



HOW TO CUSTOMIZE REPORT DATA BY ADDING FIELDS

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

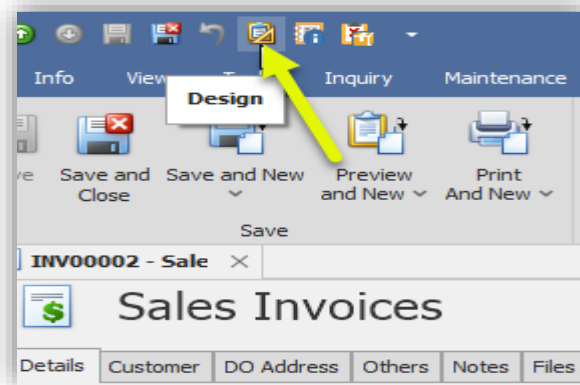
Sample Scenario:

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

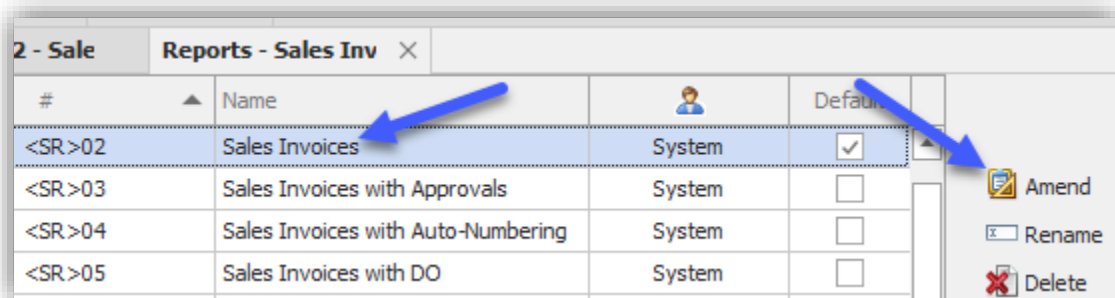
Sales Invoice					
Bill To: BEST TECH ENGINEERING, INC 89 LITTLE BAGUIO ST. GREENHILLS SAN JUAN CITY TEL: 677-09-30 FAX: 699-09-78 Attn: MR. DE GUZMAN			No. INV00002 Date 07/19/2021 Your P.O. No. Salesman PETER Terms 30 DAYS Page 1 of 1 Transfer From		
CODE	DESCRIPTION	QTY	UOM	U. PRICE	AMOUNT
SAMKEY	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				TOTAL AMOUNT 5,510.40	
Notes: 1. All cheques should be crossed and made payable to SAMPLE TRADING, INC.				ROUNDING ADJ 0.00	
				NET AMOUNT Php 5,510.40	

Procedure:

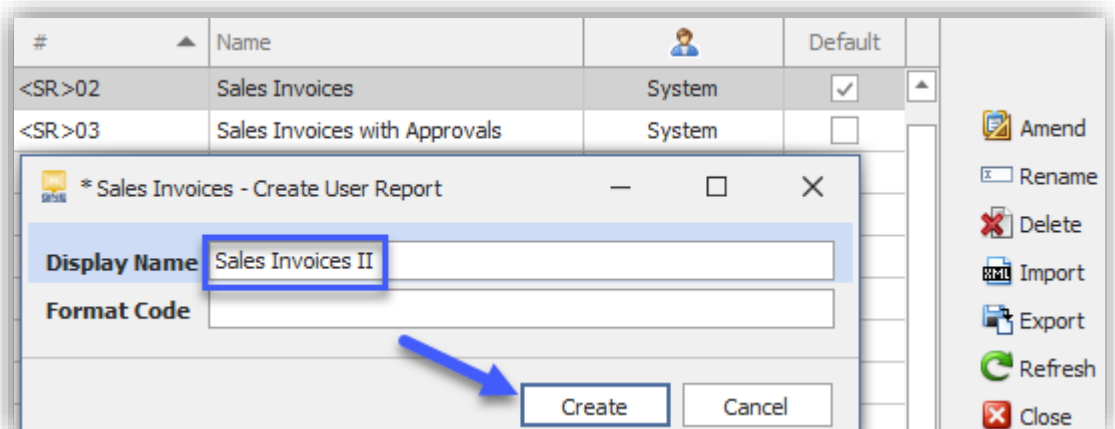
1. On the report or transaction screen (in our scenario it's the Sales Invoice), click the **Design** button.



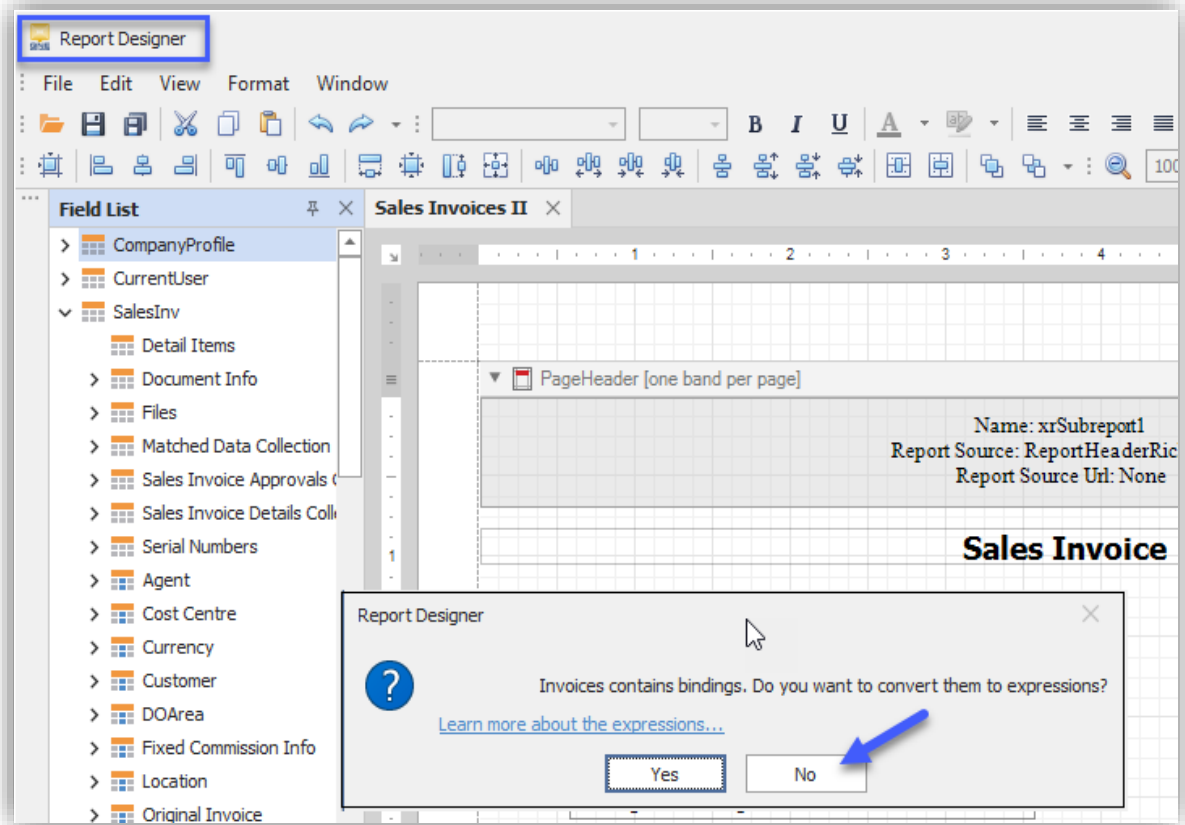
2. Click to select the format (as your template) you wish to modify/customize > Click **Amend**.



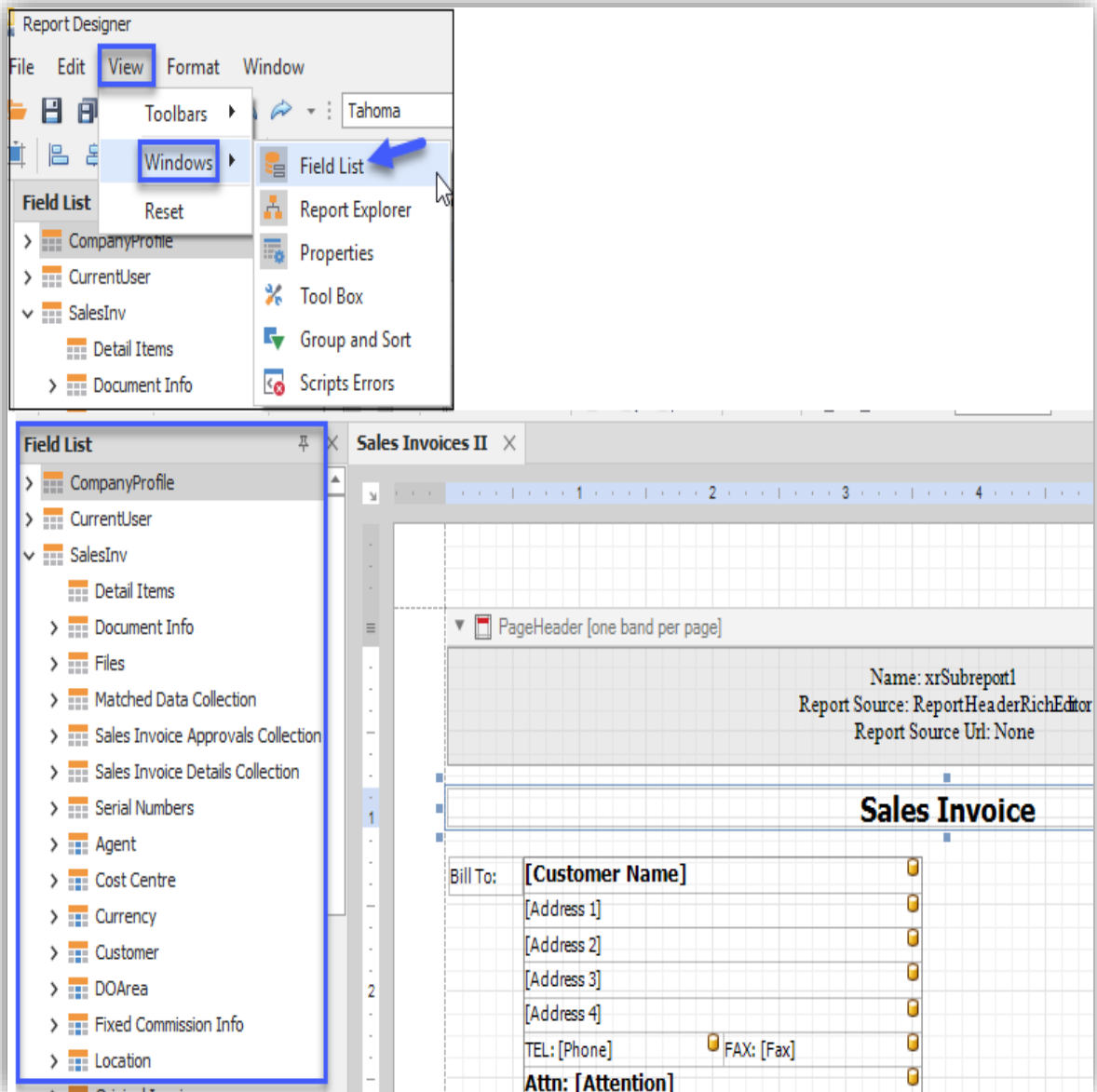
3. Type a new display name (e.g. Sales Invoices II) > Click **Create**.



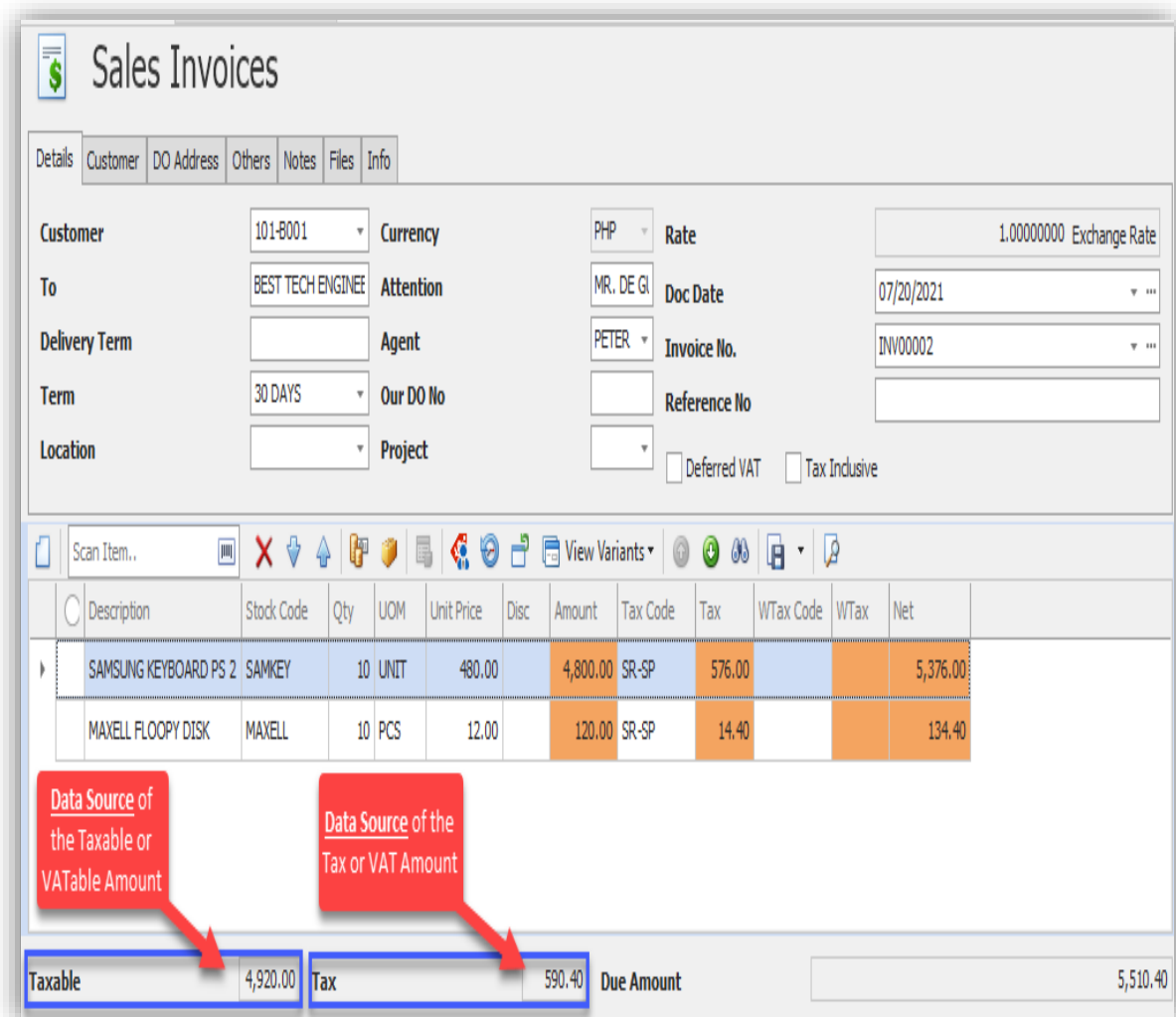
4. On the Report Designer window, in case you get a similar prompt as below, click **No**.



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.



Sales Invoices

Details Customer DO Address Others Notes Files Info

Customer: 101-B001 Currency: PHP Rate: 1.00000000 Exchange Rate

To: BEST TECH ENGINEER Attention: MR. DE GI Doc Date: 07/20/2021

Delivery Term: Agent: PETER Invoice No.: INV00002

Term: 30 DAYS Our DO No: Reference No:

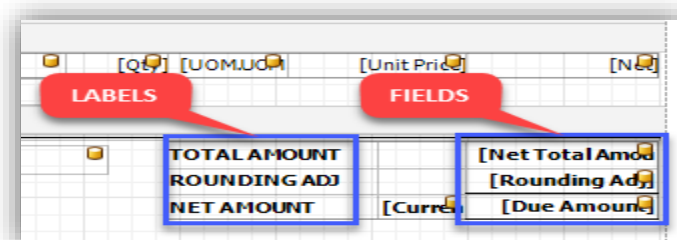
Location: Project: ☐ Deferred VAT ☐ Tax Inclusive

Description	Stock Code	Qty	UOM	Unit Price	Disc	Amount	Tax Code	Tax	WTax Code	WTax	Net
SAMSUNG KEYBOARD PS 2	SAMKEY	10	UNIT	480.00		4,800.00	SR-SP	576.00			5,376.00
MAXELL FLOOPY DISK	MAXELL	10	PCS	12.00		120.00	SR-SP	14.40			134.40

Summary:

Taxable	4,920.00	Tax	590.40	Due Amount	5,510.40
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7. In Report Designer, rename the *TOTAL AMOUNT* to **VATable Amount** and *ROUNDING ADJ* to **VAT 12%**.



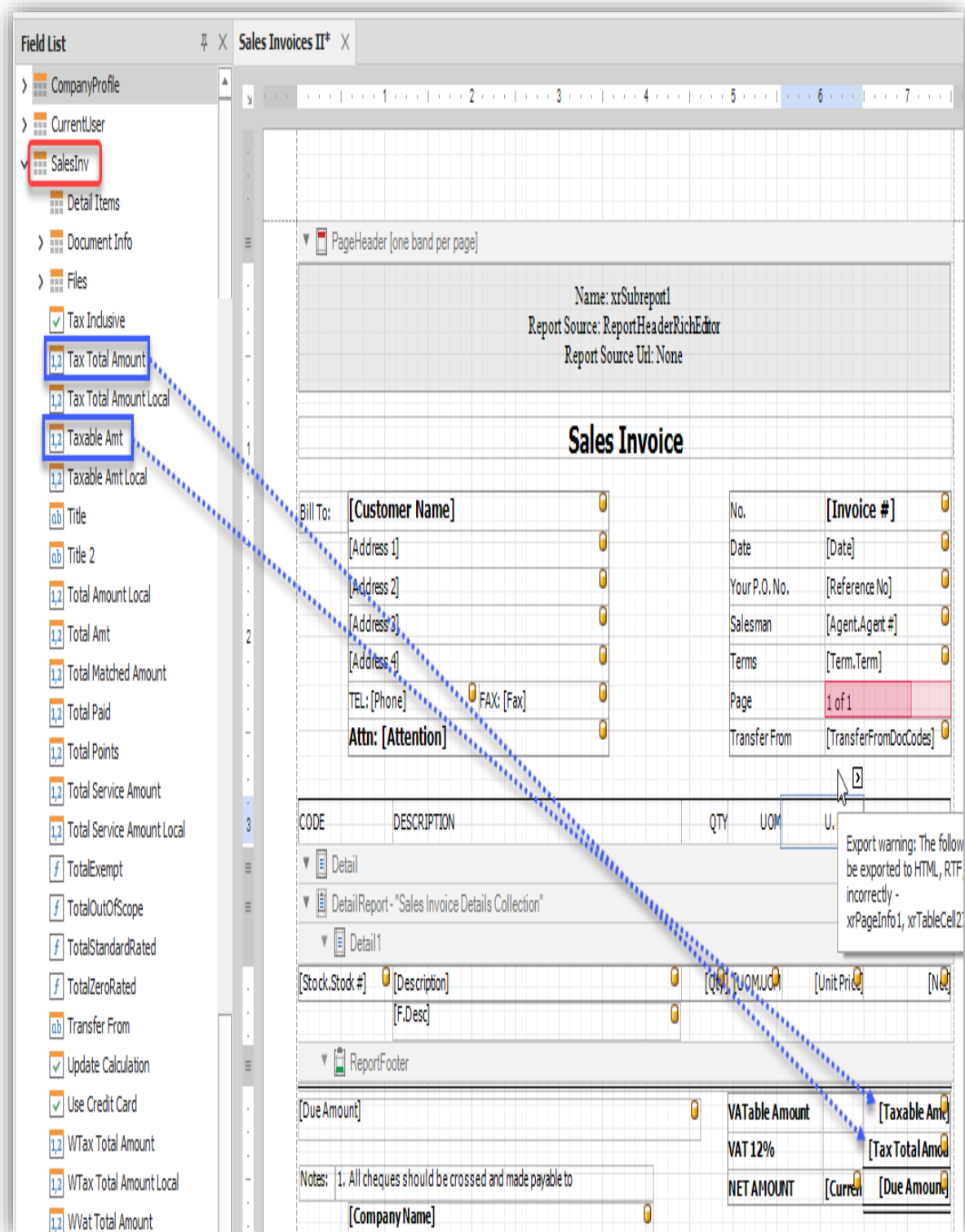
LABELS

FIELDS

TOTAL AMOUNT
ROUNDING ADJ
NET AMOUNT

[Net Total Amount]
[Rounding Adj]
[Due Amount]

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



Field List

- CompanyProfile
- CurrentUser
- SalesInv**
 - Detail Items
- Document Info
- Files
- Tax Inclusive
- Tax Total Amount
- Tax Total Amount Local
- Taxable Amt
- Taxable Amt Local
- Title
- Title 2
- Total Amount Local
- Total Amt
- Total Matched Amount
- Total Paid
- Total Points
- Total Service Amount
- Total Service Amount Local
- TotalExempt
- TotalOutOfScope
- TotalStandardRated
- TotalZeroRated
- Transfer From
- Update Calculation
- Use Credit Card
- WTax Total Amount
- WTax Total Amount Local
- WVat Total Amount

Sales Invoices II*

PageHeader [one band per page]

Name: xrSubreport1
Report Source: ReportHeaderRichEditor
Report Source Uri: None

Sales Invoice

Bill To: [Customer Name]
[Address 1]
[Address 2]
[Address 3]
[Address 4]
TEL: [Phone] FAX: [Fax]
Attn: [Attention]

No. [Invoice #]
Date [Date]
Your P.O. No. [Reference No]
Salesman [Agent.Agent #]
Terms [Term.Term]
Page 1 of 1
Transfer From [TransferFromDocCodes]

CODE	DESCRIPTION	QTY	UOM	U.
Detail				
DetailReport - "Sales Invoice Details Collection"				
Detail1				
[Stock.Stock #]	[Description]	[Qty]	[UOM]	[Unit Price]
	[F.Desc]			

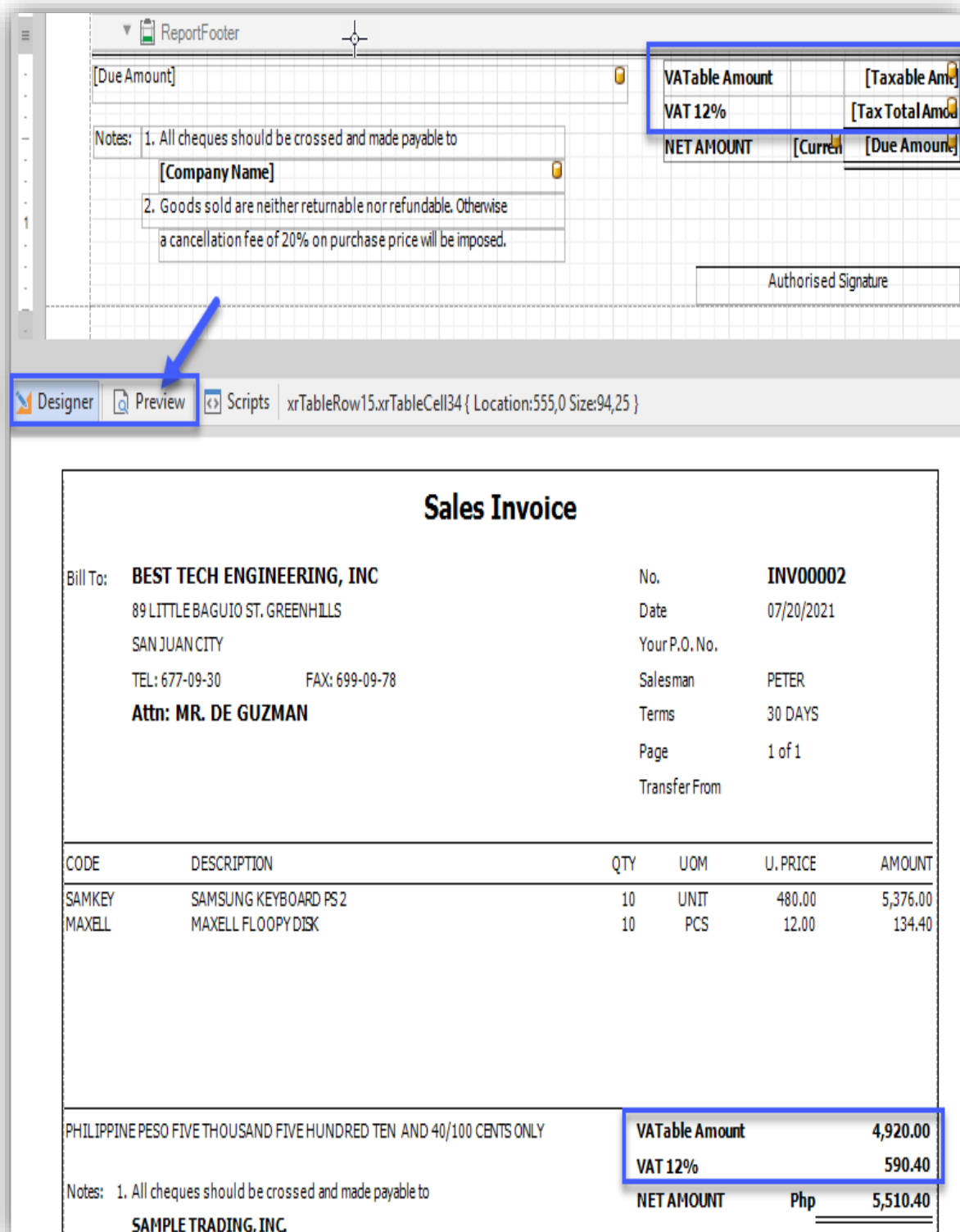
ReportFooter

[Due Amount] VATable Amount [Taxable Amt]
VAT 12% [Tax Total Amount]
NET AMOUNT [Current] [Due Amount]

Notes: 1. All cheques should be crossed and made payable to [Company Name]

Export warning: The follow be exported to HTML, RTF incorrectly - xrPageInfo1, xrTableCell2

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).



ReportFooter

[Due Amount]	VATable Amount	[Taxable Amount]
	VAT 12%	[Tax Total Amount]
	NET AMOUNT	[Current] [Due Amount]

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

Authorized Signature

Designer **Preview** Scripts xrTableRow15.xrTableCell34 { Location:555,0 Size:94,25 }

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 07/20/2021
Your P.O. No.
Salesman PETER
Terms 30 DAYS
Page 1 of 1
Transfer From

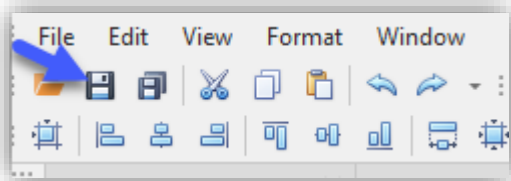
CODE	DESCRIPTION	QTY	UOM	U. PRICE	AMOUNT
SAMKEY	SAMSUNG KEYBOARD PS2	10	UNIT	480.00	5,376.00
MAXELL	MAXELL FLOOPY DISK	10	PCS	12.00	134.40

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

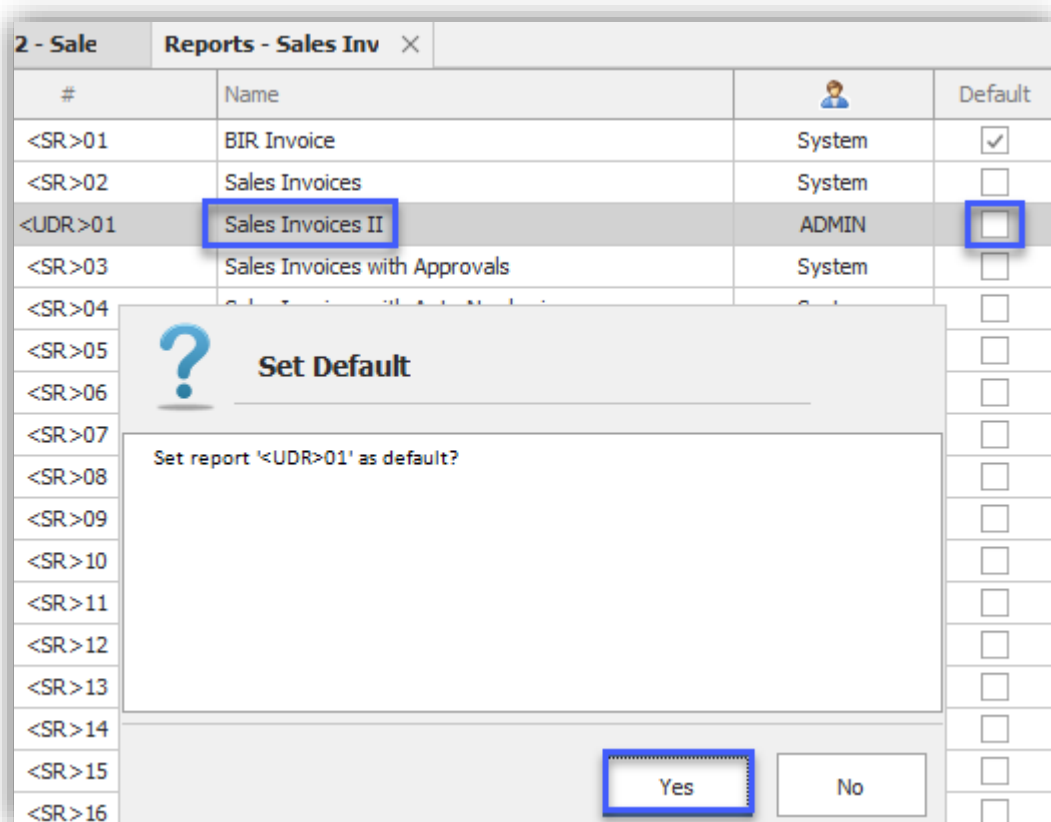
VATable Amount	4,920.00
VAT 12%	590.40
NET AMOUNT	Php 5,510.40

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

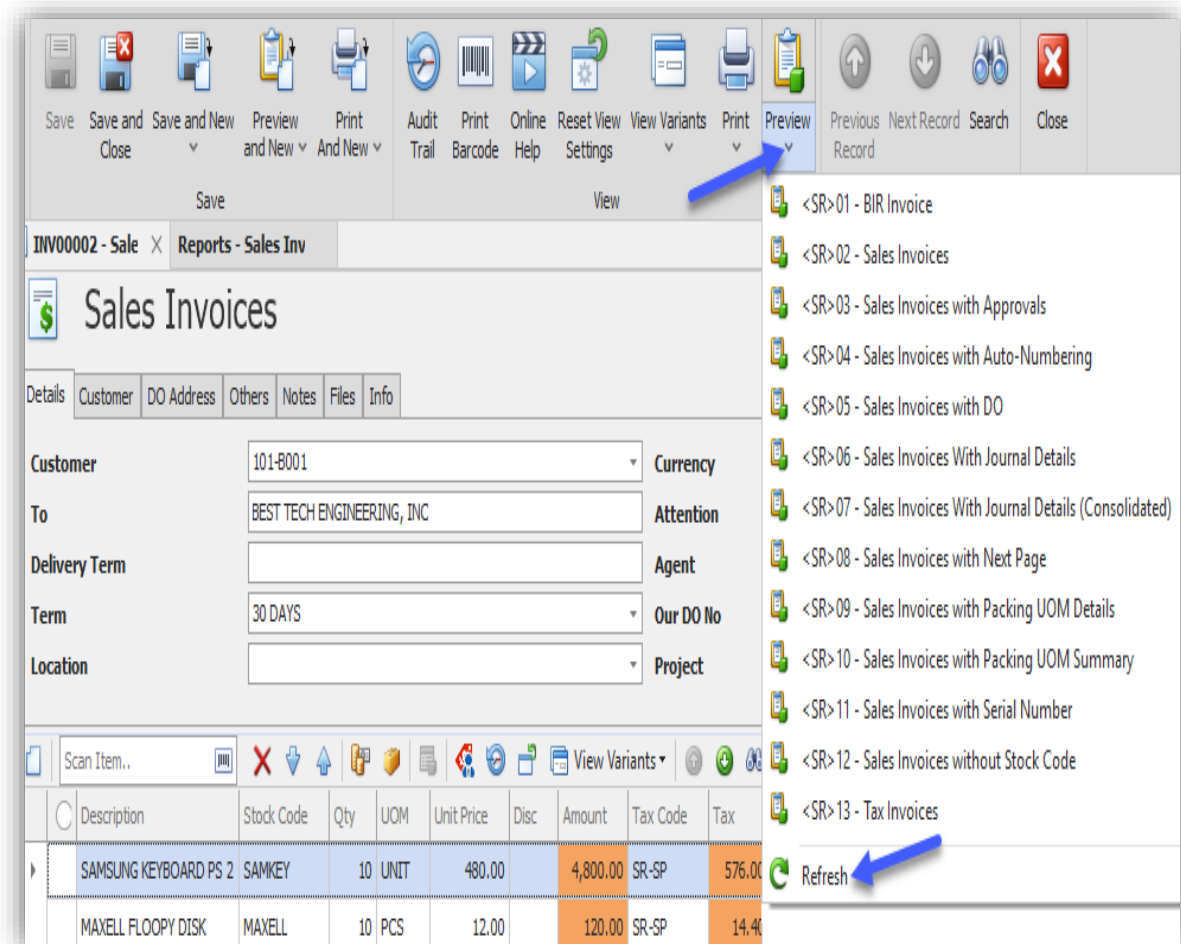
10. Click on **Save** to save your work > Close the Report Designer window.



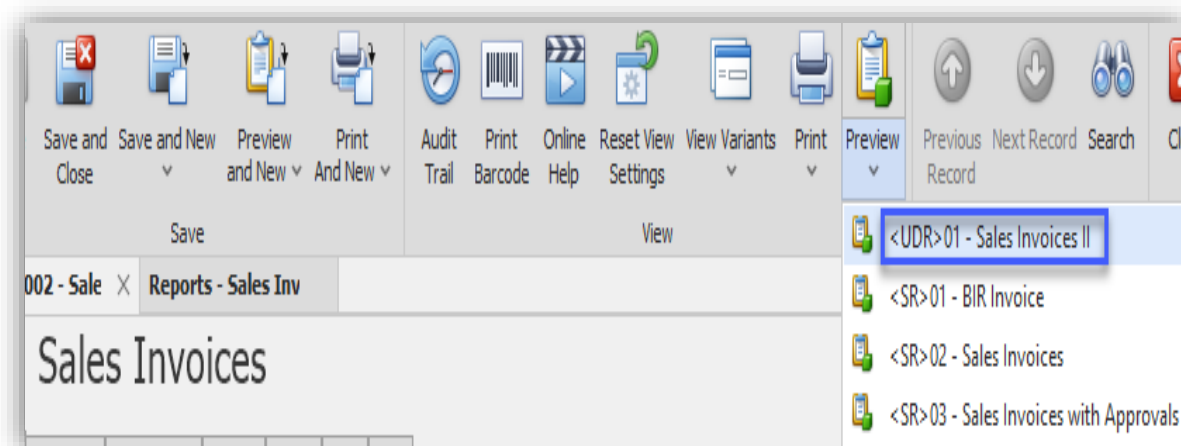
11. Should you want to make the newly created format as default, click the **Default Checkbox** and click **Yes**.



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 89 LITTLE BAGUIO ST. GREENHILLS SAN JUAN CITY TEL: 677-09-30 FAX: 699-09-78 Attn: MR. DE GUZMAN	No. INV00002 Date 07/20/2021 Your P.O. No. Salesman PETER Terms 30 DAYS Page 1 of 1 Transfer From
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CODE	DESCRIPTION	QTY	UOM	U. PRICE	AMOUNT
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 a cancellation fee of 20% on purchase price will be imposed.

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

 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