

How To Create A Crystal Report

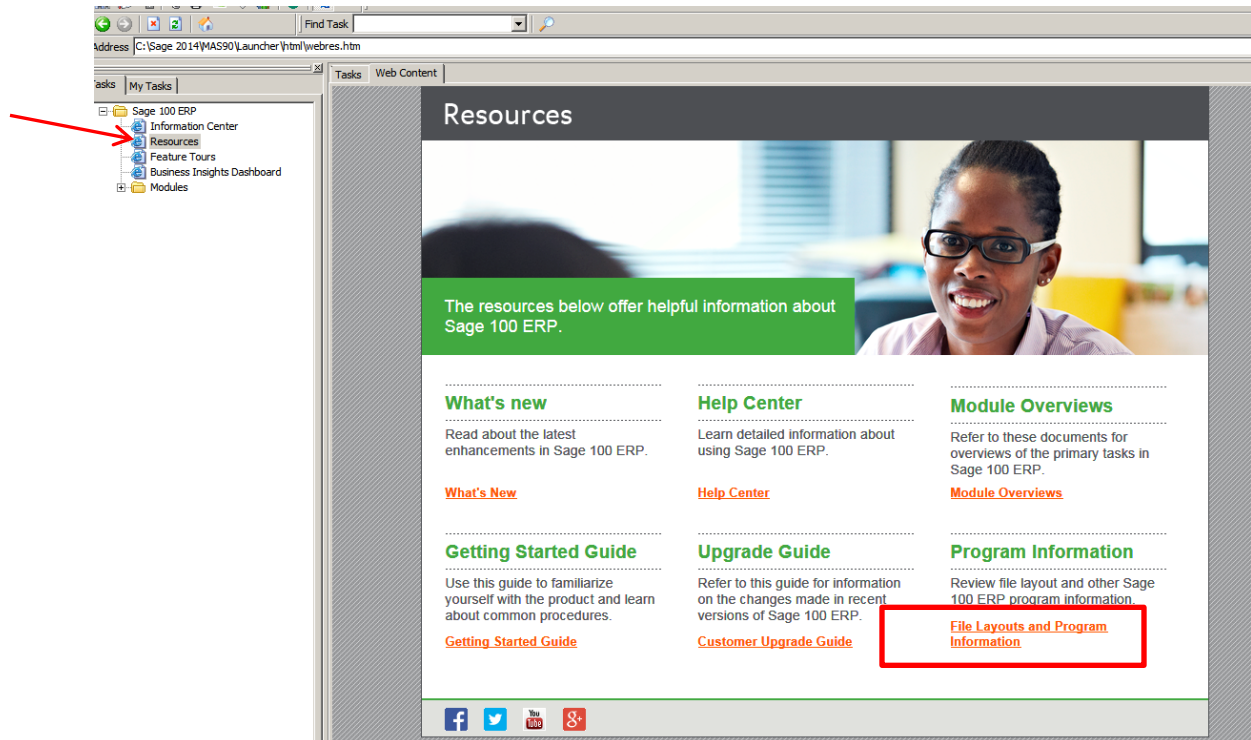
Step 1: Decide what you want on your report

Step 2: Determine which table or tables to use

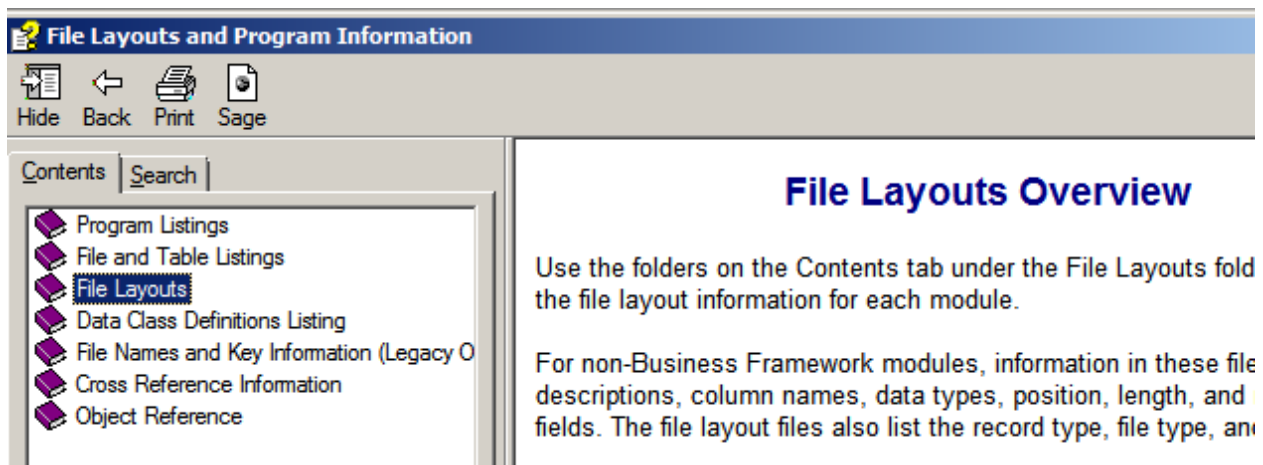
Step 3: Confirm Crystal is installed on your workstation

Miscellaneous Item Detail Report

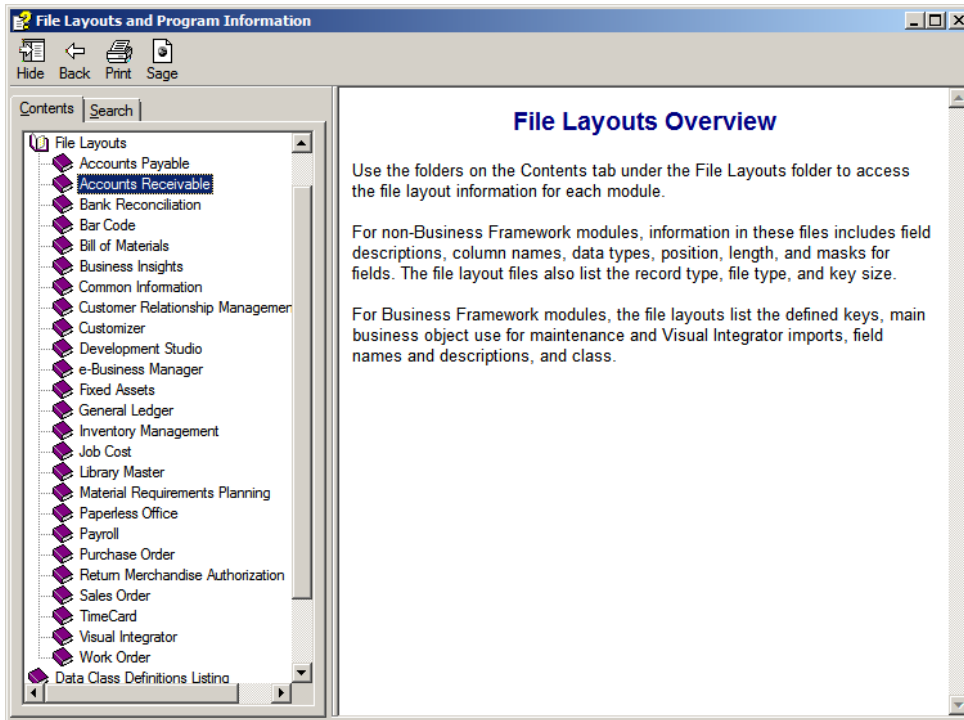
Click on Resources -> File Layouts and Program Information



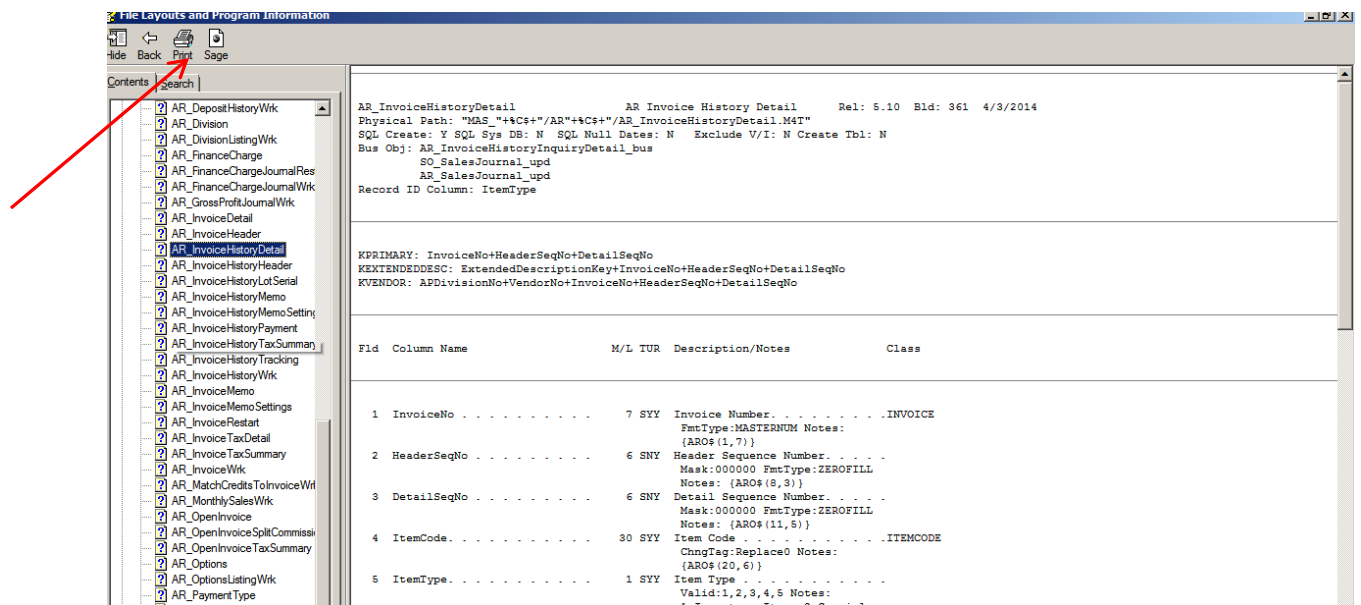
Click on File Layouts from the Contents menu



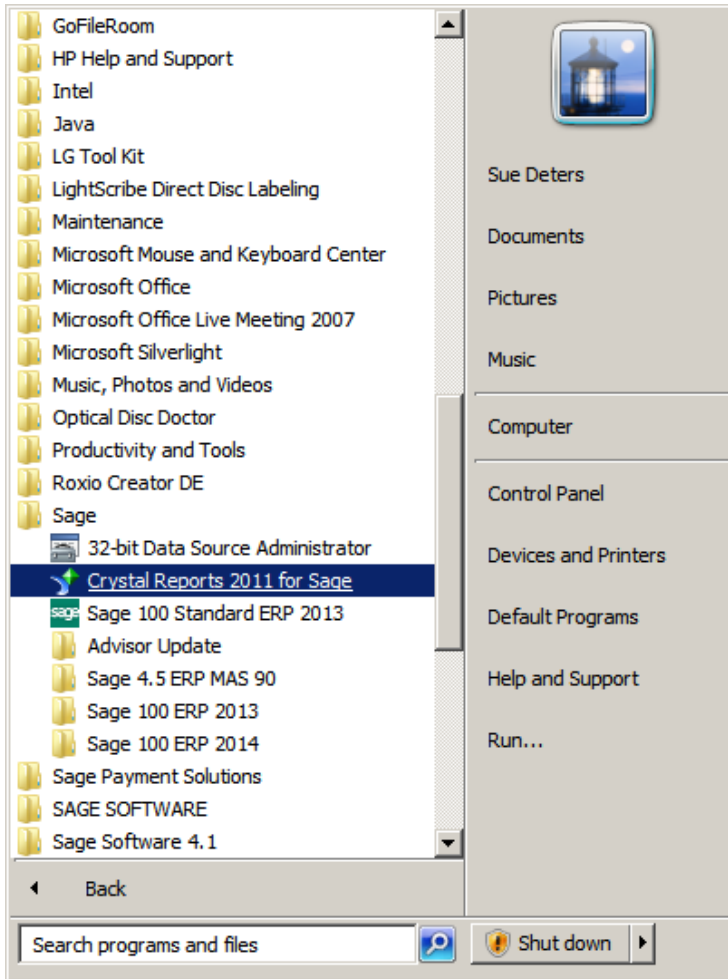
Select the module that contains the files that you want to work with



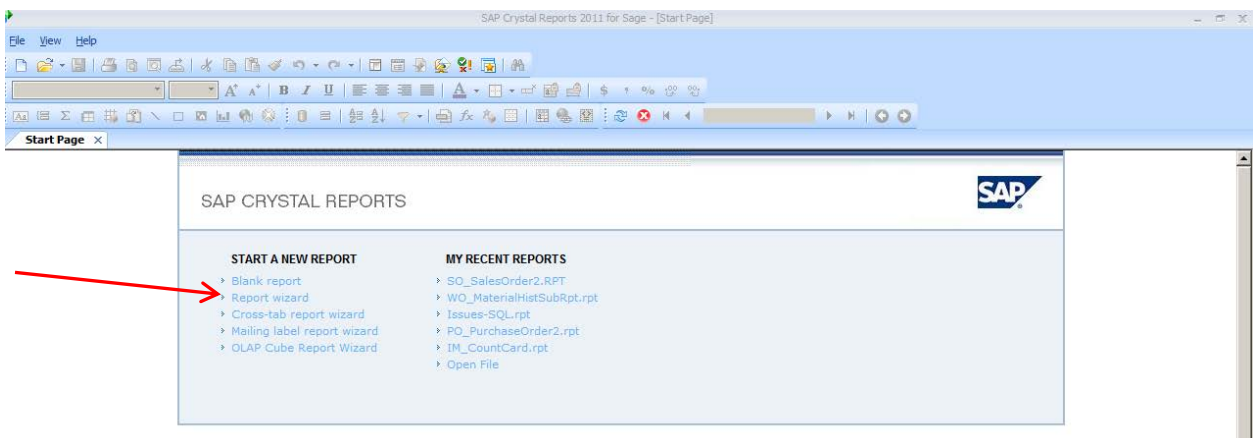
Click on the file name. The data dictionary will show on the right side of screen. You can print the page by selecting the printer icon at the top of the screen. You can use the printout when selecting the fields in Crystal.



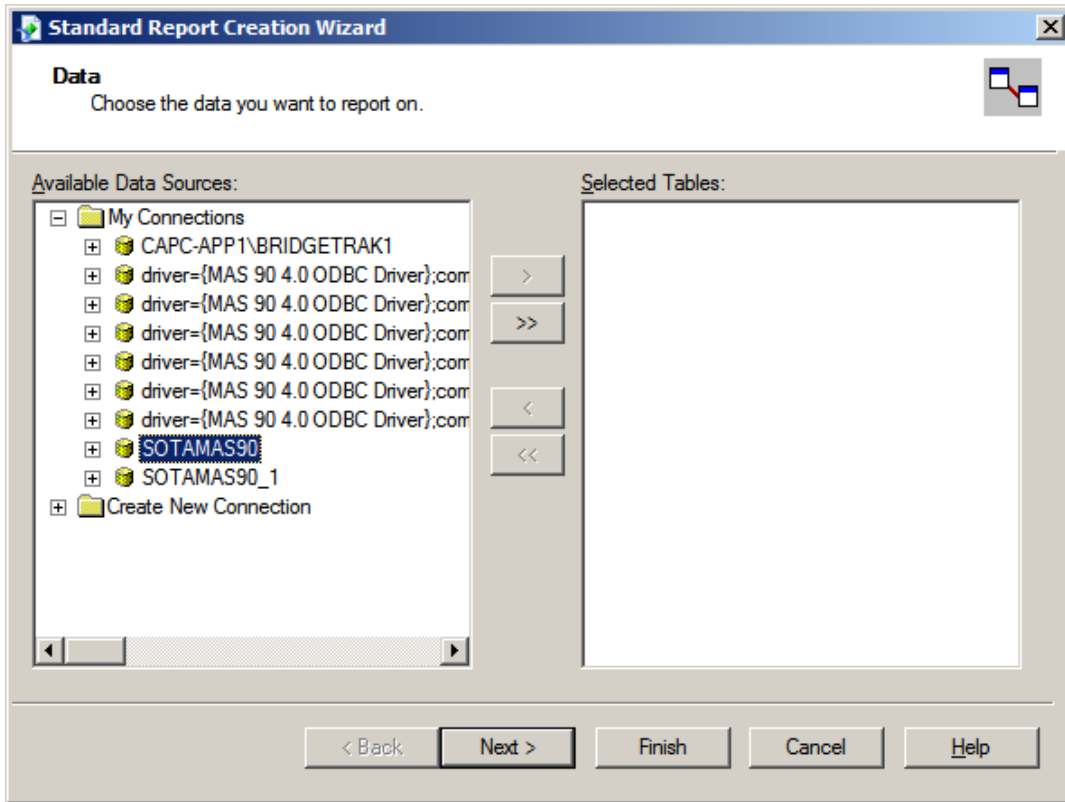
Open Crystal Reports from your Programs list



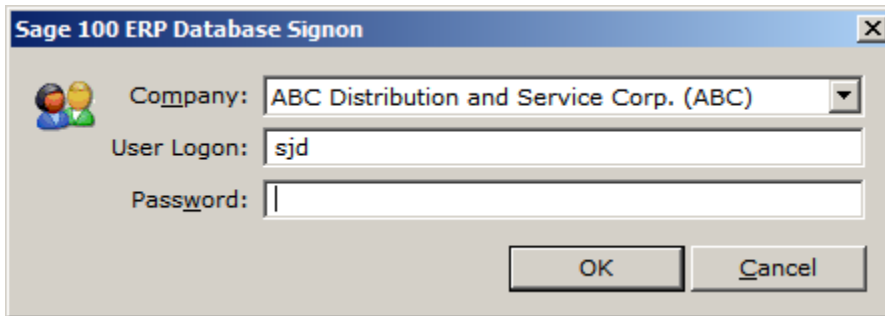
Click on Report Wizard



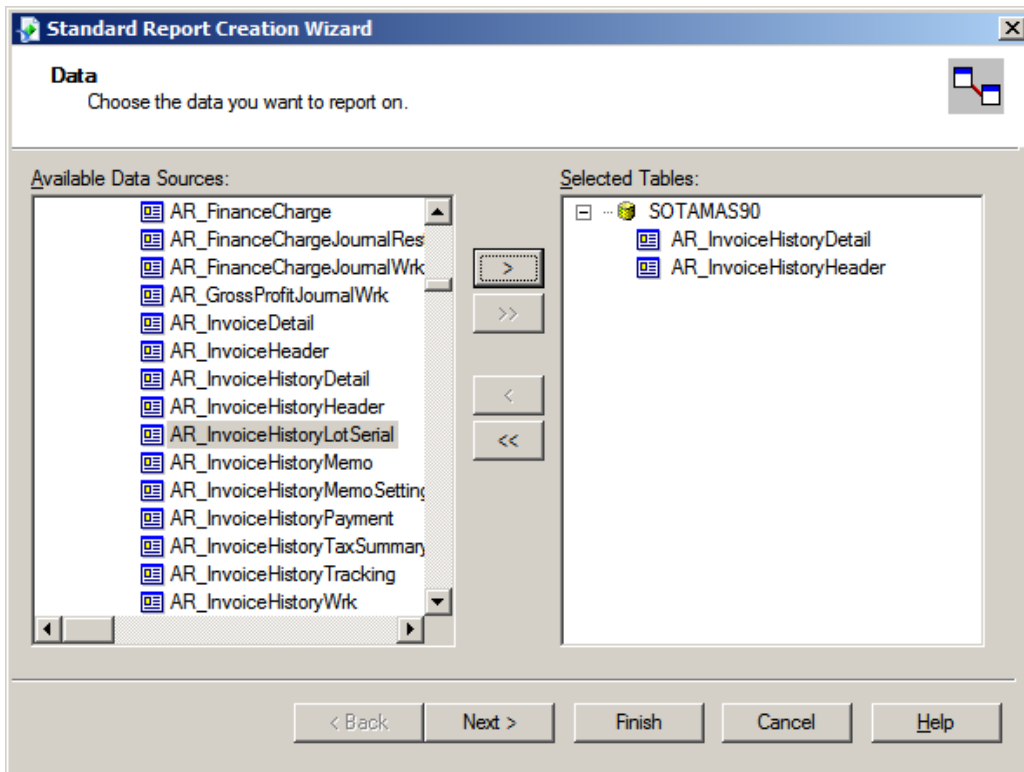
Double click on the SOTAMAS90 Data Source



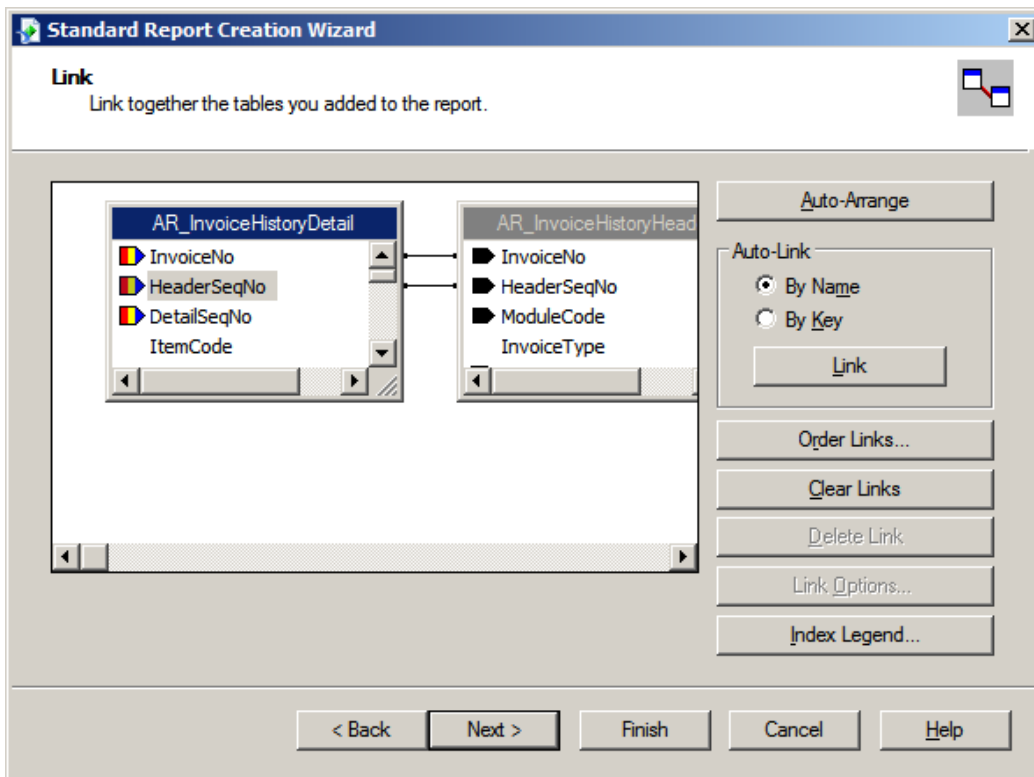
Select the Company Code and enter your User Logon information



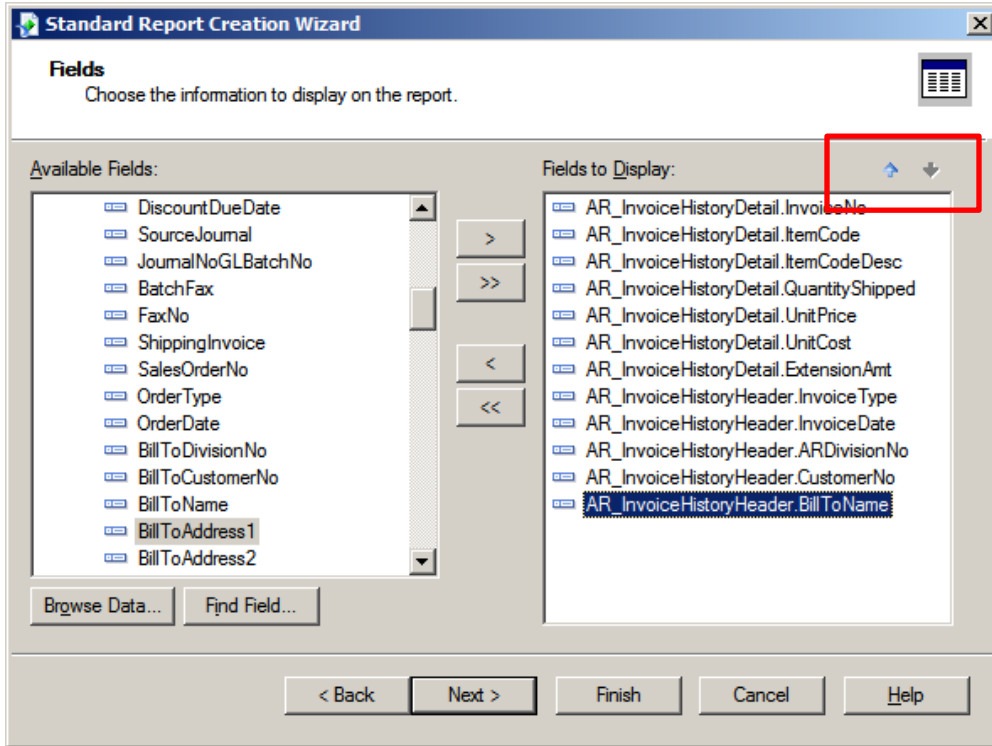
Scroll down until you find the table(s) that you want to include in your report. Highlight the table and click the > button to select the tables. Once the tables are selected, click the Next button.



Click the Next button on the Link window

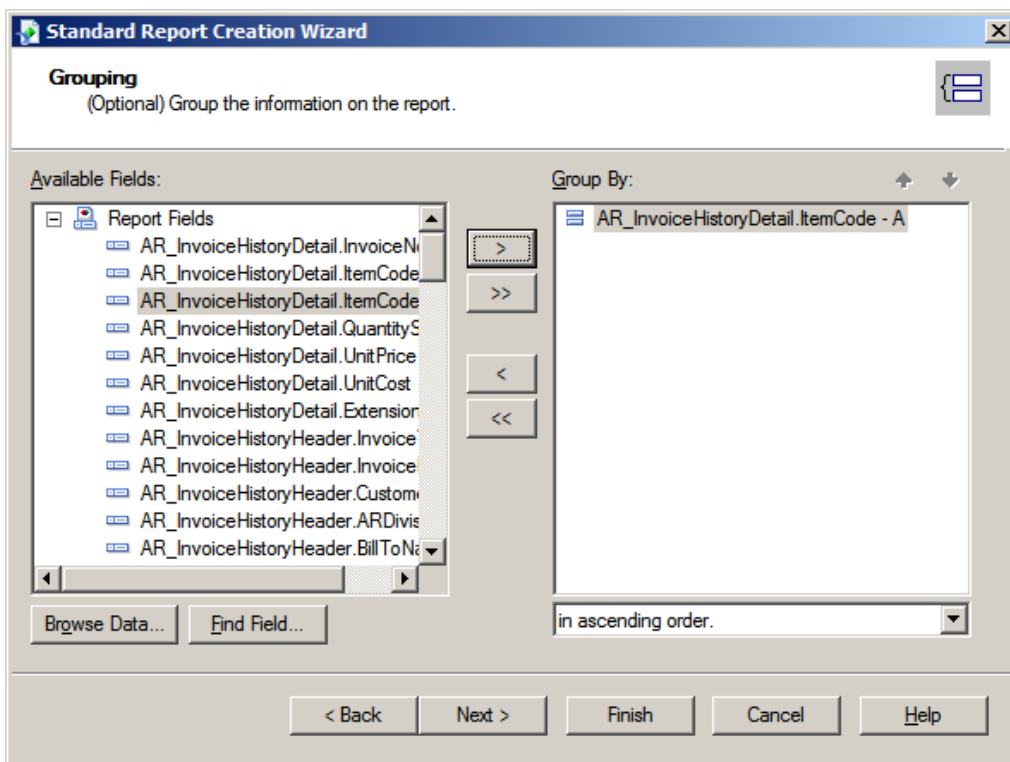


Select the fields from each table that you would like to appear on your report. You can move the positioning of the fields by using the up and down arrows. Click the Next button.



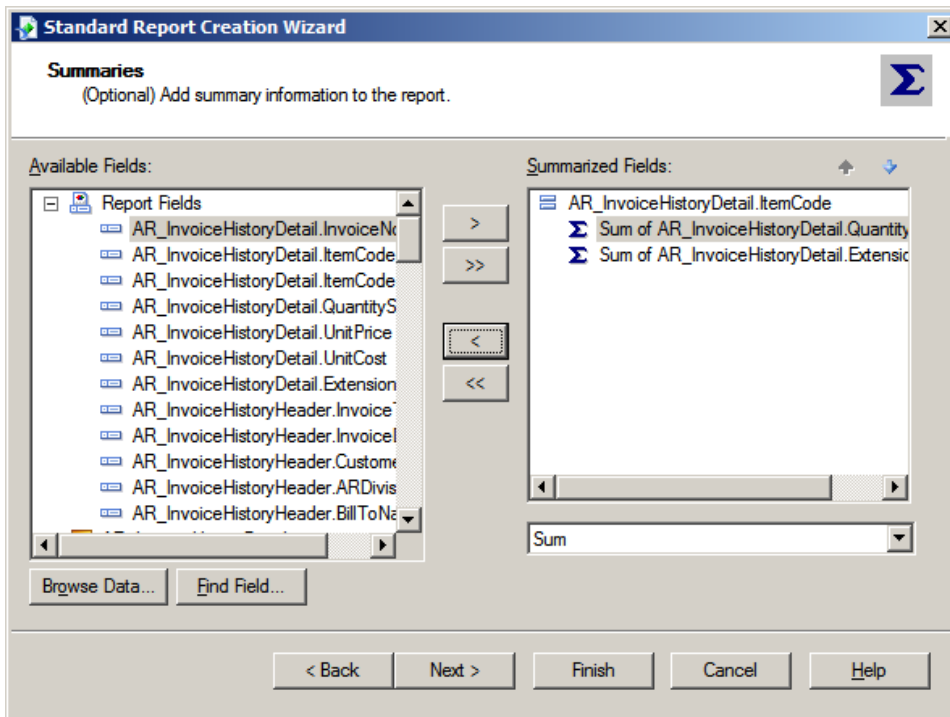
Select the field or fields that you will Group the data by. This will allow you to do a sub-total by Group. Click the Next button.

Note: Grouping is optional.

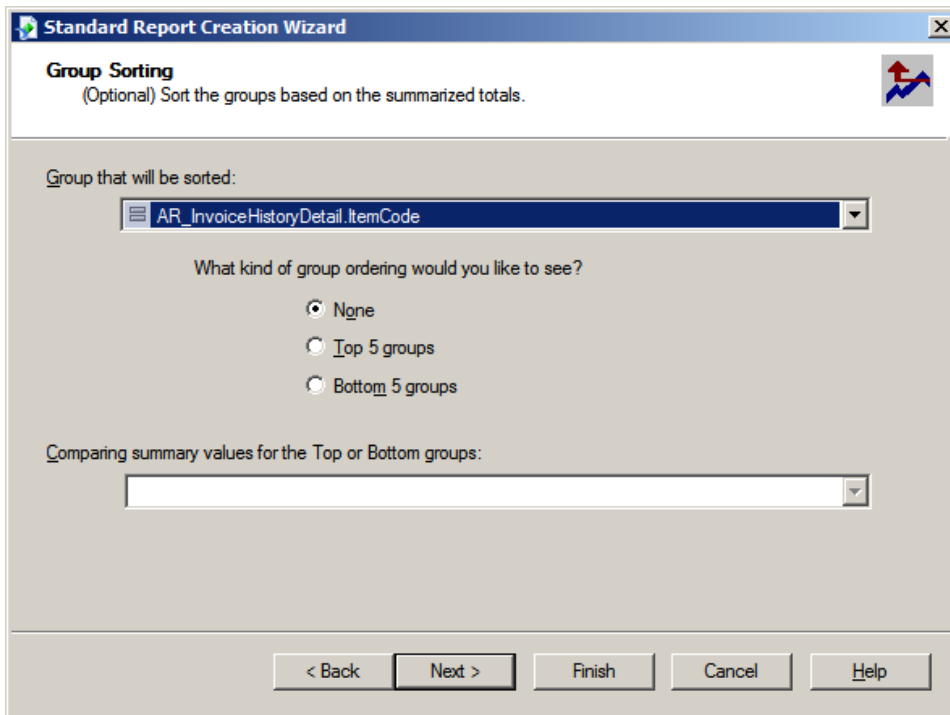


Select the fields to have a Summary Total. Click the Next button.

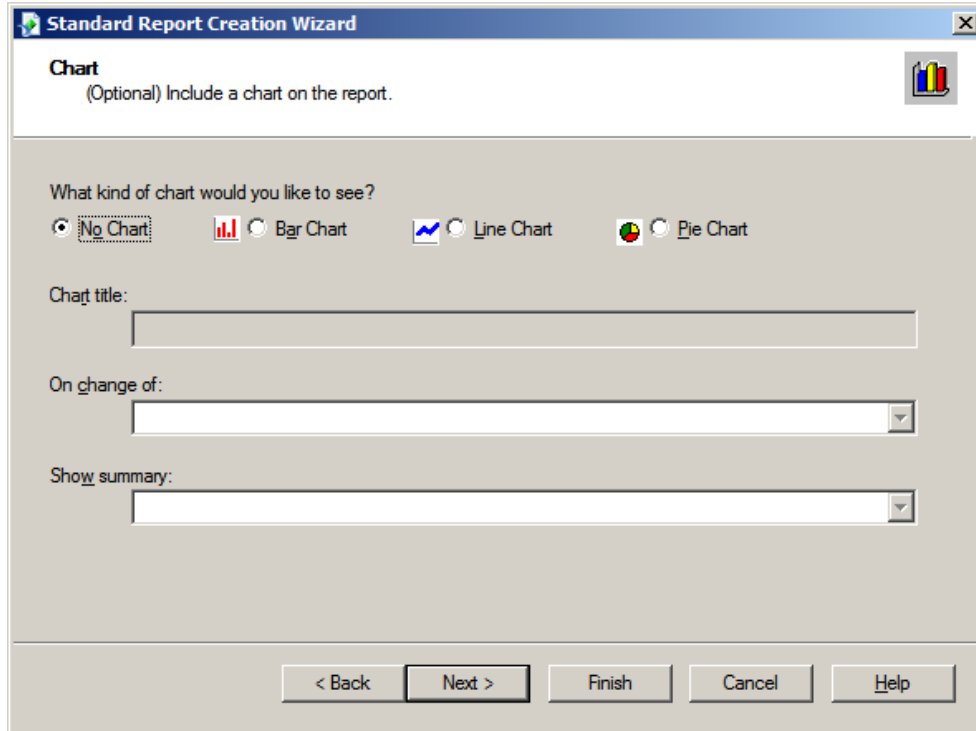
Note: Summarizing is Optional.



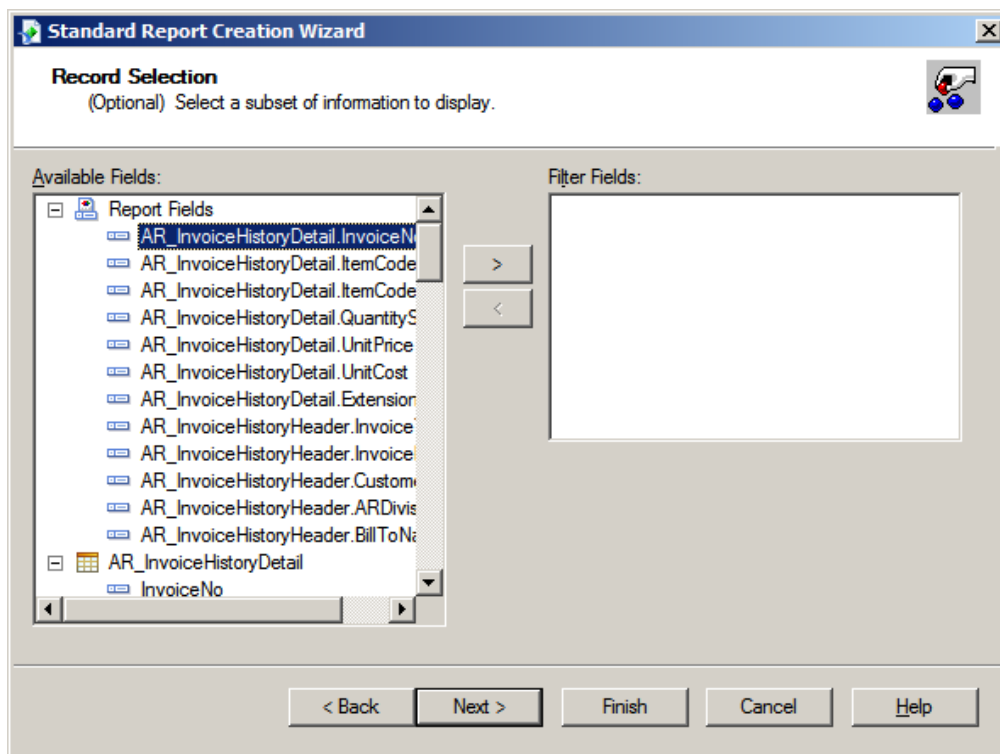
Use the Group Sorting screen to sort groups you created on the Grouping screen. You can sort all groups, or you can choose the top or bottom 5 groups. When sorting by the top or bottom 5 groups, you can also choose the summarized field you want to base the sorting on. Click the Next button on the Group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



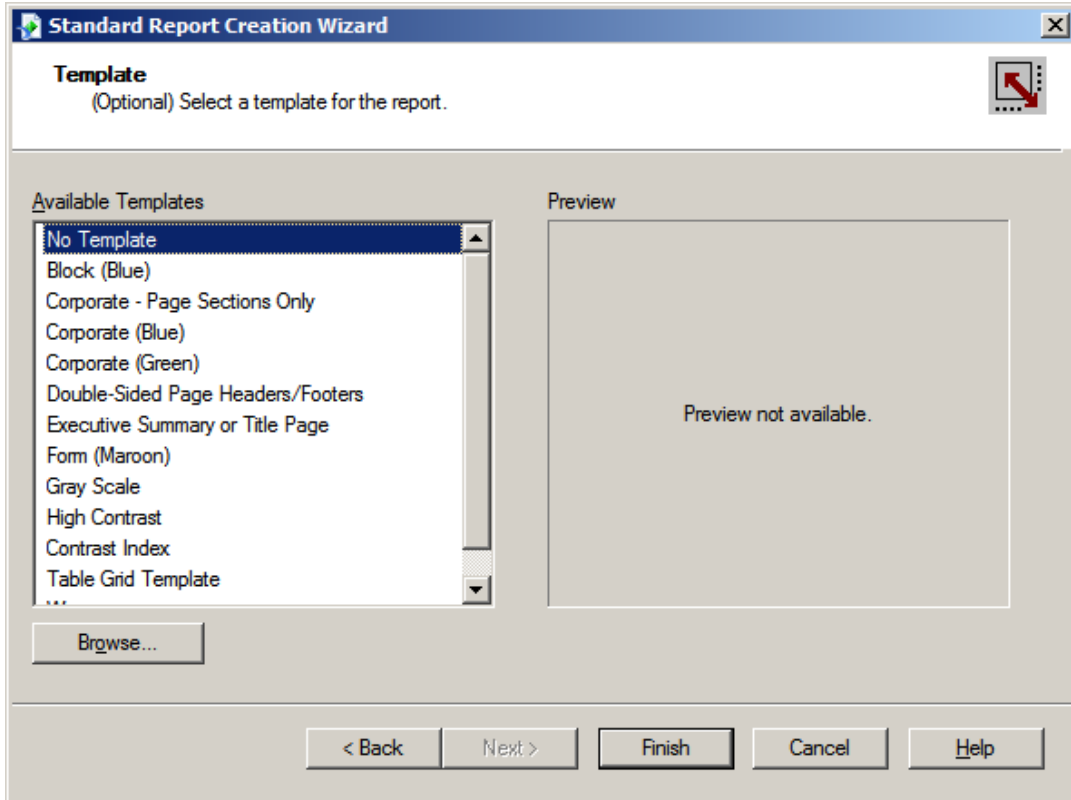
Use the Chart screen to insert a graph or chart into a report. Click the Next button on the Chart screen.



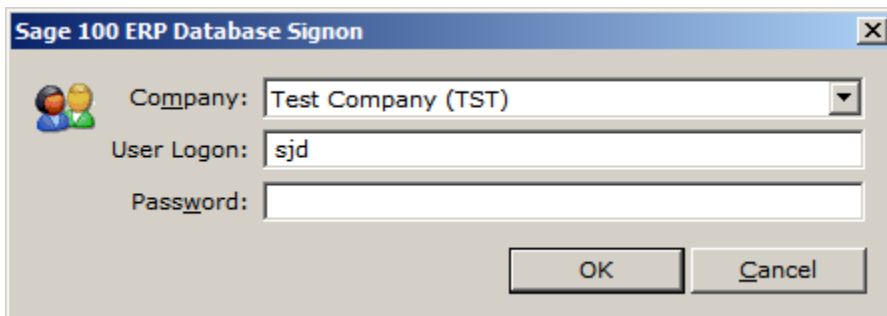
Use the Record Selection screen to choose fields to select (or filter) records in a report. By selecting records in this manner, you can narrow the scope of your report and improve processing speed. Creating a record selection is an optional step in the wizard. Click the Next button.



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.

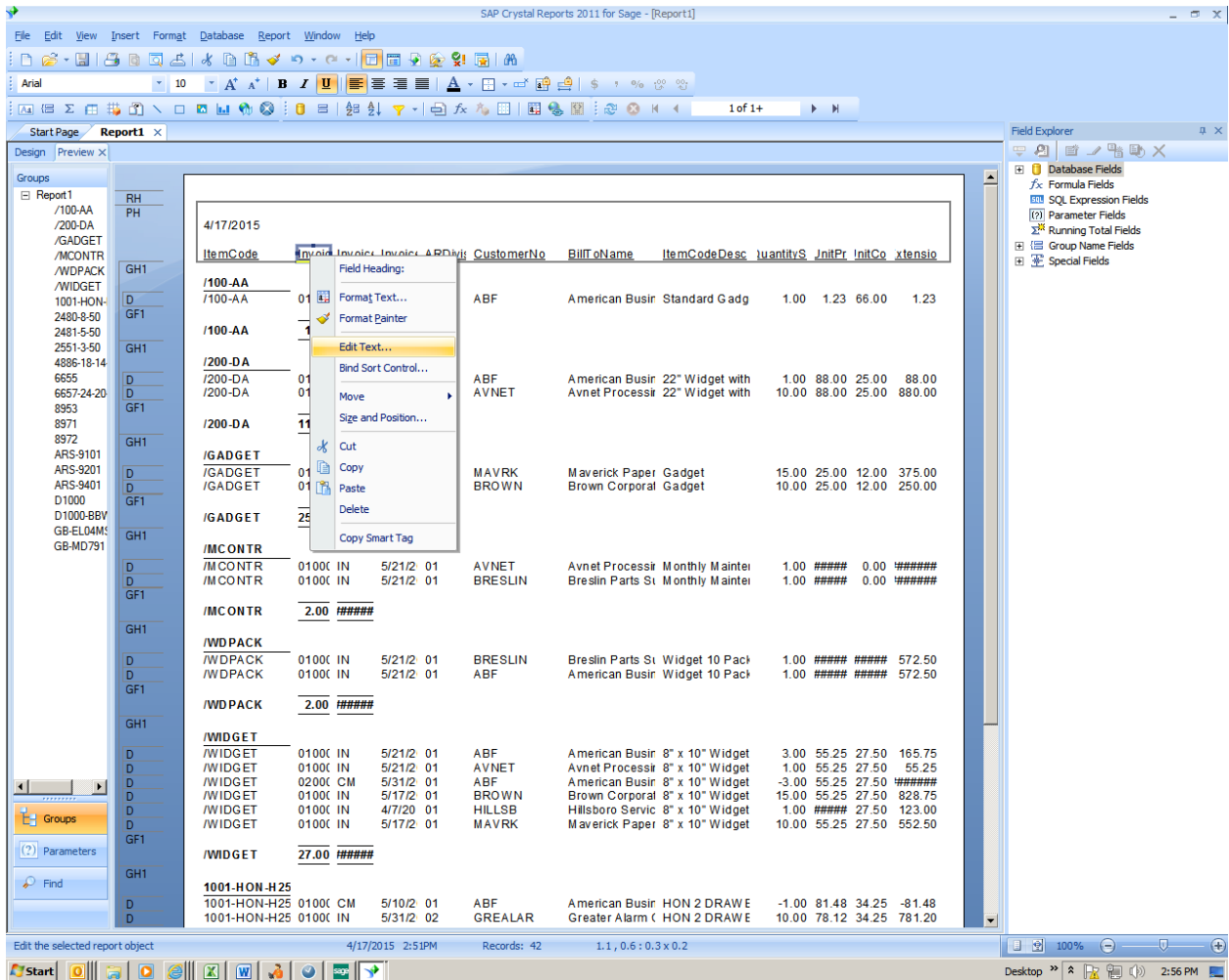


Clean-Up Time!

4/17/2015

ItemCode	Invoice	Invoice	Invoice	ARDivis	CustomerNo	BillToName	ItemCodeDesc	QuantityS	UnitPr	InitCo	xtensio
/100-AA											
/100-AA	0100C	AD	3/9/20	01	ABF	American Busir	Standard Gadg	1.00	1.23	66.00	1.23
	1.00	1.23									
/200-DA											
/200-DA	0100C	IN	5/21/2	01	ABF	American Busir	22" Widget with	1.00	88.00	25.00	88.00
/200-DA	0100C	IN	5/21/2	01	AVNET	Avnet Processr	22" Widget with	10.00	88.00	25.00	880.00
	11.00	#####									
/GADGET											
/GADGET	0100C	IN	5/10/2	01	MAVRK	Maverick Paper	Gadget	15.00	25.00	12.00	375.00
/GADGET	0100C	IN	5/17/2	01	BROWN	Brown Corporal	Gadget	10.00	25.00	12.00	250.00
	25.00	#####									
/MCONTR											
/MCONTR	0100C	IN	5/21/2	01	AVNET	Avnet Processr	Monthly Mainte	1.00	#####	0.00	#####
/MCONTR	0100C	IN	5/21/2	01	BRESLIN	Breslin Parts St	Monthly Mainte	1.00	#####	0.00	#####
	2.00	#####									
/WDPACK											
/WDPACK	0100C	IN	5/21/2	01	BRESLIN	Breslin Parts St	Widget 10 Pac	1.00	#####	#####	572.50
/WDPACK	0100C	IN	5/21/2	01	ABF	American Busir	Widget 10 Pac	1.00	#####	#####	572.50
	2.00	#####									
/WIDGET											
/WIDGET	0100C	IN	5/21/2	01	ABF	American Busir	8" x 10" Widget	3.00	55.25	27.50	165.75
/WIDGET	0100C	IN	5/21/2	01	AVNET	Avnet Processr	8" x 10" Widget	1.00	55.25	27.50	55.25
/WIDGET	0200C	CM	5/31/2	01	ABF	American Busir	8" x 10" Widget	-3.00	55.25	27.50	#####
/WIDGET	0100C	IN	5/17/2	01	BROWN	Brown Corporal	8" x 10" Widget	15.00	55.25	27.50	828.75
/WIDGET	0100C	IN	4/7/20	01	HILLSB	Hillsboro Servic	8" x 10" Widget	1.00	#####	27.50	123.00
/WIDGET	0100C	IN	5/17/2	01	MAVRK	Maverick Paper	8" x 10" Widget	10.00	55.25	27.50	552.50
	27.00	#####									
1001-HON-H25											
1001-HON-H25	0100C	CM	5/10/2	01	ABF	American Busir	HON 2 DRAWE	-1.00	81.48	34.25	-81.48
1001-HON-H25	0100C	IN	5/31/2	02	GREALAR	Greater Alarm (HON 2 DRAWE	10.00	78.12	34.25	781.20

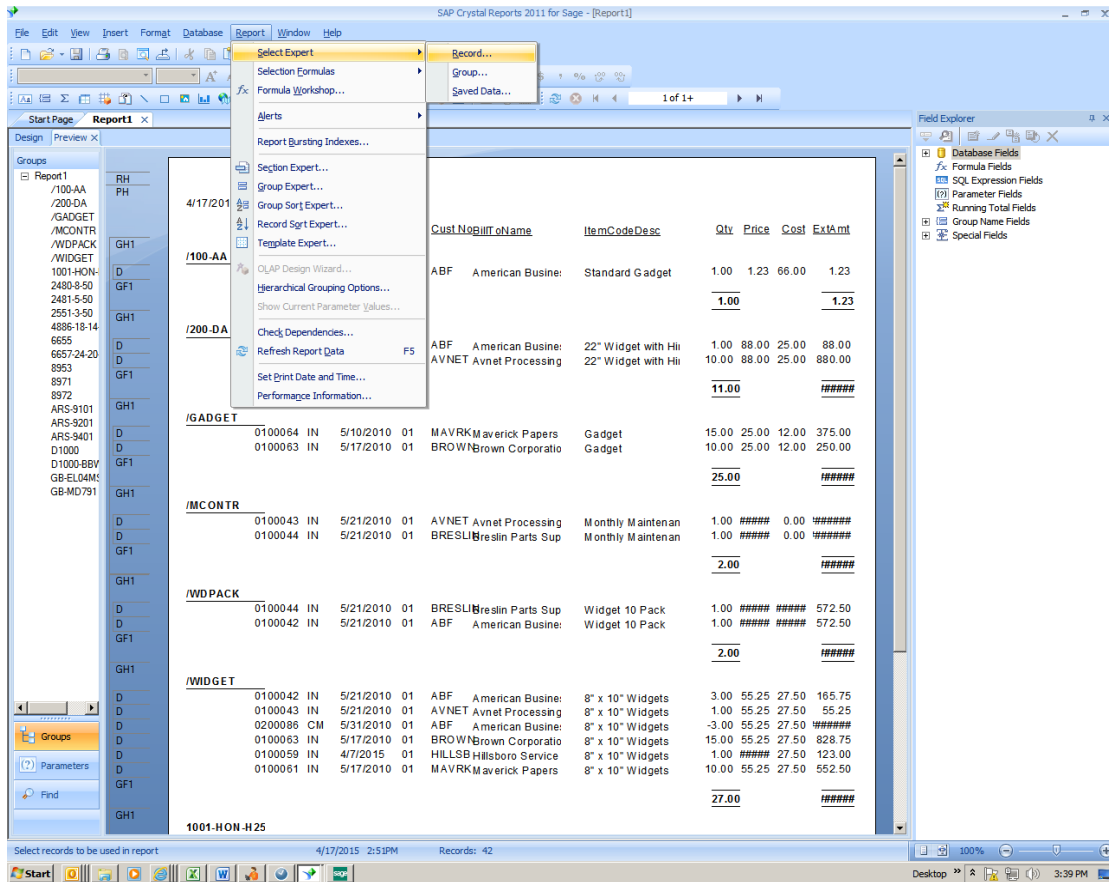
Fix Column Headers. Right click on the field, select Edit Text, change column names to better fit on report. Click on fields that are too small, use the mouse to stretch the field to a better size. Move fields if additional space is needed.



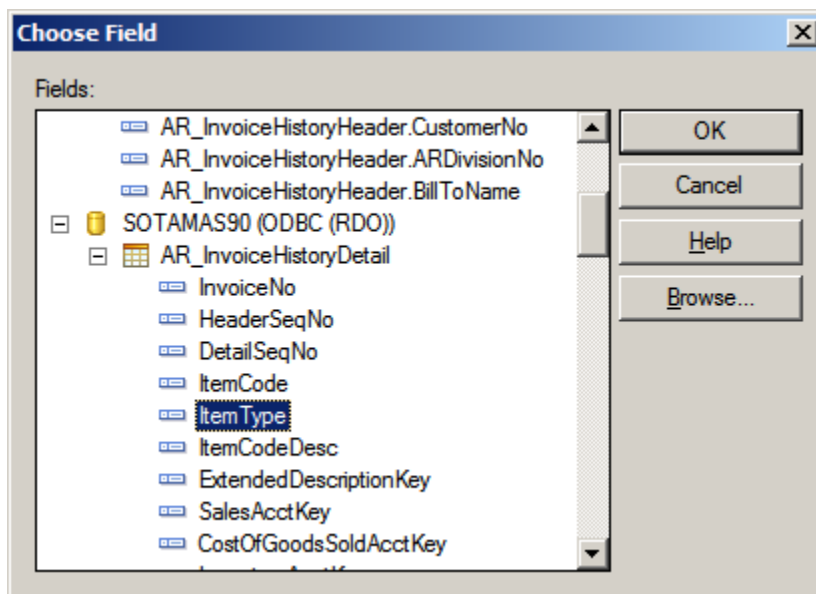
- To move Header and Detail fields, click on Header field, hold down Shift key, then click Detail field. Both fields should be highlighted in blue, move your mouse to the highlighted field in the Details area. Your pointer will have four arrows, you can now move both fields at the same time.
- Remove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

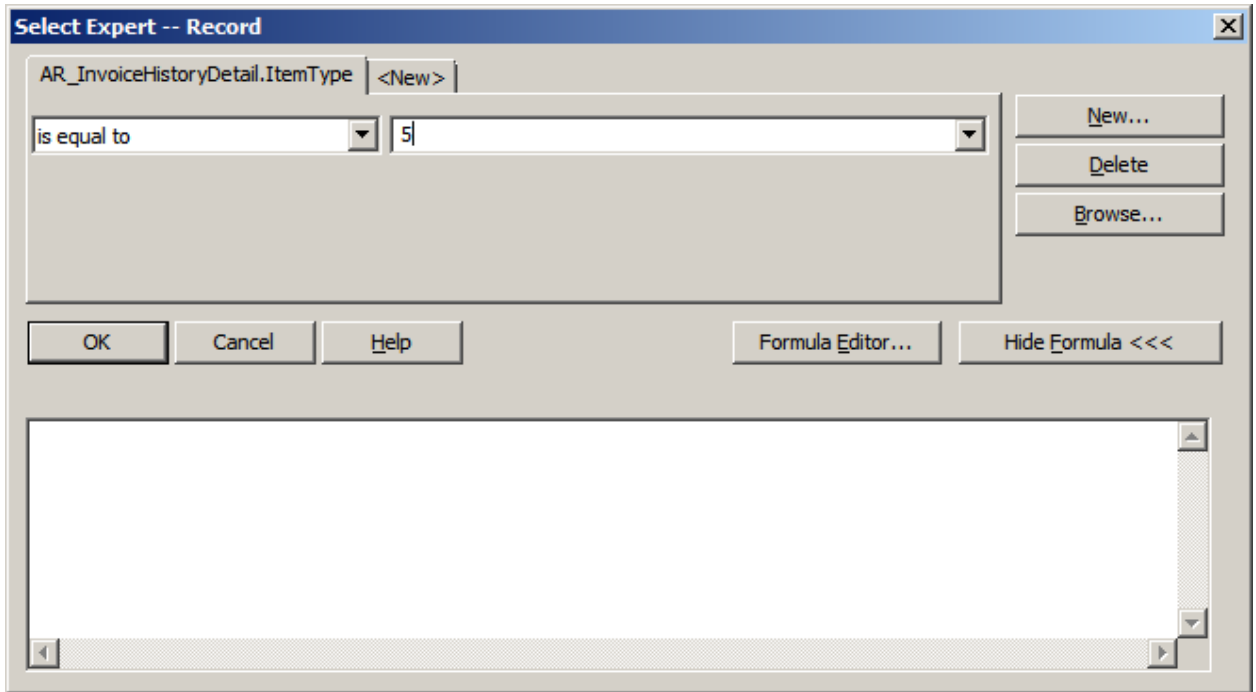


Choose the field that you want to filter.

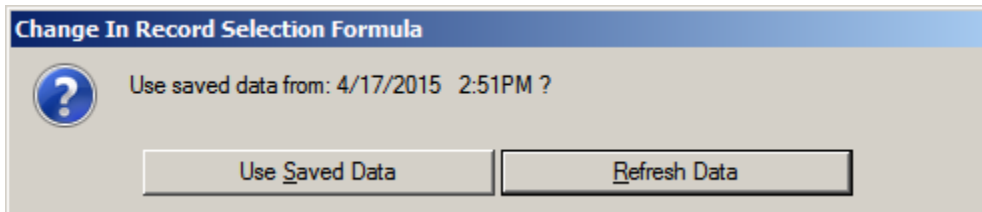


Item Type = 5 will select Miscellaneous Items only. Click OK.

Note: See AR_InvoiceHistoryDetail layout for Item Type choices.



Select Refresh Data.



4/17/2015										
	Inv No	Type	InvDate	Cust No	BillToName	ItemCodeDesc	Qty	Price	Cost	ExtAmt
/200-DA										
D	0100042	IN	5/21/2010	01	ABF	American Busine: 22" Widget with Hii	1.00	88.00	25.00	88.00
D	0100043	IN	5/21/2010	01	AVNET	Avnet Processing 22" Widget with Hii	10.00	88.00	25.00	880.00
GF1								<u>11.00</u>		<u>968.00</u>
/MCONTR										
D	0100043	IN	5/21/2010	01	AVNET	Avnet Processing Monthly Maintenanc	1.00	1,000.00	0.00	1,000.00
D	0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup Monthly Maintenanc	1.00	1,000.00	0.00	1,000.00
GF1								<u>2.00</u>		<u>2,000.00</u>
/WDPACK										
D	0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup Widget 10 Pack	1.00	572.50	280.00	572.50
D	0100042	IN	5/21/2010	01	ABF	American Busine: Widget 10 Pack	1.00	572.50	280.00	572.50
GF1								<u>2.00</u>		<u>1,145.00</u>
/WIDGET										
D	0200086	CM	5/31/2010	01	ABF	American Busine: 8" x 10" Widgets	-3.00	55.25	27.50	-165.75
D	0100042	IN	5/21/2010	01	ABF	American Busine: 8" x 10" Widgets	3.00	55.25	27.50	165.75
D	0100043	IN	5/21/2010	01	AVNET	Avnet Processing 8" x 10" Widgets	1.00	55.25	27.50	55.25
GF1								<u>1.00</u>		<u>55.25</u>
RF	Grand Total:							<u>16.00</u>		<u>4,168.25</u>

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.

Item ID	Description	Quantity	Amount
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
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
Grand Total:			16.00

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.

Create a new parameter and list of values.

Name: Invoice Date Type: Date List of Values: Static

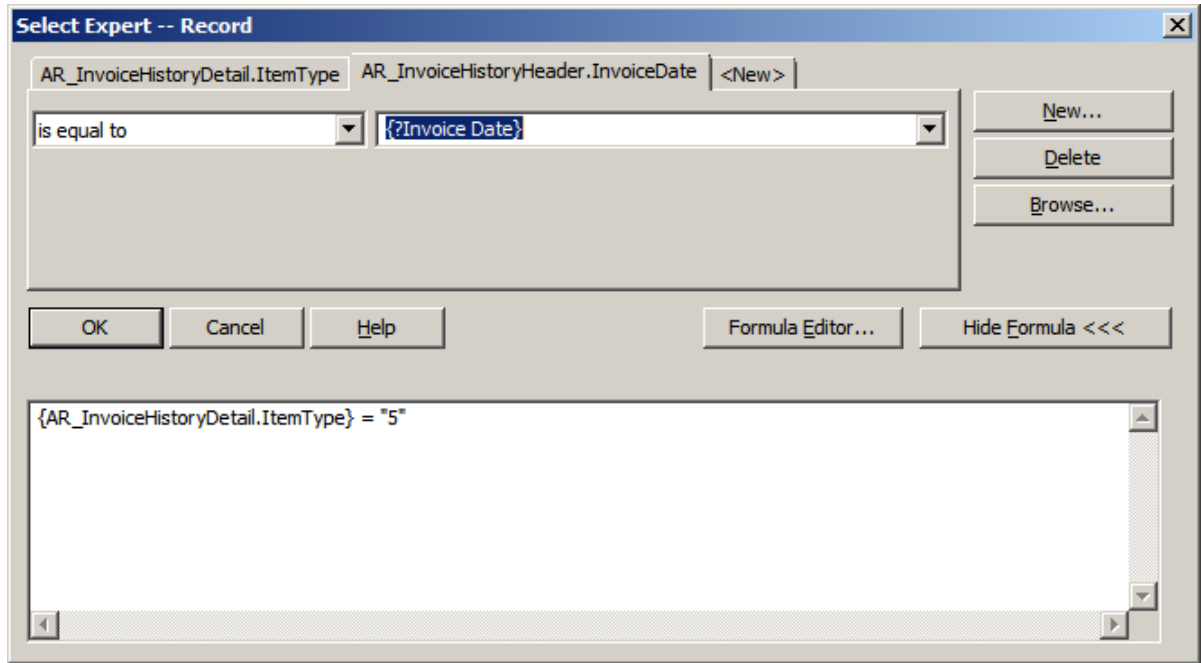
Value Field: (None) Description Field: (None)

Value Options:

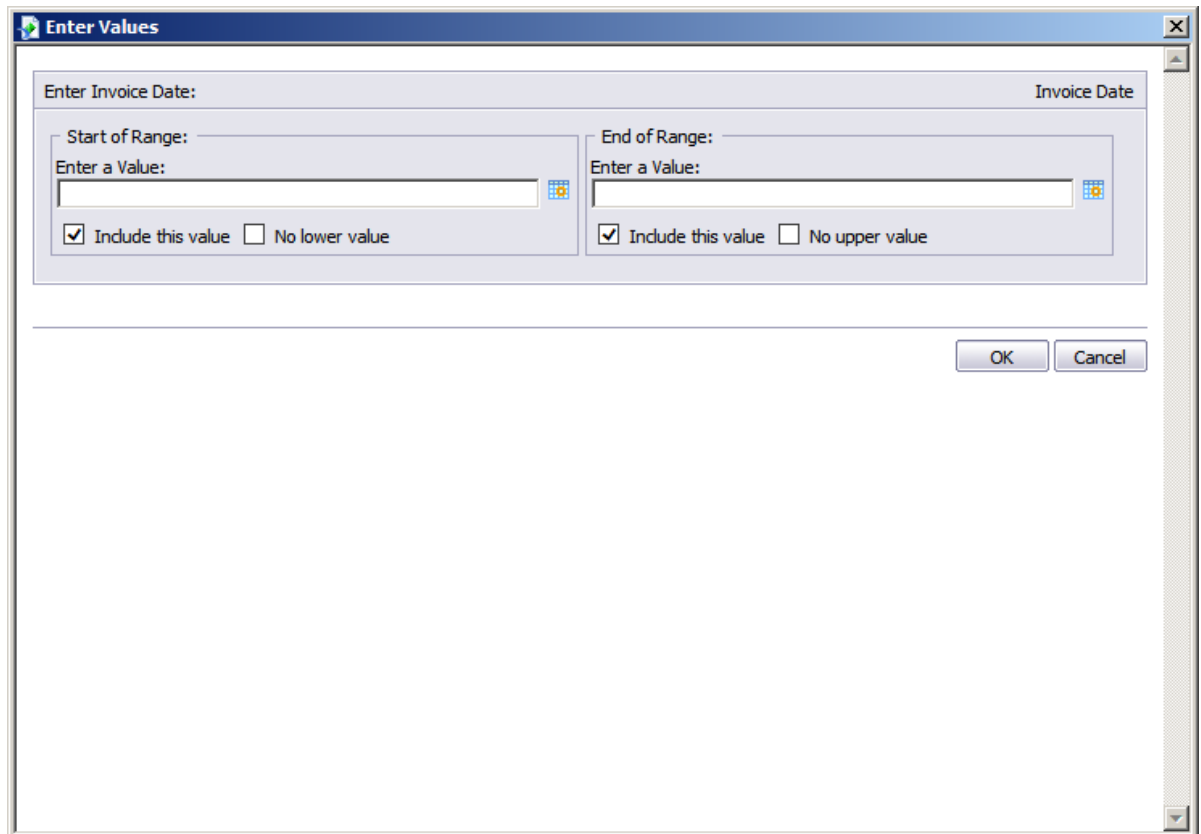
Option	Setting
Allow custom values	True
Allow multiple values	False
Allow discrete values	False
Allow range values	True
Start	

OK Cancel Help

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.

Enter Values

Enter Invoice Date: Invoice Date

Start of Range: End of Range:

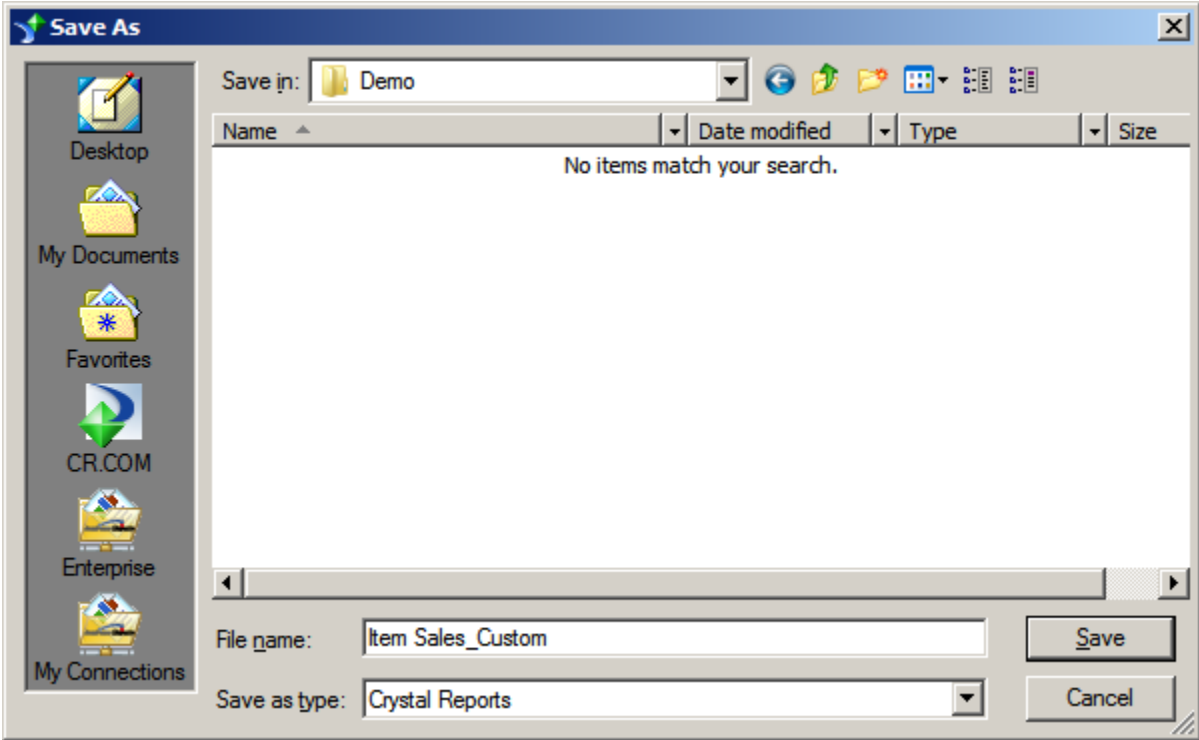
Enter a Value: Enter a Value:

Include this value No lower value Include this value No upper value

Inv No	Type	InvDate	Cust No	BillToName	ItemCodeDesc	Qty	Price	Cost	ExtAmt
4/17/2015									
/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 Mainten	1.00	1,000.00	0.00,000.00
0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Monthly Mainten	1.00	1,000.00	0.00,000.00
							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

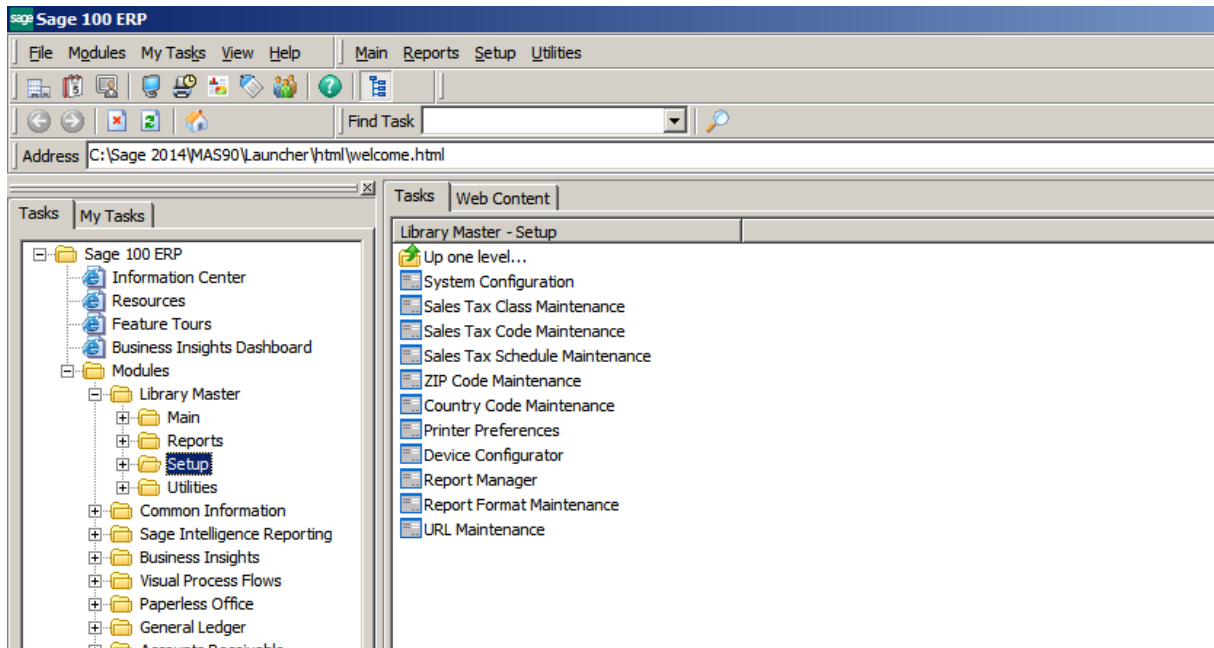
Click File -> Save As. Save your report.

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

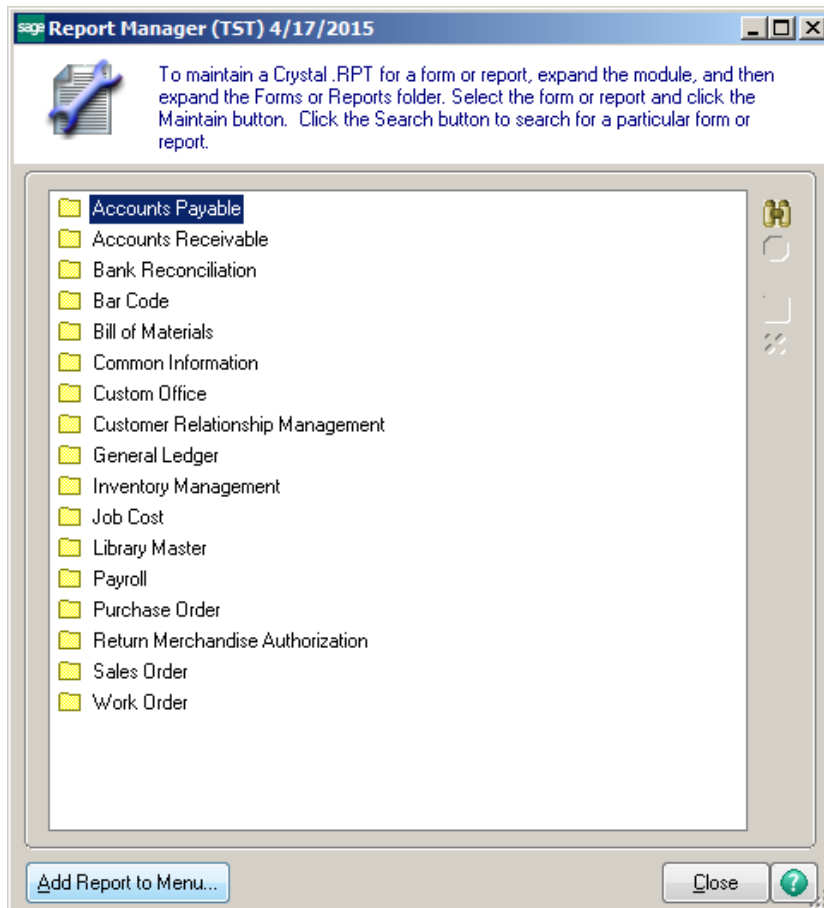


How to Add Report to Sage Menu:

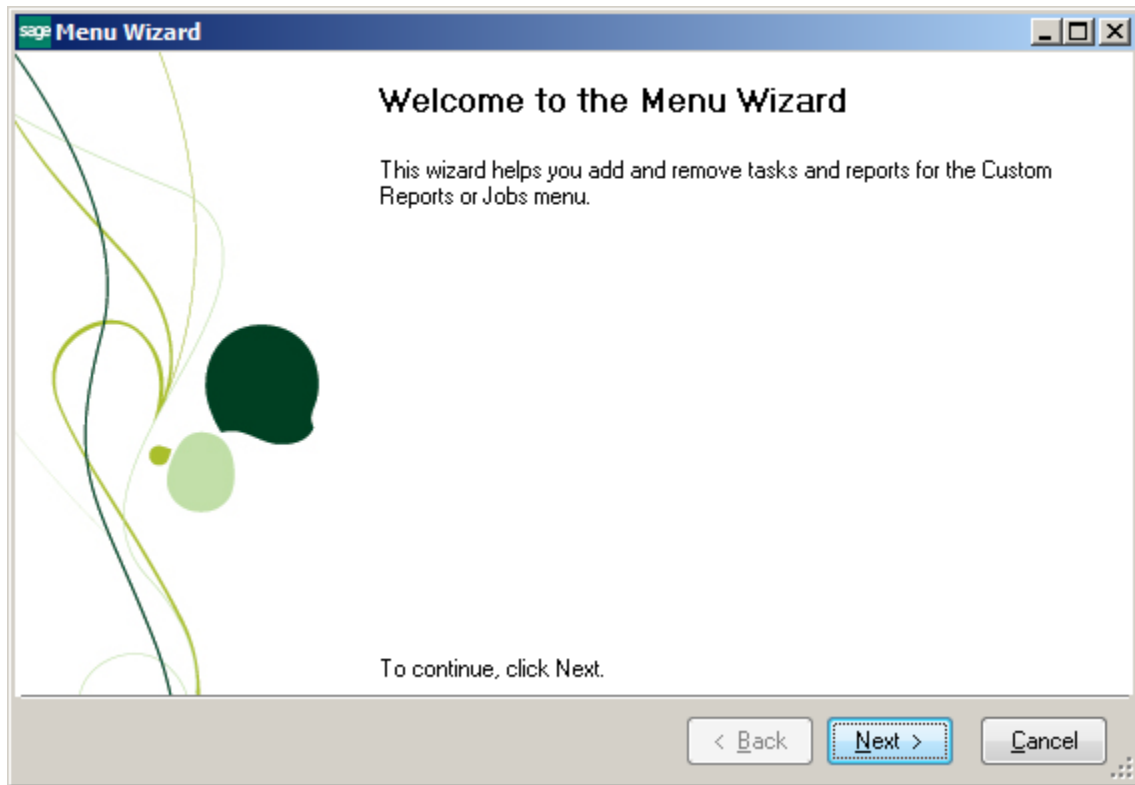
Click Library Master -> Setup -> Report Manager



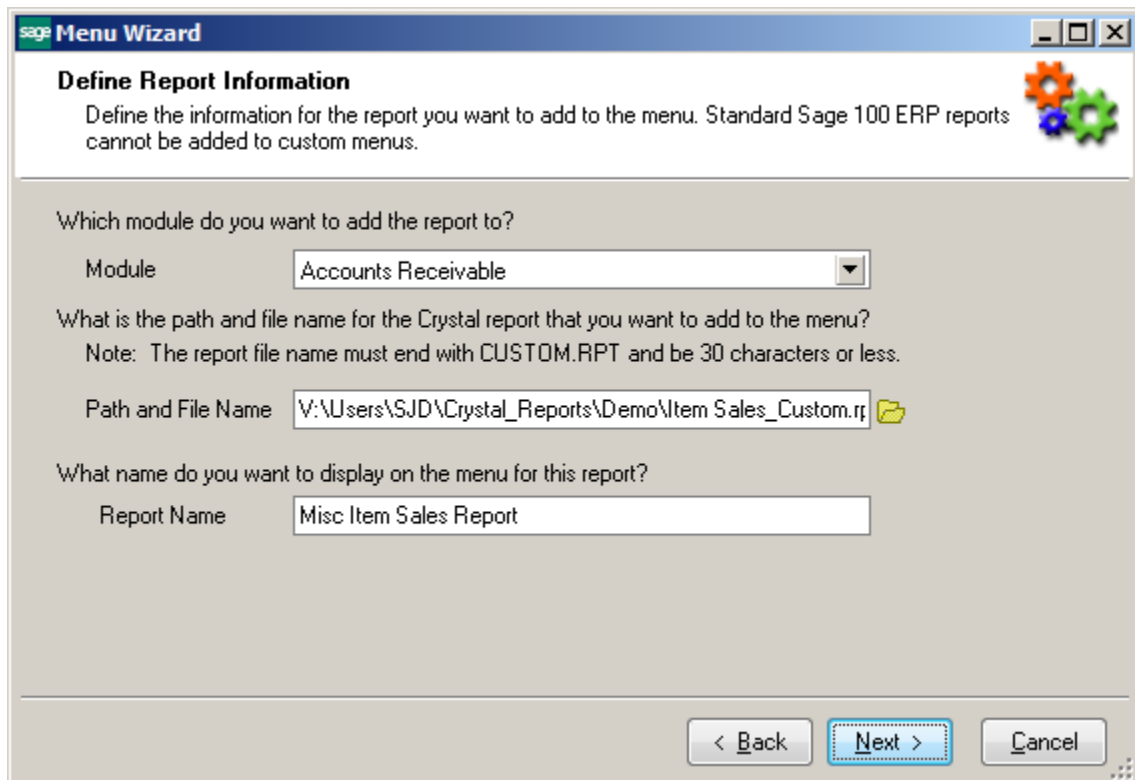
Click Add Report to Menu.



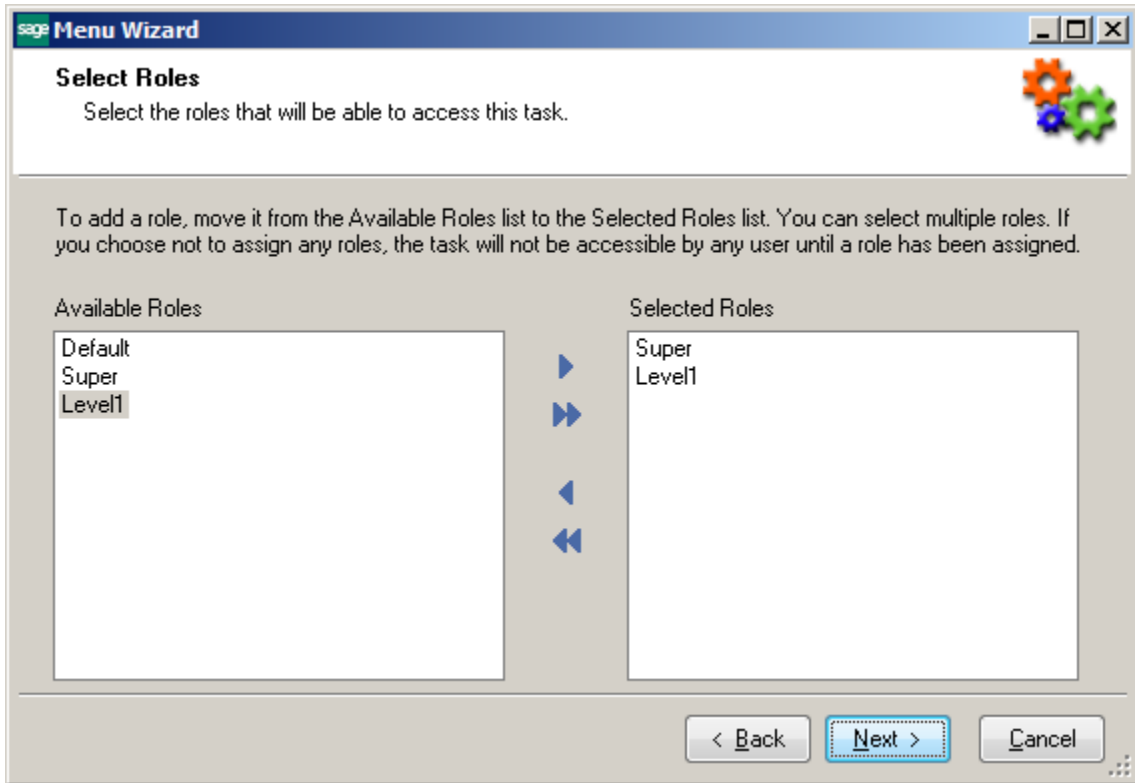
Click the Next button



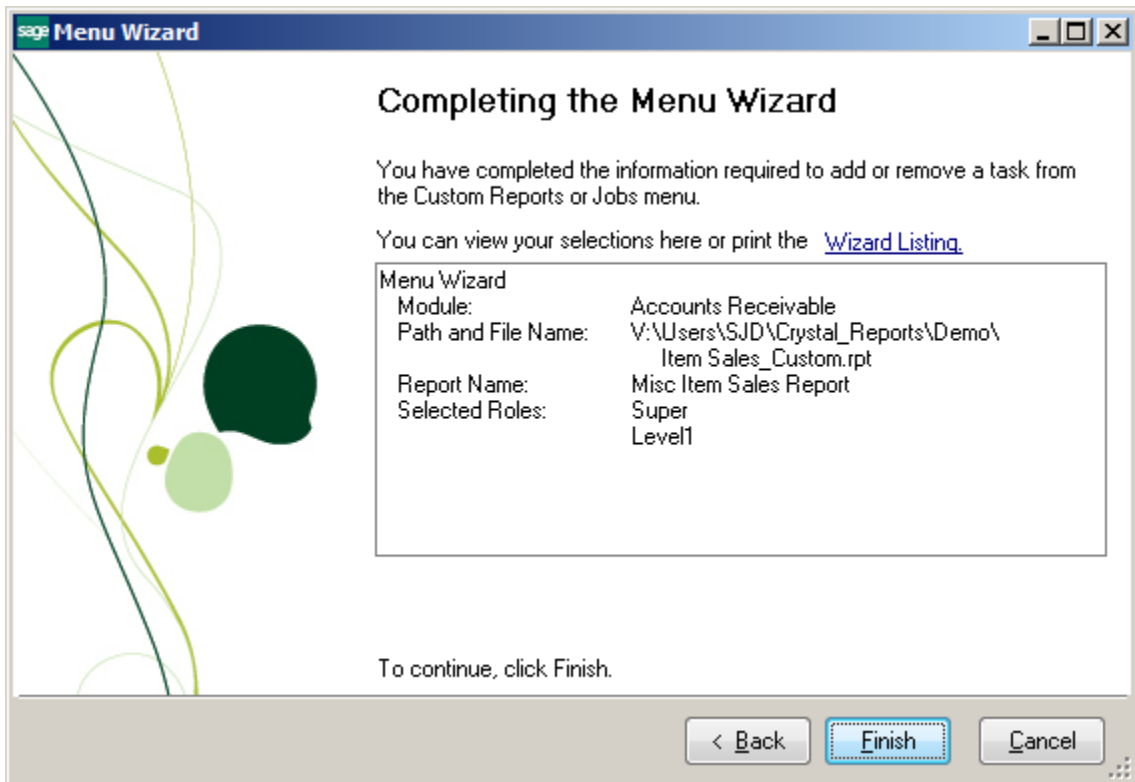
Select the module that you want to add the report to. Enter the path to the report and enter the report name. Click the Next button.



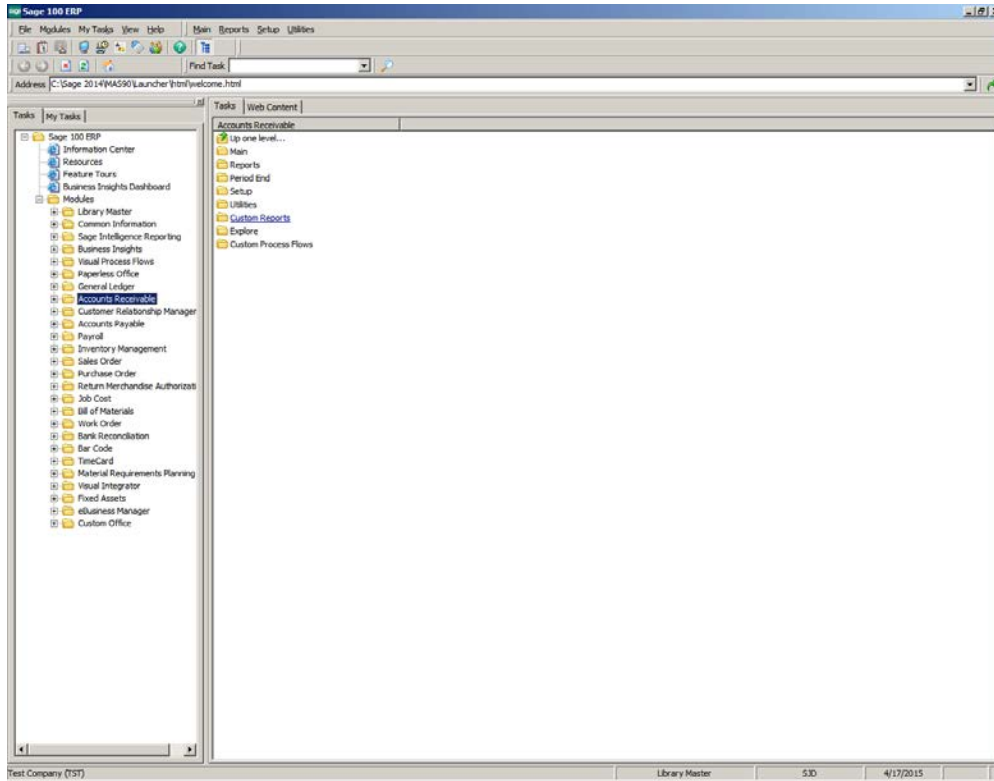
Select the Roles that will have the rights to run the report. Click the Next button.



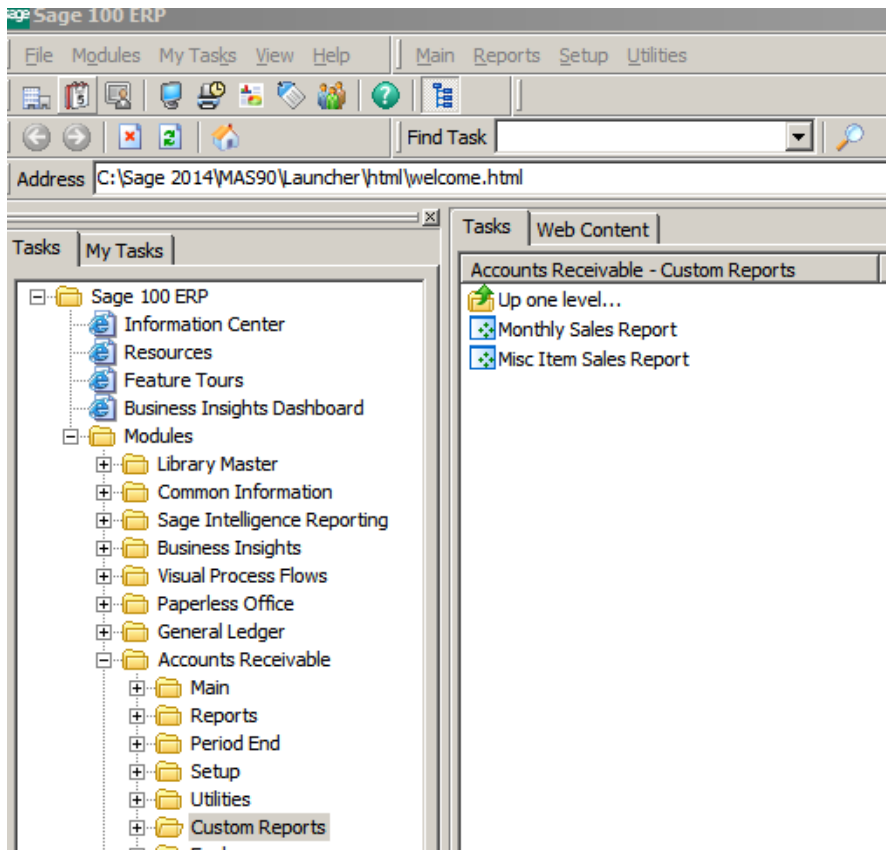
Click the Finish button and Close the Report Manager window.



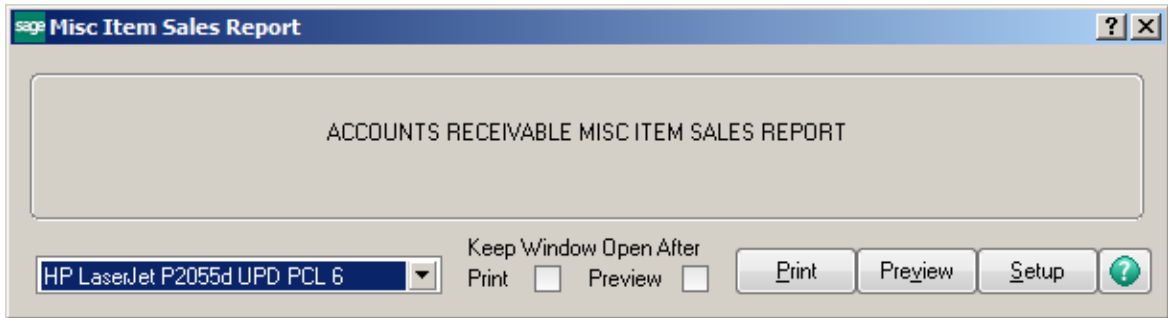
Select Custom Reports from the module you added the report for.



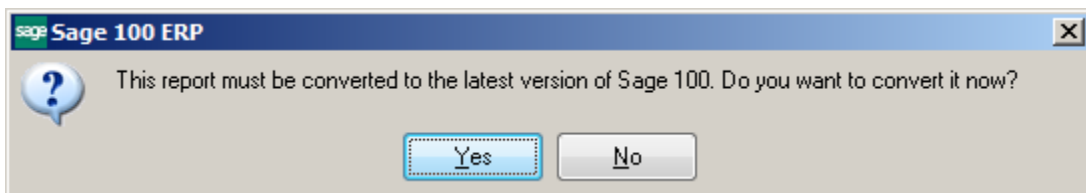
Select the new report.



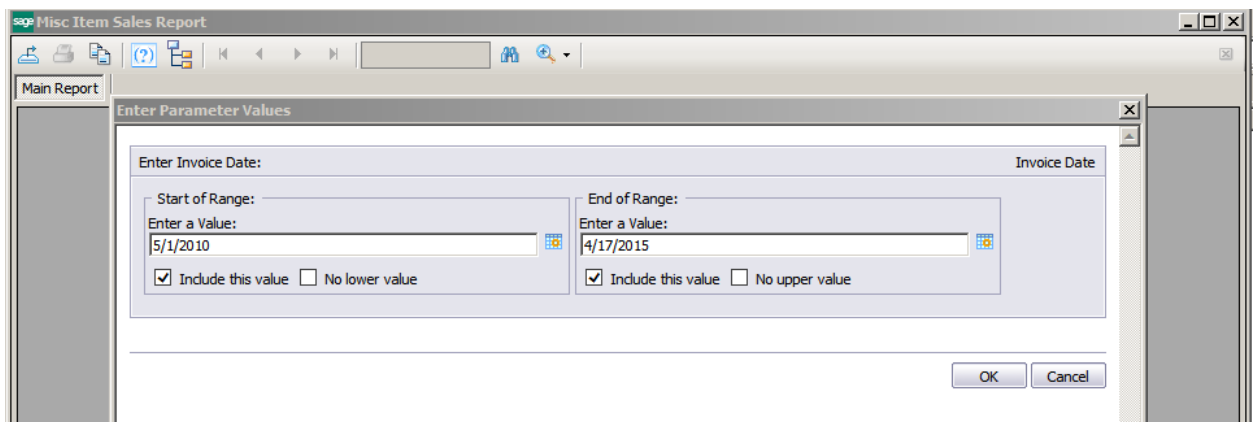
Click the Print button



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.



Misc Item Sales Report											
Main Report											
4/17/2015											
Inv No	Type	InvDate	Cust No	BillToName	ItemCodeDesc	Qty	Price	Cost	ExtAmt		
<u>/100-AA</u>											
0100058	AD	3/9/2015	01	ABF	American Busine:	Standard Gadget	1.00	1.23	66.00	1.23	
							<u>1.00</u>			<u>1.23</u>	
<u>/200-DA</u>											
0100043	IN	5/21/2010	01	AVNET	Avnet Processin:	22" Widget with Hir	10.00	88.00	25.00	880.00	
0100042	IN	5/21/2010	01	ABF	American Busine:	22" Widget with Hir	1.00	88.00	25.00	88.00	
							<u>###</u>			<u>968.00</u>	
<u>/GADGET</u>											
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	
							<u>###</u>			<u>625.00</u>	
<u>/MCONTR</u>											
0100044	IN	5/21/2010	01	BRESLIN	Breslin Parts Sup	Monthly Maintenanc	1.00	1,000.00	0.00	1,000.00	
0100043	IN	5/21/2010	01	AVNET	Avnet Processin:	Monthly Maintenanc	1.00	1,000.00	0.00	1,000.00	
							<u>2.00</u>			<u>2,000.00</u>	
<u>/WDPACK</u>											
0100042	IN	5/21/2010	01	ABF	American Busine:	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	
							<u>2.00</u>			<u>1,145.00</u>	
<u>/WIDGET</u>											

Current Page No.: 1

Total Page No.: 1

Zoom Factor: 100%