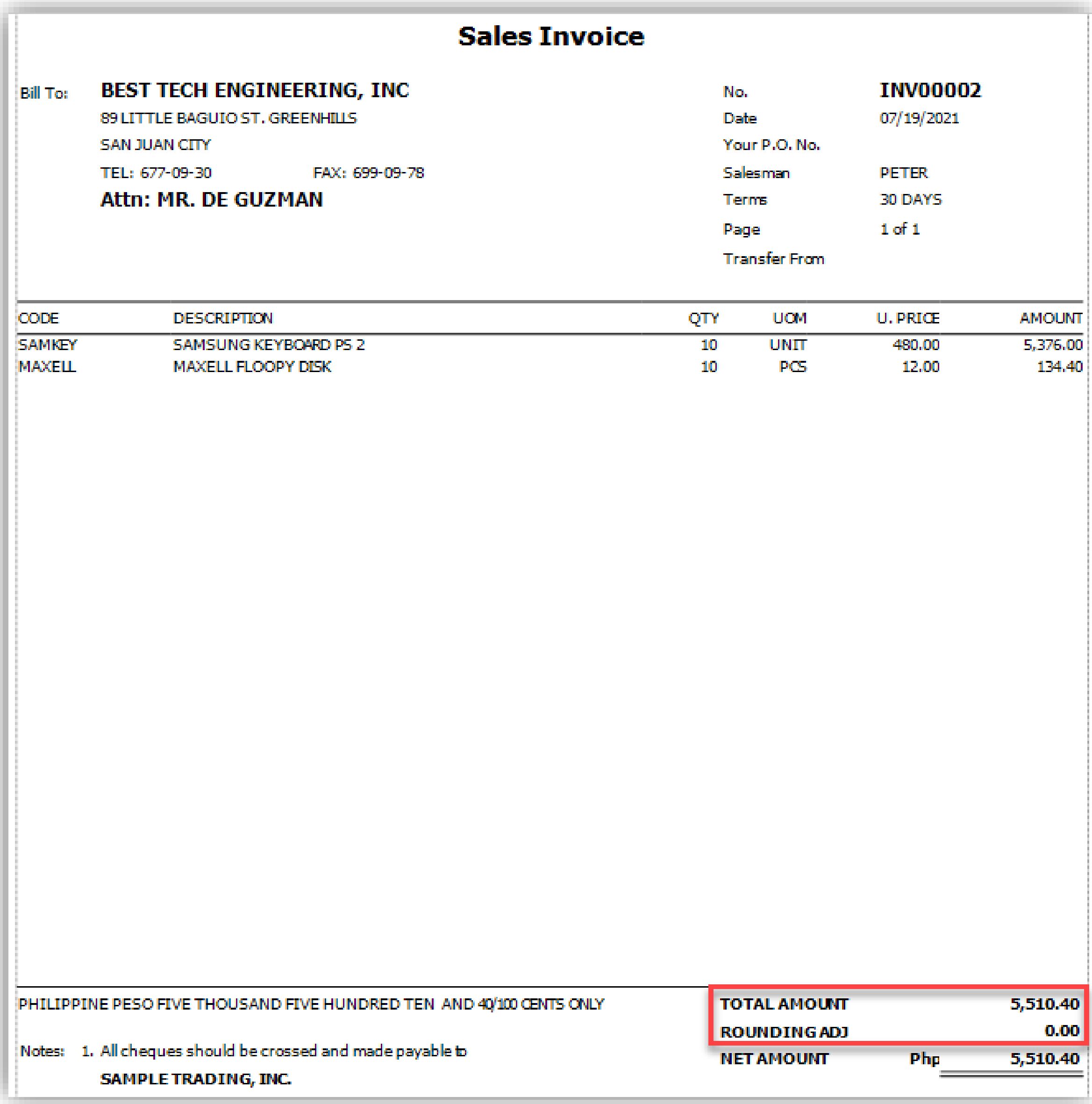
HOW TO CUSTOMIZE REPORT DATA BY ADDING FIELDS

In Report Designer, **Fields** are objects that are linked or mapped to their respective ***Data Sources***.

Sample Scenario:

To show the **VATable Amount** and the **VAT Amount** in place of *TOTAL AMOUNT* and *ROUNDING ADJ* respectively on the Sales Invoice Form.



Sales Invoice

Bill To: **BEST TECH ENGINEERING, INC**
89 LITTLE BAGUIO ST. GREENHILLS
SAN JUAN CITY
TEL: 677-09-30 FAX: 699-09-78
Attn: MR. DE GUZMAN

No. **INV00002**
Date 07/19/2021
Your P.O. No.
Salesman PETER
Terms 30 DAYS
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Transfer From

CODE	DESCRIPTION	QTY	UOM	U. PRICE	AMOUNT
SAMKEY	SAMSUNG KEYBOARD PS 2	10	UNIT	480.00	5,376.00
MAXELL	MAXELL FLOOPY DISK	10	PCS	12.00	134.40

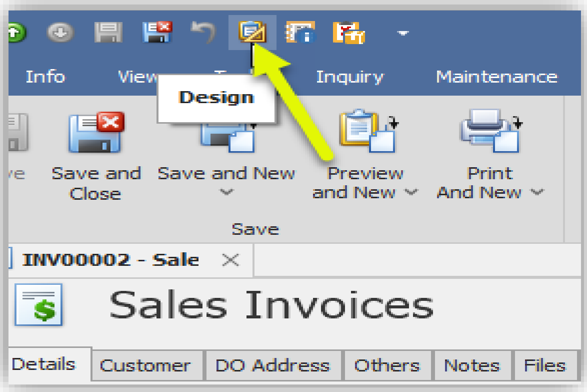
PHILIPPINE PESO FIVE THOUSAND FIVE HUNDRED TEN AND 40/100 CENTS ONLY

Notes: 1. All cheques should be crossed and made payable to
SAMPLE TRADING, INC.

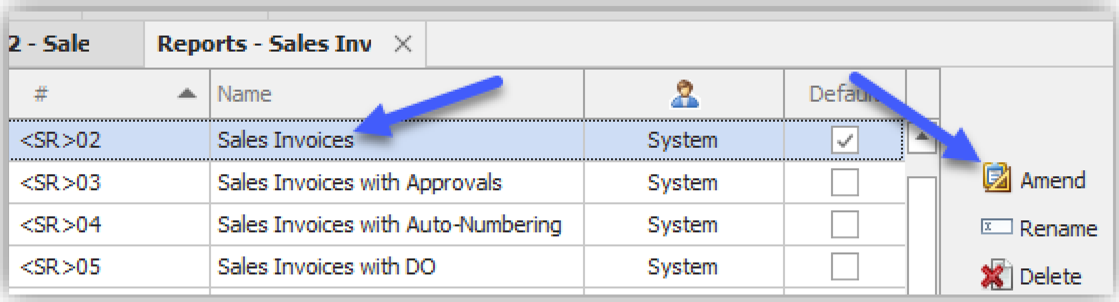
TOTAL AMOUNT		**5,510.40**
ROUNDING ADJ		**0.00**
NET AMOUNT	**Php**	**5,510.40**

Procedure:

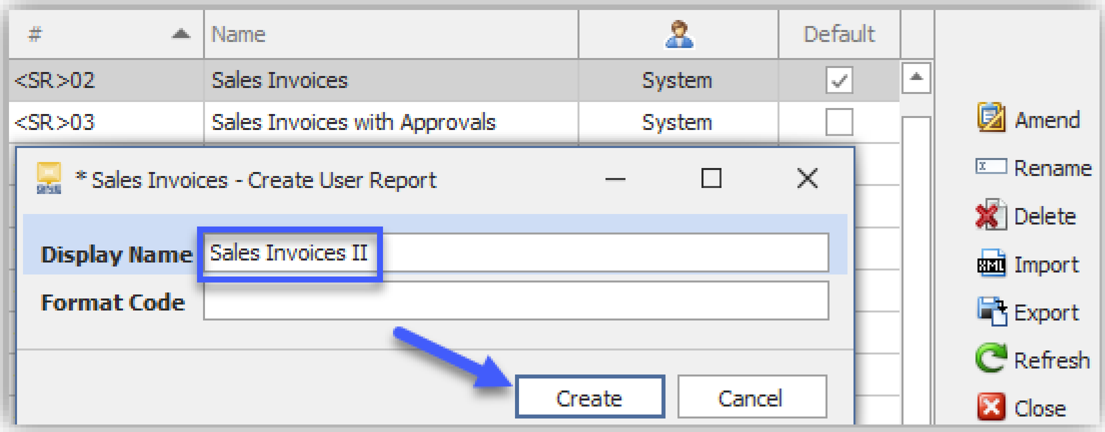
1. On the report or transaction screen (in our scenario it's the Sales Invoice), click the **Design** button.



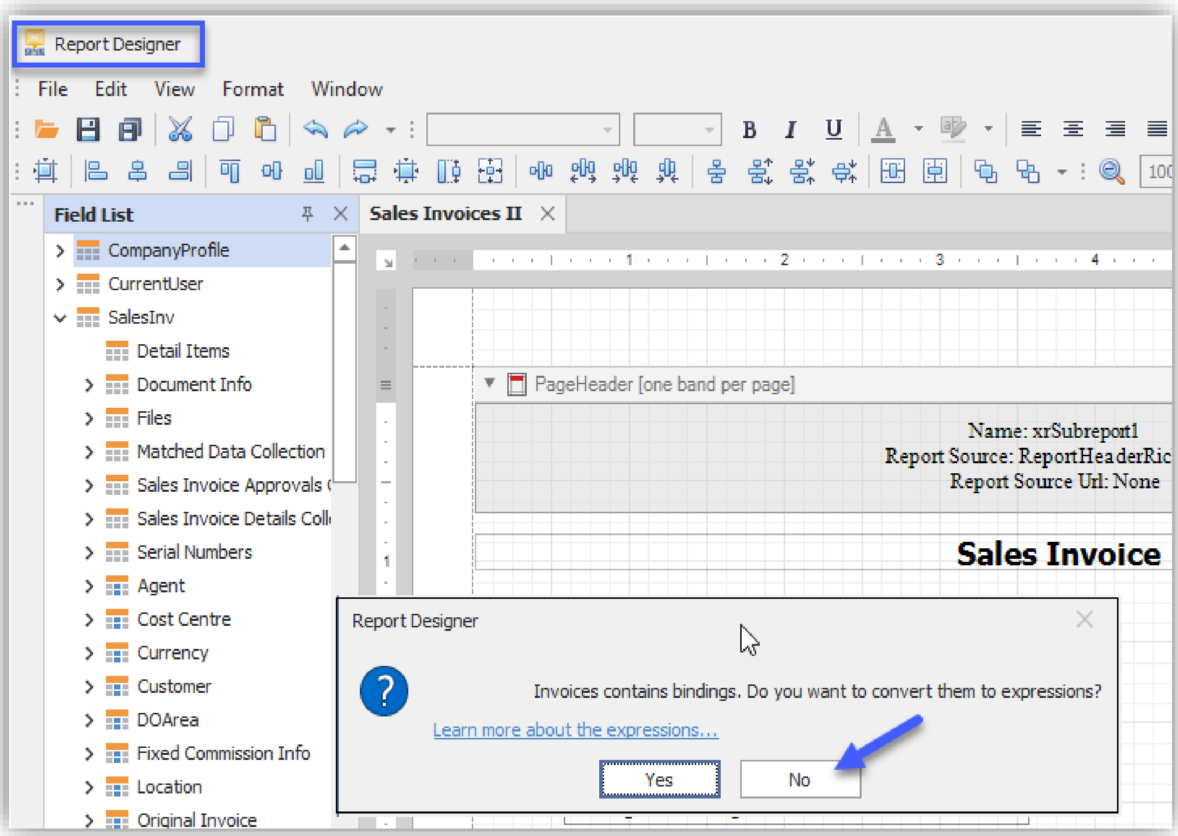
2. Click to select the format (as your template) you wish to modify/customize > Click **Amend**.



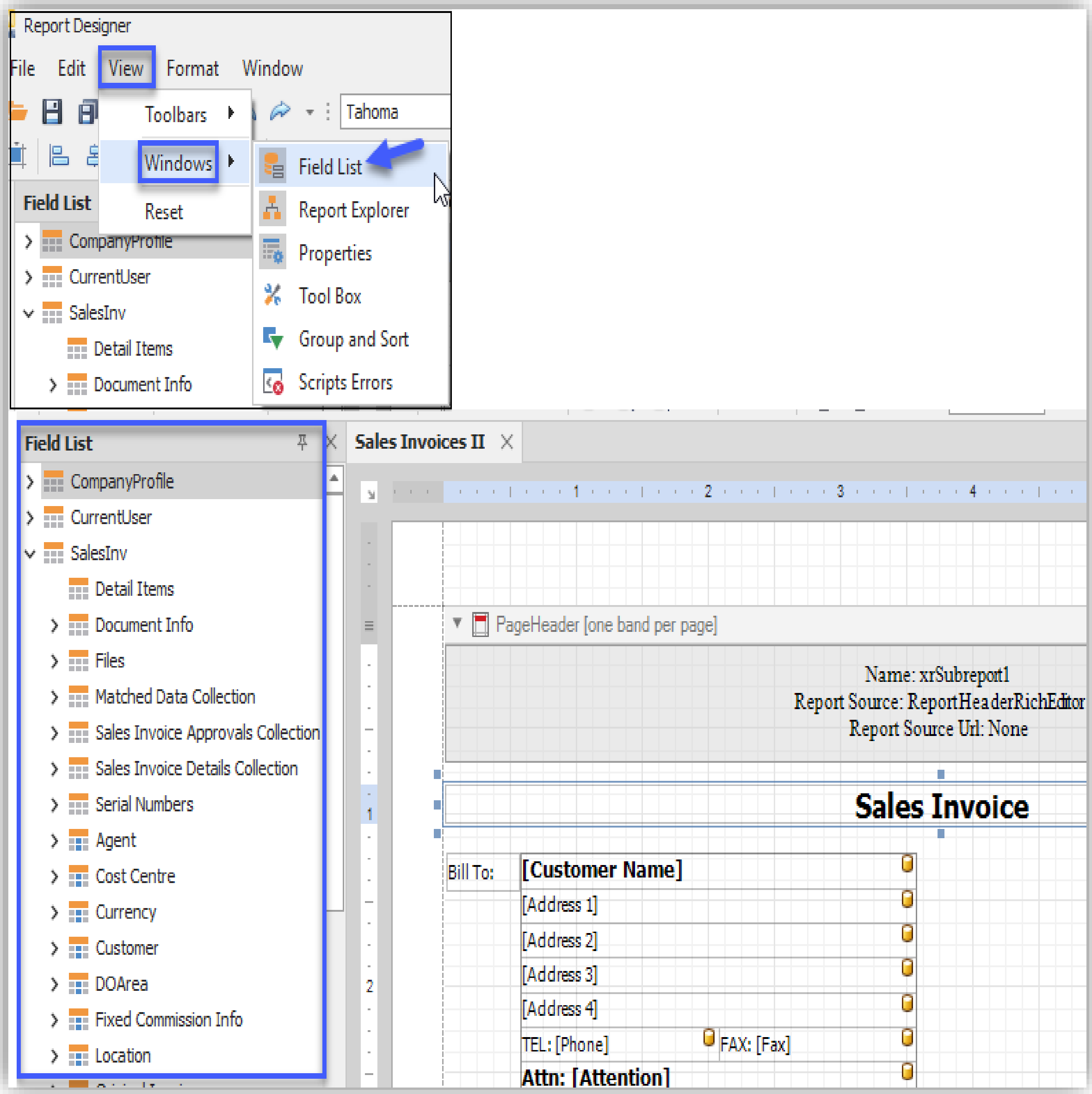
3. Type a new display name (e.g. Sales Invoices II) > Click **Create**.



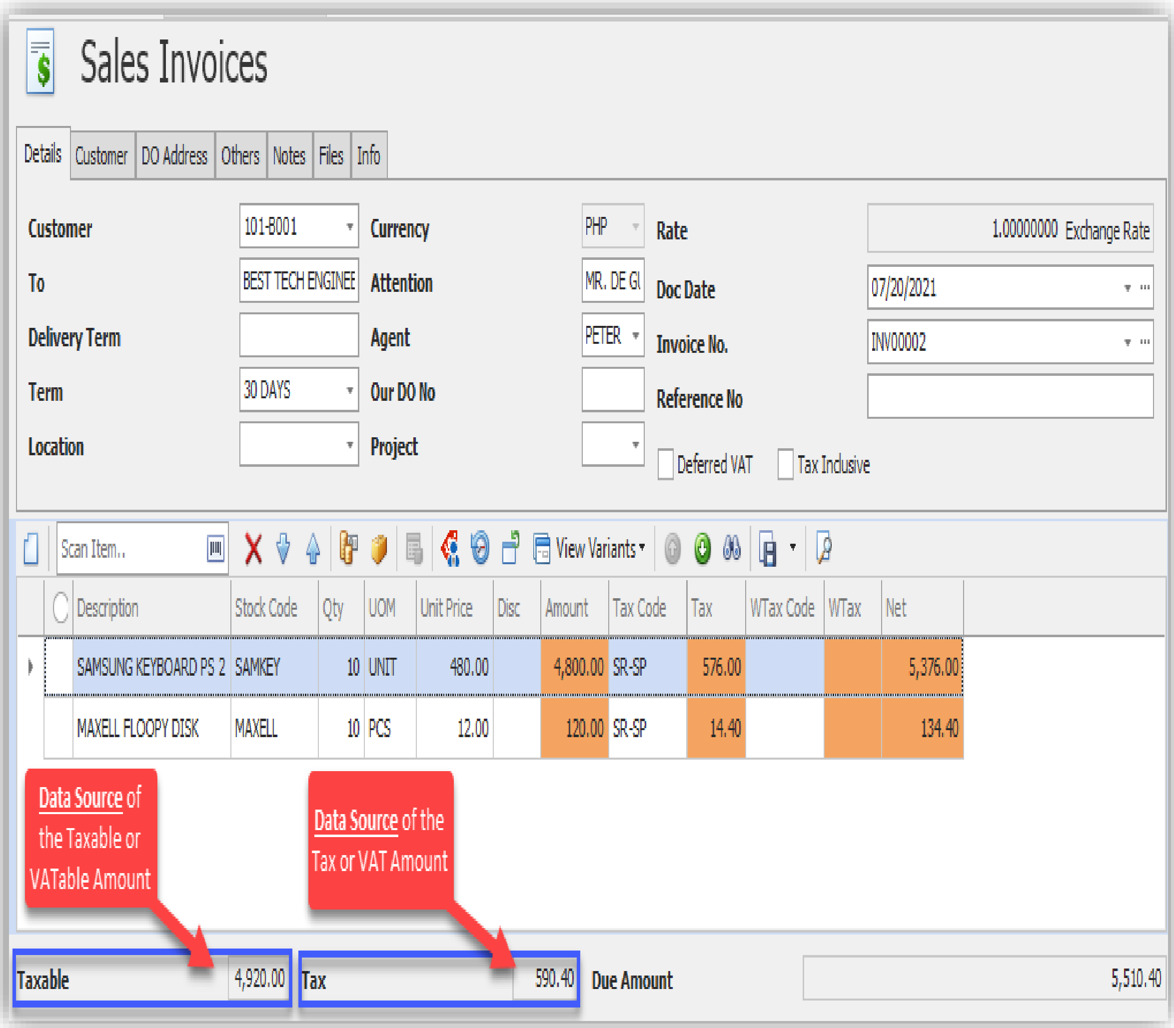
4. On the Report Designer window, in case you get a similar prompt as below, click **No**.



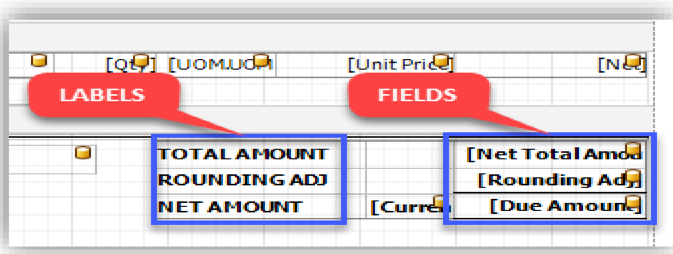
5. If the Field List pane is not displayed, go to View > Windows > click **Field List**.



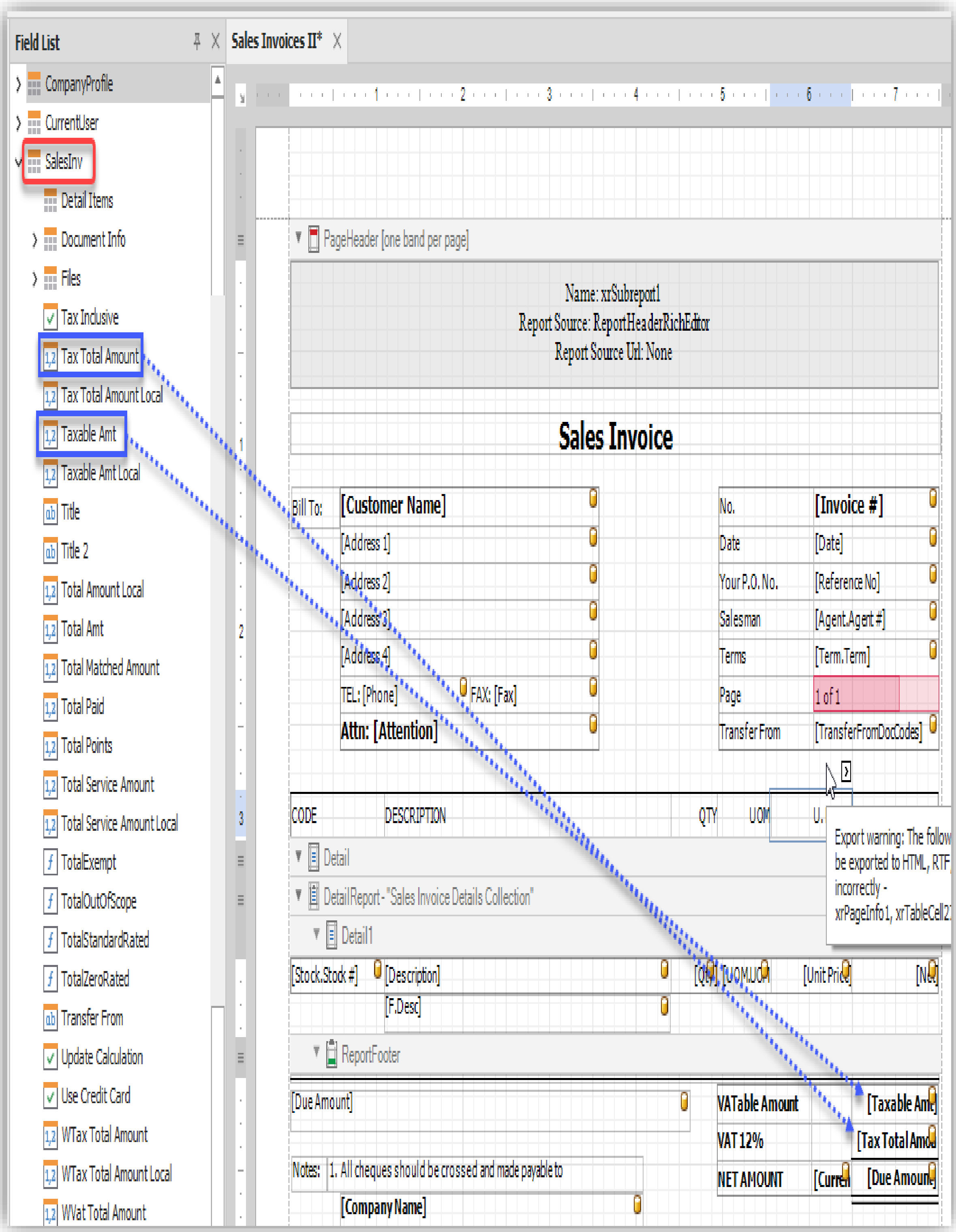
6. In our sample scenario, below is the Sales Invoice transaction.



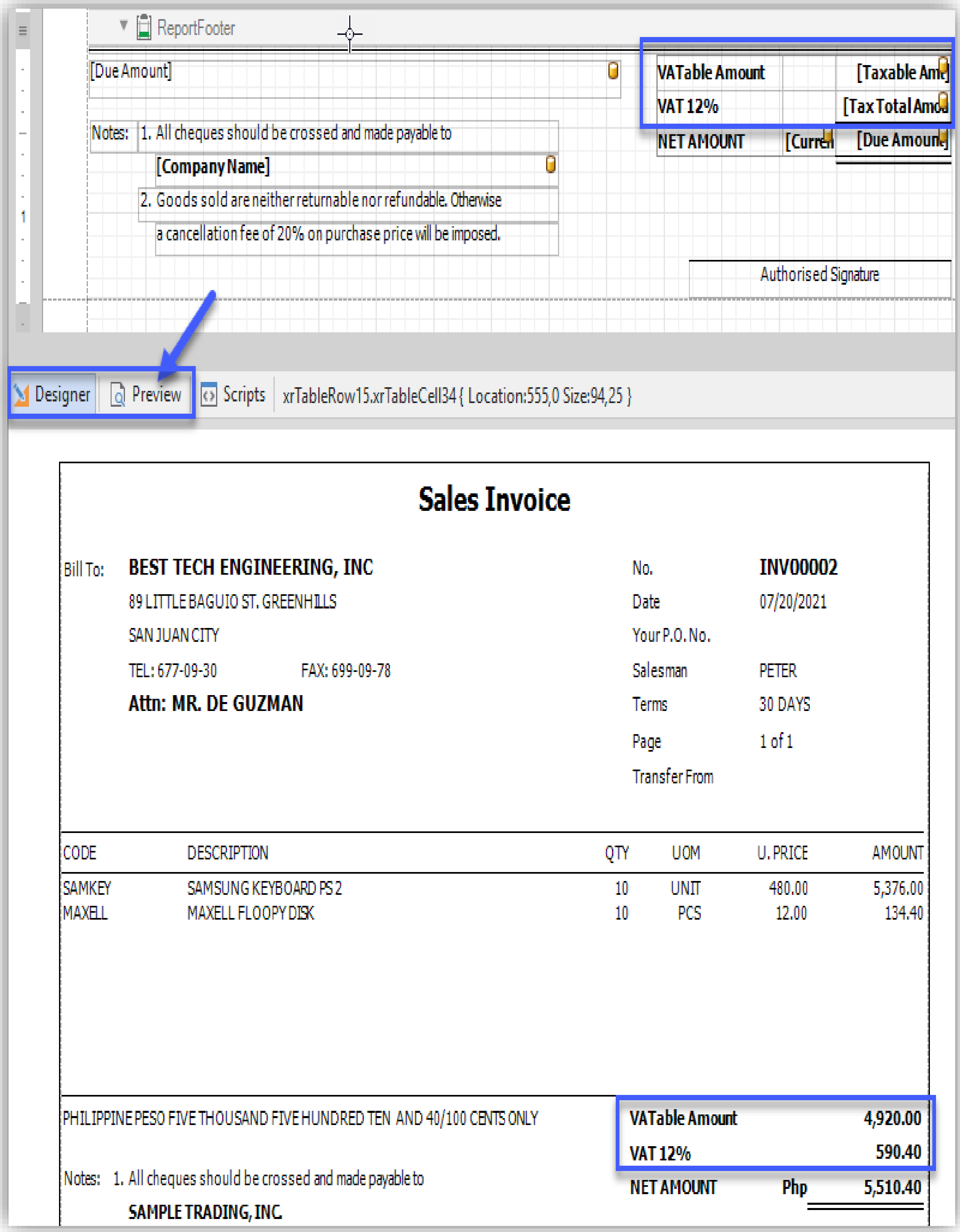
7. In Report Designer, rename the *TOTAL AMOUNT* to **VATable Amount** and *ROUNDING ADJ* to **VAT 12%**.



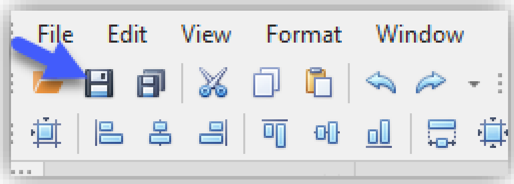
8. Under **Field List**, look for their corresponding Fields and drag & drop them to replace the existing Fields.



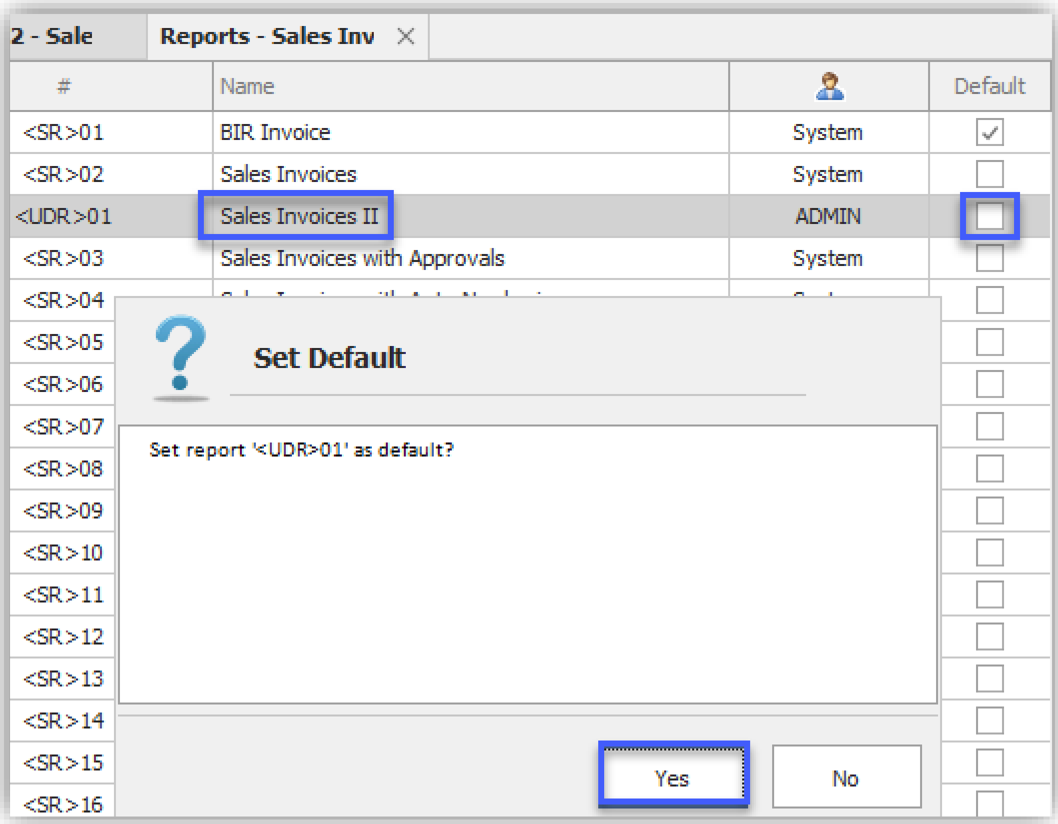
9. Click on **Preview** at the bottom part and see if it's already okay, otherwise click back on **Designer** and make the necessary changes (e.g. It's not the correct Field based on the reflected amount or data).



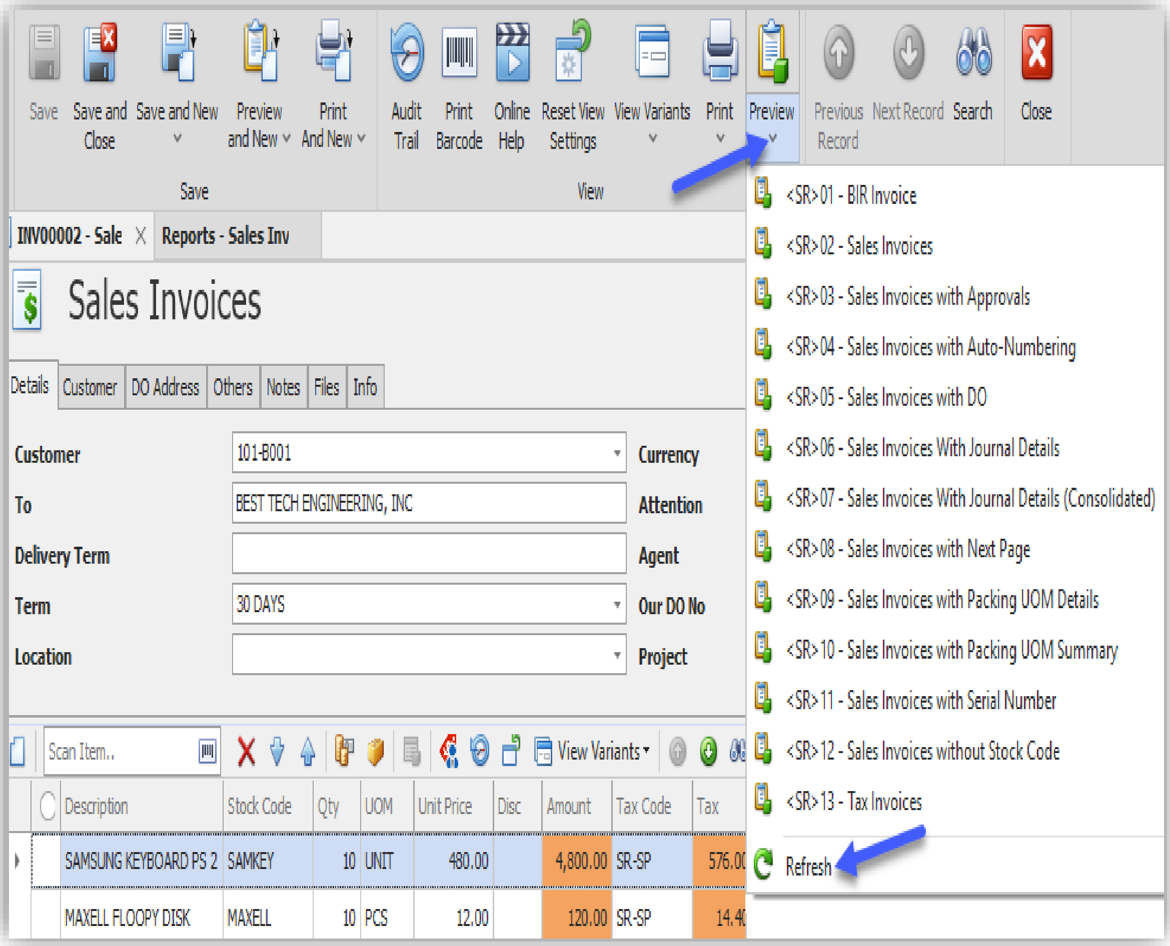
10. Click on **Save** to save your work > Close the Report Designer window.



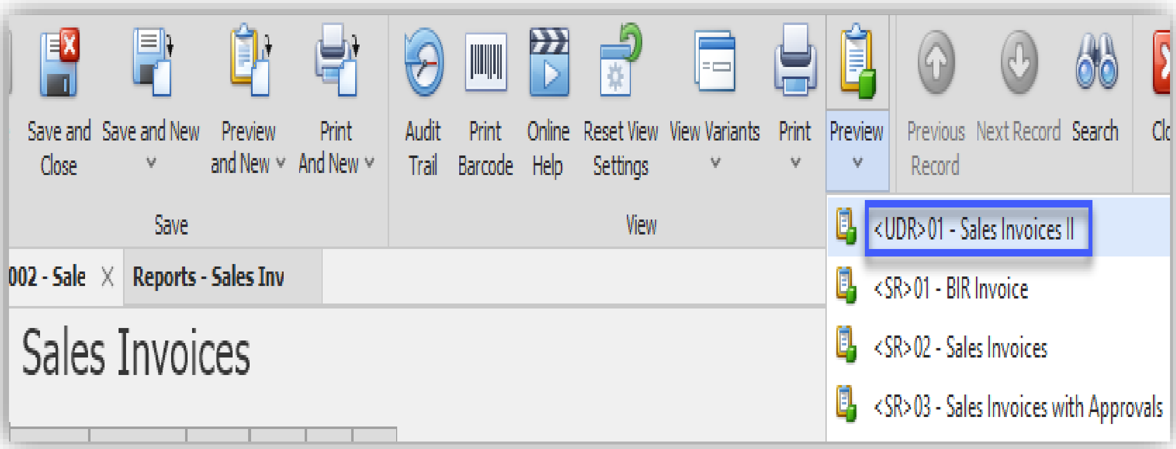
11. Should you want to make the newly created format as default, click the **Default Checkbox** and click **Yes**.



12. Back to the Sales Invoice screen > Click the **Preview drop-down** button > Click **Refresh**.



13. You should now see the new format you've just created.



14. Preview the Sales Invoice using the format you have created.

SAMPLE TRADING, INC. *(000-111-222-333-0000)*
GST Reg. No.:
Unit 806 Pearl of the Orient Tower 1240 Roxas Blvd., Ermita Manila, Philippines
Tel : 567-4248 Fax : 567-4250
URL : Email : sampletrading@yahoo.com

Sales Invoice

Bill To:	**BEST TECH ENGINEERING, INC**	No.	**INV00002**
	89 LITTLE BAGUIO ST. GREENHILLS	Date	07/20/2021
	SAN JUAN CITY	Your P.O. No.	
	TEL: 677-09-30 FAX: 699-09-78	Salesman	PETER
	Attn: MR. DE GUZMAN	Terms	30 DAYS
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CODE	DESCRIPTION	QTY	UOM	U. PRICE	AMOUNT
SAMKEY	SAMSUNG KEYBOARD PS 2	10	UNIT	480.00	5,376.00
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PHILIPPINE PESO FIVE THOUSAND FIVE HUNDRED TEN AND 40/100 CENTS ONLY

VATable Amount		**4,920.00**
VAT 12%		**590.40**
NET AMOUNT	**Php**	**5,510.40**

Notes: 1. All cheques should be crossed and made payable to
SAMPLE TRADING, INC.
2. Goods sold are neither returnable nor refundable. Otherwise
a cancellation fee of 20% on purchase price will be imposed.

Authorised Signature

NOTE:

Should you need further assistance on this please send us an email to support@qne.com.ph or you may log a ticket via qnesupportph.freshdesk.com