

# Customizing Reports

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## Overview

The Report tool provides useful options to help you customize your reports based on your business needs and evaluation requirements. You can design your reports by selecting the settings of tables and columns; and modifying properties to suit your requirements.

Below are the steps to begin customizing your report(s):

1. Access the report that you want to customize from the **Reports** page.
2. Use any of the tabs (Frequently Run, My Reports and All Reports) to locate your report.
3. Click the link of your report.

The following are some of the different actions that you can take for customizing your reports.

### Adding a Section

1. Click the **Customize Report** button (from the View Report page).
2. Click the **Columns** tabs.
3. Select the row containing the table-column combination that you want your section or grouping to be based on, for example, customer grouping.
4. Click on the **Section** checkbox.

TABLE	COLUMN	CAPTION	SECTION
Customers & Leads	Full Name		
Sales Rep	Name		
Sales Order & Quotes	No.		
Sales Order & Quotes	Date		
Items	Name / Number		
Sales Order/Quote Line Items	Description		
Sales Order/Quote Line Items	Ext.		

Table Customers & Leads

Column Full Name

Caption

Section

5. Click **Save**.
6. Click **View**.

The report in the example below is organized by Customer. Every row is grouped and listed under an identified header (Customer-Full Name).

Reports > View Report

My New SO Item Detil Export Print Customize Report Save Save As Delete

NAME	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.
<b>1496316 Ontario Inc.</b>					
	1	1/17/2018	106	PCR PET	10.00
	5	1/17/2018	106	PCR PET	10.00
<b>1st Century Snack Foods</b>					
	6	1/21/2018	102	2	125.00
	6	1/21/2018	103	Liner Bags	0.00
	6	1/21/2018	105	Parts	30.00
	6	1/21/2018	109	Silicone TE-350-FG	161.00
	6	1/21/2018	201	DSRL-BROWN 174	0.00
	6	1/21/2018	203	DSRL-GREEN 354	14.00
	6	1/21/2018	90	Purchased Sheet:29.5 x 0.012	3.00
	8	1/22/2018	105	Parts	5.00
	11	1/29/2018	103	Liner Bags	300.00
	11	1/29/2018	H0009	High end digital component	350.00
<b>Acushnet</b>					
	1	12/26/2017	100	Sushi Mari Moulds	284.50
	1	12/26/2017	A100001	The best born in the world	50.25

## Renaming Column Names

Another way of customizing the report is renaming the column names to

be more specific and to make the report more intuitive.

1. Click the **Customize Report** button.
2. Click the **Columns** tabs.
3. Select the row containing the table-column combination that you want to make the change(s) to.
4. Enter the new report column name in the **Caption** field.

**Example:** The column *Name* for the *Sales Rep* table will be labeled as *Rep*.

TABLE	COLUMN	CAPTION	SE
Customers & Leads	Full Name		CU
Customers & Leads	Bill Address Name/Company		
Sales Rep	Name		
Sales Order & Quotes	No.		
Sales Order & Quotes	Date		
Items	Name / Number		
Sales Order/Quote Line Items	Description		
Sales Order/Quote Line Items	Ext.		

Table Sales Rep

Column Name

Caption

5. Click **Save**.
6. Click **View** to see the changes in the report.

My New SO Item Detail Export Print Customize Report Save Save As Delete

1496316 Ontario Inc.

REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.
	1	1/17/2018	106	PCR PET	10.00
	5	1/17/2018	106	PCR PET	10.00

21st Century Snack Foods

REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.
	6	1/21/2018	102	2	125.00
	6	1/21/2018	103	Liner Bags	0.00
	6	1/21/2018	105	Parts	30.00

## Adding Columns to a Section

You can also add new columns and make it part of a section.

1. Click the **Customize Report** button.
2. Click the **Columns** tabs.
3. Select the columns that you want to include in the report by dragging and dropping the column name inside the box.

TABLE	COLUMN	CAPTION	SECTION
Customers & Leads	Full Name		Customers & Leads-Full Name
Customers & Leads	Bill Address Name/Company		
Sales Rep	Name		
Sales Order & Quotes	No.		
Sales Order & Quotes	Date		
Items	Name / Number		
Sales Order/Quote Line Items	Description		
Sales Order/Quote Line Items	Ext.		

Table Customers & Leads  
Column Bill Address Name/Company  
Caption   
Section   
Section

4. Choose the section from the **Section** picklist.
5. Click **Save**.

TABLE	COLUMN	CAPTION	SECTION	SUMMARY FUNCTION	ACTION
Customers & Leads	Full Name		Customers & Leads-Full Name	None	⊗
Customers & Leads	Bill Address Name/Company		Customers & Leads-Full Name	None	⊗
Sales Rep	Name		None	None	⊗
Sales Order & Quotes	No.		None	None	⊗
Sales Order & Quotes	Date		None	None	⊗
Items	Name / Number		None	None	⊗
Sales Order/Quote Line Items	Description		None	None	⊗
Sales Order/Quote Line Items	Ext.		None	None	⊗

RenderType Tabular

6. Click **View** to check if report reflects the update.

Acushnet					Bill Address Name/Company: Acushnet Recycling Inc
REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.
	1	12/26/2017	100	Sushi Mori Moulds	284.50
	1	12/26/2017	A100001	The best born in the world	50.25

## Adding a Summary Function

One of the most common and helpful information in reports is the *total* of numeric data. You can add a summary function in your report. This is useful for reports that include, for example Sales Order/Quote Line Items.

1. Click the **Customize Report** button.
2. Click the **Columns** tabs.
3. Select the row containing the table-column combination that you want to make the change(s) to.
4. Select **Sum** from **Summary** Function picklist.

TABLE	COLUMN	CAPTION	SECTION
Customers & Leads	Full Name		Customers & Leads-Full Name
Customers & Leads	Bill Address Name/Company		
Sales Rep	Name		
Sales Order & Quotes	No.		
Sales Order & Quotes	Date		
Items	Name / Number		
Sales Order/Quote Line Items	Description		
Sales Order/Quote Line Items	Ext.		

Table Sales Order/Quote Line Items

Summary Function **Sum**

Column Ext.

Caption

Section

Section

5. Click **Save**.
6. Click **View** to check the sub-total(s) and grand total (at the bottom) in the report.

Alos Cuisine LLC						Bill Address Name/Company:
REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.	
	3	1/8/2018	105	Parts	30.52	
	3	1/8/2018	108	Prep Charges	45.00	
					75.52	
AMI						Bill Address Name/Company:
REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.	
	9	1/24/2018	102	2	1,875.00	
	9	1/24/2018	409	WT16-S-S	0.00	
					1,875.00	
BB Goodbeans LLC						Bill Address Name/Company:
REP	NO.	DATE	NAME / NUMBER	DESCRIPTION	EXT.	
	7	1/22/2018	103	Liner Bags	136.00	
	7	1/22/2018	203	DSRL-GREEN 354	171.80	
					307.80	

## Using Filters

Use the filter function for instances that you need only very specific information for your reports.

1. Click the **Customize Report** button.
  2. Click the **Filters** tab.
  3. Drag and drop the column that you want to filter in the box.
  4. Set your filter specification by using the picklist and entering a value in the field or selecting from the dropdown.
- The operator and criteria that will be available depend on the column (also know as field type) selected, such as the examples below.
    - Entity Ref - After selecting an operator, select the value from the dropdown. If you have a multiple selection, hold down the *Ctrl* button while clicking with your mouse.

Tables	Columns	Filters	Sort By
TABLE			COLUMN
Sales Order & Quotes			Tran Type

Table Sales Order & Quotes

Column Tran Type

in

- None
- Adjustment
- Receiver
- Work Order

- Text and Numbers - After selecting an operator, enter the appropriate value in the field.

Table Customers & Leads

Column Bill Address City

equal to

- Dates - Select the timeframe from the dropdown.

Table Items

Column Created Date/Time

This month

- Boolean - After selecting an operator, choose True or False accordingly from the drop down.

Table Items

Column Active

equal to

True



When combining fields the logical joiner is AND meaning all filters must resolve to true in order for the entire statement to be true. [List Filters](#) has additional information about using filters.

5. Click **Save** or **Save As**.

6. Click **View**.

## Sorting Reports

Reports can be sorted by almost any field, but *only up to three fields* can be selected at a time. Most reports have a default sort order that can be customized.

1. To access your reports screen, click on the **Reports** tab on your main landing page. The *Reports* screen will be represented by three tabs (Frequently Run, My Reports and All Reports).

The screenshot shows the OrderTime interface with the 'Reports' tab selected. The 'All Reports' sub-tab is active. The main content area is divided into sections: Purchasing, General, and Production. Under 'Purchasing', there are sub-sections for Vendors, Purchase Orders, and Receivers & Vendor Returns. Under 'General', there are sub-sections for Activities and Valuation. Under 'Production', there are sub-sections for Bill of Materials and Work Orders & Disassemblies. A blue arrow points to the 'Valuation Summary' report under the 'Valuation' section.

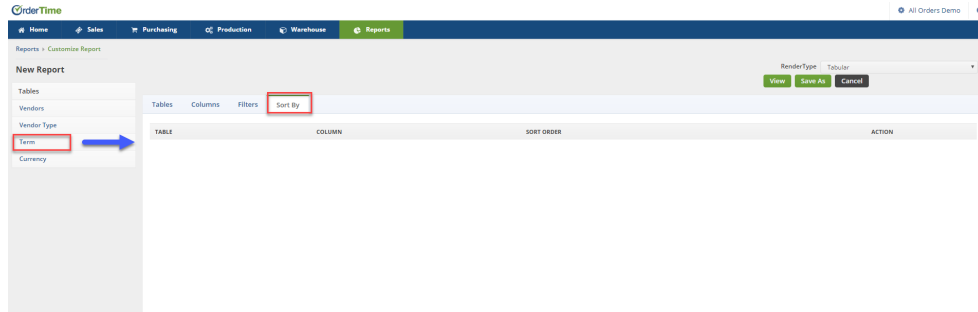
2. Select the appropriate tab to customize a report.

3. Access the report you would like to edit and click **Customize Reports**.

4. Next click **Sort by**, which is located in the center of your screen.



- On the left side of your screen you will find all the available *Sort By topics*. Click the corresponding topic to populate all the available *Sort Fields*.
- Simply *click and drag* the fields you would like, onto the Sort By list.



You can also sort the fields by using the **Sort Order** picklist. You can choose either **Asc** for ascending or **Desc** for descending.

TABLE	COLUMN	SORT ORDER
Customers & Leads	Full Name	Asc
Sales Order/Quote Line Items	Id	Asc

Table Sales Order/Quote Line Items  
 Column Id  
 Sort order Asc