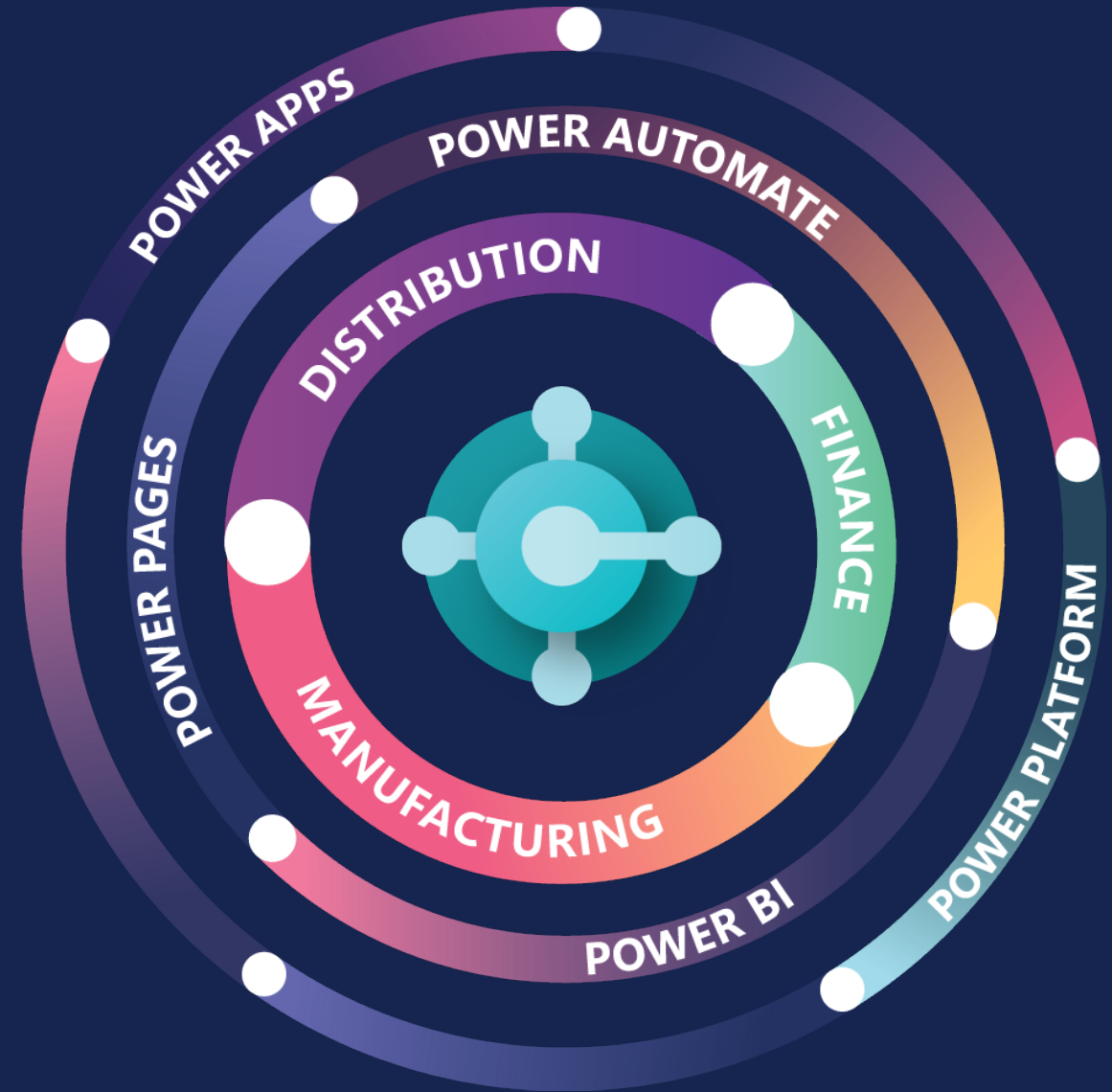


# BUSINESS CENTRAL connect

Clever by Design: Labelling  
& Layouts That Work



18<sup>th</sup> & 19<sup>th</sup> NOVEMBER 2025

# What we'll cover

1. Excel Layouts
2. Word Layouts
3. Clever Labelling





# Introducing the Layouts

# What's our goal?

## Word

- Word layouts are ideal for adjusting style elements such as font, size, or colour. They also offer flexibility in adding and rearranging data fields, making them well-suited for reports intended to be printed.

## Excel

- Excel layouts are easy to modify because summarising data, adding graphics, and changing styles use standard features. However, some reports don't have datasets that work well with Excel layouts; complex calculations are better handled by RDLC or Word Layouts.

## RDLC

- RDLC layouts offer flexible ways to add and arrange data fields, making them well-suited for printable reports.



# Excel Layouts

# Excel Layouts

- Microsoft Excel report layouts can be used to create reports that include Excel features such as **formulas**, **PivotTables** and **PivotCharts**
- To begin, first navigate to the Reports Layout screen and then find the appropriate report and then select **Run Report**

| Report Layouts: All ▾                                                                               |             |                                 |                                 |                                 |  |
|-----------------------------------------------------------------------------------------------------|-------------|---------------------------------|---------------------------------|---------------------------------|--|
| Search Manage New Layout Edit Info Run Report Set Default Export Layout Replace Layout More options |             |                                 |                                 |                                 |  |
|                                                                                                     | Report ID ↑ | Report Name                     | Layout Name                     | Description                     |  |
|                                                                                                     | 107         | Customer - Order Summary        | ./CustomerOrdersSummary.rdlc    | ./CustomerOrdersSummary.rdlc    |  |
|                                                                                                     | 108         | Customer - Order Detail         | ./CustomerOrderDetail.rdlc      | ./CustomerOrderDetail.rdlc      |  |
|                                                                                                     | 109         | Customer - Summary Ageing Simp. | ./CustomerSummaryAgingSimp.rdlc | ./CustomerSummaryAgingSimp.rdlc |  |
|                                                                                                     | 110         | Customer - Labels               | ./CustomerLabels.rdlc           | ./CustomerLabels.rdlc           |  |
|                                                                                                     | 111         | Customer - Top 10 List          | ./CustomerTop10List.rdlc        | ./CustomerTop10List.rdlc        |  |
|                                                                                                     | 112         | Sales Statistics                | ./SalesStatistics.rdlc          | ./SalesStatistics.rdlc          |  |
| →                                                                                                   | 113         | Customer/Item Sales             | ./CustomerItemSales.rdlc        | ./CustomerItemSales.rdlc        |  |

# Excel Layouts

- Next, apply a filter if needed to reduce the time the report will take to run, this won't affect the excel layout from using other filters going forward
- Then select **Send to...**
- Then choose **Microsoft Excel Document (data only)**
- This will download an Excel document with the raw data that is used to create the standard report

Customer/Item Sales

Printer ..... (Handled by the browser) ▾

Report Layout ..... ./Sales/Reports/CustomerItemSales.rdlc ...

**Options**

New Page per Customer ..... ☒

**Filter: Customer**

× No. .... ▾

× Search Name .....

× Customer Posting Group ..... ▾

+ Filter...

Filter total: 0

Send to... Print Preview Cancel

# Excel Layouts

- From the data tab, create a **PivotTable** to summarise the data select **Insert > PivotTable**
- Here I have created a **Pivot** to compare the **Average Profit** and **Average Sales Amount** for each item.
- To do this, place the **Item Description** and **Value Entry Buffer Item No.** fields into the **Rows** and then the **Profit** and **Value Entry Buffer Sales Amount Actual** fields into the **Values**. Next, amend both of the values to show as **Averages** rather than **Sums**.

| 1  | A                           | B                 | C                              | D | E |
|----|-----------------------------|-------------------|--------------------------------|---|---|
| 2  |                             |                   |                                |   |   |
| 3  | Row Labels                  | Average of Profit | Average of Sales Amount Actual |   |   |
| 4  | 1000                        |                   |                                |   |   |
| 5  | Bicycle                     | 0                 | 0                              |   |   |
| 6  | 1896-S                      |                   |                                |   |   |
| 7  | ATHENS Desk                 | 12852             | 58446                          |   |   |
| 8  | 1900-S                      |                   |                                |   |   |
| 9  | PARIS Guest Chair, black    | 3312              | 15012                          |   |   |
| 10 | 1906-S                      |                   |                                |   |   |
| 11 | ATHENS Mobile Pedestal      | 6437.6            | 29265.6                        |   |   |
| 12 | 1908-S                      |                   |                                |   |   |
| 13 | LONDON Swivel Chair, blue   | 2040              | 9247.5                         |   |   |
| 14 | 1920-S                      |                   |                                |   |   |
| 15 | ANTWERP Conference Table    | 3557.4            | 16185.4                        |   |   |
| 16 | 1924-W                      |                   |                                |   |   |
| 17 | CHAMONIX Base Storage Unit  | 0                 | 0                              |   |   |
| 18 | 1928-S                      |                   |                                |   |   |
| 19 | AMSTERDAM Lamp              | 647.4             | 2954.8                         |   |   |
| 20 | 1936-S                      |                   |                                |   |   |
| 21 | BERLIN Guest Chair, yellow  | 3726              | 16888.5                        |   |   |
| 22 | 1953-W                      |                   |                                |   |   |
| 23 | Guest Section 1             | 1999.2            | 1999.2                         |   |   |
| 24 | 1960-S                      |                   |                                |   |   |
| 25 | ROME Guest Chair, green     | 984.4             | 4461.9                         |   |   |
| 26 | 1964-S                      |                   |                                |   |   |
| 27 | TOKYO Guest Chair, blue     | 2042.4            | 9257.4                         |   |   |
| 28 | 1965-W                      |                   |                                |   |   |
| 29 | Conference Bundle 2-8       | 3071.925          | 3071.925                       |   |   |
| 30 | 1968-S                      |                   |                                |   |   |
| 31 | MEXICO Swivel Chair, black  | 1428              | 6473.25                        |   |   |
| 32 | 1969-W                      |                   |                                |   |   |
| 33 | Conference Package 1        | 776.3             | 776.3                          |   |   |
| 34 | 1972-S                      |                   |                                |   |   |
| 35 | MUNICH Swivel Chair, yellow | 1441.6            | 6534.9                         |   |   |
| 36 | 1980-S                      |                   |                                |   |   |
| 37 | MOSCOW Swivel Chair, red    | 829.6             | 3760.65                        |   |   |
| 38 | 1988-S                      |                   |                                |   |   |
| 39 | SEOUL Guest Chair, red      | 690               | 3127.5                         |   |   |
| 40 | 1996-S                      |                   |                                |   |   |
| 41 | ATLANTA Whiteboard, base    | 7980              | 36268                          |   |   |
| 42 | 2000-S                      |                   |                                |   |   |
| 43 | SYDNEY Swivel Chair, green  | 2448              | 11097                          |   |   |
| 44 | ASSEMBLED ITEM              |                   |                                |   |   |
| 45 | Assembled Item              | -22.8             | 0                              |   |   |
| 46 | LOT TRACKED                 |                   |                                |   |   |

PivotTable Fields

Choose fields to add to report:

Search

☐ ValueEntryBuffer\_Invoiced\_Quantity\_Caption
 ☐ Item\_Base\_Unit\_of\_Measure\_Caption
 ☐ ValueEntryBuffer\_Sales\_Amount\_Actual\_Control4...
 ☐ ValueEntryBuffer\_Discount\_Amount\_Control45Cap...
 ☐ Profit\_Control46Caption
 ☐ ProfitPct\_Control47Caption
 ☐ Customer\_Phone\_No\_Caption
 ☐ TotalCaption
 ☒ ValueEntryBuffer\_Item\_No\_
 ☒ Item\_Description
 ☐ ValueEntryBuffer\_Invoiced\_Quantity\_
 ☒ ValueEntryBuffer\_Sales\_Amount\_Actual\_Con...
 ☐ ValueEntryBuffer\_Discount\_Amount\_Control45
 ☐ Profit\_Control46
 ☐ ProfitPct\_Control47
 ☐ Item\_Base\_Unit\_of\_Measure\_

More Tables...

Drag fields between areas below:

Filters

Columns

Σ Values

Rows

ValueEntryBuffer\_Item\_No\_
Item\_Description

Σ Values

Average of Profit
Average of Sales Amount Actual

☐ Defer Layout Update
 Update

## Dos

- Columns **can** be deleted or hidden as needed
- Sheets can be placed in any order, with the **Data** sheet first or last
- Add columns to the data sheet for any calculated fields required – but only at the end after a gap
- Consider Field Settings and other Excel pivot table tools

## Don'ts

- Don't change the name of the **Data Sheet, Data Table, or Columns**
- Don't add any columns within the original Excel table

# Pivot Table techniques

- In the Pivot Table Fields section
- Choose the Row or Column to 'flatten'
- Choose Field Settings
- In the **Subtotals and Filters** tab, change **Subtotal** to None if this is not required
- In the **Layout and Print** tab, change to **Show Item Labels in Tabular form** and if required tick **Repeat Item Labels**

This screenshot shows the Pivot Table Fields task pane. At the top, a list of fields includes 'Customer\_Item\_SalesCaption', 'CurrReport\_PAGENOCaption', 'All\_amounts\_are\_in\_LCYCaption', 'ValueEntryBuffer\_Item\_No\_Caption', and 'Item\_DescriptionCaption'. Below this, a section titled 'Drag fields between areas below:' contains a list of actions: 'Move Up', 'Move Down', 'Move to Beginning', 'Move to End', 'Move to Report Filter', 'Move to Row Labels', 'Move to Column Labels', 'Move to Values', and 'Remove Field'. The 'Field Settings...' button is highlighted with a red box. Below the actions, three fields are listed: 'ValueEntryBuffer\_Item\_No\_\_', 'Item\_Description', and 'Customer\_No\_\_'. To the right, the 'Columns' area shows 'Σ Values' and 'Sales Amount Actual (t...'. The 'Values' area shows 'Average Profit'. At the bottom, there is a 'Defer Layout Update' checkbox and an 'Update' button.

This screenshot shows the 'Field Settings' dialog box with the 'Subtotals & Filters' tab selected. The 'Source Name' is 'ValueEntryBuffer\_Item\_No\_\_' and the 'Custom Name' is also 'ValueEntryBuffer\_Item\_No\_\_'. The 'Subtotals' section has 'Automatic' selected with a radio button. The 'Filter' section has 'Include new items in manual filter' unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

This screenshot shows the 'Field Settings' dialog box with the 'Layout & Print' tab selected. The 'Source Name' and 'Custom Name' are the same as in the previous screenshot. The 'Layout' section has 'Show item labels in tabular form' selected with a radio button. The 'Print' section has 'Insert page break after each item' unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

# Pivot Table techniques

- Right click in the pivot table
- Choose **Pivot Table** options
- Untick the **Show expand/collapse buttons** option

| 1  | A            | B                       | C           | D                           | E              |
|----|--------------|-------------------------|-------------|-----------------------------|----------------|
| 2  |              |                         |             |                             |                |
| 3  | Row Labels   | Item_Description        | Customer_No | Sales Amount Actual (total) | Average Profit |
| 4  | 1896-S       | ATHENS Desk             | 10000       | £64,290.60                  | £14,137.20     |
| 5  |              |                         | 20000       | £5,195.20                   | £1,142.40      |
| 6  |              |                         | 30000       | £52,601.40                  | £11,566.80     |
| 7  | 1896-S Total |                         |             | £122,087.20                 | £8,948.80      |
| 8  | 1953-W       | Guest Section 1         | 10000       | £2,040.00                   | £2,040.00      |
| 9  |              |                         | 20000       | £1,958.40                   | £1,958.40      |
| 10 | 1953-W Total |                         |             | £3,998.40                   | £1,999.20      |
| 11 | 1960-S       | ROME Guest Chair, green | 10000       | £7,255.80                   | £1,600.80      |
| 12 |              |                         | 20000       | £500.40                     | £110.40        |
| 13 |              |                         | 30000       | £2,627.10                   | £579.60        |
| 14 |              |                         | 40000       | £3,502.80                   | £772.80        |
| 15 | 1960-S Total |                         |             | £13,886.10                  | £765.90        |
| 16 | 1965-W       | Conference Bundle       | 10000       | £2,730.60                   | £2,730.60      |
| 17 |              |                         | 20000       | £3,944.20                   | £3,944.20      |
| 18 |              |                         | 30000       | £2,275.50                   | £2,275.50      |
| 19 |              |                         | 40000       | £3,337.40                   | £3,337.40      |
| 20 | 1965-W Total |                         |             | £12,287.70                  | £3,071.93      |
| 21 | 1969-W       | Conference Package      | 10000       | £1,109.00                   | £1,109.00      |
| 22 |              |                         | 20000       | £443.60                     | £443.60        |
| 23 | 1969-W Total |                         |             | £1,552.60                   | £776.30        |
| 24 | 1972-S       | MUNICH Swivel Chair     | 10000       | £4,192.20                   | £924.80        |
| 25 |              |                         | 20000       | £369.90                     | £81.60         |
| 26 |              |                         | 30000       | £8,877.60                   | £1,958.40      |
| 27 | 1972-S Total |                         |             | £13,439.70                  | £988.27        |
| 28 | 1996-S       | ATLANTA Whiteboard      | 10000       | £63,469.00                  | £13,965.00     |
| 29 |              |                         | 20000       | £4,533.50                   | £997.50        |
| 30 |              |                         | 30000       | £43,521.60                  | £9,576.00      |
| 31 |              |                         | 40000       | £1,813.40                   | £399.00        |
| 32 | 1996-S Total |                         |             | £113,337.50                 | £6,234.38      |
| 33 | 1928-S       | AMSTERDAM Lamp          | 10000       | £1,530.80                   | £335.40        |
| 34 |              |                         | 20000       | £4,378.80                   | £959.40        |
| 35 | 1928-S Total |                         |             | £5,909.60                   | £647.40        |
| 36 | 1900-S       | PARIS Guest Chair,      | 10000       | £14,636.70                  | £3,229.20      |
| 37 | 1900-S Total |                         |             | £14,636.70                  | £3,229.20      |
| 38 | 1964-S       | TOKYO Guest Chair       | 10000       | £8,631.90                   | £1,904.40      |
| 39 | 1964-S Total |                         |             | £8,631.90                   | £1,904.40      |
| 40 | 1980-S       | MOSCOW Swivel Chair     | 10000       | £5,301.90                   | £1,169.60      |
| 41 |              |                         | 20000       | £1,726.20                   | £380.80        |
| 42 | 1980-S Total |                         |             | £7,028.10                   | £775.20        |
| 43 | 1988-S       | SEOUL Guest Chair,      | 10000       | £125.10                     | £27.60         |
| 44 |              |                         | 30000       | £2,627.10                   | £579.60        |
| 45 |              |                         | 50000       | £6,630.30                   | £1,462.80      |

| Row Labels  | Item_Description | Customer_No | Sales Amount Actual (total) |
|-------------|------------------|-------------|-----------------------------|
| 196-S       | ATHENS Desk      | 10000       | £64,290.60                  |
|             |                  | 20000       | £5,195.20                   |
|             |                  | 30000       | £52,601.40                  |
| 196-S Total |                  |             | £122,087.20                 |
| 193-W       |                  |             | £958.40                     |
| 193-W Total |                  |             | £998.40                     |
| 190-S       |                  |             | £255.80                     |
| 190-S Total |                  |             | £886.10                     |
| 195-W       |                  |             | £730.60                     |
| 195-W Total |                  |             | £287.70                     |
| 199-W       |                  |             | £109.00                     |
| 199-W Total |                  |             | £443.60                     |
| 192-S       |                  |             | £192.20                     |
| 192-S Total |                  |             | £369.90                     |
| 196-S       |                  |             | £877.60                     |
| 196-S Total |                  |             | £439.70                     |
| 198-S       |                  |             | £469.00                     |
| 198-S Total |                  |             | £533.50                     |
|             |                  |             | £521.60                     |
|             |                  |             | £813.40                     |
|             |                  |             | £337.50                     |
|             |                  |             | £530.80                     |
|             |                  | 30000       | £4,378.80                   |
|             |                  |             | £6,630.30                   |

Pivot Table Options

PivotTable Name: PivotTable1

Layout & Format Totals & Filters Display Printing Data Alt Text

Display

☐ Show expand/collapse buttons

☒ Show contextual tooltips

☐ Show properties in tooltips

☒ Display field captions and filter drop-downs

☐ Classic pivot table layout (enables dragging of fields in the grid)

☐ Show the Values row

☐ Show items with no data on rows

☐ Show items with no data on columns

☐ Display item labels when no fields are in the values area

Field List

☐ Sort A to Z

☒ Sort in data source order

OK Cancel

# Excel Layouts – adding to Layout to a report

Dynamics 365 Business Central

25 -4 Environment: BC25-4

Report Layouts

✓ Saved

Report Layouts: All

customer

Manage New Edit info Run report

| Report ID ↑ | Report Name         | Layout Name ▼                   | Description                     | Def...                              | Extension                 |
|-------------|---------------------|---------------------------------|---------------------------------|-------------------------------------|---------------------------|
| → 113       | Customer/Item Sales | ./Sales/Reports/CustomerItem... | ./Sales/Reports/CustomerItem... | <input checked="" type="checkbox"/> | Base Application by Micro |

BUSINESS CENTRAL

man

# Defaulting the Report Layout

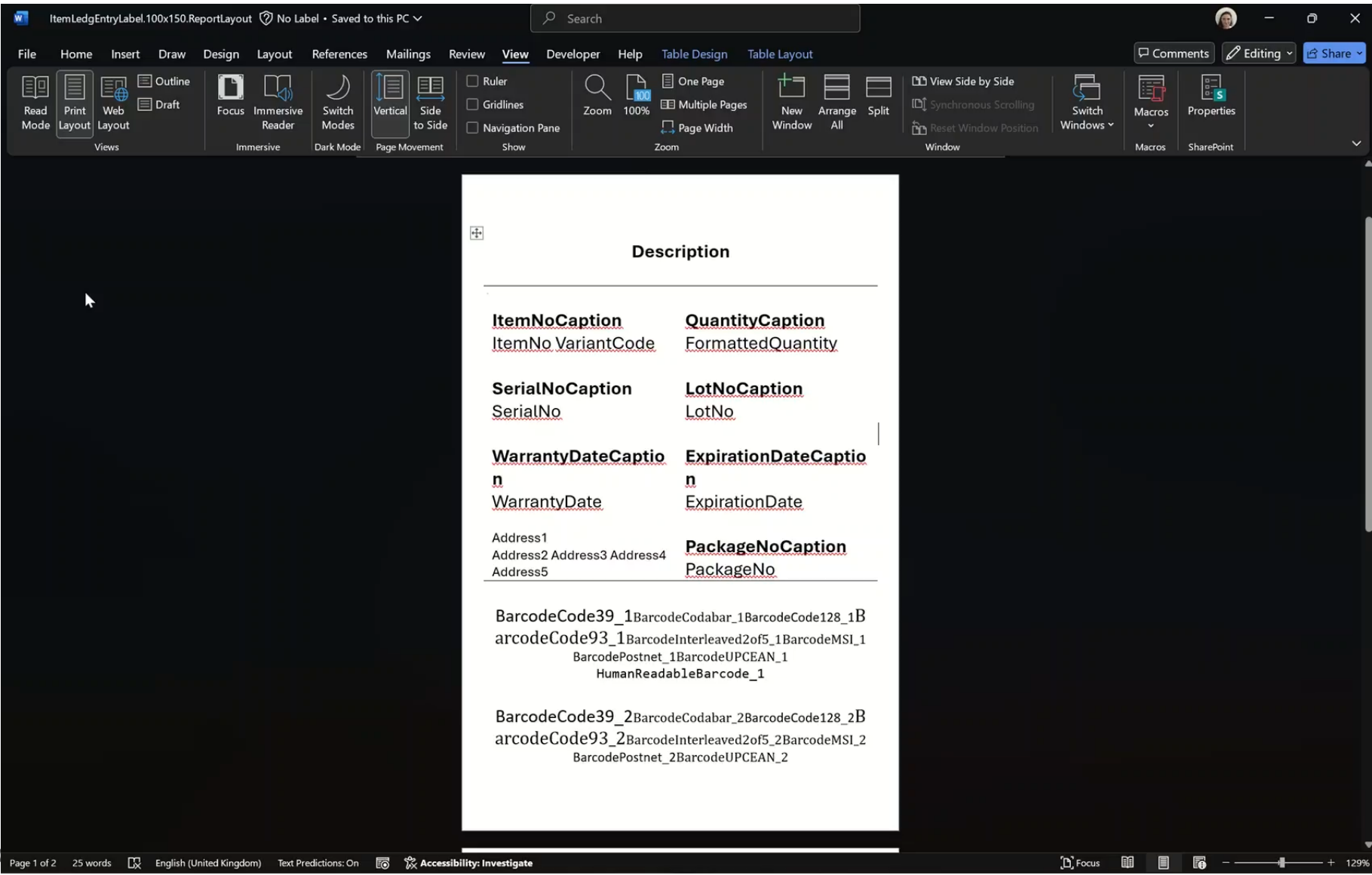
- Select the **Set Default** option on the new report layout will mean it will become the new default layout for all users of that report

| Report Layouts                                                                                                                                                   |             |   |                     |                                                          |         |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|---|---------------------|----------------------------------------------------------|---------|
| Report Layouts: All ▾   🔍 Search   Manage   📄 New Layout   ✎ Edit Info   📊 Run Report   <b>🏠 Set Default</b>   📄 Export Layout   🔄 Replace Layout   More options |             |   |                     |                                                          |         |
|                                                                                                                                                                  | Report ID ↑ |   | Report Name         | Layout Name                                              | Descrip |
| →                                                                                                                                                                | 1306        | ⋮ | Sales - Invoice     | Sales Invoice                                            | Sales I |
|                                                                                                                                                                  | 1307        |   | Sales - Credit Memo | ./SalesReceivables/Document/StandardSalesCreditMemo.rdlc | ./Sales |
|                                                                                                                                                                  | 1307        |   | Sales - Credit Memo | ./StandardSalesCreditMemo.docx                           | ./Stand |
|                                                                                                                                                                  | 1308        |   | Sales - Shipment    | ./SalesReceivables/Document/StandardSalesShipment.rdlc   | ./Sales |
|                                                                                                                                                                  | 1308        |   | Sales - Shipment    | lavyouts/StandardSalesShipmentWithComments.rdlc          | lavyout |



# Word Layouts

# Enabling the Developer Pane within Word



# Export a report to edit

Dynamics 365 Business Central

25-4 Environment: BC25-4

SaaS-Meg

Finance

Credit Control

Cash Management

Sales

Purchasing

Shopify

All Reports

PA

SO

Report Layouts:

All

Delete

New

Edit info

Run report

Export layout

Replace layout

| Report ID ↑ | Report Name         | Layout Name                         | Description                         | Def...                              | Extension                         | Type ↑ | Obs...                   |
|-------------|---------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------|--------|--------------------------|
| 1306        | Sales - Invoice     | Sales Invoice for Subscription B... | The Sales Invoice for Subscripti... | <input type="checkbox"/>            | Subscription Billing by Microsoft | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Standard Sales Invoice (Word)       | The Standard Sales Invoice (W...    | <input checked="" type="checkbox"/> | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Standard Sales Invoice - Blue (...) | The Standard Sales Invoice - Bl...  | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Standard Sales Invoice - thema...   | The Standard Sales Invoice - T...   | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Standard Sales Invoice Email (...)  | The Standard Sales Invoice Em...    | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Standard Sales Invoice - VAT S...   | The Standard Sales Invoice - V...   | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1306        | Sales - Invoice     | Test                                | Test                                | <input type="checkbox"/>            |                                   | Word   | <input type="checkbox"/> |
| 1307        | Sales - Credit Memo | Standard Sales Credit Memo (R...    | The Standard Sales Credit Me...     | <input type="checkbox"/>            | Base Application by Microsoft     | RDLC   | <input type="checkbox"/> |
| 1307        | Sales - Credit Memo | Standard Sales Credit Memo (...)    | The Standard Sales Credit Me...     | <input checked="" type="checkbox"/> | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1307        | Sales - Credit Memo | Standard Sales Credit Memo E...     | The Standard Sales Credit Me...     | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1307        | Sales - Credit Memo | Standard Sales Credit Memo - ...    | The Standard Sales Credit Me...     | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |
| 1308        | Sales - Shipment    | layouts/StandardSalesShipmen...     | layouts/StandardSalesShipmen...     | <input checked="" type="checkbox"/> | Clever Comments by Clever Dy...   | RDLC   | <input type="checkbox"/> |
| 1308        | Sales - Shipment    | Standard Sales Shipment (RDLC)      | The Standard Sales Shipment (...)   | <input type="checkbox"/>            | Base Application by Microsoft     | RDLC   | <input type="checkbox"/> |
| 1308        | Sales - Shipment    | Standard Sales Shipment (Word)      | The Standard Sales Shipment (...)   | <input type="checkbox"/>            | Base Application by Microsoft     | Word   | <input type="checkbox"/> |

# Add a field

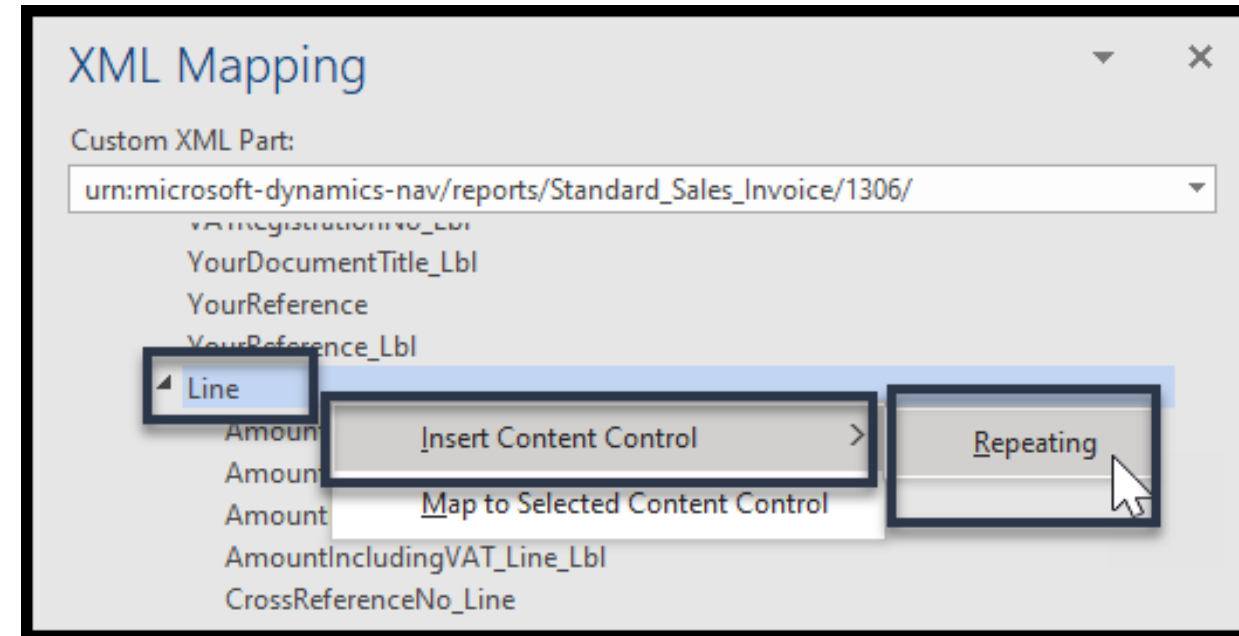
1. After finding the space for the field, and finding the appropriate field, within the **XML Mapping Pane** select **urn:Microsoft-dynamics-nav/reports/Standard\_Sales\_Invoice/1306/**
2. Select **Header**
3. Find **SalesPerson\_Lbl** right click and choose **Insert Content Control > Plain Text**.
4. Then find the **SalesPersonName** field to add below it.

Note: The **Lbl** fields are used as headers, whereas those without the **Lbl** are pieces of information that will be automatically updated.

# Repeating

When using **Word Reports** to populate the **lines area** of the report you must ensure that the **Repeating** option is selected as it means that if multiple lines are required it means that every line of the report is printed

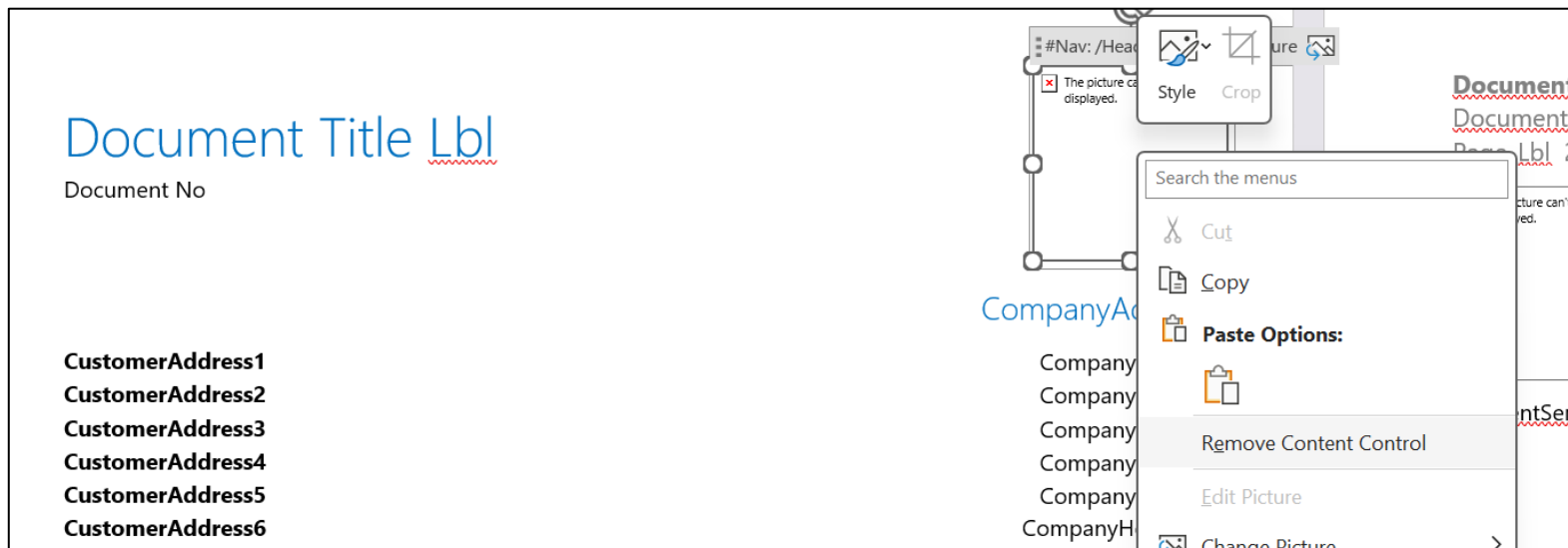
To use the repeating content control, highlight the line that will be repeated and then right click choose **Insert Content Control** and **Repeating**



# Changing Images

A common request is to change the images visible on the reports, as the logo in the top right corner of the report is driven from the Company Information page

Images can also be changed by right clicking on an image and selecting Remove Content Control, then selecting Change Picture to open the File Explorer and choose the appropriate image



# Format Changes

It is also possible to change the font, colours as well as the headers and footers of the report to suit your requirements

The screenshot displays the Microsoft Dynamics 365 Table Design ribbon for a report titled 'StandardSalesInvoiceBlueSimple'. The ribbon includes tabs for Layout, References, Mailings, Review, View, Developer, Help, and Table Design. The Table Design tab is active, showing various table styles and formatting options. A table is visible with the following structure:

| ItemNo_Line_Lbl | Description_Line_Lbl | Quantity_Line_Lbl | Unit_Lbl    | VATPct_Line_Lbl | LineAmount_Line_Lbl |
|-----------------|----------------------|-------------------|-------------|-----------------|---------------------|
| DocumentDate    | DocumentDate_Lbl     | DueDate           | DueDate_Lbl | PaymentT        | PaymentT_Lbl        |

A color picker is open, showing 'Theme Colors' and 'Standard Colors'. The 'Green, Accent 2' color is selected, and a 'Sample' button is visible. The 'High-contrast only' toggle is set to 'Off'. The 'More Colors...' option is also available.

# Uploading the report

Once the report has been amended and the file saved, navigate back to the Report Layouts list highlight the appropriate report and select New

| SaaS-Meg                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                   |                                     |                                     |                                     |     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----|
| Finance ▾ Credit Control ▾ Cash Management ▾ Sales ▾ Purchasing ▾ Shopify ▾                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                   |                                     |                                     |                                     |     |
| Report Layouts: All ▾  ▾    Delete  New  Edit info  Run report  Export layout  |                   |                                     |                                     |                                     |     |
| Report ID ↑                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Report Name       | Layout Name                         | Description                         | Def...                              | Ext |
| 1306                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Sales - Invoice   | Sales Invoice for Subscription B... | The Sales Invoice for Subscripti... | <input type="checkbox"/>            | Su  |
| <u>1306</u>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | ⋮ Sales - Invoice | Standard Sales Invoice (Word)       | The Standard Sales Invoice (W...    | <input checked="" type="checkbox"/> | Ba  |

# Uploading the report

Next, enter the appropriate name, ensure that Word has been set within Format Options and then select Available in All Companies if you would like for the report to be available in all companies within the Environment

Add New Layout for a Report

Report ID

1306

Report Name

Sales - Invoice

Layout Name

Sales Invoice - Customer Day

Description

Sales Invoice - Customer Day

Format Options

Word

Available in All Companies

☒

Create a Blank Layout from the report object

☐

Create Multiple Data Sheets

Default

OK

Cancel



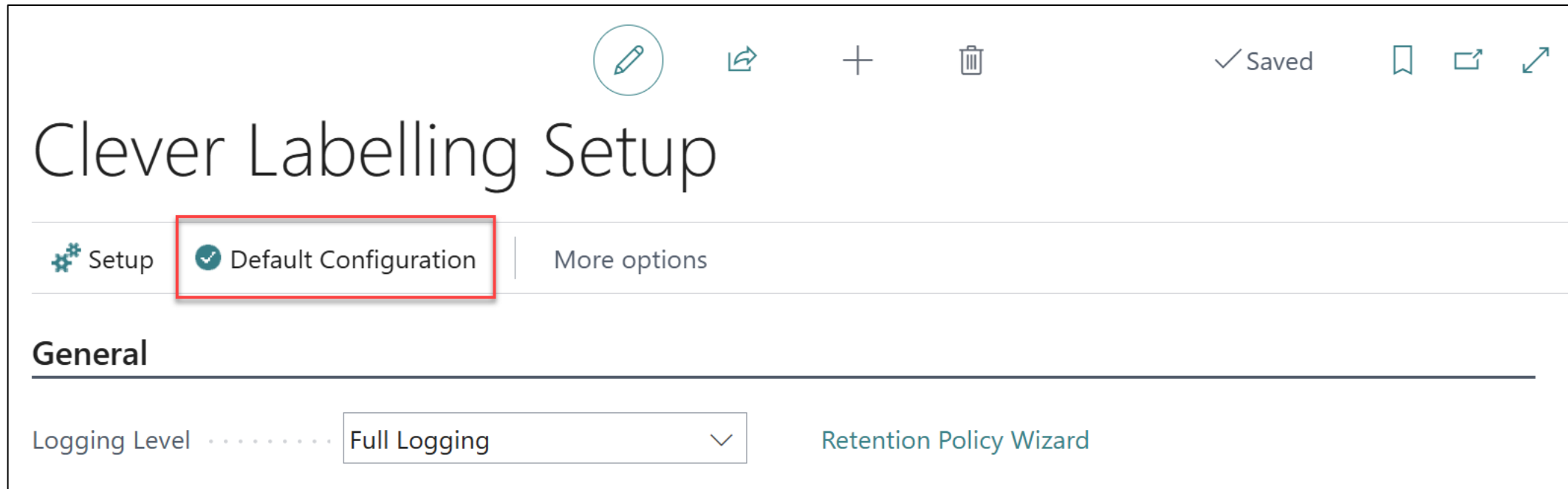
# Clever Labelling

# What is Clever Labelling?

- Provides the ability to print labels and other documentation across the supply chain
- Allows you to control when and where within your business processes you need to generate labels which allows you to generate labels in a number of different ways
- Has the following features:
  - Includes pre-built labels (using Word Layout) which can be customised
  - Has configurable transaction triggers to setup when and what printing is required
  - Support of multiple Barcode Formats including GS1-128
  - Integrates out of the box with BarTender and Loftware solutions

# Before we get started!

- Before we dive in, upon initial installation of Clever Labelling you must ensure that you run the Default Configuration which will provide you with a great starting point for what we're about to show you.













✓ Saved







# Clever Labelling Setup

-  Setup
-  Default Configuration
- More options

## General

Logging Level ..... Full Logging

[Retention Policy Wizard](#)



ItemLdgEntryLabel.100x150.ReportLayout No Label • Saved to this PC

File Home Insert Draw Design Layout References Mailings Review View **Developer** Help

Read Mode Print Layout Web Layout Draft Views

Focus Immersive Reader Switch Modes Page Movement

Ruler Gridlines Navigation Pane Show

Zoom 100% One Page Multiple Pages Page Width Zoom

New Window Arrange All Split Window

View Side Synchronise Reset Window

### Description

|                                                                                                                                                         |                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| <b>ItemNoCaption</b><br><u>ItemNo</u> VariantCode                                                                                                       | <b>QuantityCaption</b><br><u>FormattedQuantity</u>    |
| <b>SerialNoCaption</b><br><u>SerialNo</u>                                                                                                               | <b>LotNoCaption</b><br><u>LotNo</u>                   |
| <b>WarrantyDateCaption</b><br><u>WarrantyDate</u>                                                                                                       | <b>ExpirationDateCaption</b><br><u>ExpirationDate</u> |
| Address1<br>Address2 Address3 Address4<br>Address5                                                                                                      | <b>PackageNoCaption</b><br><u>PackageNo</u>           |
| BarcodeCode39_1BarcodeCodabar_1BarcodeCode128_1BarcodeCode93_1BarcodeInterleaved2of5_1BarcodeMSI_1BarcodePostnet_1BarcodeUPCEAN_1HumanReadableBarcode_1 |                                                       |
| BarcodeCode39_2BarcodeCodabar_2BarcodeCode128_2BarcodeCode93_2BarcodeInterleaved2of5_2BarcodeMSI_2BarcodePostnet_2BarcodeUPCEAN_2                       |                                                       |

- Now, using the steps we showed you earlier the Label can be modified to provide only the details required

Thank you.

BUSINESS CENTRAL  
**connect**

18<sup>th</sup> & 19<sup>th</sup> NOVEMBER 2025

