

How to Customize Report with User Defined Field (如何使用自定义字段定制报表)

SCENARIO: How to customize the Sales Invoice Register report to display Promotion items only?

情景：如何定制 Sales Invoice Register report 只显示 Promotion 货品？

STEP 1: Create new user define field – Promotion

第一步骤：创建新的自定义字段 - Promotion

STEP 2: Pull out the Promotion field in Sales Invoice transaction

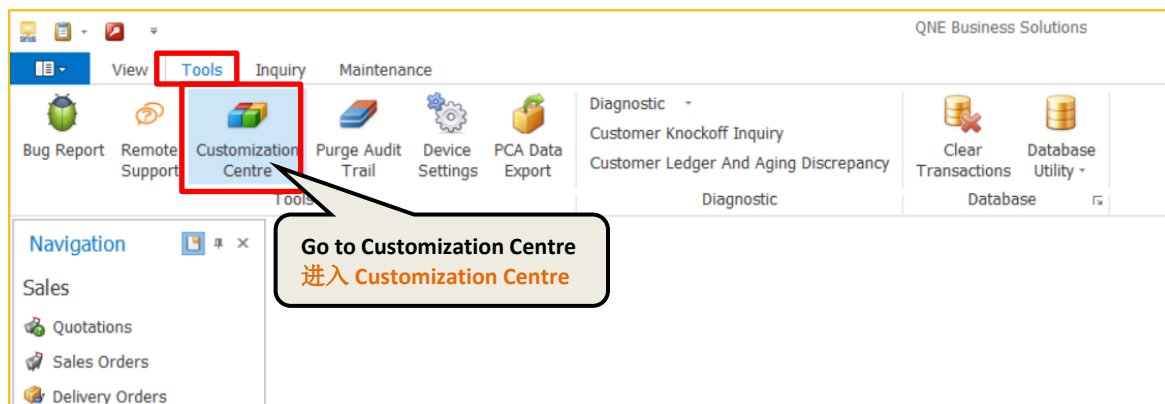
第二步骤：将 Promotion field 放置在 Sales Invoice 交易

STEP 3: Customize Sales Invoice Register Report

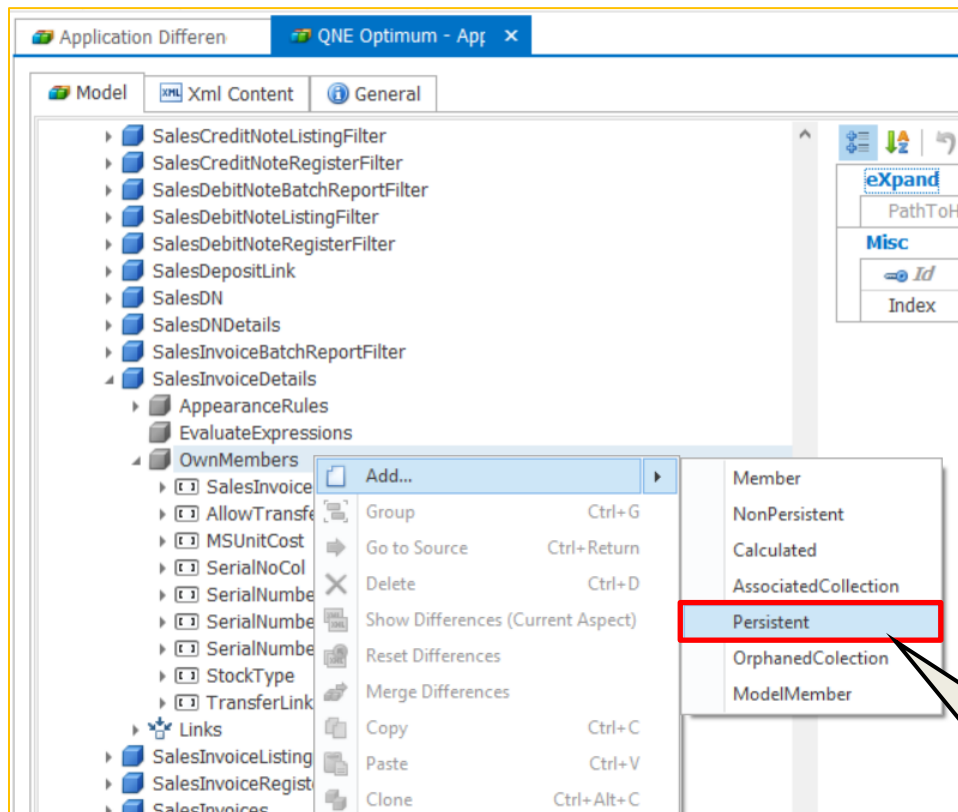
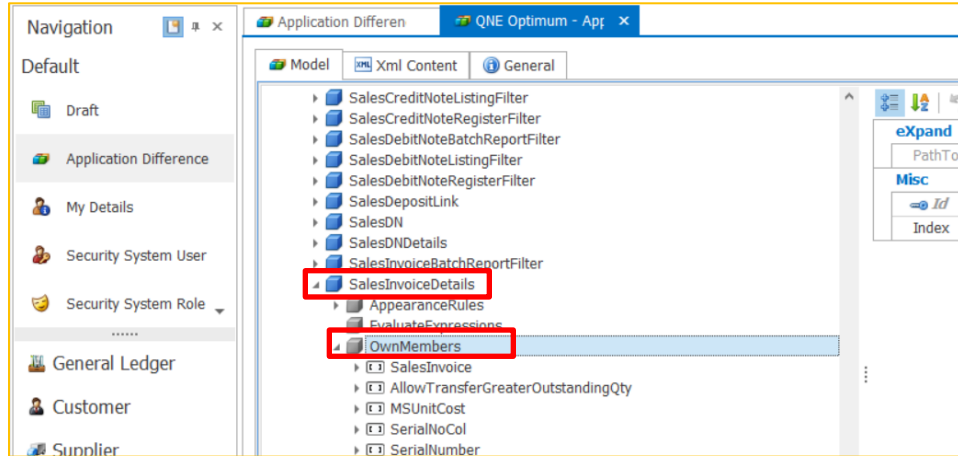
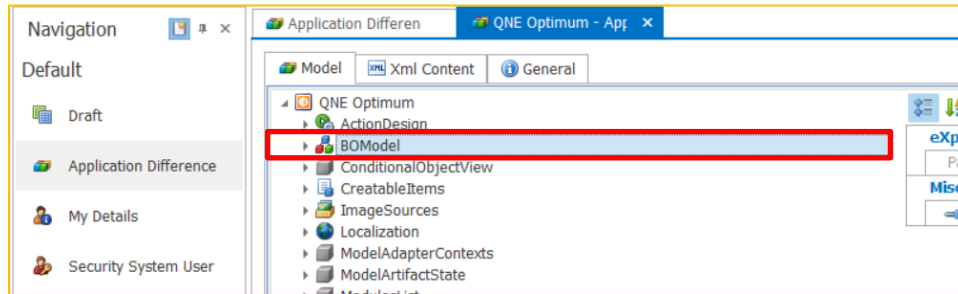
第三步骤：定制 Sales Invoice Register 报表

STEP 1: Create new user define field – Promotion

第一步骤：创建新的自定义字段- Promotion



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Right Click on OwnMembers -> Add
-> Persistent
在 OwnMembers 右点击, 选择
Add -> Persistent

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Please select System.Boolean
(you can just type Boolean then enter)
请选择 System.Boolean
(你可以直接输入 Boolean 然后按 enter)

Enter Caption as Promotion
输入标题 Promotion

Enter Id as Promotion
(suggest the Id put _ sign in front)
输入 Id 是 Promotion
(建议 Id 前面放 _ 符号)

Click Save follow by Reload Model
点击 Save 然后 点击 Reload Model

STEP 2: Pull out the Promotion field in Sales Invoice transaction

第二步骤：将 Promotion field 放置在 Sales Invoice 交易。

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Sales Invoices

Details Customer DO Address Others Notes Files Info

Customer: To: Delivery Term: Term: C.O.D. Location: Currency: RM Attention: Agent: Our DO No: Rate: 1.00000000 Doc Date: 02/02/2016 Invoice No.: INV00018 Reference No: Tax Inclusive Rounding

Column Chooser

- Best Fit
- Best Fit (all columns)
- Filter Editor...
- Show Find Panel
- Show Auto Filter Row
- Auto Width
- Enter Move Next Row
- Show Footer
- Show All Columns
- Reset Layout
- Rename

Right Click on Item Detail Field Header, then select Column Chooser
在 Item Details Field Header 右点击, 选择 Column Chooser

Customization

- Allow Transfer Greater...
- Amt.L
- Department
- Disc Amt
- Add...
- Remove

Click on Add
点击 Add

Object Model

- GLAccount
- Id
- Is Bundled
- Is Sub Item
- Item Type Code
- Min Price
- Net
- Net.L
- Pos
- Project
- Promotion
- Qty
- Reference No
- Sales Invoice
- Serial No

Add Close

Select Promotion field then click Add
选择 Promotion 然后点击 Add

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Sales Invoices

Details Customer DO Address Others Notes Files Info

Customer: Currency: RM Rate: 1.00000000
 To: Attention: Doc Date: 02/02/2016
 Delivery Term: Agent: Invoice No.: INV00019
 Term: C.O.D. Our DO No: Reference No:
 Location: ☐ Tax Inclusive ☐ Rounding

#	Stock Code	Description	Further Description	Qty	UOM	Unit Price	Disc	Amount	Tax Code	Tax	Net
			Promotion								

Customization

Min Price
 Net.L
 Pos
Promotion
 Add...
 Remove

Hold the mouse click to pull out the Promotion field
 把 Promotion field 摆放出来

Sales Invoices

Details Customer DO Address Others Notes Files Info

Customer: 700-A001 Currency: RM Rate: 1.00000000
 To: ADVANCE TRADING SDN. BHD. Attention: Ms. Lee Pui San
 Delivery Term: Agent: CINDY
 Term: C.O.D. Our DO No:
 Location: ☐ Rounding

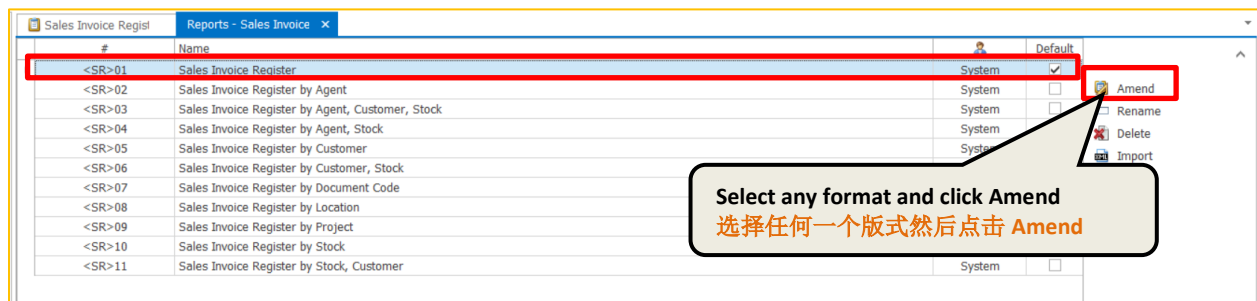
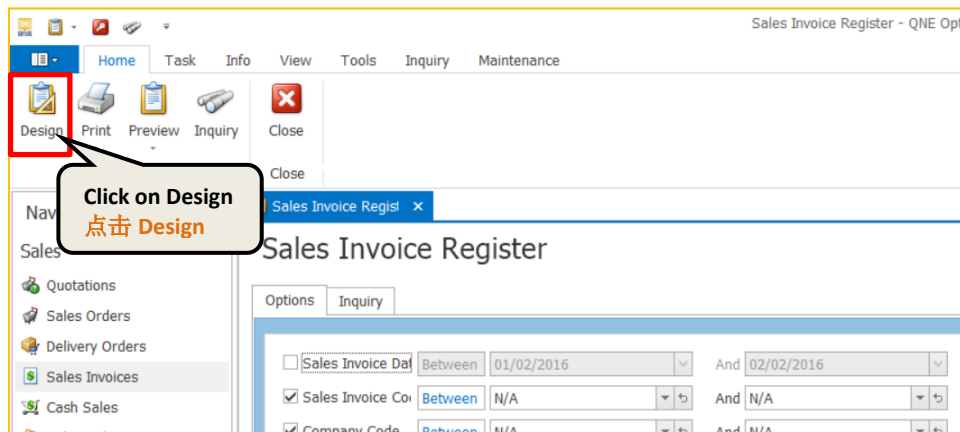
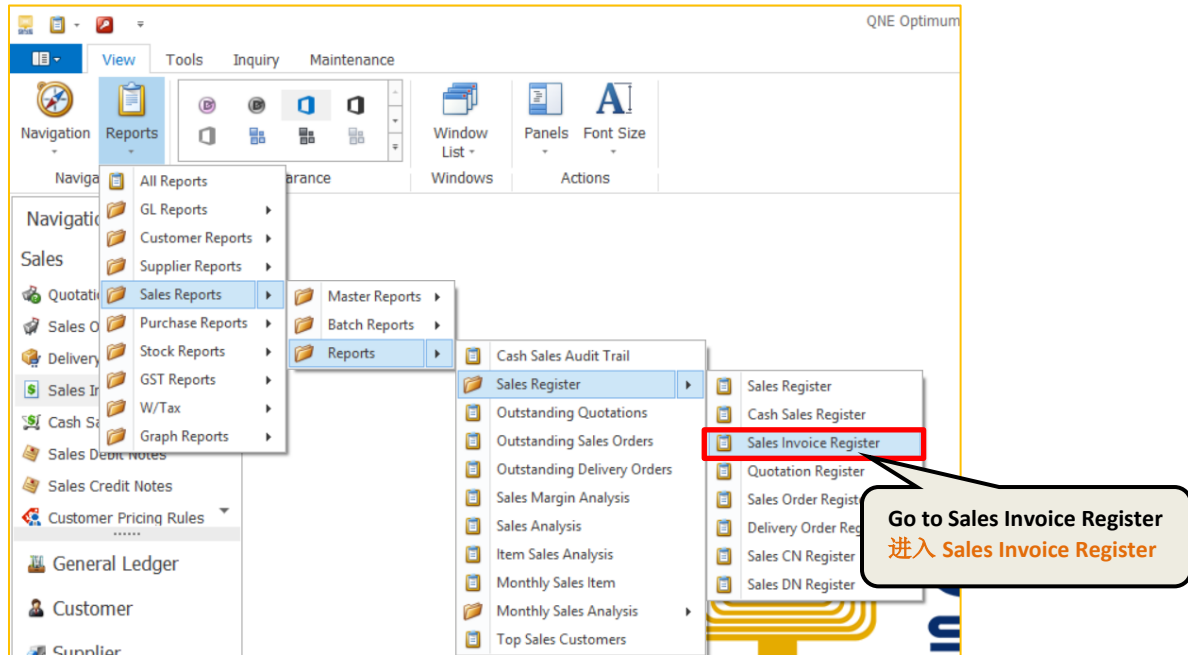
#	Stock Code	Description	Further Description	Qty	Promotion	UOM	Unit Price	Sales Price	Disc	Amount	Tax Code	Tax	Net
	AMD-XP/1800	AMD XP 1800		10	<input checked="" type="checkbox"/>	UNITS	685.00	685.00		6,850.00	SR	411...	7,2...
	AMD-XP/1800	AMD XP 1800		2	<input checked="" type="checkbox"/>	UNITS	630.00	685.00		1,260.00	SR	75.60	1,3...
	ASUS-MB	ASUS TECH MB MOTHERBOA...		2	<input checked="" type="checkbox"/>	UNITS	250.00	280.00		500.00	SR	30.00	53...

Create one Sales Invoice with Promotion items
 创建一张发单与 Promotion 货品

STEP 3: Customize Sales Invoice Register Report

第三步骤: 定制 Sales Invoice Register 报表

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Click on *SalesInvoiceRegister*, then go to *Filter String* under *Property Grid*
点击 *SalesInvoiceRegister* 然后在 *Property Grid* 搜寻 *Filter String*

Click on 3 dot button
点击 3 点按钮

Choose *Promotion* field, use *Equals* condition then enter the value as *Yes*, after that click *OK*
选择 *Promotion* field, 然后使用 *Equals* 条件, 输入 *Yes* 然后点击 *OK*

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