How to Spice Up Your Forms Using Crystal

WHAT CAN I DO?

- Add a logo

- Add background colors and/or change the font colors

  > Qty Ordered

- Change the Font style and size

- Remove unwanted information
  - Remove the '**Salesperson:**' label and 'SalespersonNo' field if you do not have salespeople
  - Remove the '**Whse:**' label and 'LineWarehouseCode' field if you only have one warehouse

- Add information
  - Add a static message in the footer

  We appreciate your business!

  - Add a 'Remit To' box in the header if the address for sending payments is different than your company address, i.e., a Post Office Box

  > **Remit To:**
  >
  > P.O. Box 45678
  > St. Louis, MO 63141-1245

BEFORE YOUR BEGIN

You **must** have Crystal Reports installed on your workstation in order to modify forms and reports. If you have the Designer button Designer... in the upper right hand corner of the report selection dialog, then you have Crystal Reports installed. If you don't see the button, you won't be able to create custom forms or reports. The Sales Order Invoice is the form used in this example.

HOW DO I DO IT?

- **IMPORTANT:** Enter a **Custom Form Code.** When a new version or Product Update is installed, the Standard Form is overwritten and you will lose the customizations. Click the Tab key.

- Select a Form Template and Click the OK button.
  - Preprinted Laser – prints only data with no titles or graphics
  - Plain – prints data, titles and graphical
  - Marbled – prints data, titles and graphical with a marbled background

- Click the Designer button ⌜Designer...⌟ to launch the Custom Form in Crystal Reports to begin your customization:

Add Your Company's Logo:

Why O Why
11789 Happy Trails Court
My Town, MO 63141
P: (314) 999-0786 F: (314) 999-1786
www.connerash.com

- o Click the 'Insert Picture' icon OR select to Insert -> Picture from the Menu.
- o Navigate to your image file – .bmp, .jpg, .png or .tif.
- o Highlight the file and Click the Open button.
- o Move the outline into place and Click the LEFT mouse button to insert the image onto the form.
- o If the image is too large, you can select it, hover over a corner until you get the single arrow and then slide the corner diagonally up and to the left to make the image smaller.
- o **NOTE:** Be careful to look for fields that might be hidden by the image.

Modify the '@InvoiceTitle

Invoice

- o Select the @InvoiceTitle field on the form.
- o Use the single arrow to reduce the size of the field.
- o Use the double arrow to move the field to a different location on the form.

- o Right-click the field and select 'Format Field' to open the Format Editor.
- o Click the Border Tab and change the 'Line style:' for 'Left:', 'Right:', 'Top:' and 'Bottom:' to Single using the drop-down arrows.
- o Click the 'Drop Shadow' checkbox to add a Drop Shadow.
- o Select a 'Color:' for the 'Border:' and 'Background' using the drop-down arrows. Remember to Click the 'Background:' checkbox to select a Background color.
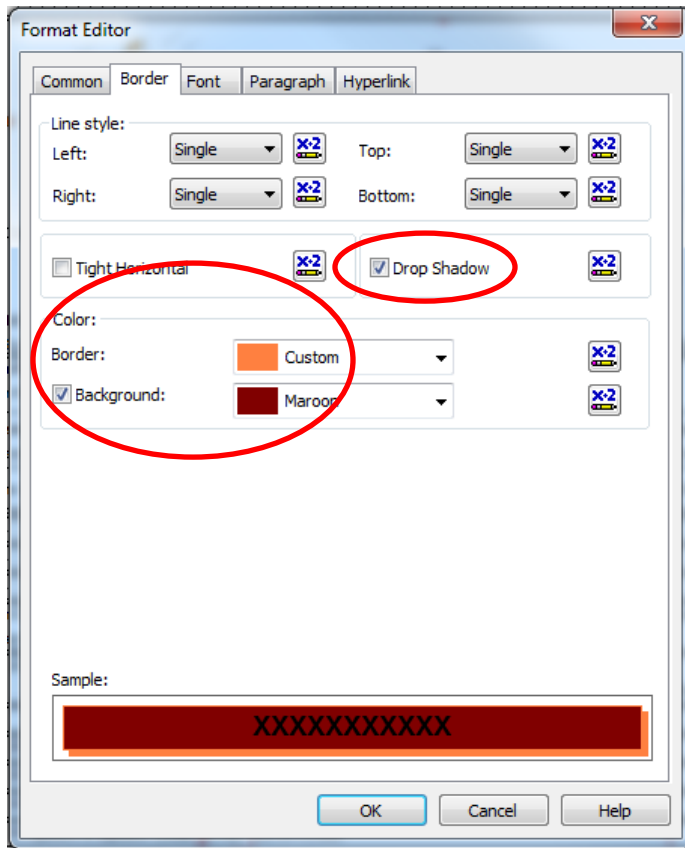
o Click the Font Tab to change the Font, Style, Size and Color.
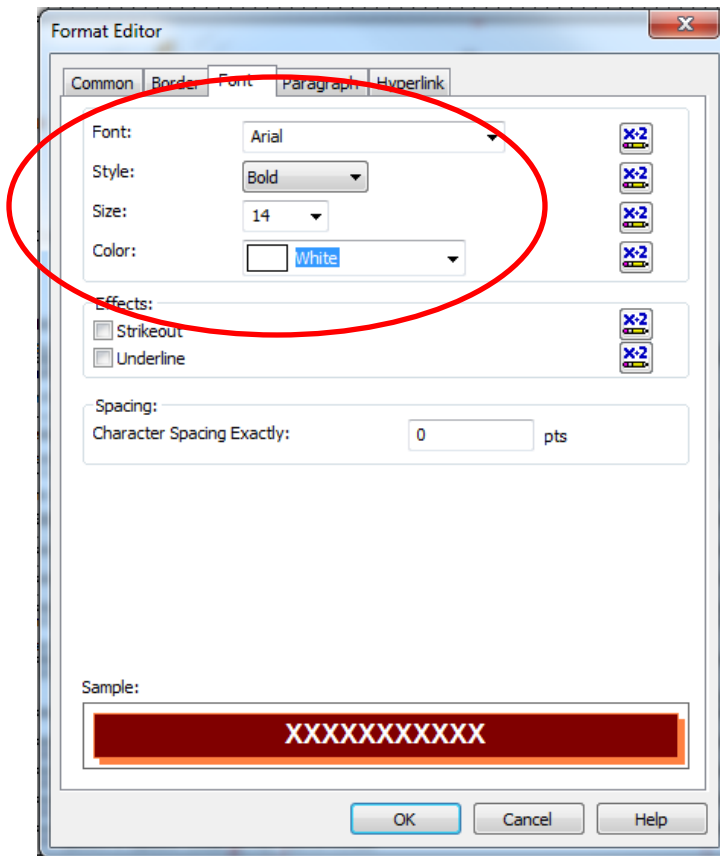
o When finished, Click the OK button to exit the Format Editor.

Remove Information From the Form
o Click the Label and/or Database Field and press the Delete key on the keyboard. For example,

If the Salesperson is not necessary, Click the 'Salesperson:' label and then hold the CTRL button and Click the 'SalespersonNo' field to select both fields. Press the Delete key to remove the fields from the template.

Click the 'Customer Number:' label and then press the CTRL button and Click the '@CustomerNumber' field. Move the fields up to take the space of the Salesperson information that was deleted.

Modify the Company Address Block

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www.connerash.com

- o The '@CompanyAddressBlock' is a Formula Field. The default formula combines the Company Name, Company Address lines and Company Phone from the Company Maintenance record.
- o The formula checks for the presence of information and accommodates blank fields.
- o If you have a Fax Number and/or URL in Company Maintenance, you can modify the formula to include those fields.
- o Click the + sign to expand the Formula Fields in the Field Explorer.
- o Locate the 'CompanyAddressBlock' formula and double click to open the formula in the Formula Editor.
- o Add the variables to the first section in the Formula Editor
- o Add the 'if' statements to the middle section in the Formula Editor
- o Add the variables to the 'formula' section in the Formula Editor

```
Dim CompanyName as string
Dim Address1 as string
Dim Address2 as string
Dim Address3 as string
Dim Address4 as string
Dim Phone as string
Dim Fax as string          New variables go here
Dim URL as string

if {@CompanyName} <> "" then CompanyName = {@CompanyName}+ chr(13)+ chr(10)
if {@CompanyAddress1} <> "" then Address1 = {@CompanyAddress1}+ chr(13)+ chr(10)
if {@CompanyAddress2} <> "" then Address2 = {@CompanyAddress2}+ chr(13)+ chr(10)
if {@CompanyAddress3} <> "" then Address3 = {@CompanyAddress3}+ chr(13)+ chr(10)
if {@CompanyAddress4} <> "" then Address4 = {@CompanyAddress4}+ chr(13)+ chr(10)
if {@CompanyPhone} <> "" then Phone = "P: " + {@CompanyPhone}
if {@CompanyFax} <> "" then Fax = "  F: " + {@CompanyFax}+ chr(13)+ chr(10)
if {@CompanyURL} <> "" then URL = {@CompanyURL}

formula = CompanyName + Address1 + Address2 + Address3 + Address4 + Phone + Fax + URL
```

New 'if' statements go here

Make sure to add the variables to the formula or they won't print!

Add Background Colors and Change Font Size and Color

Sold To:
Orange Door & Window Co.
56 Technology
Irvine, CA 92618-2301
    Confirm To: Harold English, President

- o Select one or more fields on the form. For example, the 'Sold To:' label, '@SoldToAddressBlock', 'Ship To:' label and '@ShipToAddressBlock'.
- o You can hover over one of the blue boxes on the box surrounding the 'Sold To:' label until the single arrow is visible and drag the line to make the box wider.
- o You can also change the size of the fields by hovering over the blue box on the left until the single arrow is visible and then dragging to the left to make the fields smaller.
- o To change the Background Color for the 'Sold To:' and 'Ship To:' labels, select one of the labels and the press the CTRL button and Click the other label.
  - ➢ Right-click and select 'Format Objects…'.
  - ➢ Click the Border Tab.
  - ➢ Select a Background color using the drop-down arrows. Remember to Click the 'Background:' checkbox to select a Background color.
  - ➢ Click the Font Tab to change the Font, Style, Size and Color.
  - ➢ When finished, Click the OK button to exit the Format Editor

Create Boxes

Customer P.O.	Ship Date	
55555	05/31/2010	UPS BL

Line	Item Code	Item Description

- o Boxes are created using the Box tool ☐ or the Line tool ╲ .
- o **NOTE:** A Box is not a Text Box; you cannot enter Text in the box. If you need to enter Text, add a Label to the Box.
- o Make sure there is space around the labels and fields.
- o The section that contains the 'Customer P.O.' will be used as an example of creating boxes.
- o To make the Section wider, hover over the section divider line until the splitter displays. Drag the divider line down to make the section wider.
- o Move the bottom line the row headers and the row above the row headers down to make room for creating the boxes.
- o Move the labels and data fields to make space for the new lines.
- o Click the Box tool and draw a box around the label and field OR Click the Line tool and draw lines above between and below the labels and fields.
- o Use the techniques above to change the Background, Font and Style of the labels.
- o To center the labels, Click the Paragraph Tab and change the 'Horizontal alignment:' to 'Centered' using the drop-down arrow.

o Some of the dividing lines can be deleted to reduce the number of lines on the form. Click the line to select it and press the Delete key.

Detail Rows

There are four types of detail rows:
- o Expanded Item Codes **are not** used
- o Expanded Item Codes **are** used
- o Comment Lines
- o Lot/Serial data lines

The default form prints two lines for detail rows where Expanded Item Codes either **are not** or **are** used.
- If Expanded Item Codes **are not** used, the ItemCode, UnitOfMeasure, quantities, UnitPrice and ExtensionAmt are on the first line. The ItemCodeDesc and Warehouse are on the second line. Oftentimes, a one line detail row is preferred.
- If Expanded Item Codes **are** used, the ItemCode and ItemCodeDesc are on the first line. The LineWarehouseCode, UnitOfMeasure, quantities, UnitPrice and ExtensionAmt are on the second line.

This example assumes that Expanded Item Codes **are not** used. The UnitOfMeasure, QuantityShipped, QuantityBackordered and LineWarehouseCode are removed:
- o Select the labels and fields that are not needed on the invoice; select the first one and press the CTRL key and Click the remaining items.
- o Re-size the remaining labels and fields and move them to make room for the ItemCodeDesc.
- o Select the ItemCodeDesc and drag it up to the first line; resize the field if it is too long to fit in the available space.
- o For consistency, the labels can be formatted like the header row above.
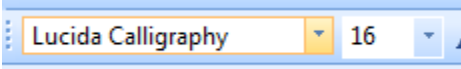
Add a Line # to the Detail Row
- o Click 'Formula Fields ' in the Field Explorer.
- o Click the New button ⊞ or Right-click and select New…
- o Enter a Name for the field, for example 'LineNo', and Click the OK button.
- o In the Formula Editor, enter a formula to convert the LineSeqNo to a number:
- o (tonumber({SO_InvoiceWrk.LineSeqNo}))/100000000
- o Drag the field to the Detail line.
- o Right-click the 'LineNo' field and select 'Format Field…'.
  - ➢ Click the Number Tab.
  - ➢ Highlight the (1123) entry and Click the OK button. This will format the 'LineNo' with no decimal places or commas.

Add a Line between Item Codes

Click the Line tool ⬊ and draw a line under the fields in the Detail row

**Add a Custom Message to the Footer**

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- o There are two Line Messages that will print on the Invoice. Data must be entered in one or both of these lines each time the invoices are printed.
- o If these Line Messages are not needed, they can be deleted and a static message can be added to the form. If the Line Messages may be used, they can be moved and a static messaged can be added above or below the Line Messages.
- o Click the 'Label' tool [Aa] and draw a box in the Footer section.
- o Type the message in the box.
- o Modify the Font and Size

  Lucida Calligraphy | 16

- o A formula can be added to the Label so it is suppressed if there is something in MessageLine1.
  - ➢ Right-click on the Label and select 'Format Text'.
  - ➢ On the Common Tab, Click the Formula button [x-2] next to the Suppress checkbox.
  - ➢ Enter the formula for the condition that will suppress the Label. For example, to suppress the Label if Message Line 1 contains text:
  - ➢ {SO_InvoiceWrk.MessageLine1} <> ""

Add a 'Remit To' Box

Remit To
P.O. Box 41578
St. Louis, MO 63141
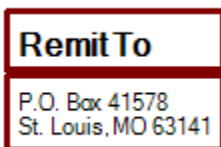
- o Click the 'Label' tool [Aa] and draw a label in the Page Header section of the form.
- o Type 'Remit To' in the Label.
- o Click the Box tool [□] and draw a rectangle around the Label.
- o Click the 'Label' tool [Aa] and draw another label below the first one in the Page Header section of the form.
- o Type the address in the Label.
- o Click the Box tool [□] and draw a rectangle around the Label.
- o You may need to adjust the width of one or both of the boxes so that they are aligned and encompass all of the text.

- o To change the Line color and thickness, Right-click on the Box and select 'Format Box'.
  - ➢ To change the 'Style:', Click the drop-down arrow and select from None, Single, Dashed or Dotted.
  - ➢ To change the 'Width:', Click on the preferred line width.
  - ➢ To change the 'Color:', Click the drop-down arrow and select a color.
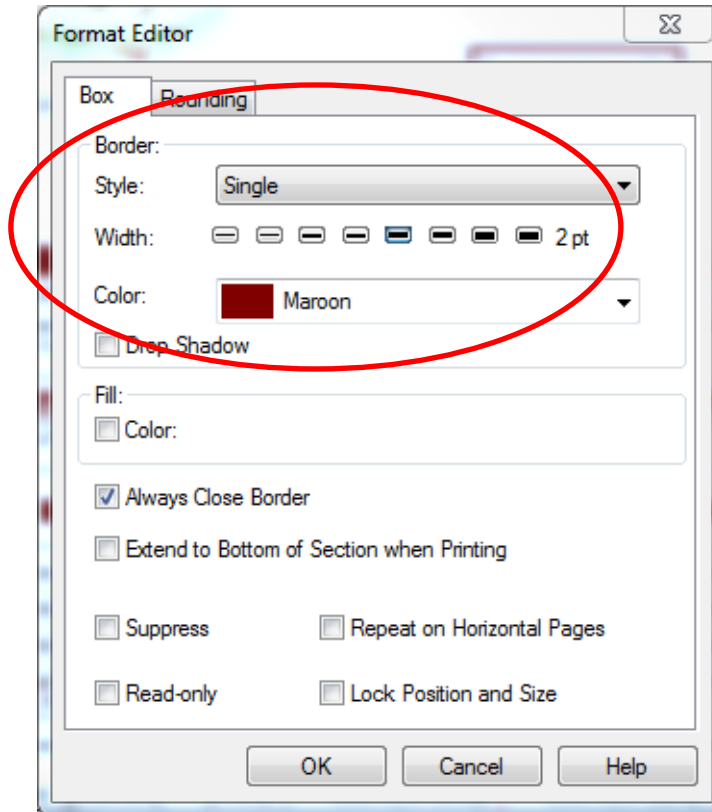
  - ➢ When finished, Click the OK button.

After all of the updates, the new Invoice would look like:

Invoice

Page: 1

Invoice Number: 0100065-IN
Invoice Date: 05/11/2015

Order Number: 0000164
Order Date 05/31/2010
Customer Number: 02-ORANGE

Why O Why
11789 Happy Trails Court
My Town, MO 63141
P: (314) 999-0786 F: (314) 999-1786
www.connerash.com

Remit To

P.O. Box 41578
St. Louis, MO 63141

Sold To:
Orange Door & Window Co.
56 Technology
Irvine, CA 92618-2301
  Confirm To: Harold English, President

Ship To:
Orange Door & Window Co.
627 N. Martin Avenue
Waukegan, IL 60085

Customer P.O.	Ship Date	Ship VIA	Terms
55555	05/31/2010	UPS BLUE	2% Ten Days, Net 30 Days

Line	Item Code	Item Description	Ordered	Price	Amount
1	6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	1.00	259.000	259.00
2	2551-3-50	DESKFILE 3 1/2" CAP 50	2.00	24.950	49.90
3	CHROME KIT	CHROME LUGGAGE AND SIDE RAILS	5.00	679.000	3,395.00

We appreciate your business!

Net Invoice:	3,703.90
Less Discount:	555.59
Freight:	0.00
Sales Tax:	0.00
Invoice Total:	3,148.31