Financial Reports Usability

Description	Ном То	
Create Row Designer	Go to Financial Reports > Row Designer	
	Enter Row Name and Description. Add and configure rows for your financial report. Click save.	
	© Row Designer	
	New Save Search Delete Undo Duplicate Options Generate Row Verify Accounts Show/Hide Rows Close Row Name: BS Summary Description: balance sheet by account type	
	② Insert ② Remove ▲ Up ▼ Down ☐ Layout → 🍞 Filter Records (F3)	
	□ ID Row Type Row Name Row Calculation Balance Side Filter Accounts Source Drill Down □ ☑ RI Line □ □	
	2	
	P.S. None R6 Filter Accounts Total Liabilities Credit [Type] * Liability Column	
	7 Filter Accounts Equity Credit [Type] = "Equity Column E	
	□	
	2 R10 Row Calculation Current Year Earnings R8 - R9	
	2 Row Calculation Total Equity R7 + R10	
	X R13 Underscore R14 Row Calculation Total Liabilities & Equity R6 + R12 R15 Double Underscore	
	R16 Page Break	
	📄 🃝 R18 Row Name - Left Align Left Test	
	R19 Row Name - Right Align Right Test	
2. Create Column Designer	Go to Financial Reports > Column Designer	
	Enter Column Name and Description	
	Add and configure columns for your financial report.	
	Click Save	
Use Default Header or Footer or Create custom Header and Footer	For Custom Header and Footer:	
Create custom rieader and rooter	Go to Financial Reports > Report Header and Footer	
	Add and configure header and footer for your financial reports	
	Click Save.	
	For Default Header and Footer:	
	Move to #4	
4. Build report in the Report Builder	Go to Financial Reports > Financial Report Builder	
	Enter Report Name and Description.	
	Build your report component:	
	Select the Row Designer for your report.	
	Select the Column Designer for your report.	
	Select default or custom report header and footer.	
	 If you like to use the default header and footer, check the Show Default Header & Footer option If you like to use custom header and footer, in the Header & Footer section of the Report Builder, select headers and footers and check the checkbox before it 	
	In the Options section, check the Show Report Settings if you want the Report Settings screen be shown prior to previewing/printing the report. This will give you more Filter options.	
5. Print Report	There are many ways to print the report. You may select anyone of these options.	

	From Report Builder screen > Report Settings screen Go to Financial Reports > Financial Report Builder In the Options section, check the Show Report Settings Click Generate toolbar button. Report Settings screen opens Click Print toolbar button	
	From Report Builder screen Go to Financial Reports > Financial Report Builder In the Options section, uncheck the Show Report Settings Click Generate toolbar button.	
	From Financial Report Viewer, click Print toolbar button Go to Financial Reports > Financial Report Viewer Select single or group report and click Print toolbar button to print report/s	
6. Print Multiple reports at the same time	Go to Financial Reports > Financial Report Group	
	Enter Group Name and Description	
	In the grid, add reports you want to be part of this Report Group	
	Click Generate toolbar button and it will print all the reports under this group	