# Designing and Using All Orders Report

Designing Templates, Reports and Labels

All Orders is packaged with many templates, reports and labels.   You use the report designer (shown below) to customize your templates and reports to suit your needs.   The report designer is fully integrated with All Orders; in other words you do not need a separate software to print reports.

An example of using the Report Designer - Creating a customized sales order template

There are many aspects to designing templates, reports and labels so best to provide an example.   One of the first things you probably want to do is to design your sales orders template so you can print or email it to your customers.

From the main menu select Reports –> Design Reports and the report designer will be displayed, on the left is a tree view of the report grouping, click the + next to Sales Order and you will see all the templates and reports.
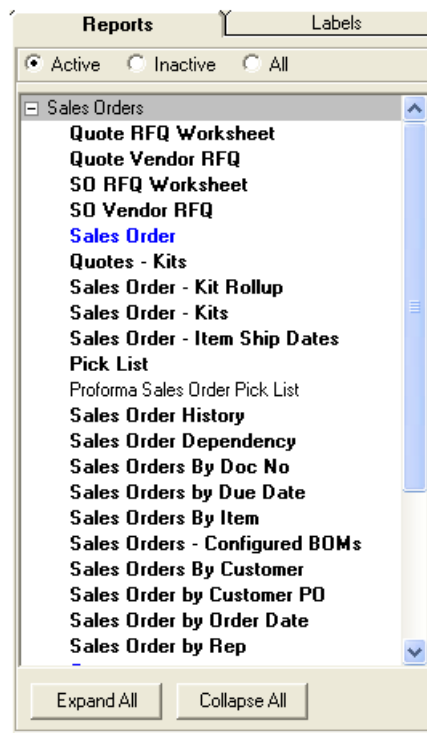
When the name of the report is bold, it means that this is a packaged report and cannot be modified. You can use the report as is or you can make any numbers of copies and then modify the copy as will be shown shortly.   When the report name is in blue it means that it is the default report.   Meaning that it is a report that shows next to the print box when you open its entry form.   For example, the default report for the sales order entry form is **Sales Order**.

Now click on the word Sales Order and on the right side you will see the default design of the sales order. Click the Copy Report button (it is framed in red in the screen shot below).

Or you could use the View menu. Copy Report is the 8th item in the list. Either way, you will be prompted for the name of your template copy (e.g. My Sales Order). The name of the report must be unique.   When All Orders finishes copying, you will see the name you gave to the report in the Reports tree view. Click on the new name to load that copy onto the Modify Design tab.

The next thing I am going to do is make My Sales Order the default template on the sales order. Click the Is Default Report button (it is framed in red in the screen shot below). The word My Sales Order should turn blue.


The next step is to prevent All Orders from printing the word My Sales Order on your template.   The ReportTitle is a special 'label' that All Orders will automatically populate with the name of the report.   To prevent this, simply change the name of the label to something other than ReportTitle (e.g. ReportTitle1)

1. Click on the Sales Order label

2. Click the View Property List button. This will show the 'properties' panel of the label on the right.   The properties control the behavior of each label or data field on a template or control.

3. Highlight the Name property and add a 1 to the end

4. Click the Save button.
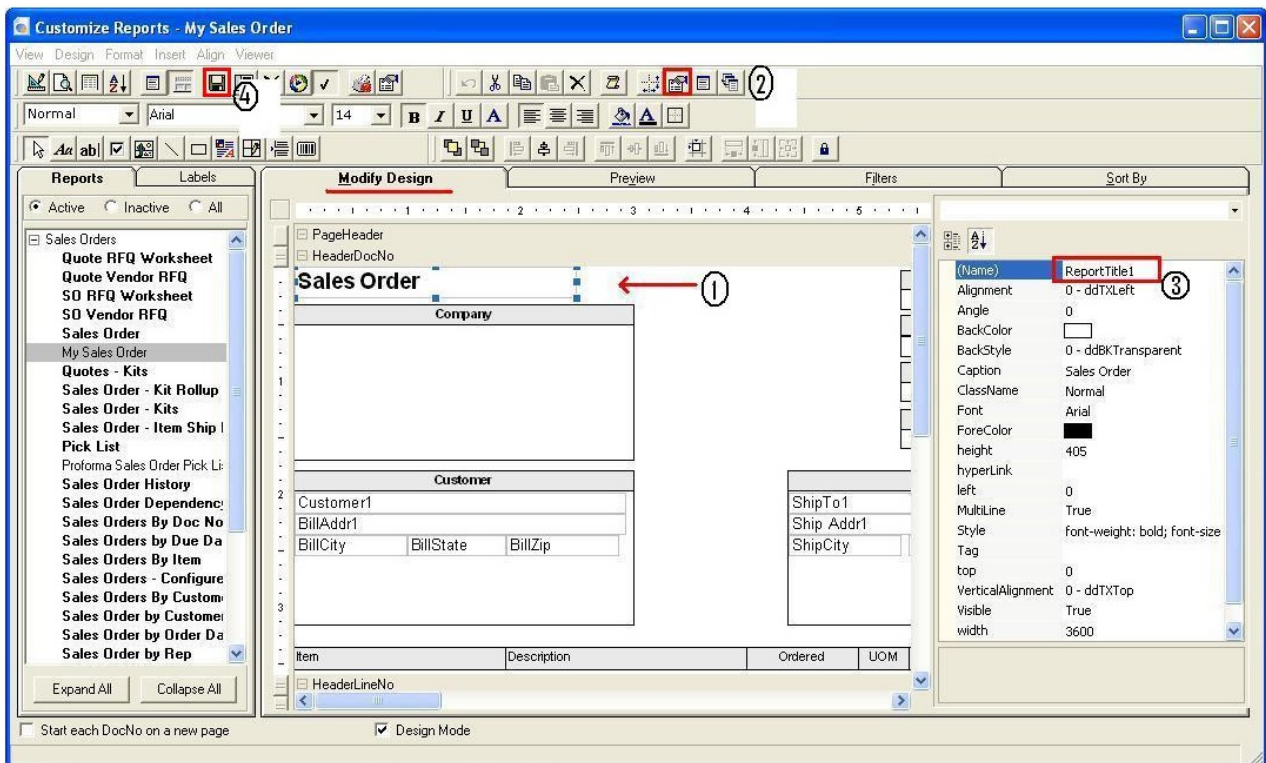
Now we are going to add a logo. Your logo should be in standard image format jpg, gif, png and be no more than 100KB.   The larger the image, the longer it will take to load your template.

1. Press the Image control button.

2. While the Image button is pressed, move you mouse over into the design area to the right of the Sales Order label and you will see that your mouse pointer turns into a cross (+).   Click and hold the left mouse button and draw a box.

3. In the properties list, click the .... of the Picture property and select your logo image.

4. Select 2 - Zoom Size Mode property

5. Press the Save button.
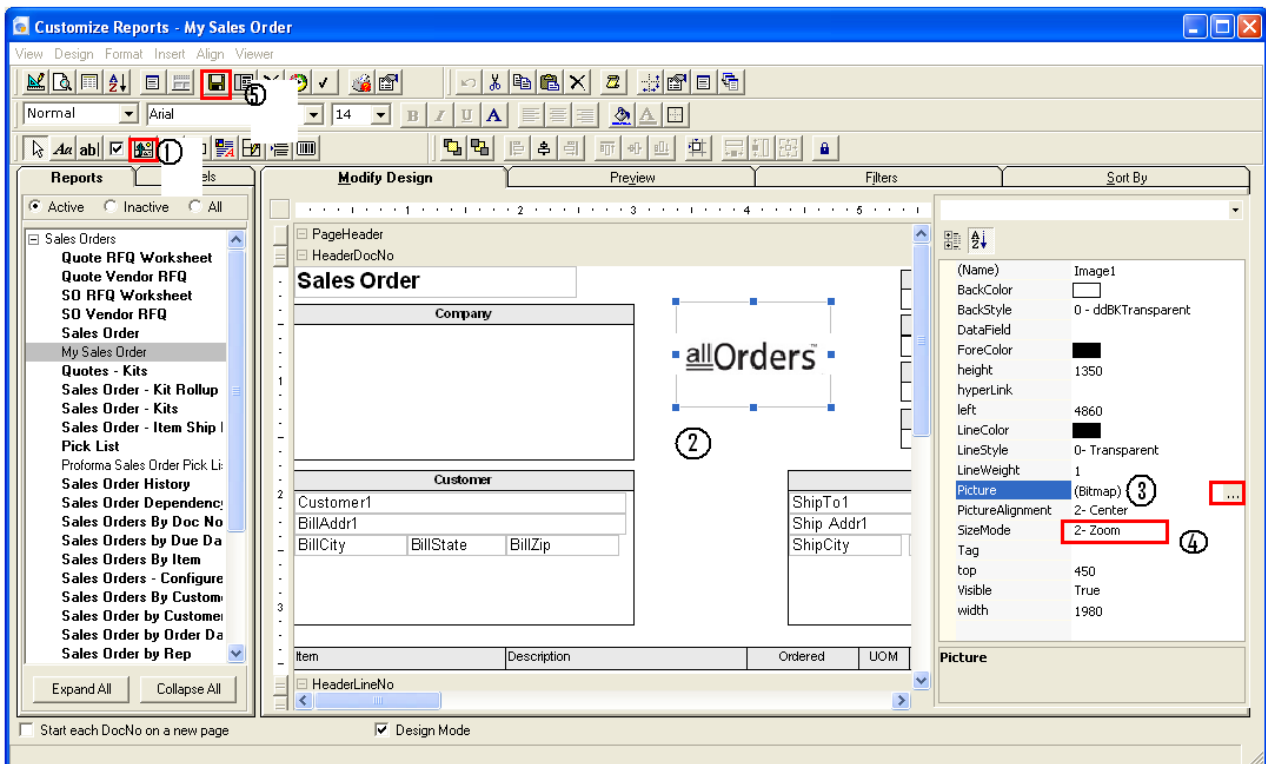
Now we are going to modify some information that is on the default template.

1. We are going add a standard message that we want printed on all sales orders that says 'Thank you for your order'.

2. We are going to remove the FOB field.

3. We are also going to add a custom field that we created (See setting up custom fields)

We already used a image 'control' to add our logo to My Sales Orders. To add static information (i.e. information that prints on all sales orders) we use a Label control as follows:

1. Click the Label button

2. While the Label button is pressed, move you mouse over into the design area under the memo field will see that your mouse pointer turns into a cross (+). Click and hold the left mouse button and draw a rectangle.

3. In the properties list, click into the area to the right of the work 'caption', delete the current contents and type in your message.

4. Click the Bold button and the Center button.

5. Click the Save button.
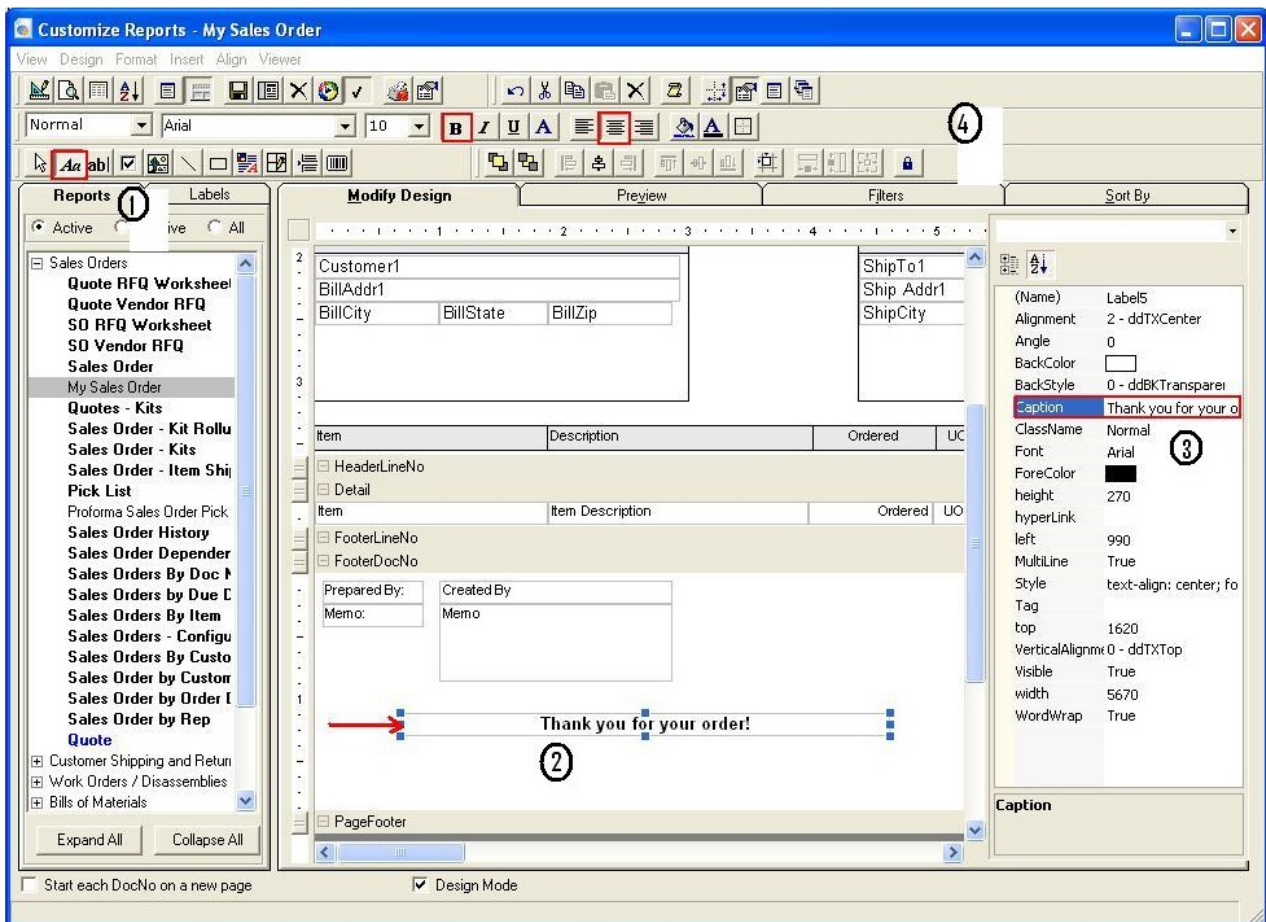
The other type of control you will be using frequently is called a Field control. A Field uses data from a specific sales orders and displays or prints it out. A Field control is tied to a specific field on the sales order. All the available fields that are available for a given template are contained in the Fields List. You show the Fields List by clicking the Fields List button or from the report design menu select Design --> Fields List. Now back to the example; here are the steps to delete the FOB field and add SOCust1 (custom field) which I use to put in a Job #.

1. To delete a field, within the report designer click the field until its highlighted then click the scissor button.

2. Find SOCust1 in the Fields List.

3. Drag and drop it into the report designer in the area you want it to appear.

4. Using the Property List, change the caption from FOB to Job # (see above example)
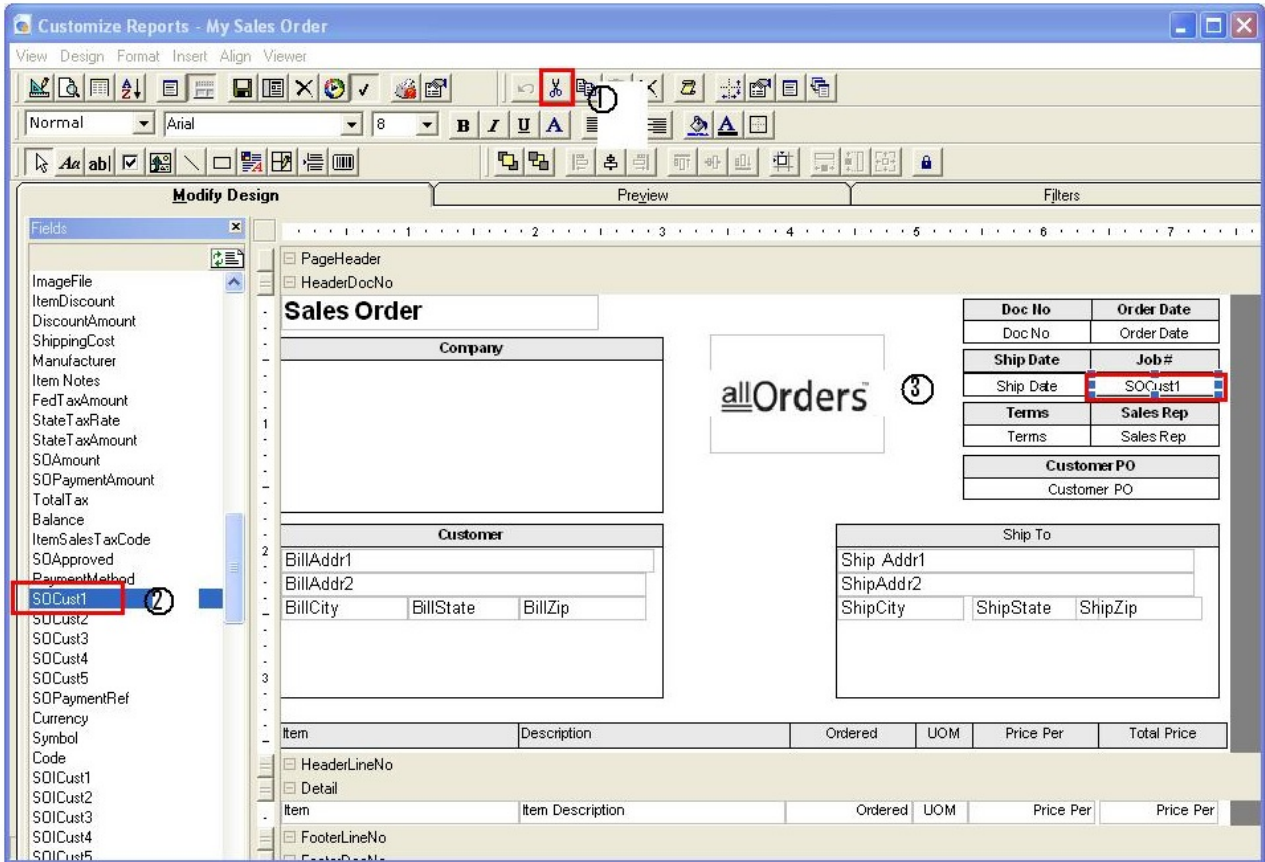
Re-open the sales order and print your new report.