How To Create A Crystal Report
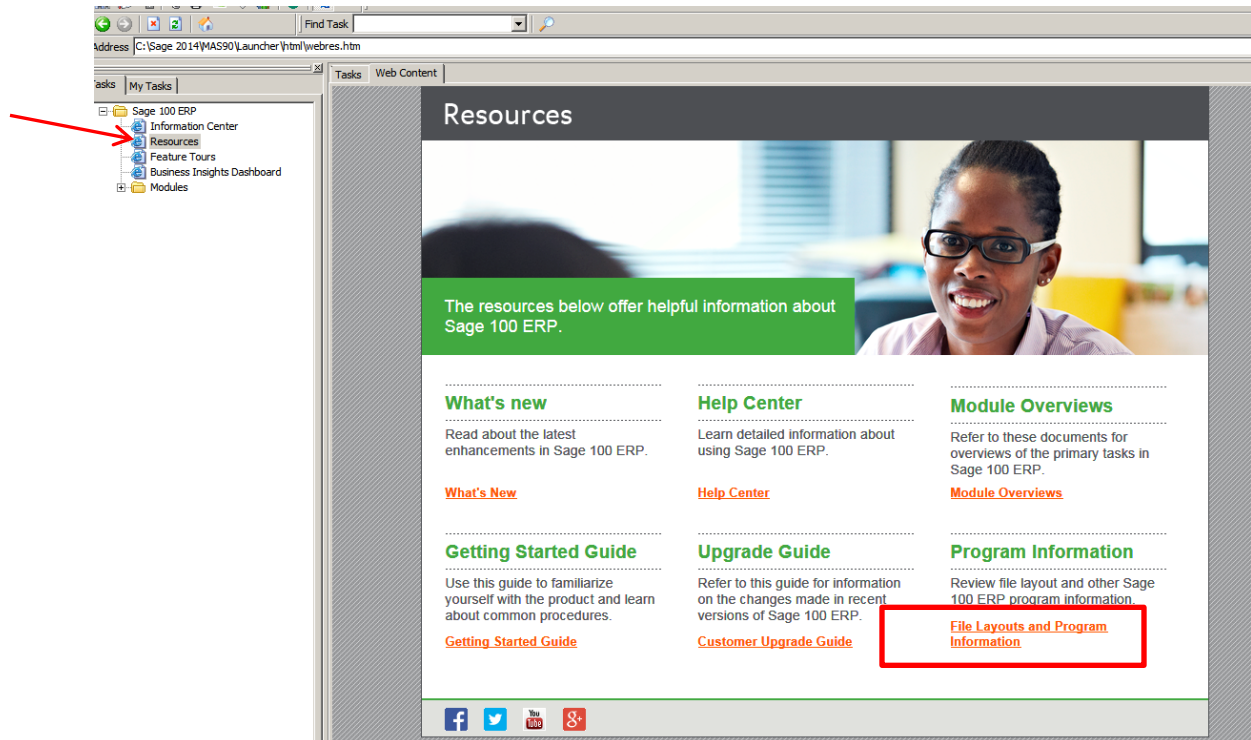
Step 1: Decide what you want on your report

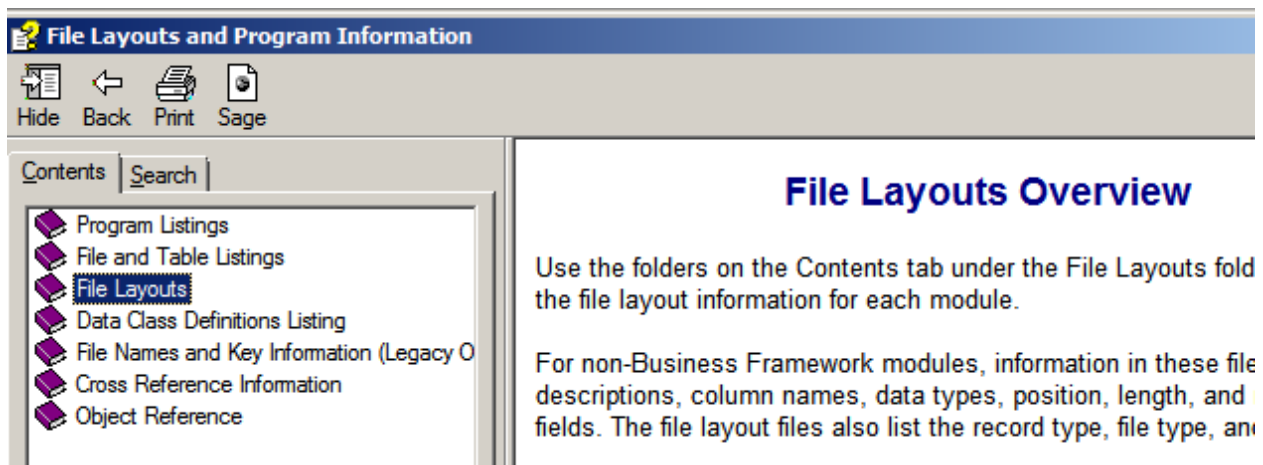**Step 2:** Determine which table or tables to use

Step 3: Confirm Crystal is installed on your workstation
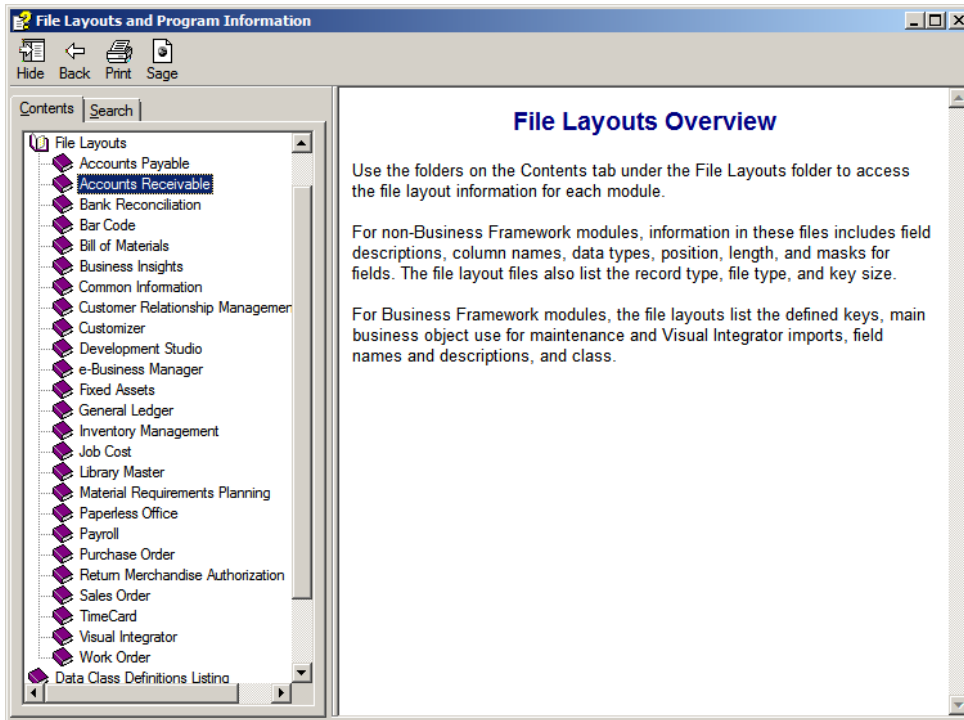
Miscellaneous Item Detail Report

Click on Resources -> File Layouts and Program Information

Click on File Layouts from the Contents menu

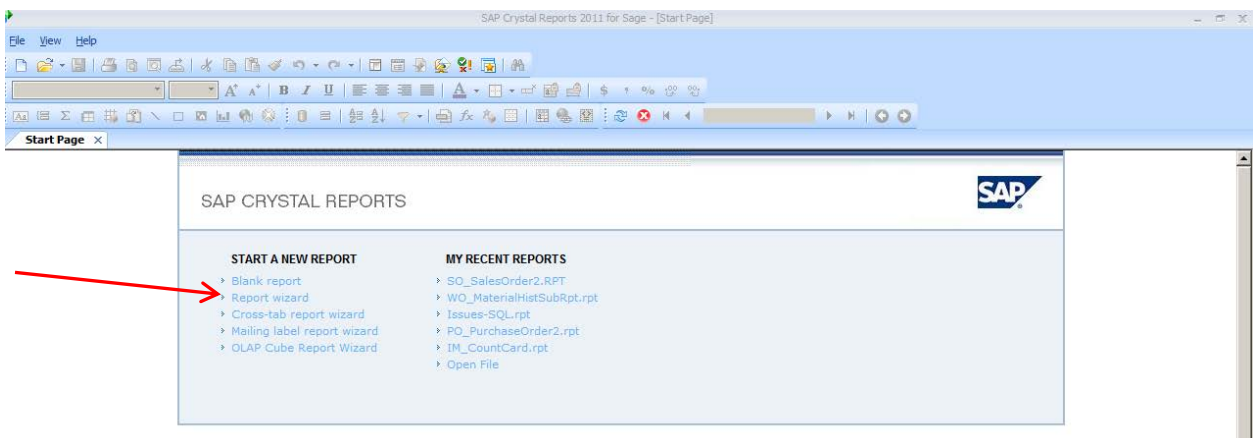Select the module that contains the files that you want to work with

Click on the file name. The data dictionary will show on the right side of screen. You can print the page by selecting the printer icon at the top of the screen. You can use the printout when selecting the fields in Crystal.
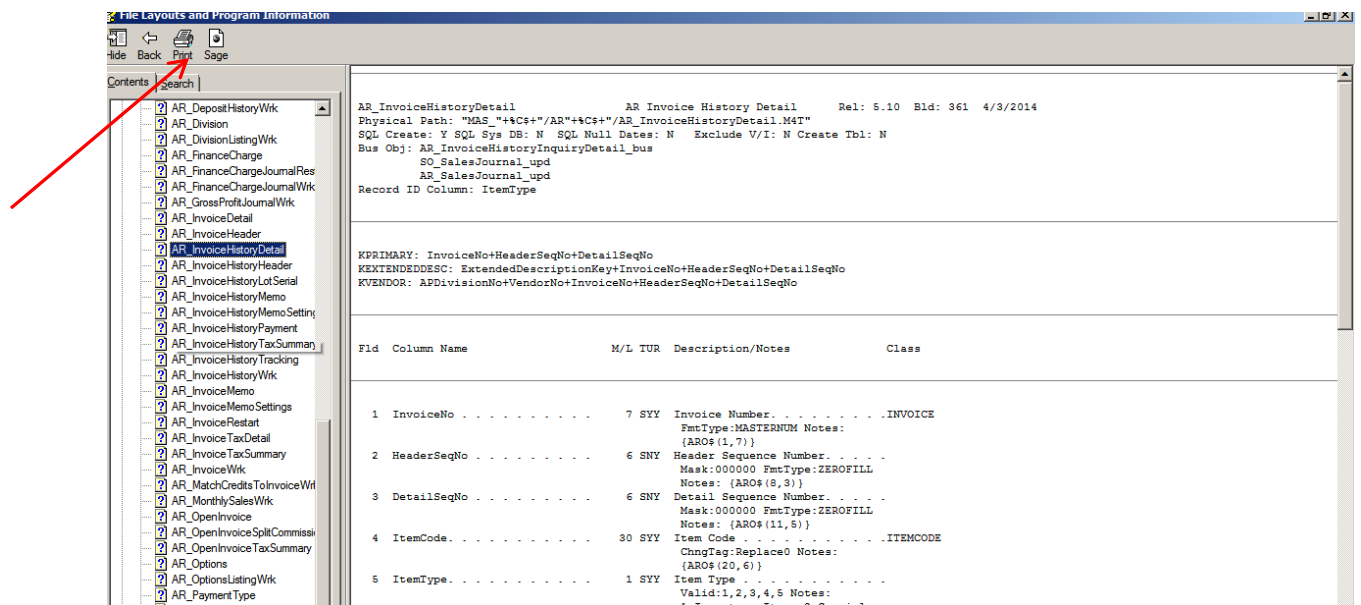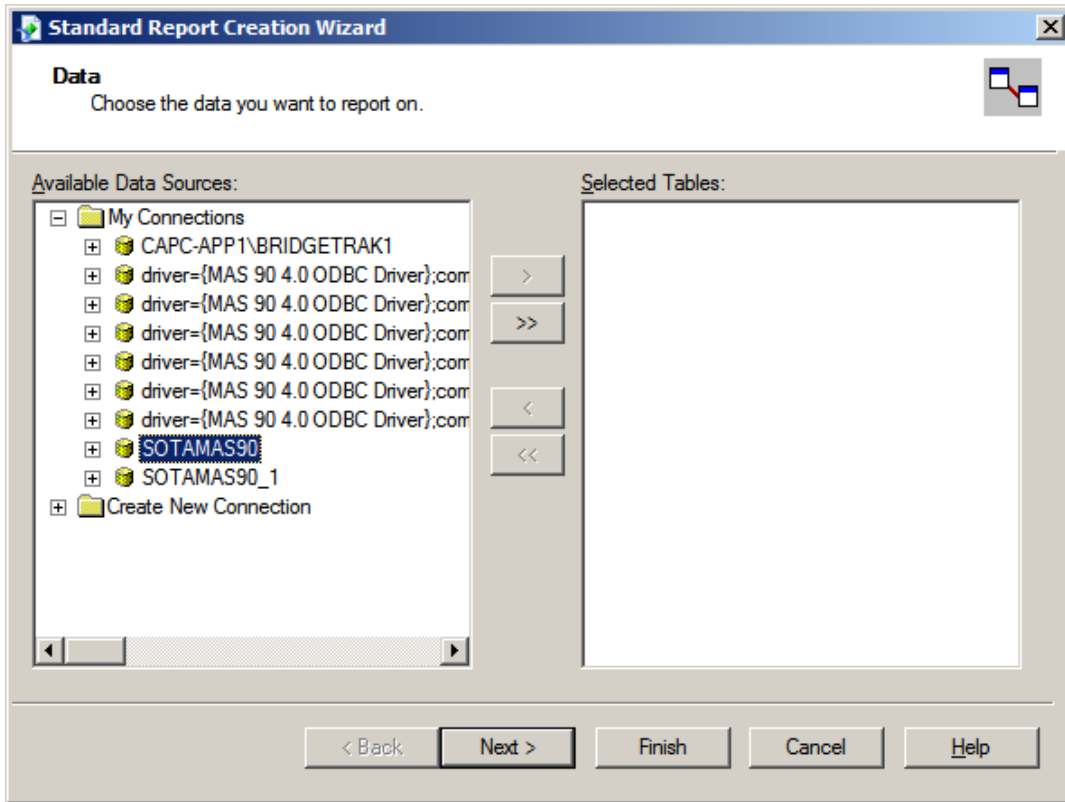
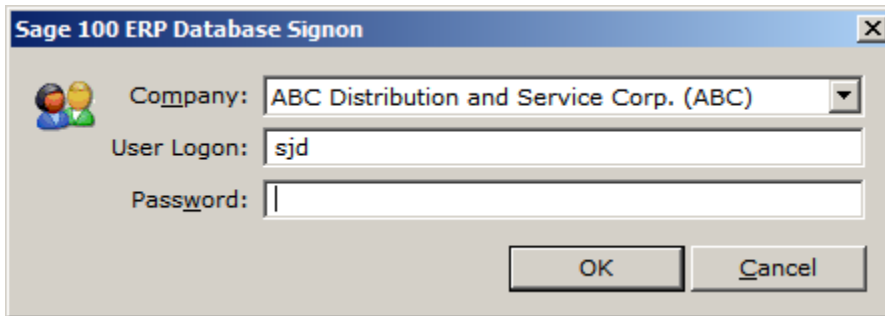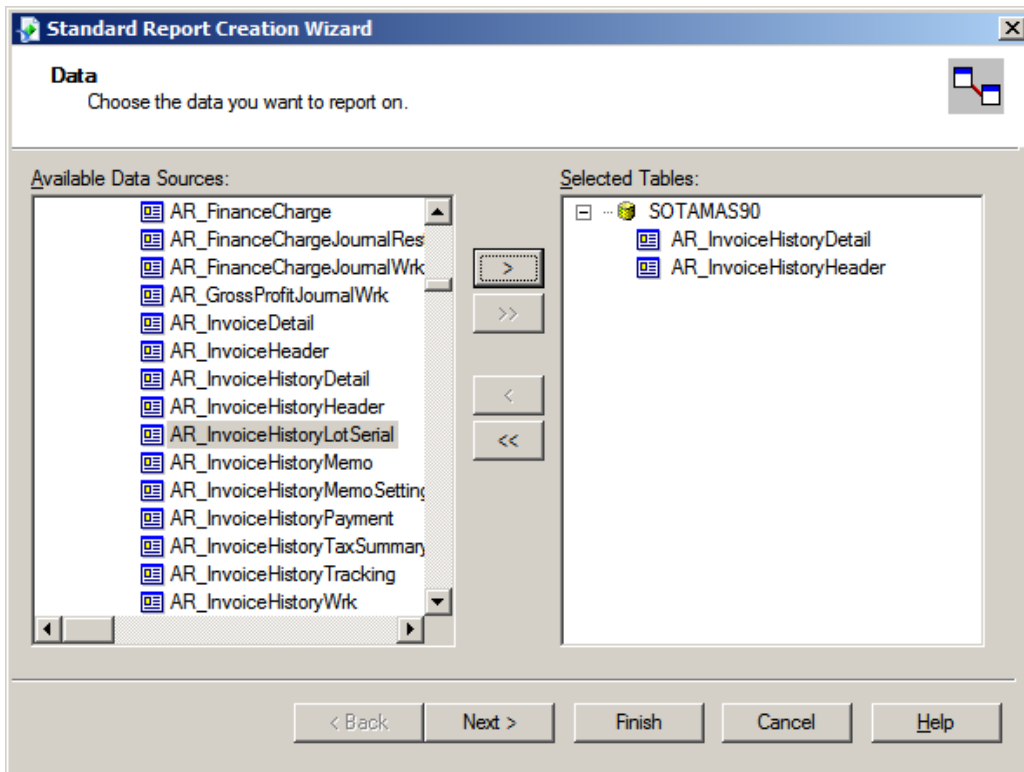Open Crystal Reports from your Programs list
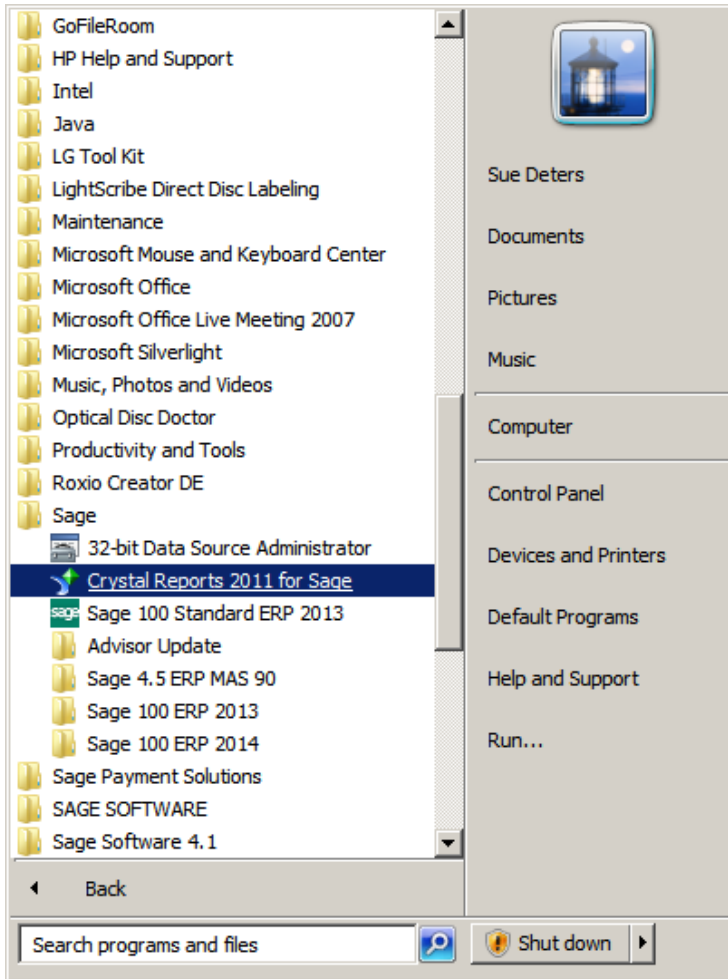
Click on Report Wizard

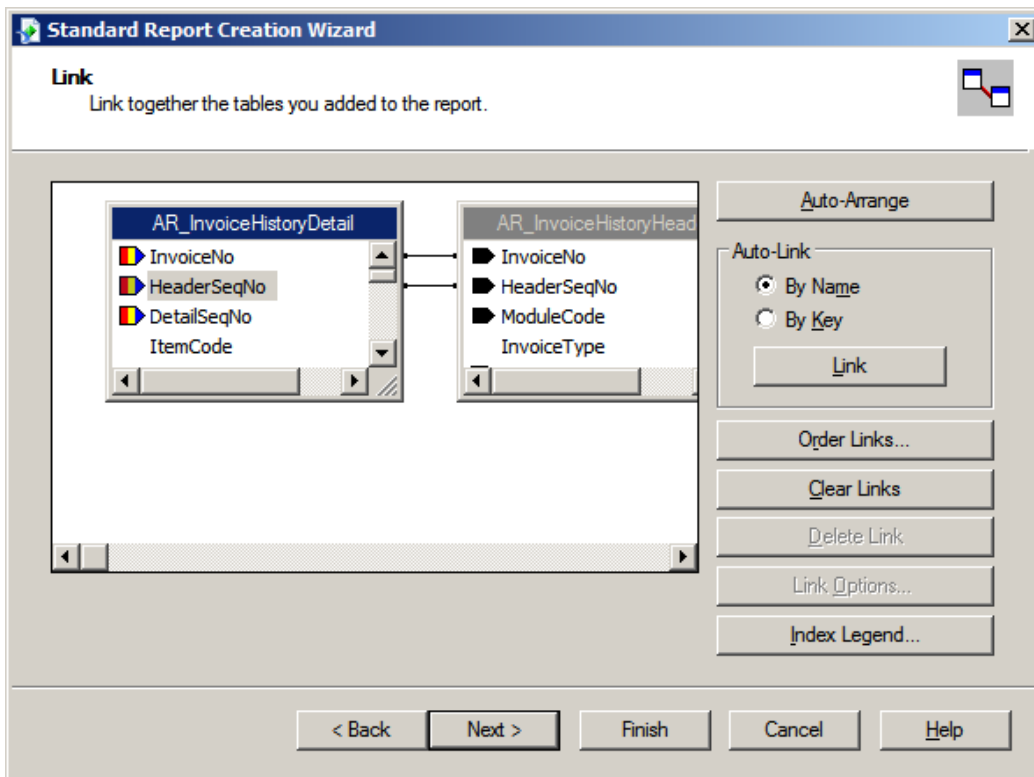Double click on the SOTAMAS90 Data Source

Select the Company Code and enter your User Logon information

Scroll down until you find the table(s) that you want to include in your report. Highlight the table and click the > button to select the tables. Once the tables are selected, click the Next button.

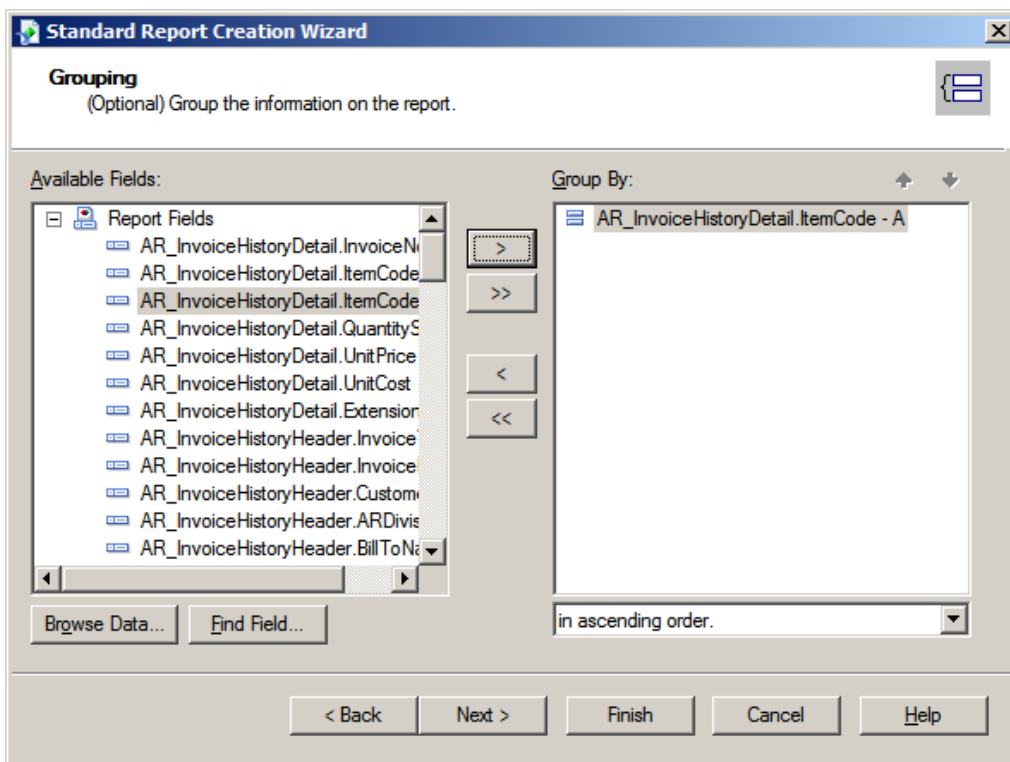Click the Next button on the Link window

Select the fields from each table that you would like to appear on your report. You can move the positioning of the fields by using the up and down arrows. Click the Next button.
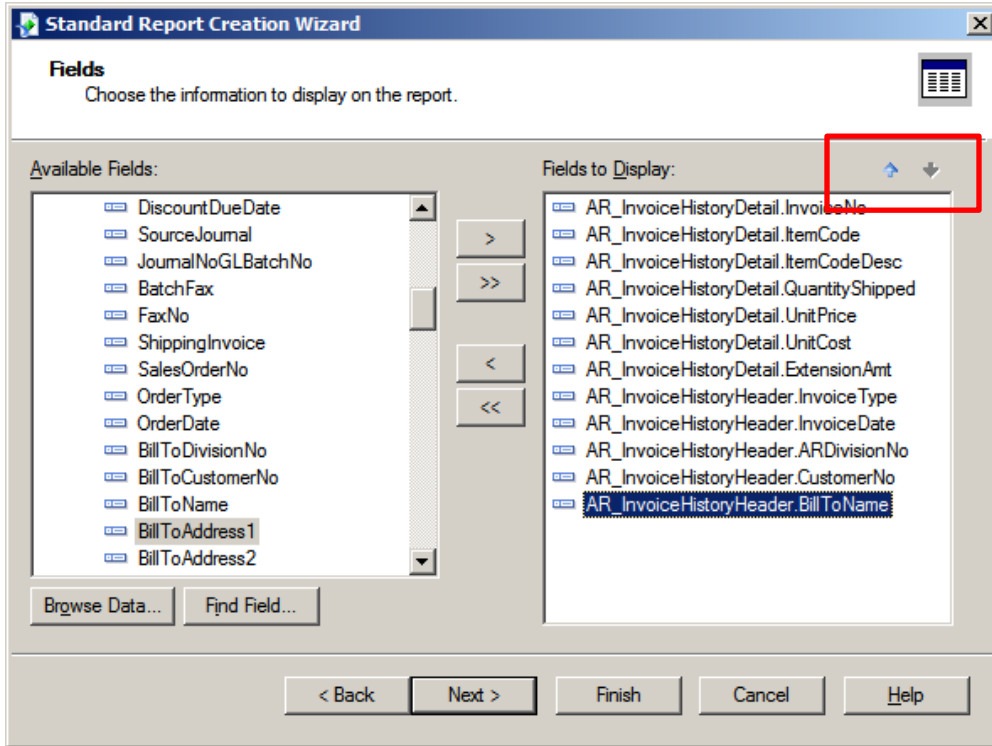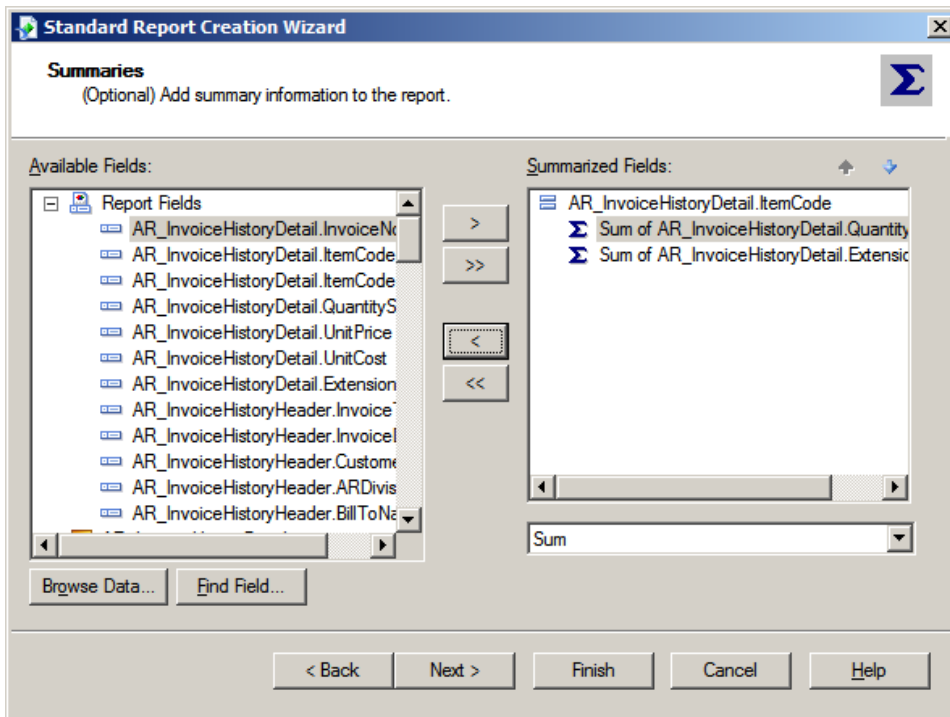

Select the field or fields that you will Group the data by. This will allow you to do a sub-total by Group. Click the Next button.
**Note:** Grouping is optional.

Select the fields to have a Summary Total. Click the Next button.
**Note:** Summarizing is Optional.

Use the Group Sorting screen to sort groups you created on the Grouping screen. You can sort all groups, or you can choose the top or bottom 5 groups. When sorting by the top or bottom 5 groups, you can also choose the summarized field you want to base the sorting on. Click the Next button on the Group Sorting screen.
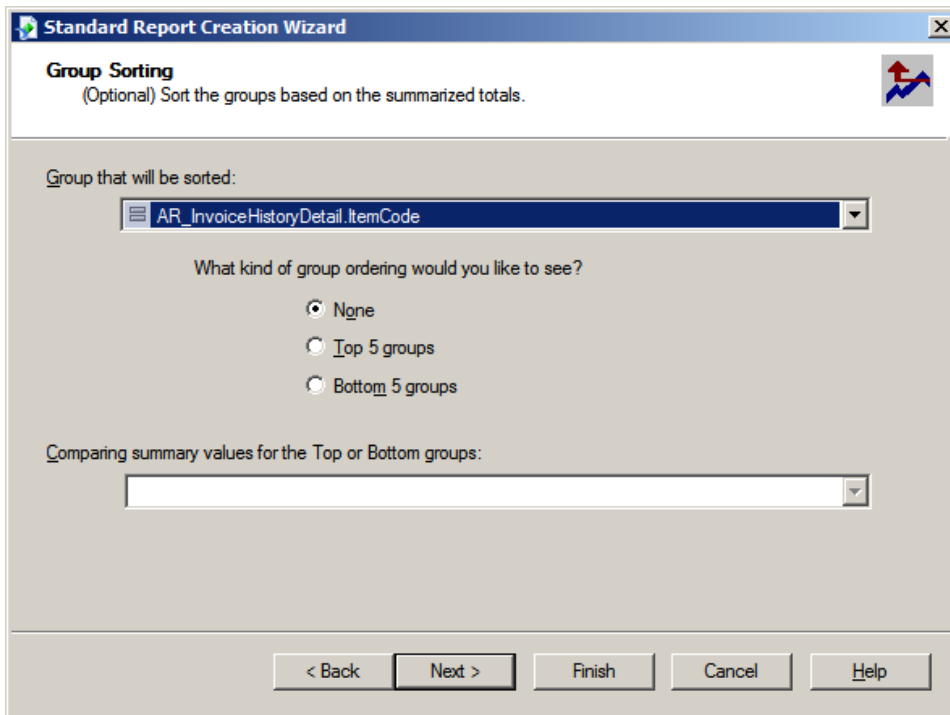
Use the Chart screen to insert a graph or chart into a report. Click the Next button on the Chart screen.
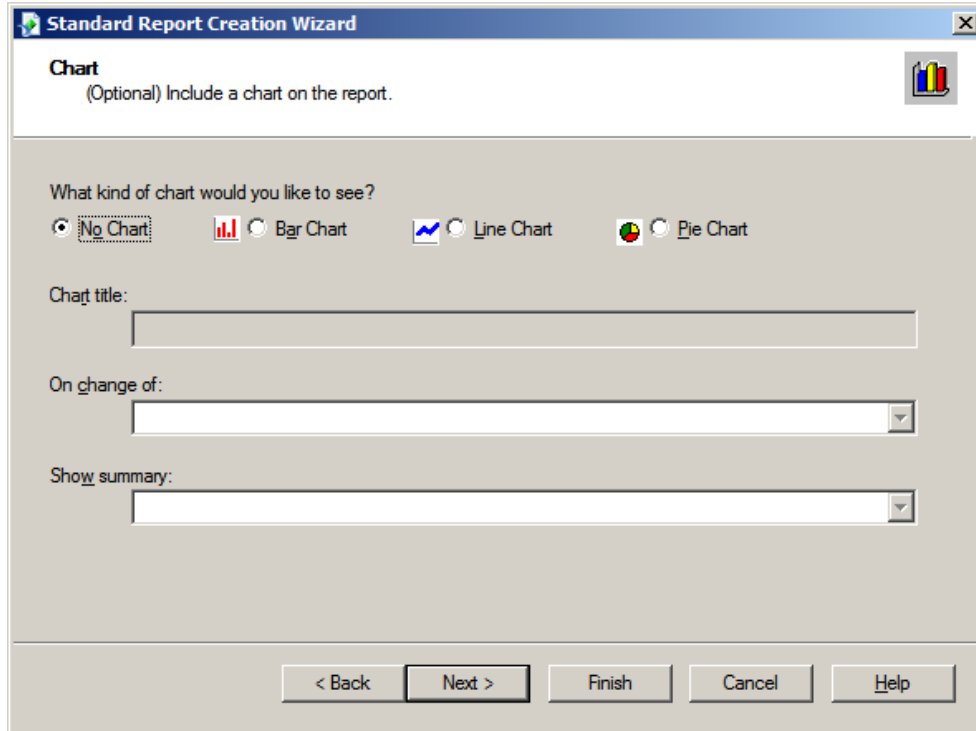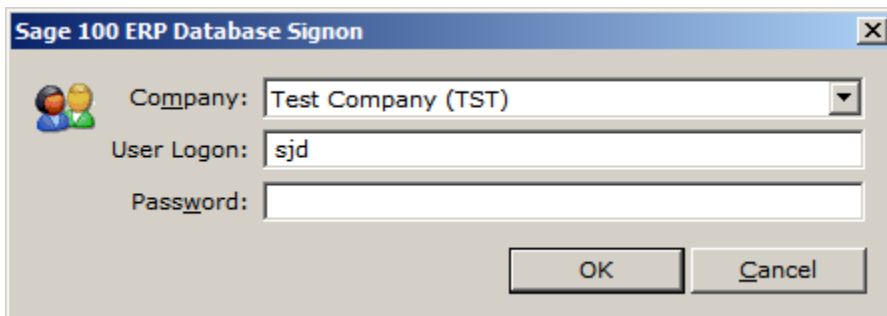

Use the Record Selection screen to choose fields to select (or filter) records in a report. By selecting records in this manner, you can narrow the scope of your report and improve processing speed. Creating a record selection is an optional step in the wizard. Click the Next button.
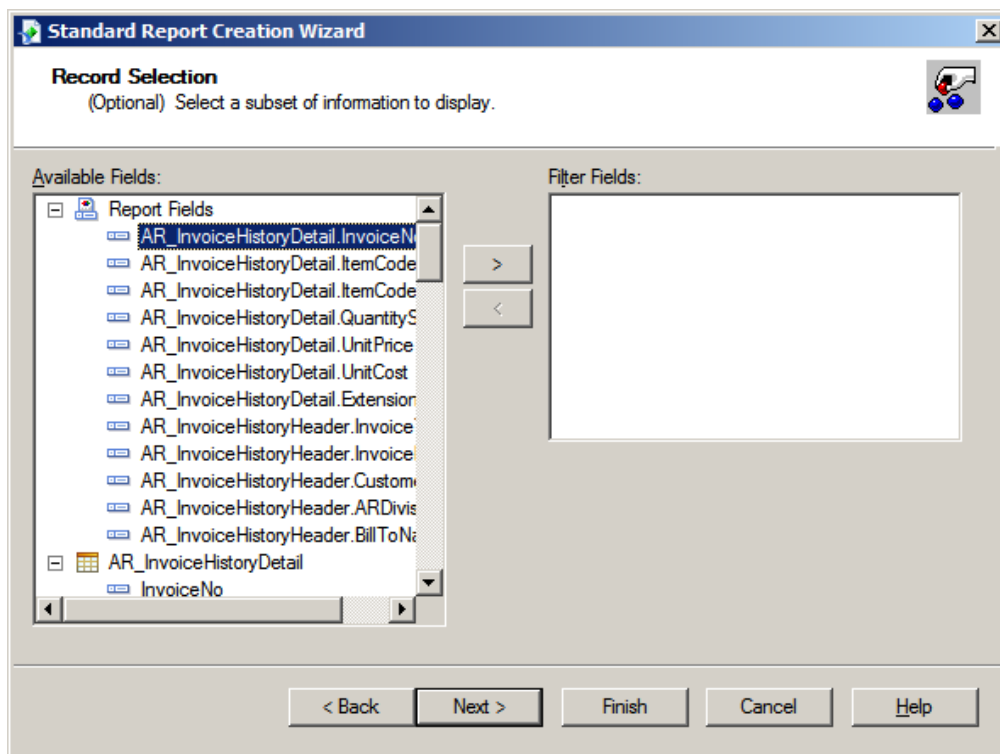
Use the Template screen to choose from predefined formatting templates for use in your report. Adding a template is an optional step in the wizard. Click the Finish button.
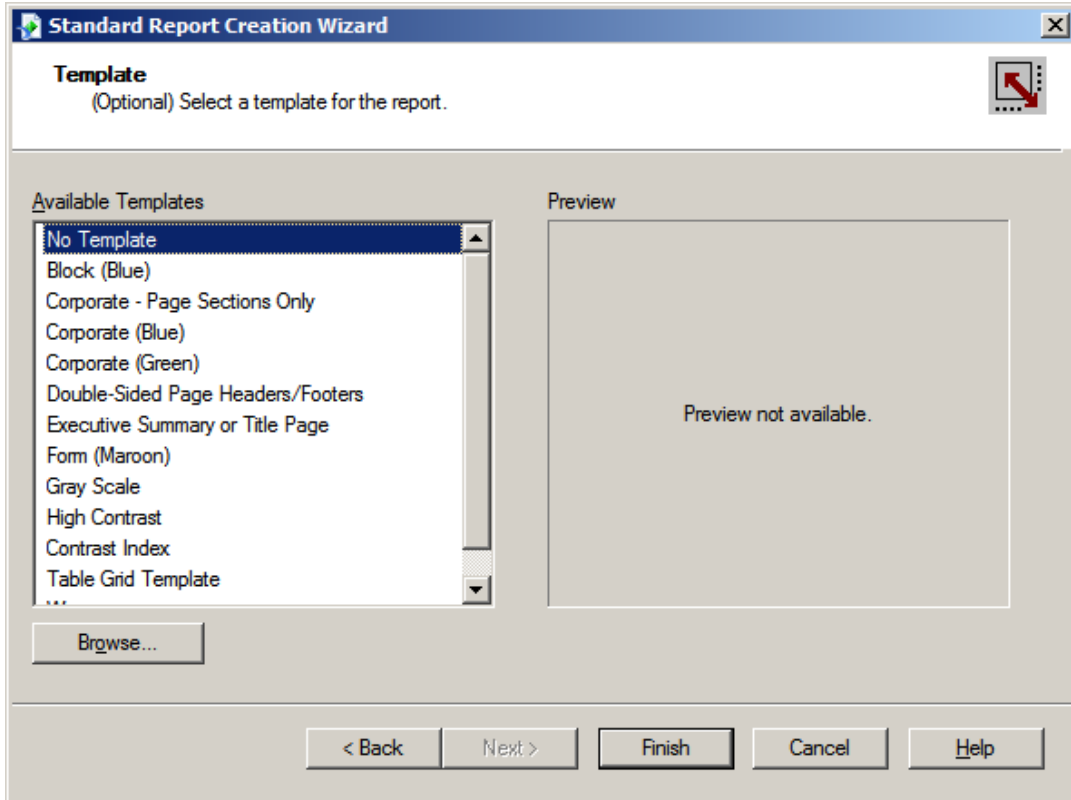
Enter the Company Code and your Logon information. Crystal will access the data in the tables for this company.
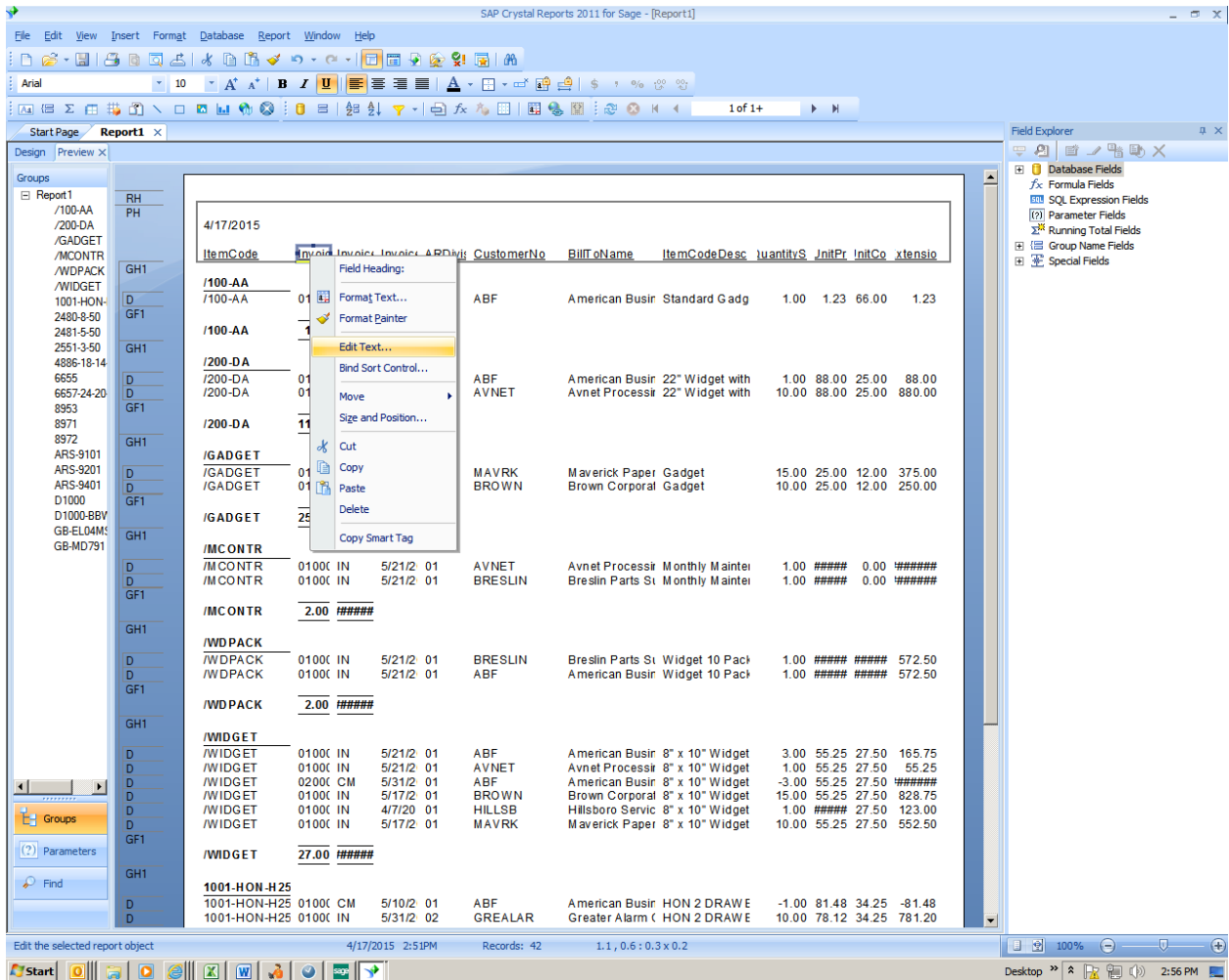
Clean-Up Time!

Fix Column Headers. Right click on the field, select Edit Text, change column names to better fit on report. Click on fields that are too small, use the mouse to stretch the field to a better size. Move fields if additional space is needed.

- To move Header and Detail fields, click on Header field, hold down Shift key, then click Detail field. Both fields should be highlighted in blue, move your mouse to the highlighted field in the Details area. Your pointer will have four arrows, you can now move both fields at the same time.

- Remove duplicate field for Item Code in Details section by highlighting and deleting.

- Move Group Footer Totals to line up under appropriate columns

Select Expert:

To filter your record selection, click Report -> Select Expert -> Record
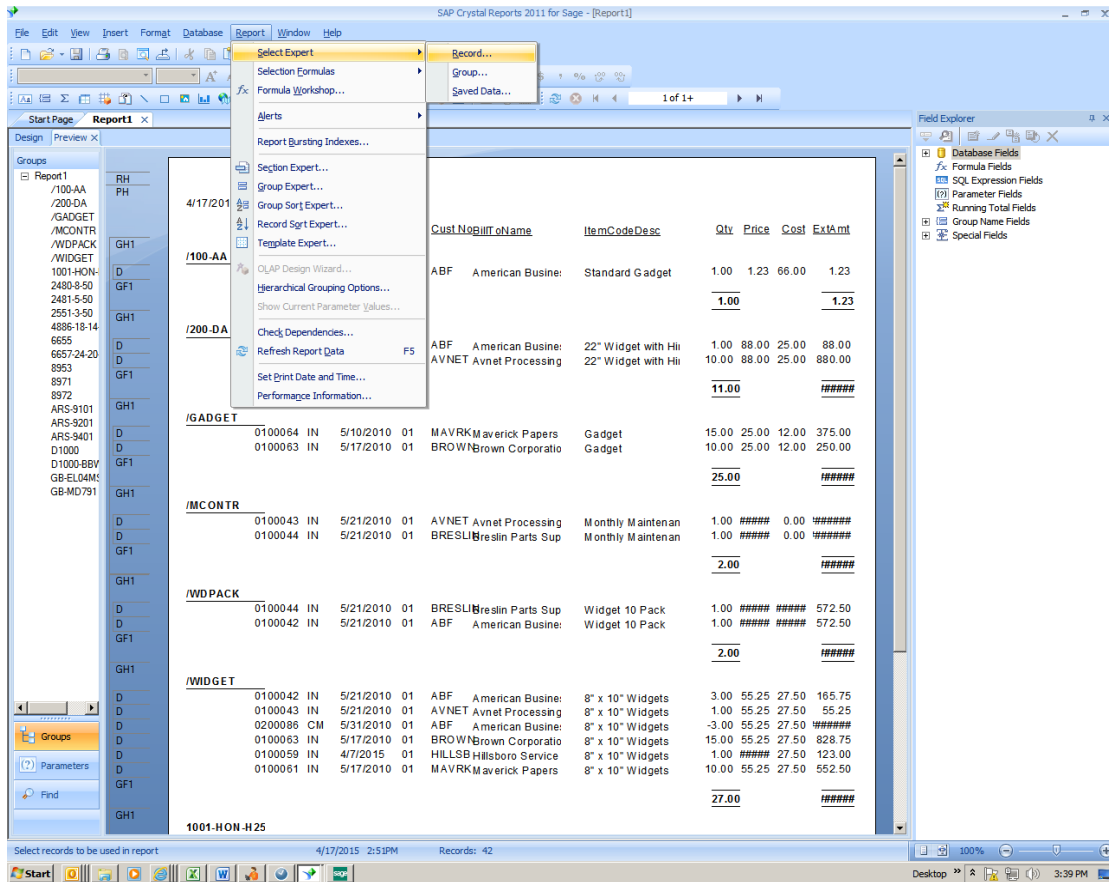
Choose the field that you want to filter.
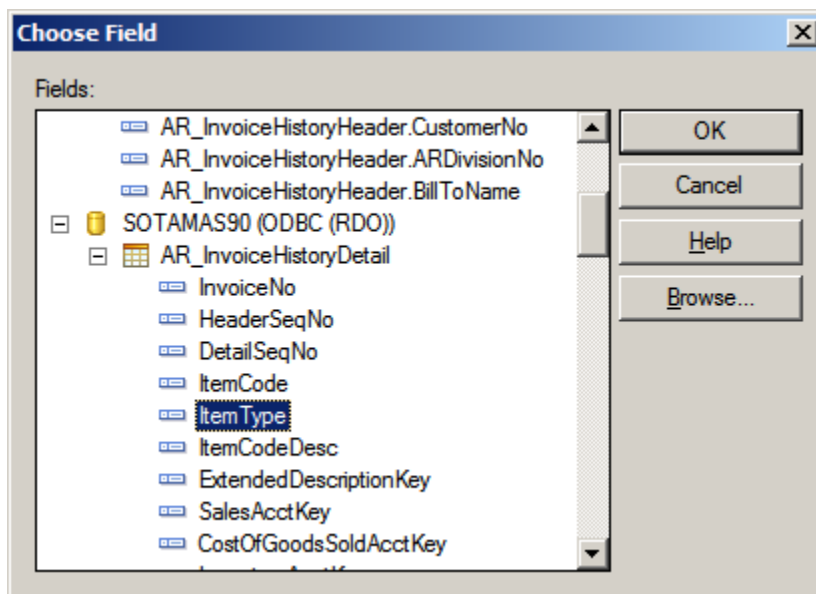
Item Type = 5 will select Miscellaneous Items only. Click OK.

Note: See AR_InvoiceHistoryDetail layout for Item Type choices.

Select Refresh Data.

Start Page   Report1 ×

Design | Preview ×

Groups
- Report1
  - /200-DA
  - /MCONTR
  - /WDPACK
  - /WIDGET

4/17/2015

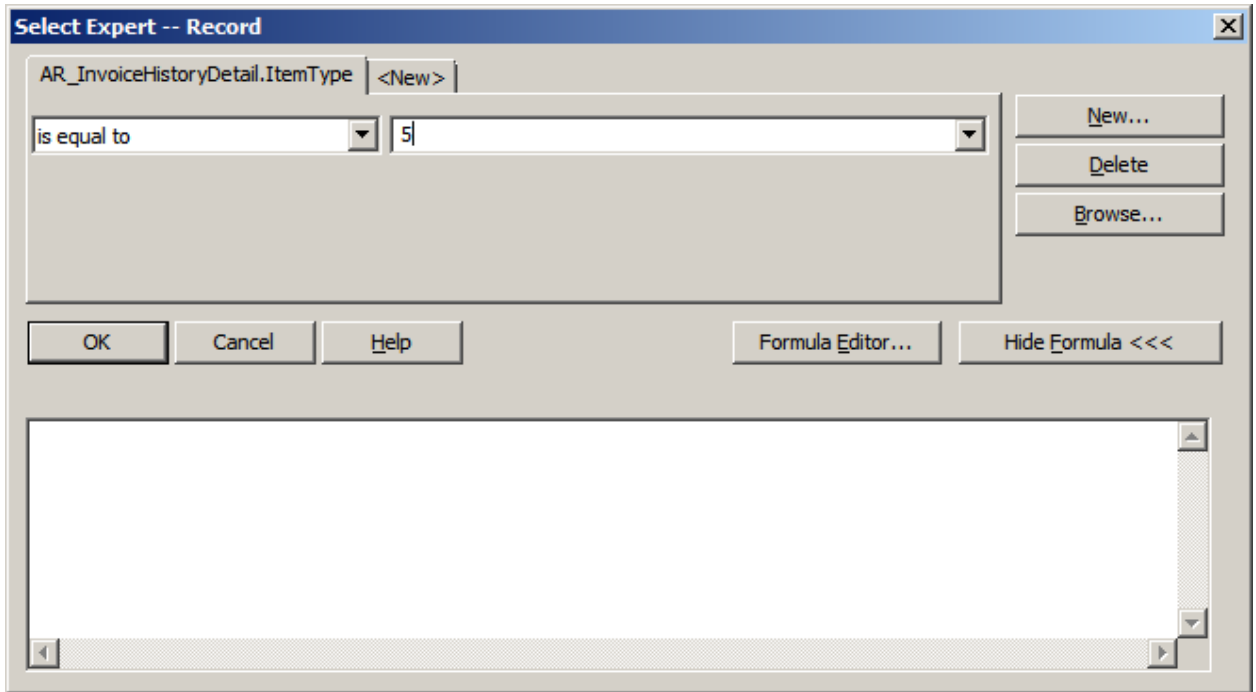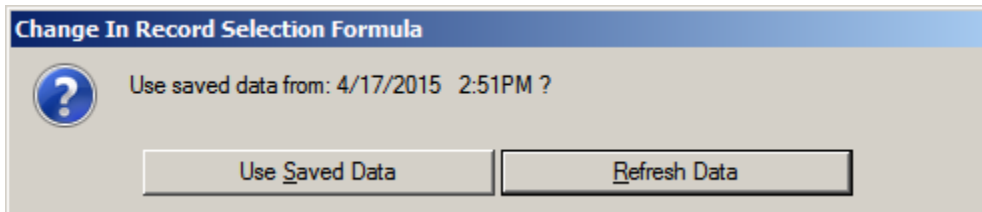| Inv No	Type	InvDate		Cust No	BillToName	ItemCodeDesc	Qty	Price	Cost	ExtAmt
/200-DA										
0100042	IN	5/21/2010	01	ABF	American Busine:	22" Widget with Hi	1.00	88.00	25.00	88.00
0100043	IN	5/21/2010	01	AVNET	Avnet Processing	22" Widget with Hi	10.00	88.00	25.00	880.00
							11.00			**968.00**
/MCONTR										
0100043	IN	5/21/2010	01	AVNET	Avnet Processing	Monthly Maintenan	1.00	1,000.00	0.00	1,000.00
0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Monthly Maintenan	1.00	1,000.00	0.00	1,000.00
							2.00			**2,000.00**
/WDPACK										
0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Widget 10 Pack	1.00	572.50	280.00	572.50
0100042	IN	5/21/2010	01	ABF	American Busine:	Widget 10 Pack	1.00	572.50	280.00	572.50
							2.00			**1,145.00**
/WIDGET										
0200086	CM	5/31/2010	01	ABF	American Busine:	8" x 10" Widgets	-3.00	55.25	27.50	-165.75
0100042	IN	5/21/2010	01	ABF	American Busine:	8" x 10" Widgets	3.00	55.25	27.50	165.75
0100043	IN	5/21/2010	01	AVNET	Avnet Processing	8" x 10" Widgets	1.00	55.25	27.50	55.25
							1.00			**55.25**
Grand Total:							**16.00**			**4,168.25**

Adding a Date Selection:

Create a Parameter field for the Date. Click on the plus sign next to Database Fields. Select Parameter Fields. Click the New button.

Enter the Name for your Prompt in the Name field. Change the Type field to Date. Click down in the Value Options grid, Allow Range Values should be True. Click Ok.

Click on Report -> Select Expert -> Record. Click the New tab. Select the InvoiceDate field, click Ok.   Click the down arrow and select Is Equal To, then click the down arrow and select the Parameter field. Click OK.
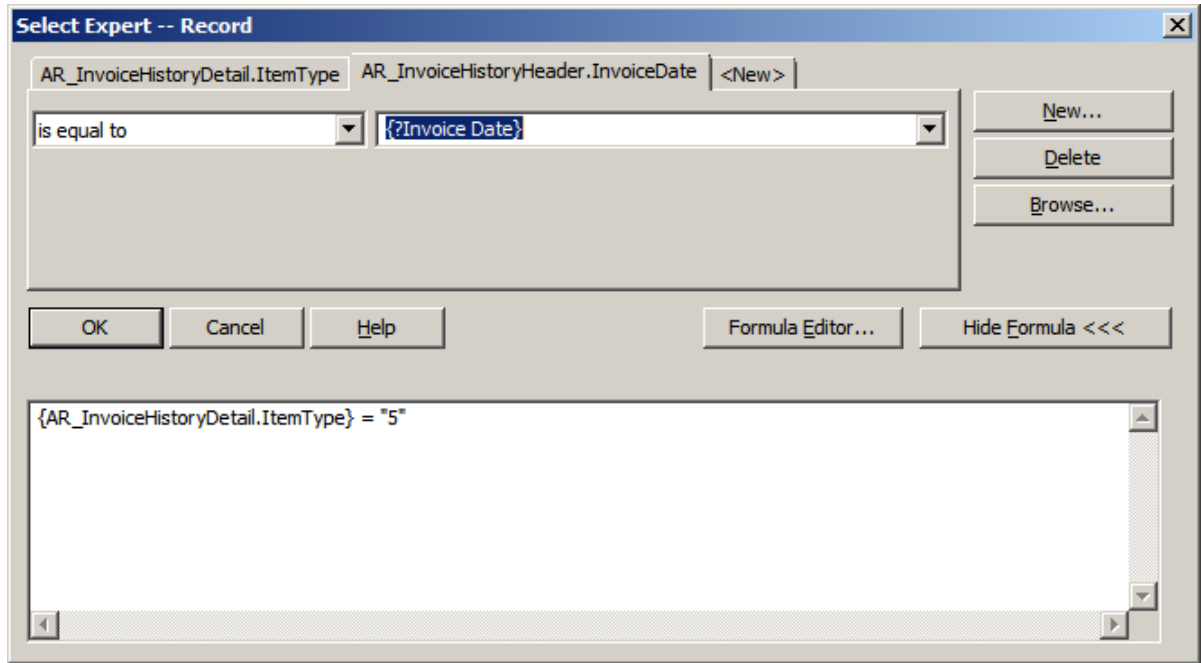
The system will prompt for the Date.
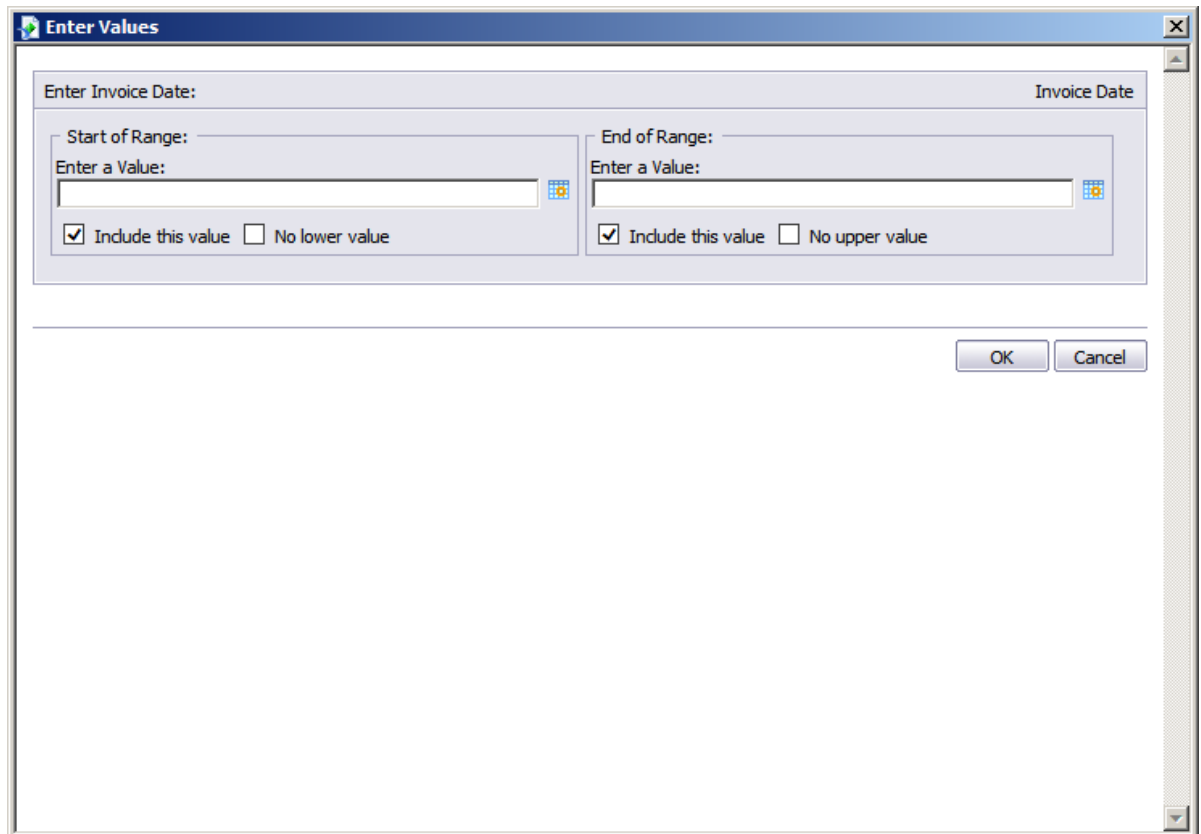
Enter the date ranges and click OK.

Click File -> Save As. Save your report.

Note: If you are going to add it to the Sage 100 menu, save the report including _custom in the report name.
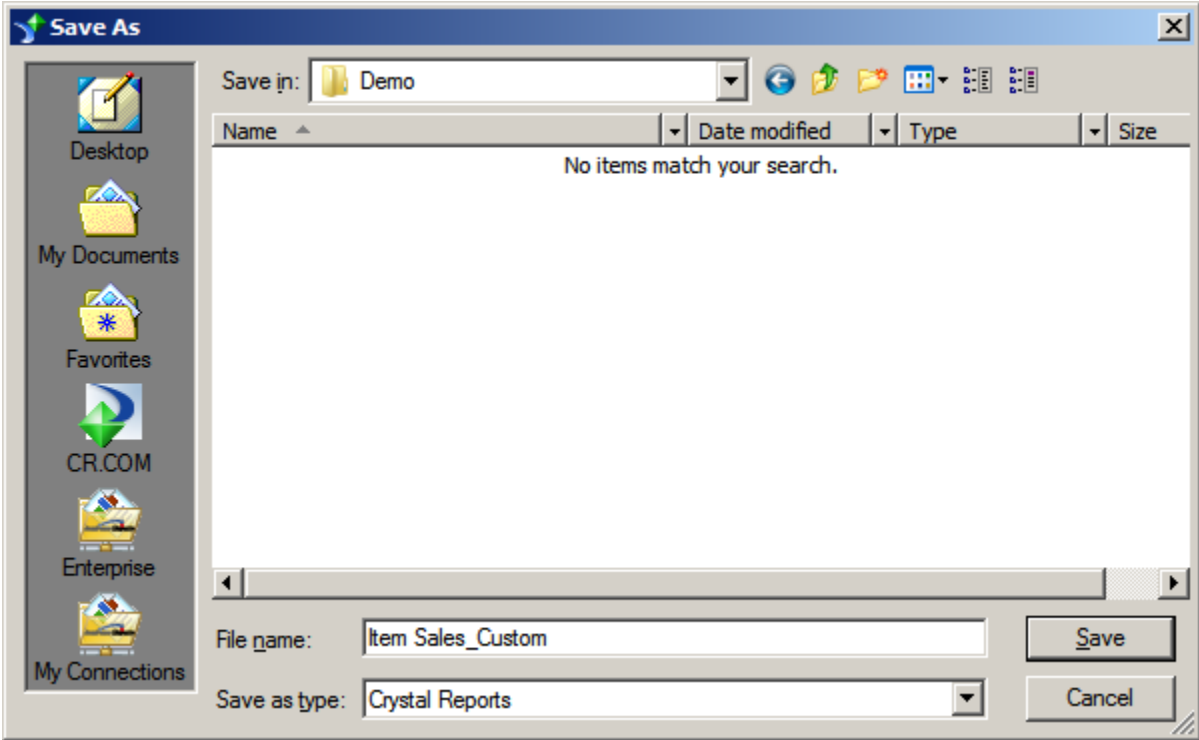
How to Add Report to Sage Menu:

Click Library Master -> Setup -> Report Manager
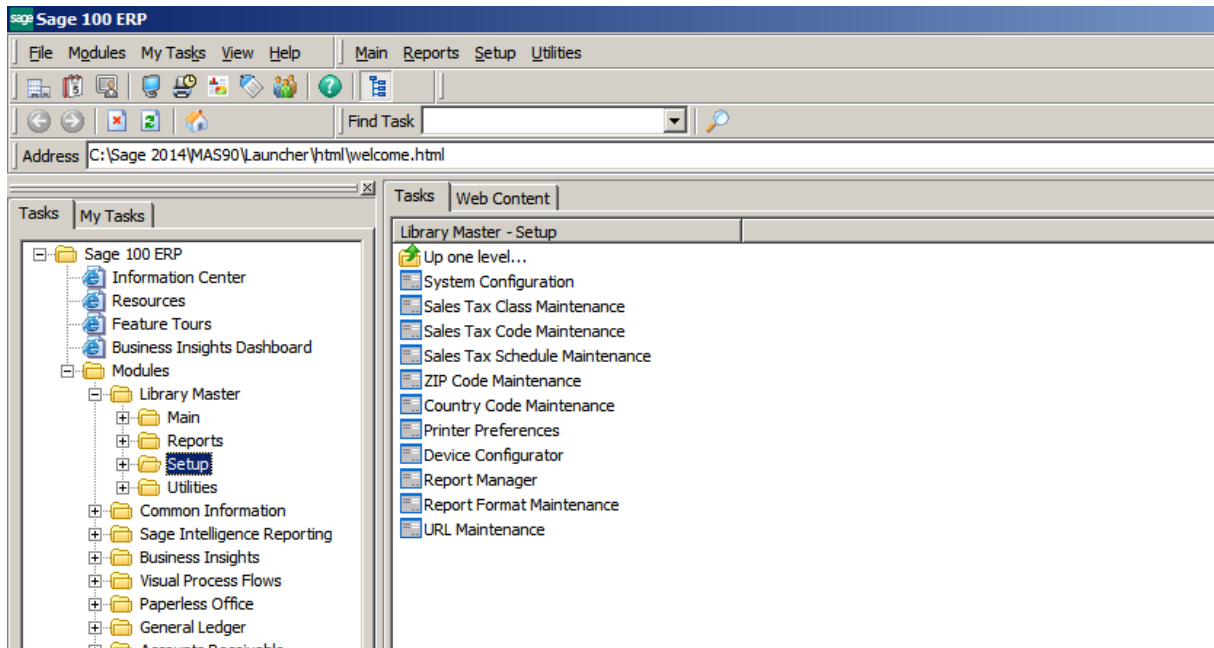
Click Add Report to Menu.
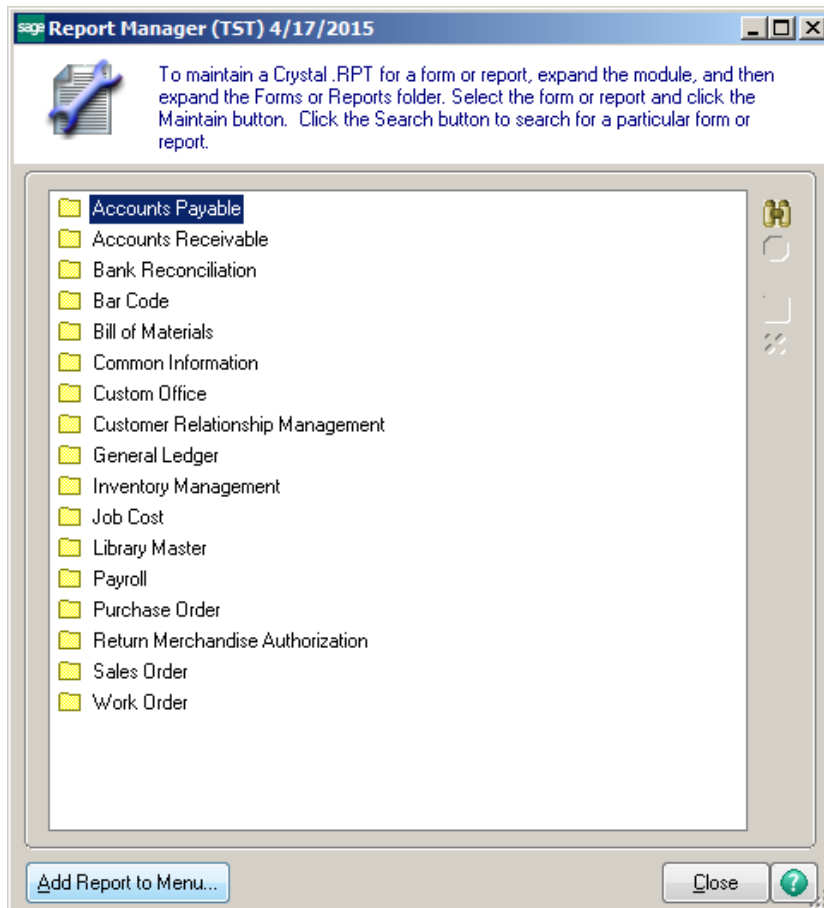
Click the Next button
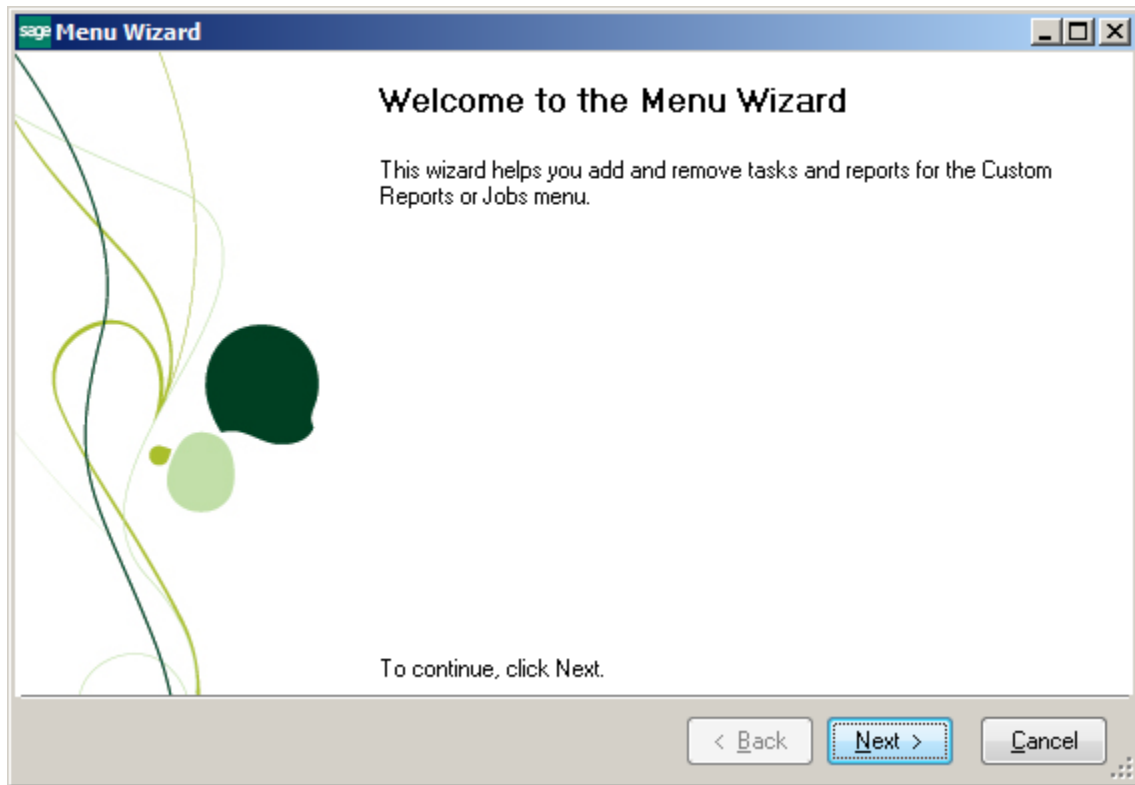
Select the module that you want to add the report to. Enter the path to the report and enter the report name. Click the Next button.
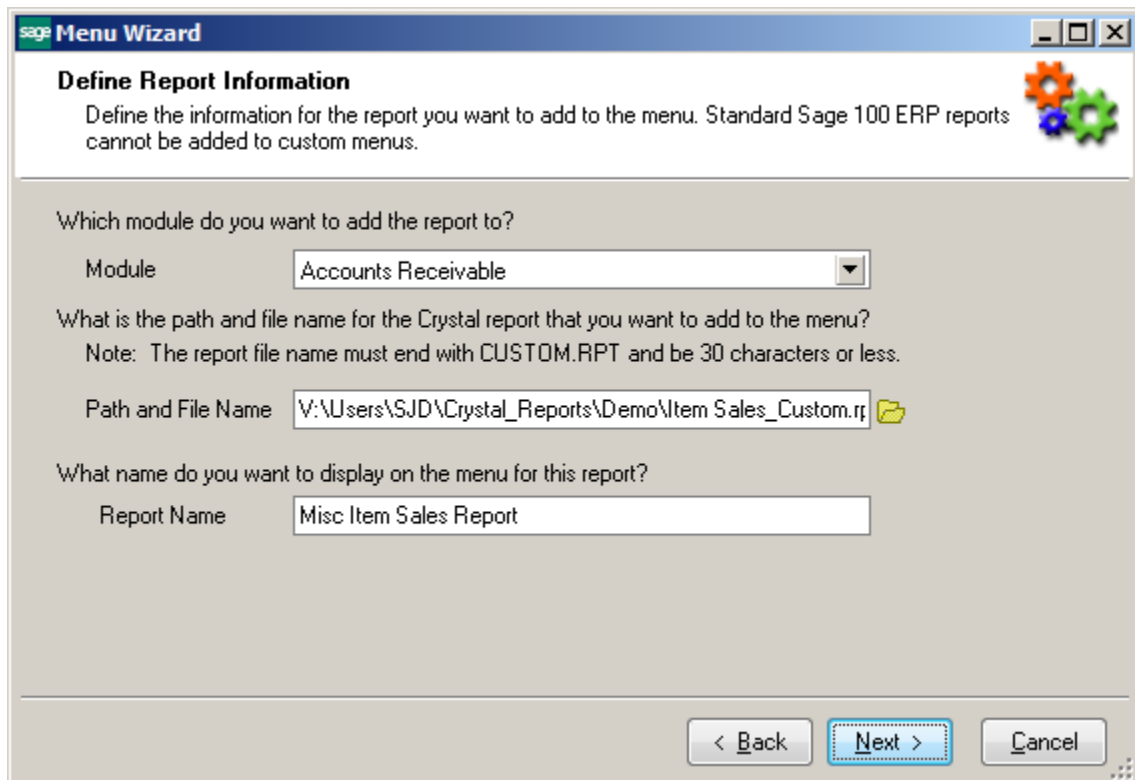
Select the Roles that will have the rights to run the report. Click the Next button.
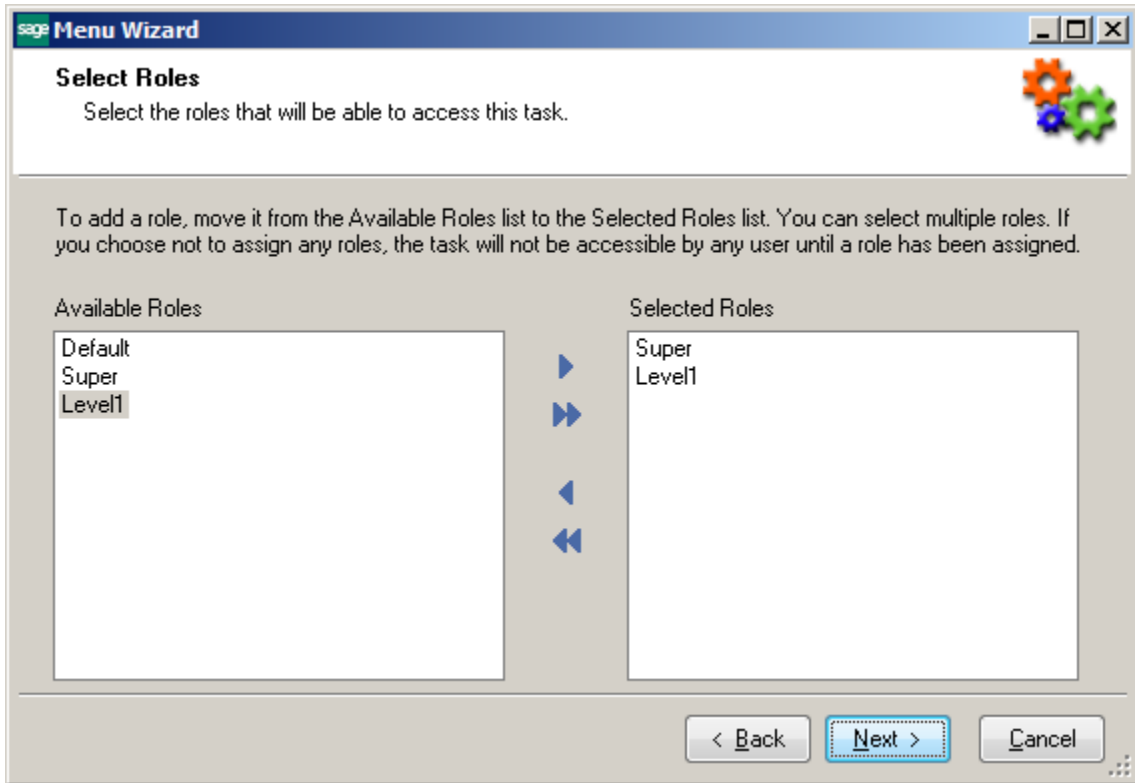
Click the Finish button and Close the Report Manager window.
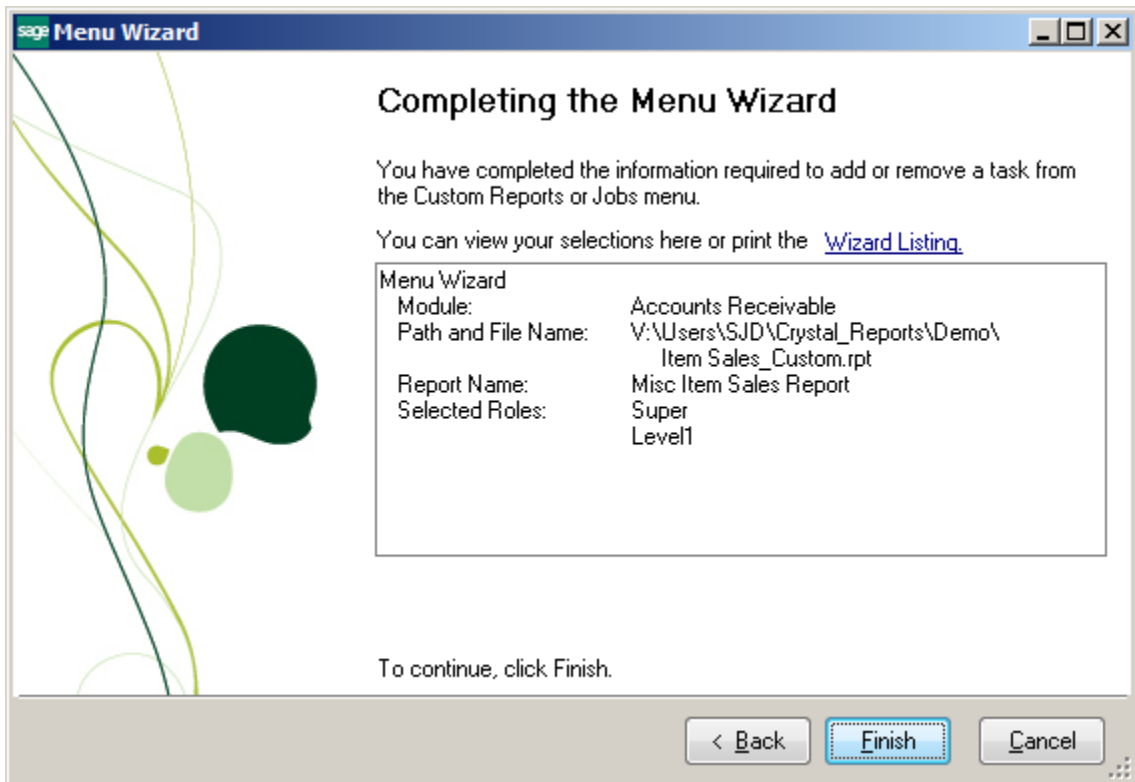
Select Custom Reports from the module you added the report for.

Select the new report.

Click the Print button

The first time running the report, the system will prompt that it needs to be converted. Click Yes.

Enter the report Dates. Click the OK button.

Main Report

4/17/2015

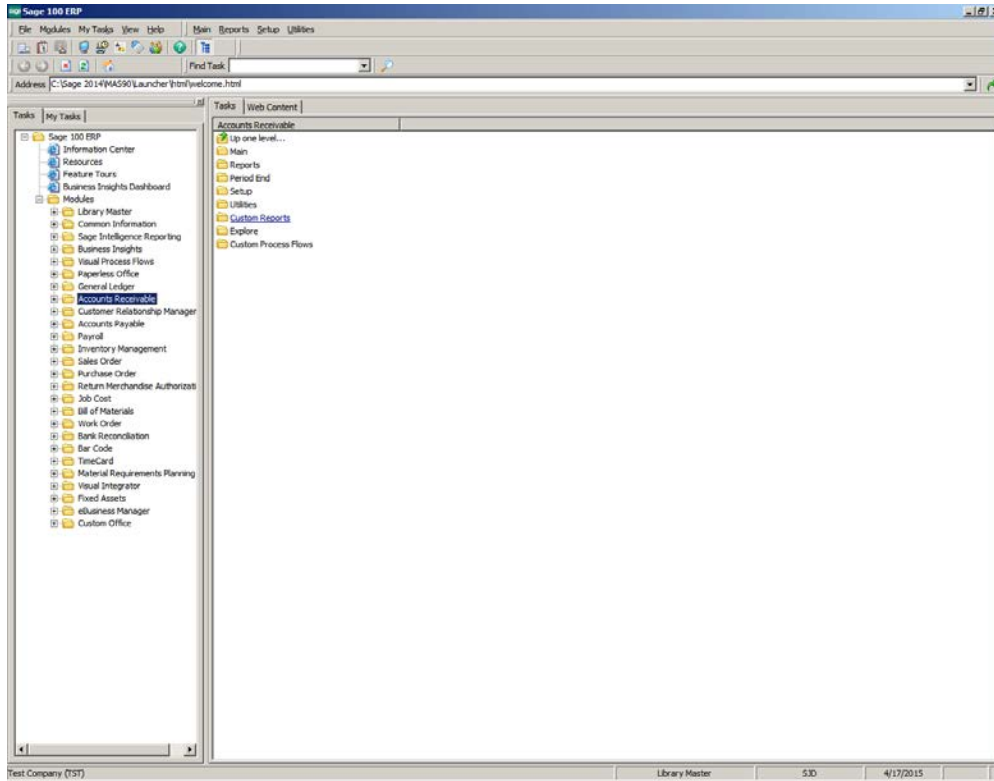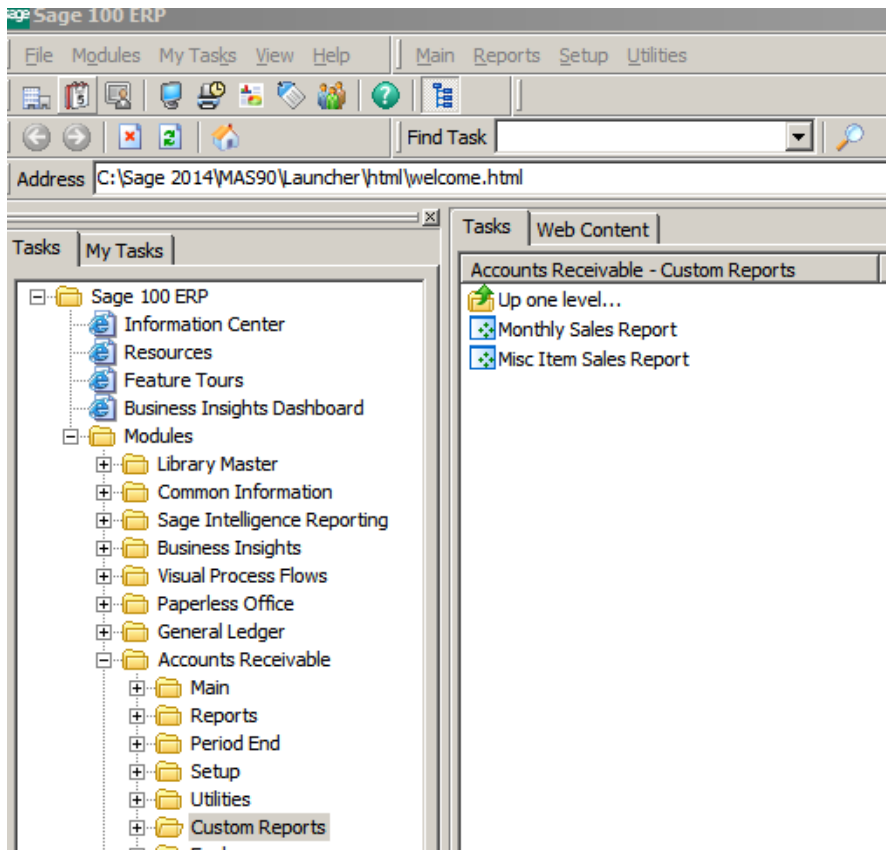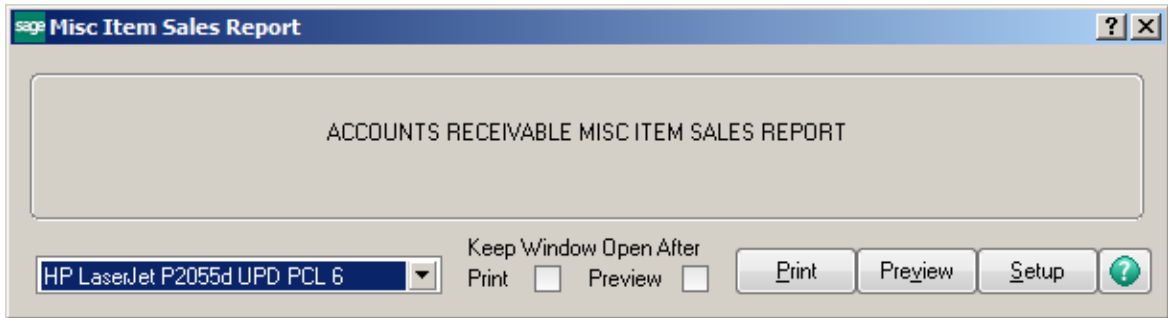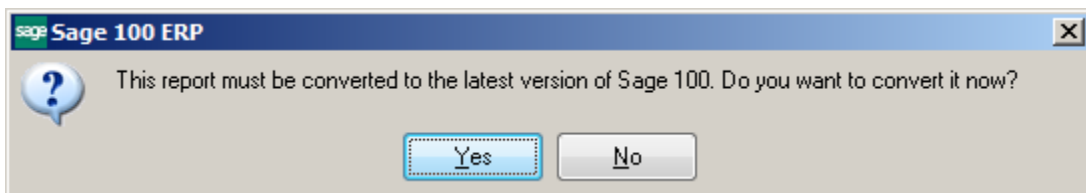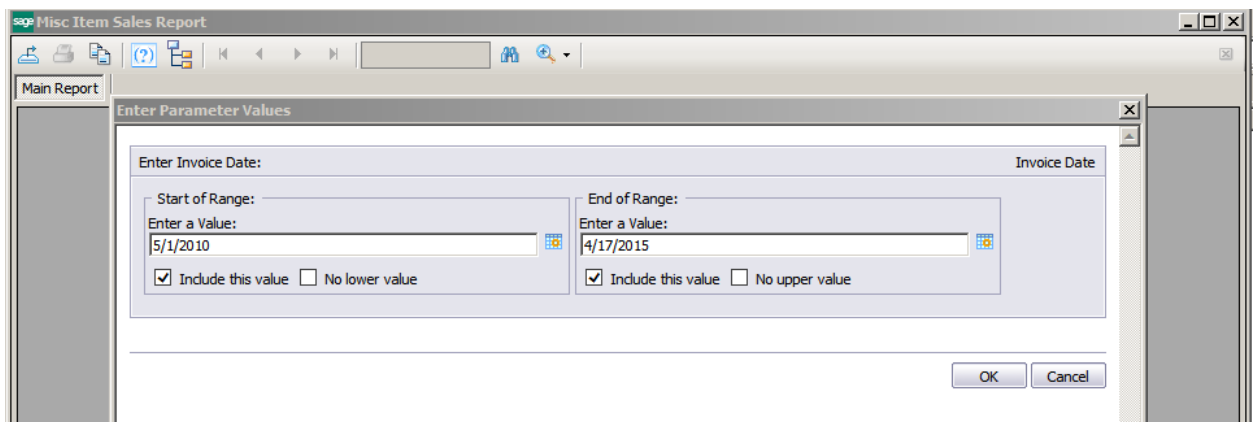|	Inv No	Type	InvDate		Cust No	BillToName	ItemCodeDesc	Qty	Price	Cost	ExtAmt
/100-AA											
	0100058	AD	3/9/2015	01	ABF	American Busines	Standard Gadget	1.00	1.23	66.00	1.23
								1.00			1.23
/200-DA											
	0100043	IN	5/21/2010	01	AVNET	Avnet Processinc	22" Widget with Hir	10.00	88.00	25.00	880.00
	0100042	IN	5/21/2010	01	ABF	American Busines	22" Widget with Hir	1.00	88.00	25.00	88.00
								####			968.00
/GADGET											
	0100064	IN	5/10/2010	01	MAVRK	Maverick Papers	Gadget	15.00	25.00	12.00	375.00
	0100063	IN	5/17/2010	01	BROWN	Brown Corporatio	Gadget	10.00	25.00	12.00	250.00
								####			625.00
/MCONTR											
	0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Monthly Maintenan	1.00	1,000.00	0.00	1,000.00
	0100043	IN	5/21/2010	01	AVNET	Avnet Processinc	Monthly Maintenan	1.00	1,000.00	0.00	1,000.00
								2.00			2,000.00
/WDPACK											
	0100042	IN	5/21/2010	01	ABF	American Busines	Widget 10 Pack	1.00	572.50	280.00	572.50
	0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Widget 10 Pack	1.00	572.50	280.00	572.50
								2.00			1,145.00
/WIDGET											

Current Page No.: 1   Total Page No.: 1   Zoom Factor: 100%