

## Creating and linking a report

Did you know you can customise the look and layout of the Alchemex reports? Why would you want to do this? Alchemex standard reports are designed to cater for the masses, you might want to change the look (colours, font style ...) to suit your company image, and you might want to change the layout (move columns, add or remove columns ...) to suit your company processes and save these changes for the next time you run the report.

### Before we start

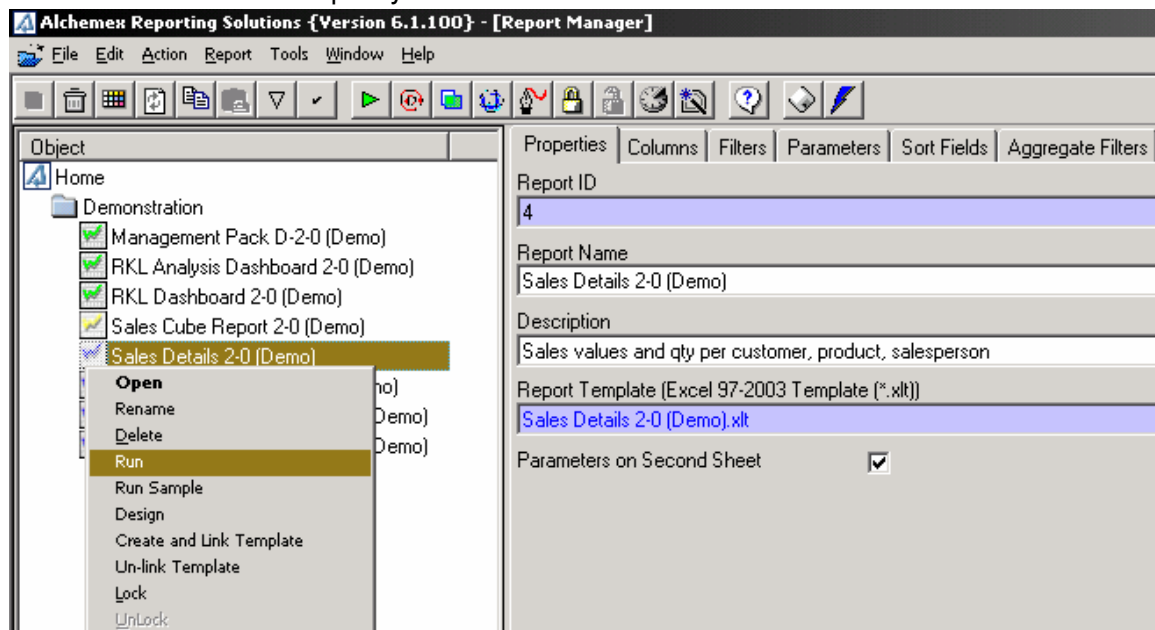
If you are unsure of making changes to any of the standard reports, it would be a good idea to make a copy of the report before you make any changes to the report.

### How to Copy a report

Open report manager and right click the report you want to Copy, select the copy option. Right click on the report folder you want to paste the copy to and select the Paste option. The copy of the report will be renamed as “Copy of” and the original report name.

### How to Create and Link the report

1. Open your Report Manager
2. Select and run out the report you want to customise



3. Make the changes to the report; ensure that Sheet1 (where Alchemex puts the Raw Data) and Sheet2 (where Alchemex puts the report parameters) are unchanged.

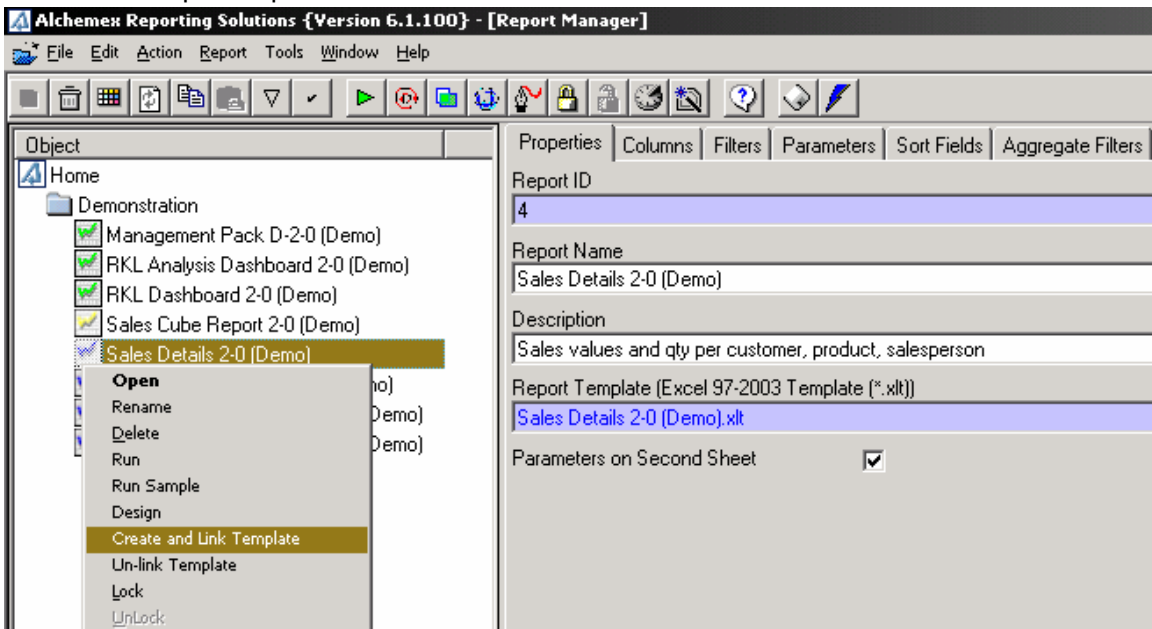
**Company Name**

SALES FOR THE PERIOD TO DATE FROM 01 SEP 2003

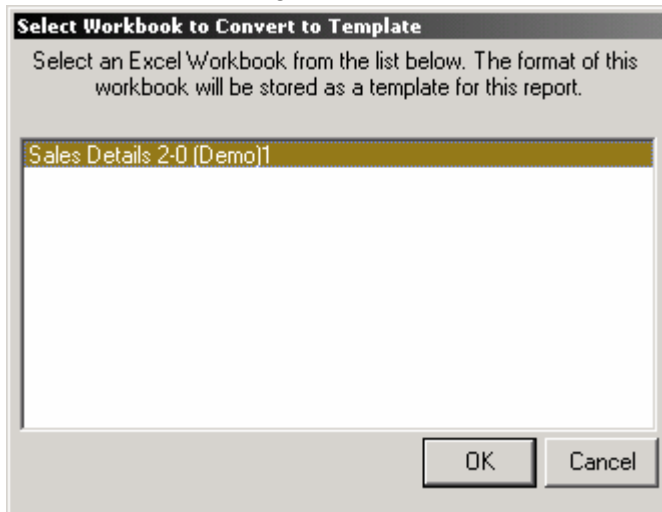
SalesPersonName	(All)	▼
Store	(All)	▼
CustomerCategory	(All)	▼

CustomerCodeName	ProductCodeName	Unit	Qty	Unit Price (Avg)	Total Cost	Total Sale	GP	GP%
ALLS01-ALL SORTS STOP SHOP	ARCH01-Archies Red Apples	PKT	21	1374.19	22,159.59	28,858.06	6,698.48	23.21%
	BX0008-B & X Sesames	PKT	4	167.74	470.95	670.97	200.01	29.81%
	RONA01-Ronalds Dried Basil	PKT	5	161.29	606.43	806.45	198.02	24.55%
	ROSY04-Rosy Blade Peaches	PKT	3	161.29	400.47	483.87	83.41	17.24%
ALLS01-ALL SORTS STOP SHOP Total			33	970.61	23,639.44	30,819.35	7,179.92	23.30%

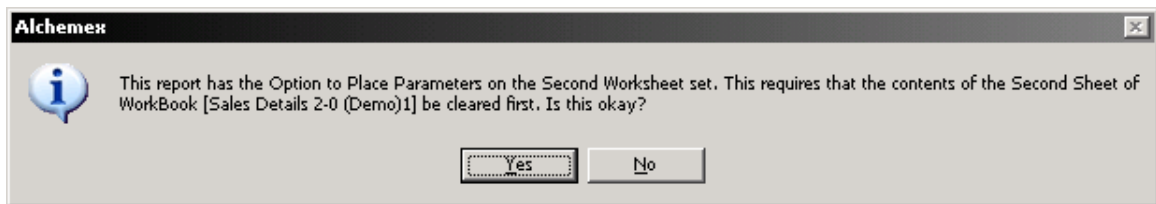
4. Once the changes have been made, leave the workbook open, and go back to Report Manager. Right click on the report the changes where made for and select the Create and Link Template option



- The popup window will show a list of all open Excel workbooks, select the workbook you have made the changes to and click OK



- You will be prompted with the below message, as mentioned in point 3 you should not make changes to Sheet2. Click Yes to link the workbook, if you select No the workbook will not be linked

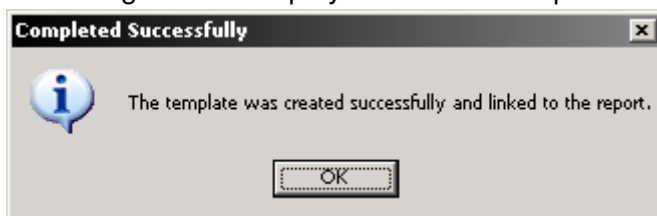


- You will also be prompted to specify the template name, it is a good idea to change the name of the template to insure that the original template is not overwritten with the



customised one, click OK

- A message will be displayed once the template has been successfully linked



- Quite easily done!