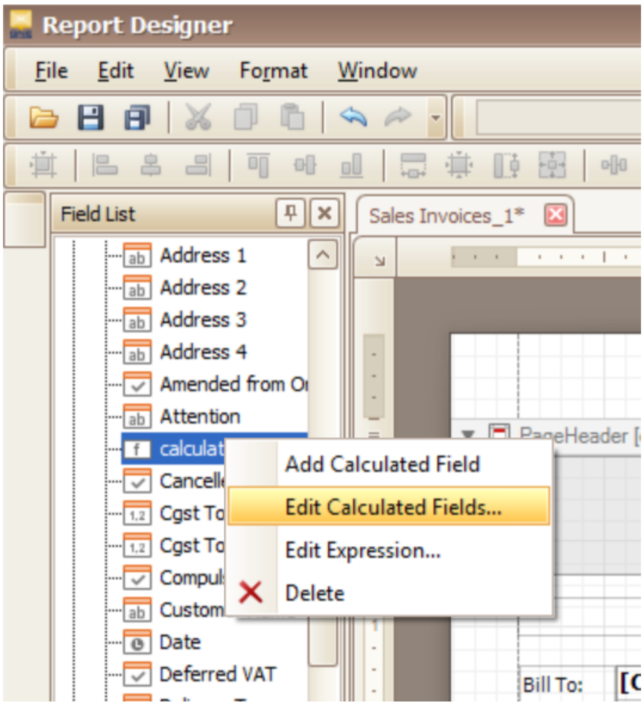
Calculated Field means combining data from the Field List and formulate an expression.

Report Designer allows the user to have a calculation which can derived from two or more data value inside the database. To add a calculation: Select a parent field in the Field List and Right click then add *Calculated Field*.

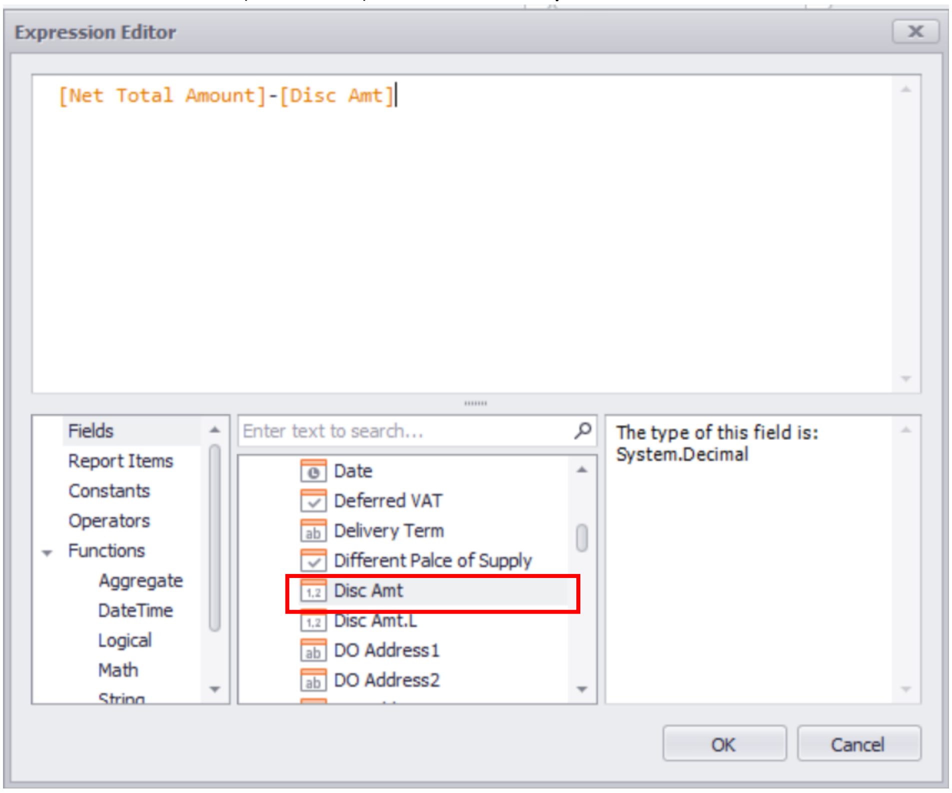
When calculated field appears ''calculatedfield1'' with an icon symbol of formula, adding of calculation can now be done.



To edit the *Calculated Field, Expression Editor* must be activated.

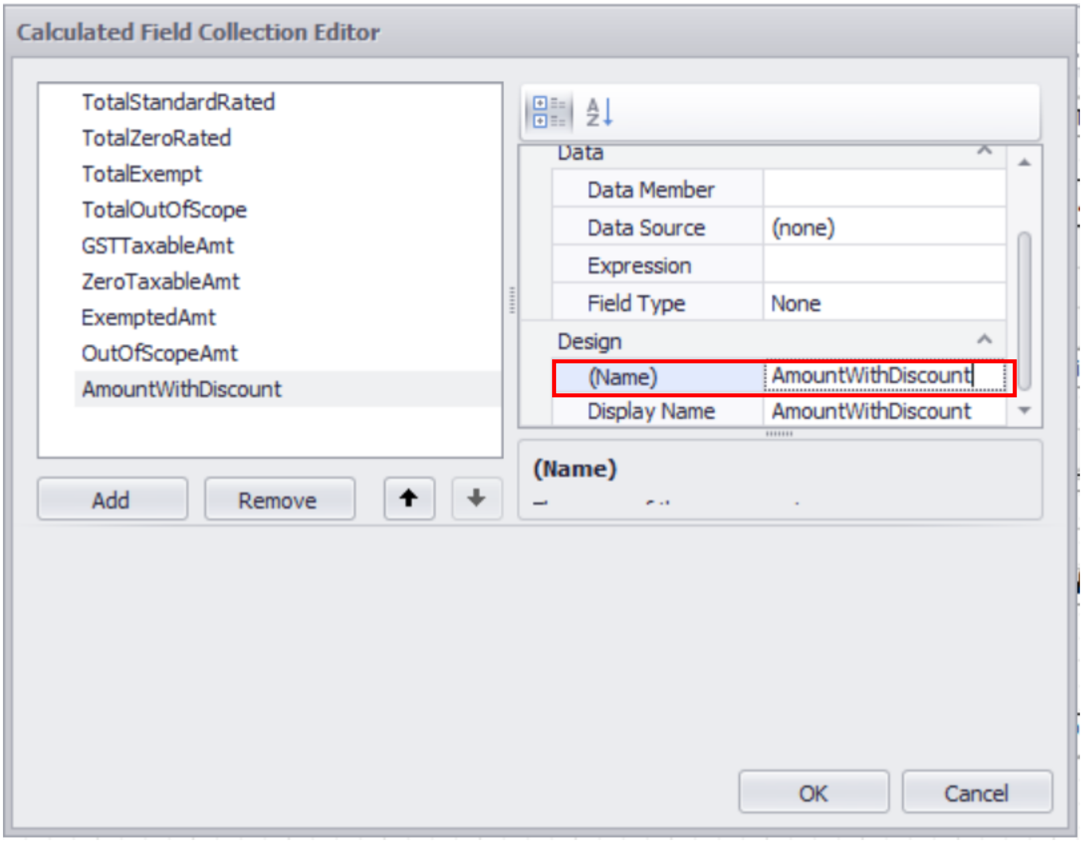


Expression Editor will let the user put the expression or operation for the calculated field. Just double click the field from list and put the operation. **Example**: Net Total Amount – Disc Amt.

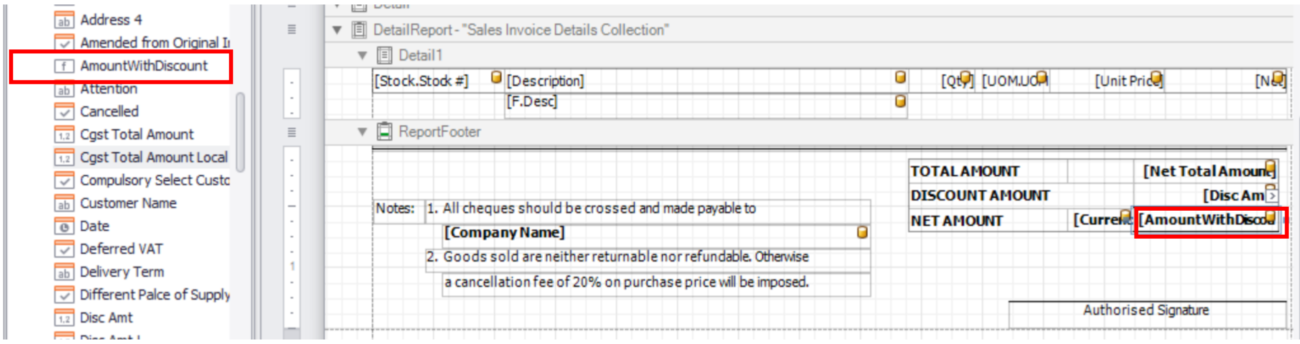


After clicking OK, the expression will be saved. To change the name of the calculated field, right click the *Calculated Field> Edit Calculated Fields.*

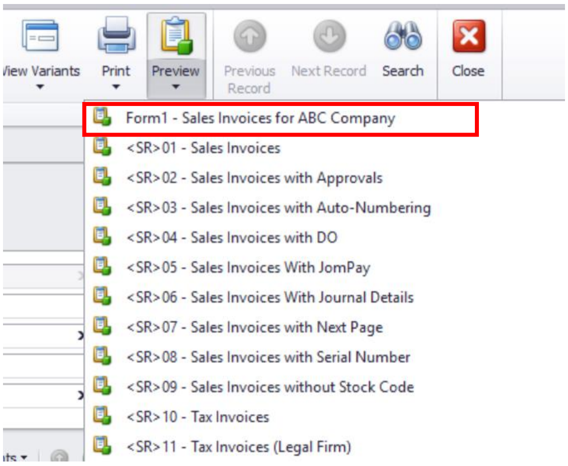
Example: **Name**: AmountWithDiscount

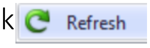


Drag the calculated field into the workspace.



Once the layout customization has been done, this form will now be available in the list of transaction formats.



In case the format cannot be seen in the list, click 

at the bottom of the list. This will reload all the transaction form formats.

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