

Custom Docs

Documents that prints out a transaction is usually accessible from the screen header. You can click on the link and print, save or email a document straight away.

Customizing Documents

Customizing a document format is straight forward. Once you have created a custom format (Crystal or Jasper), you simply drop them into the custom folder in **creports** and the system will pick up the custom format instead of the standard format, as long as you add the custom folder in the field Custom Features in The Business tab.

The screenshot shows the 'The Business' tab in the DreamApps ERP++ System Administration interface. The 'Custom Features' field is highlighted with a red circle and contains the text 'ph.SSIS'. The interface includes various fields for business information such as Short Name, Tax Number, Organization, Phone, Address, City, Email, and more. The 'Custom Features' field is located in the lower left section of the form.

Additional Documents

However, when you do not want to forsake the standard formats and want to add in additional format(s), you need to name the custom formats uniquely and add in these formats in **System Data** tab in **Cross Application->Settings**.

Your context must be **Custom Docs** and key must be the document name. You can have multiple documents by simply varying the **Row** number.

Here is an example of an additional document Order Form for the document opord (Customer Order).

Home Cross Application

asok@dreamapps.com SSIS Shelves and Storage Equipment

General Settings for Cross Application

Defaults Codes Transaction Codes Currencies GL Interface Messages Depots Tax Table Excise Locations Receipts Holidays Vehicles User Docs Site Defaults Update Costs **System Data**

Show Clear Top Previous Next Bottom Add Update Delete Refresh

Context Custom Docs Key Field opord Row 0 Name Order Form Alternate Code

Value opord_ssis

Key Field	Row	Name	Value	Alternate Code	Key Field	Row	Name	Value	Alternate Code
Custom Docs					PSA	30	PSA STORAHE AMOUNT		
opdor	0	Delivery Receipt	opdorrec_ssis		PSA	40	PSA CTNR DEMURRAGE		
opord	0	Order Form	opord_ssis		PSA	50	WRONG CTNR WEIGHT FEE		
Facebook					PSA	60	MISC CHGS 1		
URL	0	URL	http://www.facebook.com/pages/DreamSite/152739201490820		PSA	70	MISC CHGS 2		
GoogleMap					PSA	80	REMARKS MISC CHGS1		
Location	0	Address	8101 Pearl. Oritigas Centre, Oritigas, Philippines		Return	10	DHC	10	
URL	0	Map URL	http://mapsengine.google.com/map/embed?mid=2f49DtteD1aQkKmJuiAOc3WA		Return	20	DETENTION	5	
SEO					Return	30	DEMURRAGE	0	
Keywords	0	Keywords			Return	40	DAMAGE/REPAIR		
Title	0	Title			Return	50	WASHING		
					Return	60	CHASIS DEMURRAGE		

Leave a Message

This will cause the additional custom document Order Form to show up in the Order header.

Home Order Processing Order Entry

asok@dreamapps.com SSIS Shelves and Storage Equipment

Orders for Richkey Marketing New Customer

Back Ordered Scheduled

Order: CO-000011 Order Form: CO-000011

Order Jobs Details Images Signature Sched Milestones Receipts Inventory Work Customer Delivery Docs Partially Fulfilled Open Unpaid Paid Closed Held Process Comp Search History

Approve Back Order Allocate Create DO Invoice Work Order Hold Release Close Not Open Undo Deliver On Behalf Message Type Send OneClick Process

Clear Show Top Previous Next Bottom Add Update Delete Comment

Order Number CO-000011 Sales Order Order Date 02/15/2018 Customer Number CUS-002701 Richkey Marketing

Customer PO Customer PO Date [Unknown] Reference

Remarks Invoicing Rule 5-Direct from Order

Footer Message Partial Delivery Yes

Notes Print Totals Item Total

Currency PHP Exchange Rate 1.000000000 Print Tax? Yes

Total Amount 0.00 Approved Amount 0.00 Location [Select]

Salesperson leilani@dreamapps.com Periods 0

Details

Order Row	Line No	Item	Scheduled	Qty to Deliver	Qty to Invoice
10	10	Sch 1-1/2x2-1/2x2 6x12 Lg	30.000	0.000	0.000
		Warehouse Receiving	0	0	0

Leave a Message

From:

<http://wiki.dreamapps.com/wiki/> - DreamApps Wiki

Permanent link:

<http://wiki.dreamapps.com/wiki/doku.php?id=usage:custom-docs>

Last update: 2018/02/16 22:41

