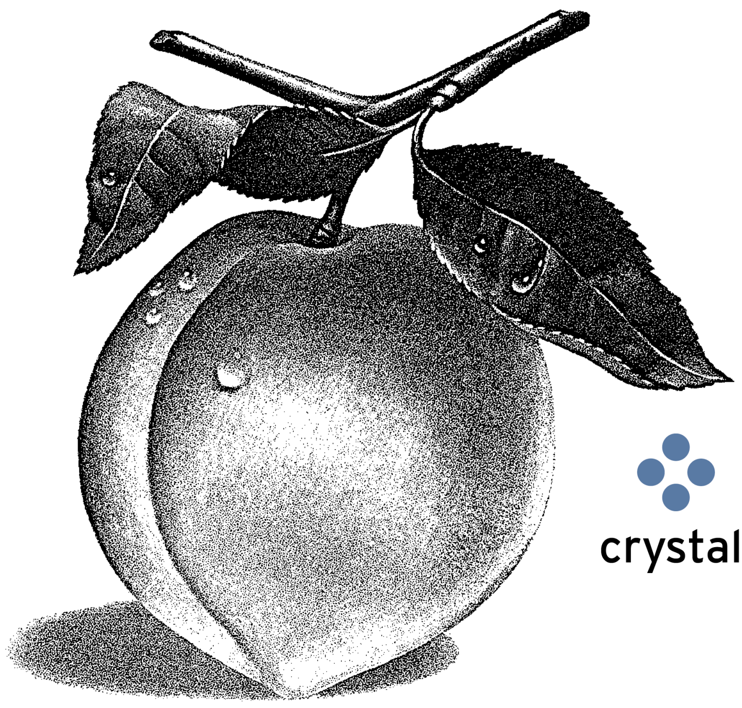
Getting Started Guide

Crystal Reports® for Peachtree®



crystal decisions

Registration and Technical Support Information

To purchase a Peachtree Support plan:	1-800-336-1420
Peachtree Software Web site	www.peachtree.com

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Crystal Reports for Peachtree Getting Started Guide
Third Edition, April 2003

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• Table of Contents •

Introduction

1

• Introduction •

Overview

Crystal Reports for Peachtree is a special version of the popular Crystal Reports® report writer designed to work with Peachtree. The program is powerful yet flexible, letting you customize reports using virtually any of the information available in your company database.

Crystal Reports for Peachtree comes with several predesigned reports that small businesses find useful. If you want to design your own reports, the program automates the design process, providing a Report Expert that will guide you step by step. But for those special cases where a report requires a unique design, the Report Designer lets you put together text (such as headers or titles), maps or graphs, images (such as company logos), and of course database elements just as you want them to appear on the printed report. Then you can preview the report to make sure it looks as you expect.

What's in This Guide

The *Crystal Reports for Peachtree Getting Started Guide* includes the following sections:

Chapter 1: Introduction This chapter contains installation instructions, a program overview, a brief description of the twelve standard Crystal reports, and a section devoted to using the program in a network environment.

Chapter 2: Previewing Crystal Reports This provides a discussion and illustration of the standard reports included with the program. It also tells you how to preview these reports using the Crystal Viewer.

Chapter 3: Designing Crystal Reports: A Tutorial This briefly describes the Crystal Report Designer and discusses how Crystal reports incorporate your Peachtree database information. Then we walk you through the process of modifying and designing Crystal reports:

- **In Lesson 1** you learn how to change the Crystal inventory labels into price tags.
- **In Lesson 2** you learn how to create a customer contact list from scratch.
- **In Lesson 3** you learn how to use the Crystal Report Expert to design a list of customer quotes filtered by expiration date.

Chapter 4: Upgrading Crystal Reports to Version 9 This includes instructions that will help you make sure your Version 8 Crystal custom reports work in Version 9 and in Peachtree 2004.

Chapter 5: Linking Report Tables in Crystal Reports Because Version 8 and Version 9 of Crystal Reports Smart Link tables differently, this chapter discusses the tables used in generating Crystal reports and fields that should be used to link them in Version 9.

Appendix: Filtering Report Data Finally, here you'll learn which tables and fields are especially useful in building Crystal reports. You'll also learn how to filter reports to eliminate the return of null values in report data.

Note

The guide you are reading is only a supplement to the *Crystal Reports User's Guide*, which comes with the Crystal Reports for Peachtree program, either in a printed or online (PDF) version. For detailed information on working with the program, consult this guide. When additional information is available in the *Crystal Reports User's Guide*, we will cross-reference it. The Crystal Reports for Peachtree program also comes with an extensive online Help system (referred to in this guide as Crystal Reports Online Help), and we will occasionally reference this online Help as well. So be sure to watch for cross-references as you read.

Installing Crystal Reports for Peachtree

Following are brief instructions for installing both the evaluation version and permanent version of Crystal Reports for Peachtree. For more information on installation, refer to the *Crystal Reports User's Guide*.

Install the Evaluation Version of Crystal Reports

If you own Peachtree Accounting or Peachtree Complete Accounting, the Peachtree installation CD comes with an evaluation copy of Crystal Reports for Peachtree. This version can be used for thirty days after installation, at which time you must upgrade to the permanent version in order to keep working with Crystal Reports.

Use the following procedure to install Crystal Reports.

1. Insert the Peachtree installation compact disc in your CD-ROM drive.

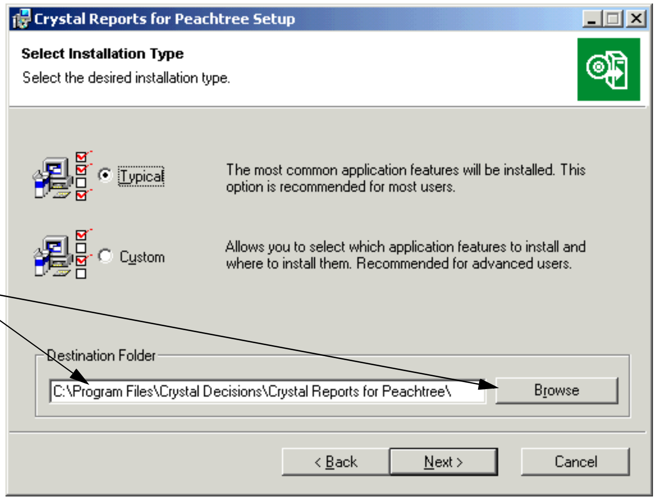
   The Crystal Reports Autorun window automatically appears.

2. Click the **Crystal Reports for Peachtree** install option.

   If the Peachtree Autorun window does not automatically appear, do the following: From the Windows **Start** menu, select **Run**. Type **x:autorun** and press **Enter** (where x: is your CD-ROM drive designation).

3. Follow the prompts to install Crystal Reports for Peachtree.

The Select Installation Type window lets you choose either a typical or custom installation of Crystal Reports. Generally, you will want to choose the **Typical** option, but for more information on custom installation, refer to the *Crystal Reports User's Guide*, the section on installation.



The default installation path (destination folder) for the program is C:\Program Files\Crystal Decisions\Crystal Reports for Peachtree. However, you can change this path if desired during installation. In the Select Installation Type window, use the **Browse** button to choose another installation path.

4 When finished with the Select Installation Type window, click the **Next** button to continue.

5 Once installation is complete, click the **Finish** button to close the window.

Install the Permanent Version of Crystal Reports

If you own Peachtree Premium Accounting or Peachtree Premium Accounting Accountants' Edition, your Peachtree installation CD includes the permanent version of Crystal Reports for Peachtree. No upgrading will be necessary except for upgrading to new releases of the software.

Besides Crystal Reports, the Peachtree installation CD allows you to install PDF versions of the Crystal Reports for Peachtree *User's Guide* and *Getting Started Guide*. Since these PDF files require Adobe Acrobat Reader, the CD includes as well a copy of Release 5 of Adobe Acrobat Reader

Install Crystal Reports for Peachtree

1 Insert Peachtree installation compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears.

2 Click the **Crystal Reports for Peachtree** install option.

3 Follow steps 3 through 5 under "Install the Evaluation Version of Crystal Reports" on page 3.

Install Adobe Acrobat Reader

To display and use the Crystal Reports PDF documents, you must have Adobe Acrobat 5 (or higher) installed on your computer. Adobe Acrobat Reader can be installed from the Crystal Reports installation CD or downloaded for free at www.adobe.com.

Use the following procedure to install Adobe Acrobat Reader from the CD.

1 Insert the Peachtree installation compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears.

2 Click the **Adobe Acrobat Reader** install option.

3 Follow the prompts to install Adobe Acrobat Reader.

Display the *User's Guide* or *Getting Started Guide*

To display the two PDF documents provided on the installation CD:

1 Insert the Peachtree installation compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears.

2 In Windows Explorer, browse to the \Doc folder on the CD. The two guides are in this folder.

3 Double-click a document to open it in Adobe Acrobat Reader.

Following Installation...

Once the Crystal Reports for Peachtree program is installed, you can launch it directly—either from the icon on your desktop or from the Windows **Start** menu—to design, edit, and print all types of reports required by your business. For added convenience, you can also access the program while working in Peachtree. See the illustration of the Peachtree **Reports** menu on page 8.

The Standard Crystal Reports

Version 8 Standard Reports

Crystal Reports for Peachtree Version 8 comes with six standard, predesigned reports.

- **Customer Detail List**—This lists a variety of formatted detail information about your customers.
- **Customer Sales by Item**—This lists stock items your company has sold in the current accounting period and the customers who have bought them. The list is sorted by item rather than by customer.
- **Inventory Labels**—These are for marking inventory items so they can be stocked in their proper location. The labels print on standard 3 across x 10 down label forms.
- **Purchases by Unit Price**—This lists, for the current accounting period, unit prices of stock and non-stock items you have purchased and the vendors who sold them. The list is sorted by item rather than by vendor.
- **Vendor Detail List**—This lists a variety of formatted detail information about your vendors.
- **Void Check Register**—This shows only your company checks, for the current accounting period, that have been voided.

Version 9 Standard Reports

Crystal Reports for Peachtree Version 9 comes with six additional, predesigned reports. Each of these reports has the marker "v9" in the report name (for example, "Aged Payables v 9") to indicate the version number. In fact, in Version 9, all twelve reports will have the "v9" marker since all will be in Version 9 format.

- **Aged Payables—**This shows a total of aged payables by vendor. It also includes basic information for each vendor taken from the Peachtree vendor record.
- **Aged Receivables—**This shows a total of aged receivables by customer. It also includes basic information for each customer taken from the Peachtree customer record.
- **Customer Balance Graph**—This is a bar graph that shows balances by customer. It also includes basic information for each customer taken from the Peachtree customer record.

- **Customer Sales by Month**—This lists all customers of your company alphabetically and lists amounts sold to them by month. The report is displayed in spreadsheet form and is taken from the data contained in the Peachtree Sales Journal.
- **Items Sold by Month—**This lists, alphabetically by ID, all stock items sold by your company each month. The report is displayed in spreadsheet form and is taken from the data contained in the Peachtree Sales Journal.
- **Vendor Balance Graph**—This is a bar graph that shows balances by vendor. It also includes basic information for each vendor taken from the Peachtree vendor record.

Where the Reports Are Stored

When you install the Crystal Reports for Peachtree program, these twelve reports are automatically copied to all of your company subdirectories. So, for example, if you have five companies in Peachtree, the standard reports will be copied to each of the five company subdirectories. In addition, a Zip file containing the twelve standard reports is automatically copied to your Peachw/Reports directory; the name of this file is REPORTS.ZIP.

If you alter or delete the original standard reports, you can always Unzip this file and copy the reports to your company subdirectory, where you'll be able to access them in Peachtree. In order to Unzip the file, you will need a copy of the WinZip® program installed on your computer. You can download an evaluation version of the program from the Internet at www.winzip.com.

Note

When you create custom reports or when you download new standard reports from the Peachtree Web site, you *must* always copy them to your company subdirectories before you can work with them in Peachtree.

How to Access the Reports

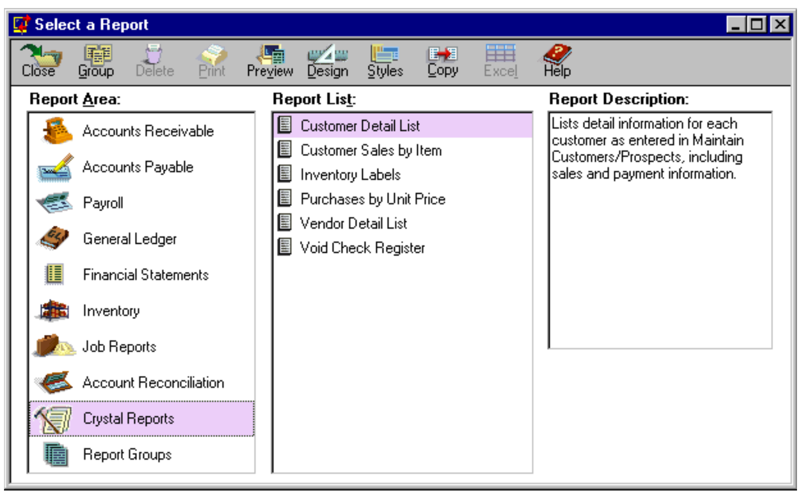
As with all Peachtree reports, you can access the standard Crystal reports from both the **Reports** menu...

The **Crystal Reports** option opens the Select a Report window with the Crystal Reports area preselected (highlighted); see the illustration below.

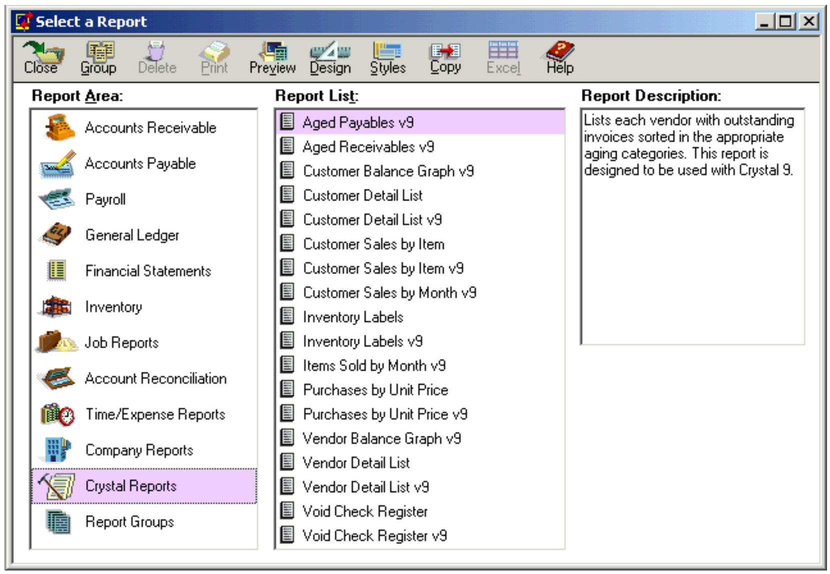
The **Crystal Reports Designer** option opens the Crystal Reports for Peachtree program, where you can select an existing report or design a new one.

Note: Time/Expense reports are available only in *Peachtree Complete* and *Peachtree Premium Accounting*.

...and from the Select a Report window, shown below listing standard Crystal reports with Version 8 of Crystal Reports for Peachtree installed.



The window looks like this if you have Version 9 of Crystal Reports installed. Note that Version 9 standard reports are marked with a "v9." (Note also that Version 8 standard reports existed in the company folder before the installation of Version 9, so these Version 8-format reports remain and *aren't* marked "v 9.")



You can select a Crystal report from the **Report List** just as you would any Peachtree report. If you right-click on a selected Crystal report in the list, you will see a popup menu featuring **Print**, **Preview**, **Design**, and **What's This?** Help options.

- For more information on using the **Print** option, look up "Print dialog box" in the Crystal Reports Online Help index. See also the "Introduction to Reporting" chapter in the *Crystal Reports User's Guide*.
- For information on using the **Preview** option, see "Previewing Crystal Reports" on page 19 of this guide.

- For more information on using the **Design** option, look up “Design tab” in the Crystal Reports Online Help index. See also the “Introduction to Reporting” chapter in the *Crystal Reports User’s Guide*.
- For more information on selecting reports and working in the Peachtree Select a Report window, see the *Peachtree User’s Guide*, the “Reports” chapter.

Note

Important: If you are using Crystal Reports for Peachtree Version 8 but have upgraded to Peachtree 2004, you will need to upgrade your custom reports to work with Peachtree. Similarly, if you have upgraded to Crystal Reports for Peachtree Version 9 for use with Peachtree 2004, you will have to upgrade any custom reports created in Version 8 before you can work with them in Peachtree. For information on upgrading custom reports, see the “Upgrading Crystal Reports to Peachtree 2004” chapter in this guide.

Using Crystal Reports in a Network

If you are working in a network environment, special conditions apply for the Crystal Reports for Peachtree program.

Special Network Conditions

The program must be installed on all machines The program needs to be installed on all networked machines where it will be used; *the program will not work properly if installed on and accessed from a central server*.

Note

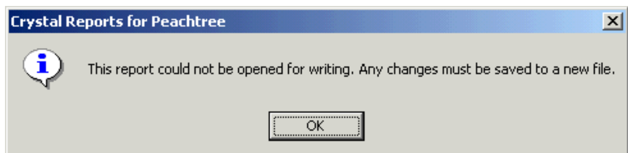
Consult your license agreement for information about the number of machines on which Crystal Reports can be installed.

So that more than one person can have access to Peachtree data and Crystal reports, you *can* copy these to a central server. Say you store your Peachtree data on drive E on the server. The data path to your Peachtree data is E:\PEACHW\DATA, and the data path to your company data is E:\PEACHW\<COMPANY>, where <COMPANY> is the name of the folder where your company files are located. Into this folder you should copy all Crystal reports that apply to the company.

Now all machines with access to the data path E:\PEACHW on the server will have access to both Peachtree data and Crystal reports. For more information about sharing Peachtree data in a network environment, look up “Network: About Peachtree in a Network Environment” in Peachtree Help.

Standard Crystal reports are read-only When Peachtree is installed, the standard Crystal reports described in this chapter are installed as read-only files in all company subdirectories. This means that anyone working in the Crystal Reports for Peachtree program will be able to preview the reports but will not be able to edit and then save them. That way, you will always have the standard reports in their original condition so you can use them as templates for custom Crystal reports.

If you are working in Crystal Reports for Peachtree and try to edit and then save a standard report, you will see an error message stating "This report could not be opened for writing. Any changes must be saved to a new file."

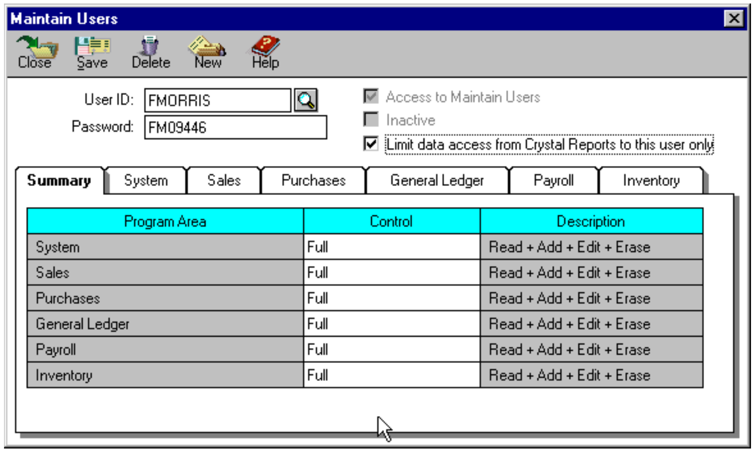


If you want to save your changes, use the **Save As** option on the **File** menu to save the file under a new name. Once saved, this new custom report will be fully editable.

Write access is limited to the first user only When you create new custom Crystal reports based on the standard ones, you will be able to edit and save these new reports as desired. However, if more than one person is working with the same custom report in Crystal Reports for Peachtree, only the *first* user to access the report will have "write access"—that is, be able to edit and save the report. All other users will have read-only access and will be able only to view and print but not save the report, whether in preview or in design mode.

Limit Data Access to One User

Through Maintain Users, Peachtree allows you to set up user passwords and limit access to areas of the program. If desired, you can limit access to Crystal Reports for Peachtree, at least for design purposes, to only one user. To give just one user *data* access to Crystal Reports, enter a maximum eight-character password for that user, and then select the **Limit data access from Crystal Reports to this user only** check box.



Now, all users will be able to preview or print a Crystal report. However, when any user tries to refresh the data in a Crystal report using the **Refresh** button in the Standard tool bar, the program will request a password. If the password entered does not match the password set up for one-user access, then the user will not be able to refresh the report data and thus potentially use different parameter values to filter the data that appears in the report.

For more information about the Maintain Users window and setting up users, click the **Help** button in the window. See also the *Peachtree User's Guide*, the "Company Administration" chapter. **For more information about refreshing report data in Crystal**, look up "Refreshing data:report data" in the Crystal Reports Online Help index.

Previewing Crystal Reports

2

Standard Crystal Reports, Version 9

Previewing Crystal Reports

• Previewing Crystal Reports •

This chapter describes and illustrates the standard reports that come with the program. It also tells you how to preview reports using the Crystal Viewer and provides an overview of report printing.

Standard Crystal Reports, Version 9

Version 9 of Crystal Reports for Peachtree is shipped with the following twelve reports. All standard reports shipped with Version 9 have the marker “v9” in the report name (for example, “Aged Payables v 9”) to indicate the version number.

Aged Payables

This report shows a total of aged payables by vendor. It also includes the following information for each vendor taken from the Peachtree vendor record:

- Vendor ID
- Vendor Name
- Contact
- Telephone (No. 1)
- Invoice/Credit Memo No.
- Aging Brackets

Aged Receivables

This report shows a total of aged receivables by customer. It also includes the following information for each customer taken from the Peachtree customer record:

- Customer ID
- Customer Name
- Contact
- Telephone (No. 1)
- Invoice/Credit Memo No.
- Aging Brackets

Customer Balance Graph

This bar graph shows balances by customer. It also includes basic information for each customer taken from the Peachtree customer record. The graph itself shows customer balances along the vertical axis and lists customer IDs along the horizontal axis. The following information for each customer is listed below the graph:

- Customer ID
- Customer Name
- Contact
- Telephone (No. 1)
- Customer Balance

Customer Detail List

This report lists detail information about customers you have added to Peachtree through Maintain Customers/Prospects. It includes the following information for each customer:

- Customer ID and name
- Bill-to and ship-to addresses
- Contact Person
- Phone Number 1 and 2
- Fax Number
- E-mail Address
- Web Address
- Prospect (yes/no)
- Customer status (active/inactive)
- Customer Type
- Customer Since date
- Tax location
- Resale Number
- Open purchase order number
- Credit Limit
- Pricing Level
- GL Sales Account

- Sales Rep Name
- Sales terms
- Sales Tax ID
- Last Invoice Date
- Last Invoice Number
- Last Payment Date
- Last Payment Amount
- Last Statement Date
- A listing of all custom fields

Customer Sales by Item

This report lists stock items sold and the customers sold to within a selected date range. The report is sorted by item rather than by customer. It includes the following information:

- Inventory ID and Description
- Customer ID
- Date of sale
- Invoice number
- Quantity sold

Customer Sales by Month

This report lists all customers of your company alphabetically and lists amounts sold to them by month. It is based on data contained in the Peachtree Sales Journal.

The report is displayed in cross-tab or spreadsheet format. Along the vertical axis it lists customers by ID, and along the horizontal axis it lists all accounting periods covered by the report (up to 26 periods).

Inventory Labels

These are labels you place on items so that they can be stocked in the proper location at your storage facility. The labels print 3 across x 10 down (30 per page) in the LL-30W laser label format available through the Peachtree Business Checks & Forms catalog. Each label lists the following information:

- Item ID
- Item description
- Vendor ID
- Location

The labels print 30 per page in the LL-30W laser label format available through the *Peachtree Business Checks & Forms* catalog.

For ordering information, consult the catalog or look up "Peachtree Checks and Forms" in Peachtree Help.

Items Sold by Month

This report lists, alphabetically by ID, all stock items sold by your company each month. It is based on data contained in the Peachtree Sales Journal.

The report is displayed in cross-tab or spreadsheet format. Along the vertical axis it lists items by ID, and along the horizontal axis it lists all accounting periods covered by the report (up to 26 periods).

Purchases by Unit Price

This report lists the unit prices of stock and non-stock items purchased and vendors purchased from within a selected date range. The report is sorted by item rather than by vendor. Use the report to check which vendors are offering the best pricing on an item.

The report includes the following information:

- Item ID and Description
- Date of purchase
- Vendor ID
- Invoice number
- Quantity
- Unit price
- Total purchase amount

Vendor Balance Graph

This is a bar graph that shows balances by vendor. It also includes basic information for each vendor taken from the Peachtree vendor record. The graph itself shows vendor balances along the vertical axis and lists vendor IDs along the horizontal axis. The following information for each vendor is listed below the graph:

- Vendor ID
- Customer Name
- Contact
- Telephone (No. 1)
- Vendor Balance

Vendor Detail List

This report lists detail information about vendors you have added to Peachtree through Maintain Vendors. It includes the following information for each vendor:

- Vendor ID and name
- Address
- Contact Person
- Fax Number
- E-mail Address
- Web Address
- Phone Number 1 and 2
- Fax Number
- Vendor Type
- Federal ID Number
- Vendor Since date
- Company account number
- Balance
- Credit Limit
- Purchase Account
- Terms
- A listing of all custom fields

Void Check Register

This report lists all disbursement and payroll checks that have been voided within a selected date range. it includes the following information:

- Check number
- Void date
- Payee (employee name, vendor name, or customer name)
- Cash account
- Check amount

This report lists, alphabetically by ID, all stock items sold by your company each month. It is based on data contained in the Peachtree Sales Journal.

The report is displayed in cross-tab or spreadsheet format. Along the vertical axis it lists items by ID, and along the horizontal axis it lists all accounting periods covered by the report (up to 26 periods).

Previewing Crystal Reports

The standard reports that come with Crystal Reports for Peachtree are designed to open in preview mode. This is so you can preview them when you select them either in the Peachtree Select a Report window or in Crystal Reports' Report Designer. The **Save data with report** option in the Crystal Reports **File** menu is turned on for each of the six standard reports; this is what allows them to be previewed.

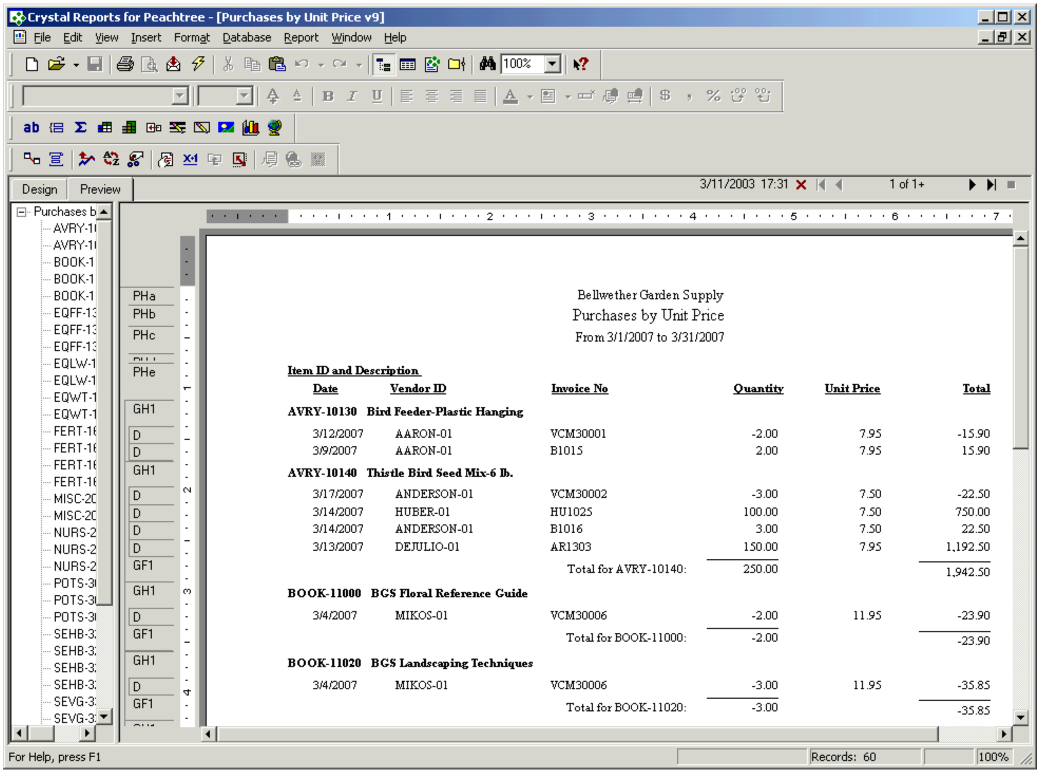
Set Up Reports to Appear in Preview Mode

If you turn off the **Save data with report** option and then save a standard report, when you open it again either in Peachtree or in Crystal Reports, the report will open in design rather than preview mode. So if you want the standard reports to open in preview mode, be sure to leave the **Save data with report** option turned on. With the option turned on, you can preview a Crystal report the same way you do other Peachtree reports.

Do one of the following:

- click the name of a Crystal report in the Select a Report window and then click the **Preview** button
- double-click the report name with the *left* mouse button

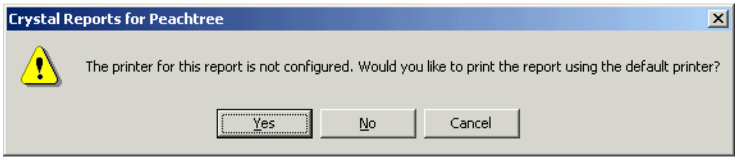
The Crystal Design window appears with the report displayed on the **Preview** tab.



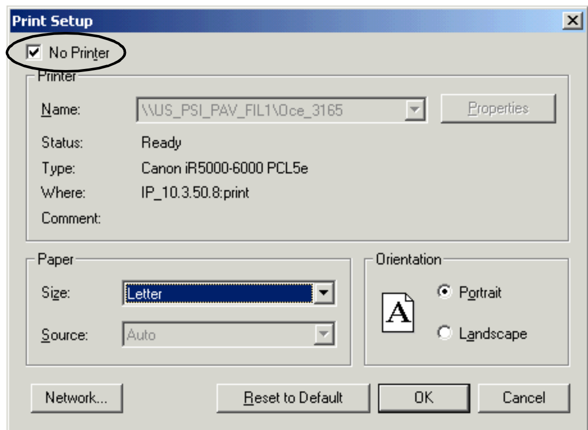
For more information on using the Crystal Reports for Peachtree Preview tab, look up "Preview Tab" in the Crystal Reports Online Help index. See also the *Crystal Reports User's Guide*, the "Introduction to Reporting" chapter.

A Note about Printing Standard Crystal Reports

All standard Crystal reports are set up with no default printer chosen. So when you print using either the **Print** button in the standard toolbar or the **Print** option in the **File** menu, Crystal Reports for Peachtree will display a message telling you that no printer has been configured for the current report.

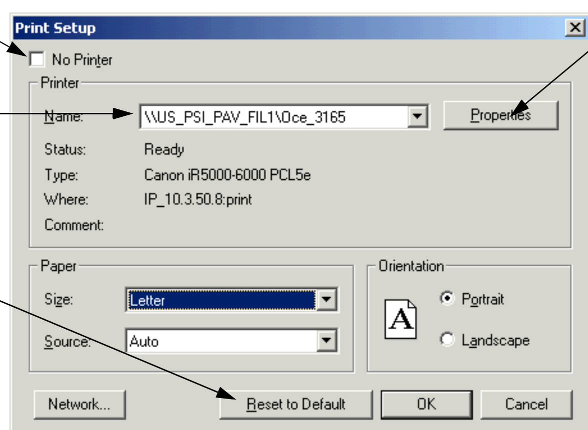


- To print the report using the default printer you have set up with the Windows **Settings>Printers** option, select **Yes**.
- To print printer the report with a different printer, select **No**.

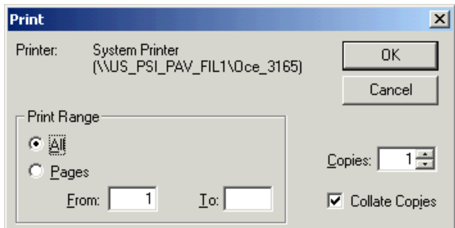


Note that the **No Printer** check box is checked, indicating there is no printer configured for this report.

You can clear the **No Printer** check box, and then using the **Name** drop-down list, select a printer to use for printing the report. Set any other print attributes, such as double-sided printing, using the **Properties** button.



You can always reset the printer to the default one, in which case the standard Print window will appear, letting you choose a variety of print options, including a range of pages to print, the number of copies to print, and whether or not you want those copies collated.



Designing Crystal Reports: A Tutorial

3

Overview

Lesson 1—Modifying Inventory Labels to Create Price Tags

Lesson 2—Designing a Customer Contact List

Lesson 3—Designing a Quotes Good Through List

• Designing Crystal Reports: A Tutorial •

Overview

When you design a Crystal report, you have a choice of either manually selecting the elements that will go into it or of automating the design process by using Crystal Reports for Peachtree's Report Experts. Through a series of tabbed windows, the Report Experts guide you in every step of the design process. If you want to manually construct the report, Crystal's Select Expert, Formula Expert, Section Expert, and Format Editor will help you choose exactly which data elements and formatting you want to appear in the report.

Information on how to use these special features is beyond the scope of this guide. Instead, see the *Crystal Reports User's Guide*, or look up the name of the specific feature in Crystal Reports online Help. However, in this chapter we give you an introduction to some of Crystal's design features in the form of a brief tutorial that walks you through the process of designing your own Crystal reports. We also show you how to customize one of the standard reports that come with Crystal Reports for Peachtree. After completing the tutorial, you'll have a better idea of how Crystal works and how to get your reports to include the precise data and formatting you want them to.

Before we start the tutorial, we explain some terms that will help you understand how Crystal reports incorporate database information; then we tell you how to add and link database information in a Crystal report.

Data Dictionaries

A *data dictionary* is a structured, simplified, and secure view of organizational data that an employee can use to create custom reports for your company. A dictionary gives the employee ready access to the data in an understandable form while ensuring control and security over your data resources, since the employee can in no way alter the original data. Using a dictionary, the employee can

- design a single, dynamic view of all the data that is necessary to create organizational reports and queries
- include multiple data sources, tables, and links
- organize the data and rename tables and fields to make it easier for company employees to understand the content and purpose of the data
- limit access to specific columns of data (for example, letting only managers see the salary column of the employee data files)

- place restriction formulas on specific rows of data (for example, allowing managers to view employee information only for those employees with a salary under $40,000)
- create complex data-manipulation formulas that employees can access without requiring a technical grasp of the formulas

Data Dictionary Files (DDFs)

Each data dictionary is made up of *data dictionary files* (DDFs). Crystal Reports for Peachtree comes with a special dictionary made up of three DDFs that contain much of the company information you would want to include in your reports. These three DDFs are called Field.DDF, Index.DDF, and File.DDF. (Note that while the program comes with *three* DDFs, you should make use of just the file called *File.DDF*—more about this below.)

In turn, each of these DDFs contains a series of subfiles with a .DAT extension. These subfiles contain a variety of company database information in the form of *fields*. For example, one .DAT file called Company.DAT contains fields that represent general information about your company, such as company name and address. Another data file called Jobs.DAT contains information about your company's jobs, including job IDs, descriptions, and start and end dates.

For a listing of all available .DAT files and the fields they contain, look up ".DAT Files" in Crystal Reports for Peachtree online Help.

Tables and Links

Within the Crystal Reports for Peachtree program, the information contained in any of these .DAT files is available in the reports you work on. You import the information into Crystal in the form of database *tables*.

Not only can you import database information into your report, you can *link* related fields within the database tables you import. These links help you match related pieces of information for reporting purposes. For example, links can help you match a vendor to the inventory items the vendor supplies.

The following section outlines how to select and link tables used in Crystal reports. For more detailed information, see the *Crystal Reports User's Guide*, the "Understanding Databases" chapter.

Using JrnlHdr and JrnlRow Tables

The JrnlRow table mentioned below in this chapter is the most important table you will use in building customer reports in Crystal. It is the chief primary table for Crystal reports, and reports are essentially built by linking it with secondary information containing customer, vendor, item, and job data. It contains fields that, when linked to the same field in secondary tables, allows the report to draw on appropriate Peachtree record information.

For example, as mentioned below, if the **CustomerRecordNumber** field in the JrnlRow table is linked to the same field in the Customer table, the report will be able to draw on customer transaction information. Similarly, if the **ItemRecordNumber** field in the JrnlRow table is linked to the same field in the LineItem table, the report will be able to draw on item-activity information, such as units-sold figures.

Sometimes the JrnlHdr table can serve as primary table for a report. This is true when all information needed to build the report is contained in the JrnlHdr report. For example, if you wanted to build an uncomplicated list displaying transactions in the Peachtree Payments Journal, you could do so without using JrnlRow. The JrnlHdr table contains fields for drawing amount, payee, and reference number information into the report, which is all the data needed to do the job. In most reports, however, JrnlHdr will be a secondary table linking to the JrnRow table as other secondary tables do.

How to Add Tables and Make Links

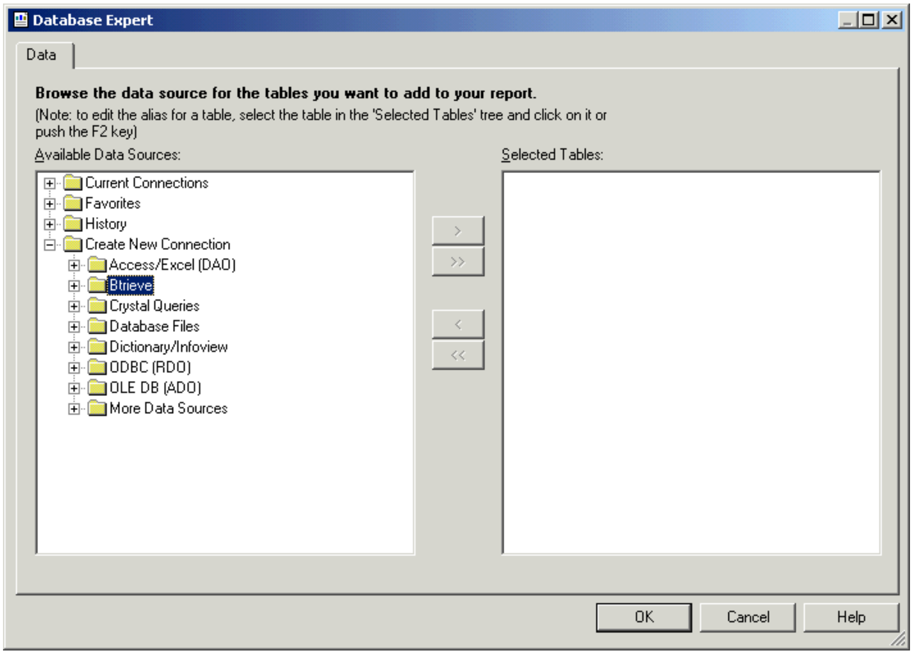
To add linked database information to your report, follow these steps:

1. Select the **Database** menu, and then select **Database Expert**.

   The Crystal Database Explorer window appears.

2. Find the **Create New Connection** folder in the list, and double-click to open it.

3 Double-click the **Btrieve** option.

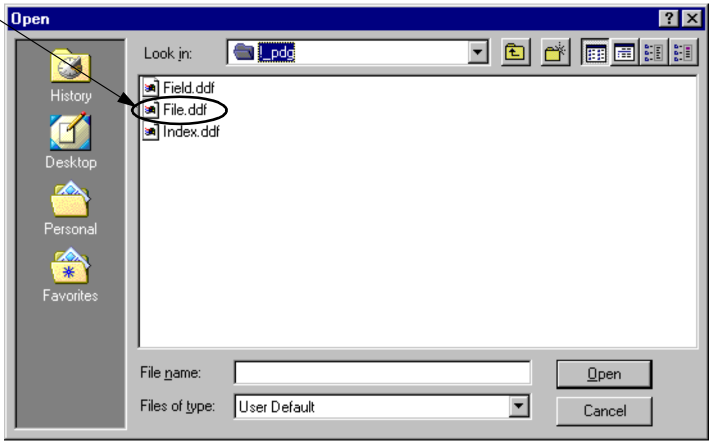


4 Double-click the **Btrieve** option.

5 In the Open window, use the **Look in** drop-down list to navigate to the folder containing your Peachtree company files.

The window displays the three Crystal Reports for Peachtree DDFs.

Crystal Reports will give you three DDFs to choose from in your Peachtree company folder, but be sure always to select *File.DDF*.

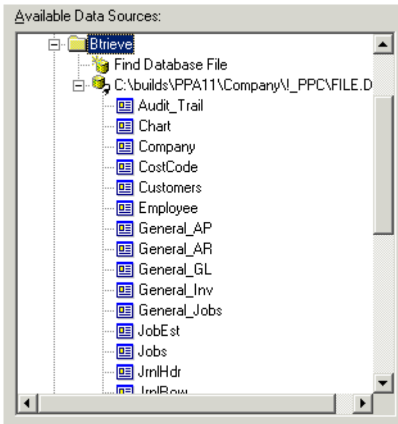


6 Select *File.DDF*, and then select the **Open** button.

Note

While the Open window will show all three DDFs that come with the Crystal Reports for Peachtree program, you should always select *File.DDF*.

7 The Database Expert window returns with the contents of the DDF displayed as a series of tables.



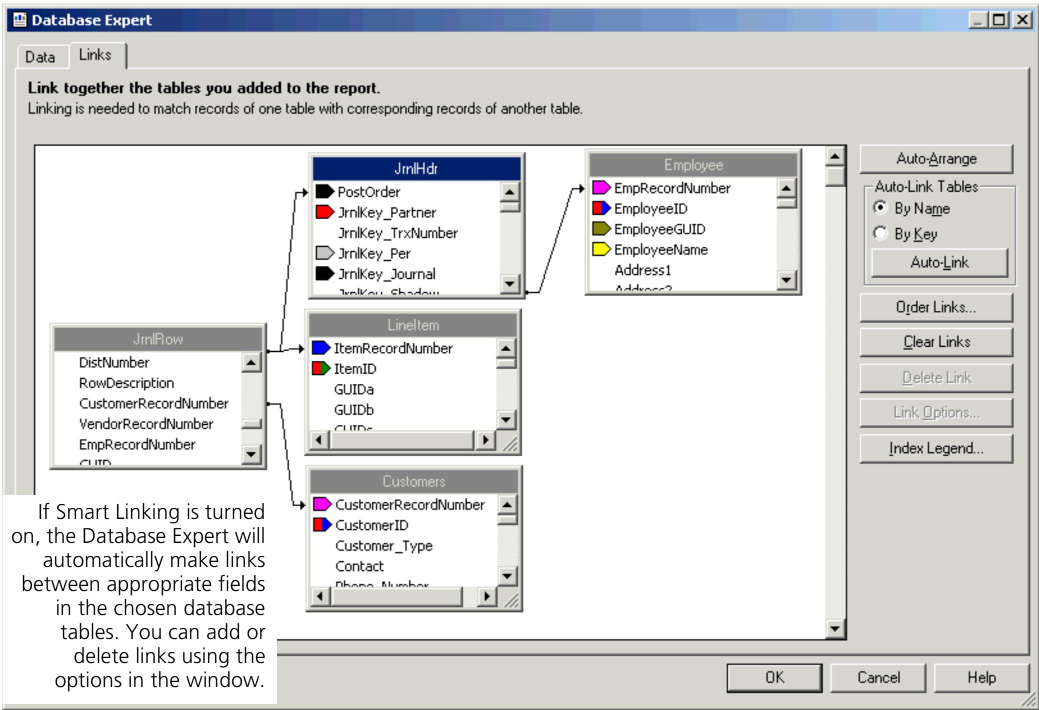
These tables correspond to the .DAT files mentioned above, the ones containing company database fields. For example, the Chart table contains all the company fields present in the Chart.DAT file, and the Employee table contains all the payroll fields present in Employee.DAT.

8 Select as many tables in the list as you want to include in the report. To select a table, do one of the following:

- Highlight the table and click the right arrow button.
- Highlight and double-click the table.

9 When finished, select the **OK** button.

The **Links** tab of the Database Expert appears. All the tables you have chosen are displayed at the center of the window. If the Smart Linking feature is turned on, the Expert automatically links all fields capable of being linked. (Using the Smart Linking feature is much the easiest way to link fields, but you can do it manually if you like.)



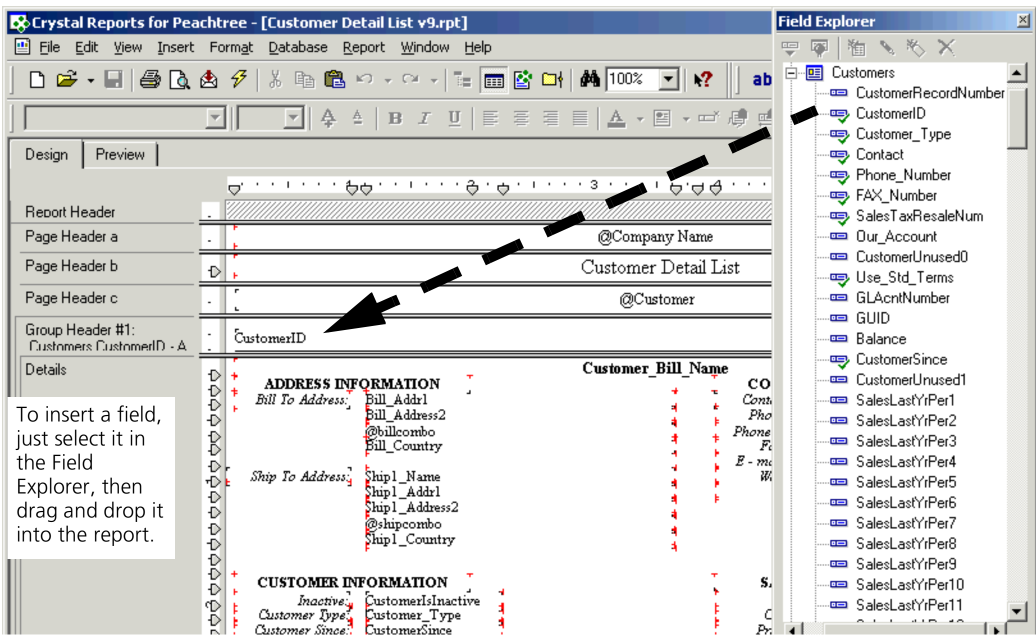
If Smart Linking is turned on, the Database Expert will automatically make links between appropriate fields in the chosen database tables. You can add or delete links using the options in the window.

You can make new links or dissolve old ones as explained in Crystal Reports Online Help. For more information, select the **Help** button in the Database Expert window.

The reason you link related fields across tables is so that the data represented by the fields can match up in meaningful ways within your report. For example, you would probably want to link the **CustomerRecordNumber** field in the JrnlRow database table to the **CustomerRecordNumber** field in the Customer table. This way, transaction information for each customer would be credited to the proper customer ID in the report.

10 When finished working in the Database Expert, select **OK** to close it.

Once you have made meaningful links among fields in the database tables, you are ready to insert the fields into your report. Using the Crystal Reports Field Explorer, you just plug one of the fields into the report wherever you want specific database information to appear. For example, to insert a customer ID into your report, you would select the **CustomerID** field in the Field Explorer window, then drag and drop the field into your report.



For instructions on working in the Field Explorer, select the **Help** button at the bottom of the window.

We’re Ready to Start the Tutorial...

Now that you understand a bit more about using Peachtree database information in Crystal Reports, we can start putting together custom reports. As mentioned at the beginning of this chapter, in Crystal Reports you have the choice of manually building a report from scratch or of letting the Crystal Report Expert step you through the process. In this tutorial, we’ll do both:

- **In Lesson 1** we’ll customize an existing standard report, inventory labels.
- **In Lesson 2** we’ll design a Customer Contact List from the ground up.
- **Finally, in Lesson 3** we’ll use the Report Expert to craft a Quotes by Expiration Date List.

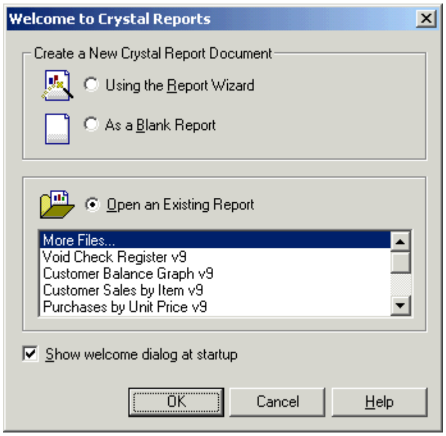
Lesson 1—Modifying Inventory Labels to Create Price Tags

As a warm-up exercise, we'll convert one of the standard Crystal reports. We'll turn the inventory labels into price tags that can be attached to sale merchandise.

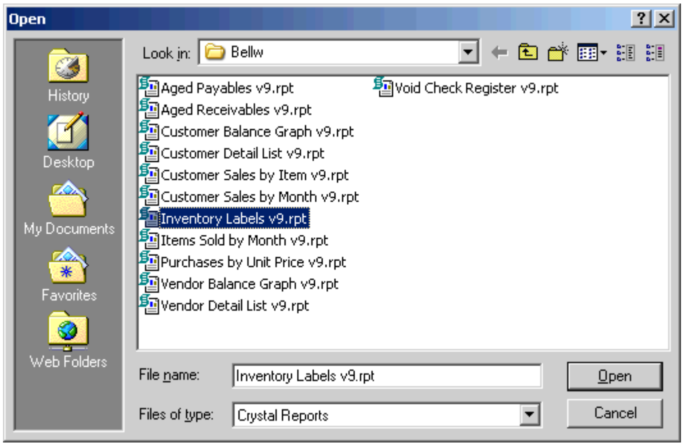
Use "Save As" to Create a Working Version of the Report

Since the standard reports are read-only versions (you can't edit them in any way), we need to create an editable version of the inventory labels.

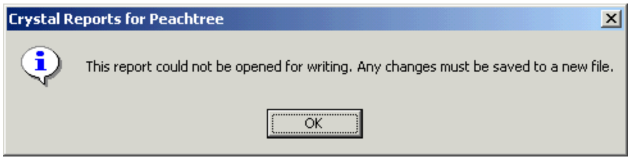
1 If Crystal Reports isn't currently running on your computer, start it now.



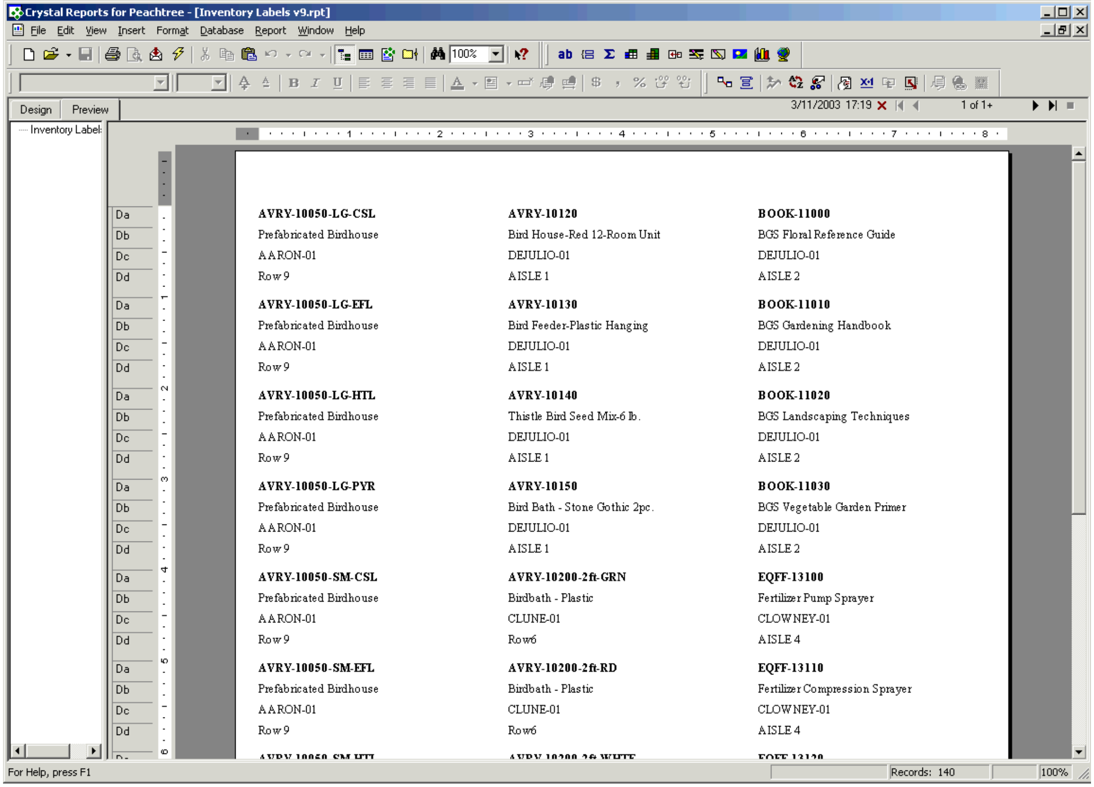
2 Select **More Files**, and then navigate to the BCS folder in the Peachw directory; this is where Bellwether Garden Supply company data is located. (If Crystal Reports is already running, select **Open** in the **File** menu, and then navigate to the Bellwether company folder.)



3 From the list of reports, select **Inventory Labels**.

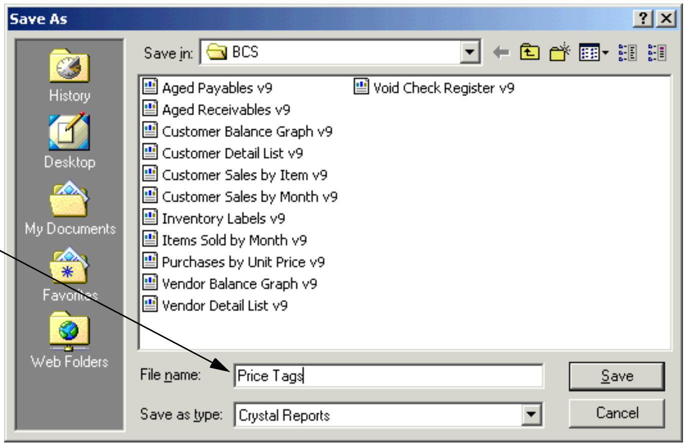


4 The message tells you that you cannot write to (edit) the report. Click **OK**.



5 To save the report in editable form, from the **File** menu, select **Save As**.

Enter the name of the new report you want to save.



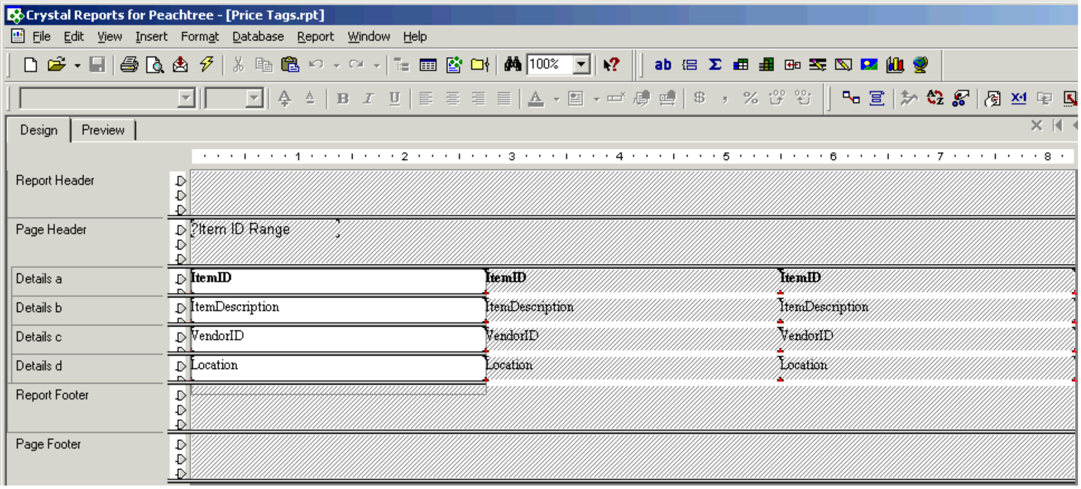
6 In the **File name** box, enter “Price Tags.” Then select **Save**.

7 Finally, before starting on the next part of the project, *close* the report and then *reopen* it.

Modify the Labels to Create Price Tags

We’re now ready to start working on our new creation.

1 Select the **Design** tab.



2 We won't need the **Vendor ID** or **Location** fields, so place the cursor in the gray area that reads "Details d" and right click.

3 From the pop-up menu, select **Delete Section**.

Note

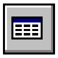
Working with report sections is an important concept but is beyond the scope of this guide. For more information, see the *Crystal Reports User's Guide*, the "Introduction to Reporting" chapter.

4 We want to keep the section marked "Details c," so just select the **Vendor ID** field.

An object frame appears around the field, and the cursor turns into a cross with four arrowheads. The field is now editable.

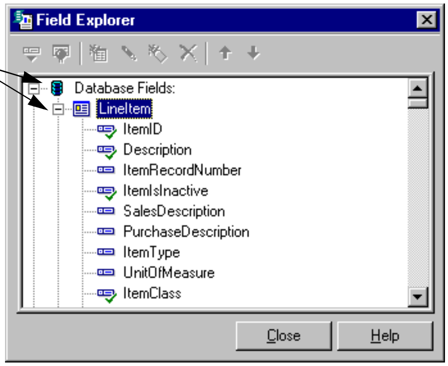
5 Right click, and from the pop-up menu, select **Delete**.

The field is deleted.



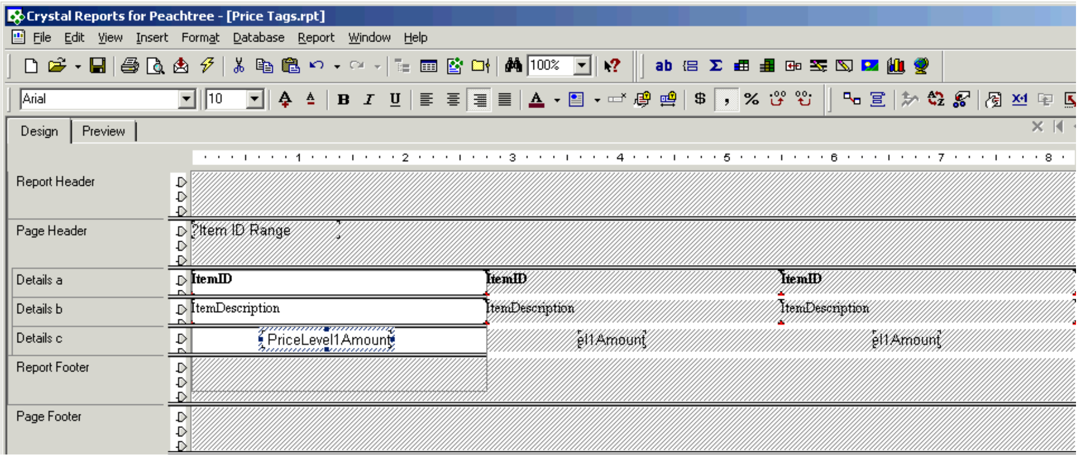
6 Select the **Field Explorer** button in the Standard toolbar.

Double-click both the Database Fields folder and the LineItem table to open them so you can navigate their contents.



7 Double-click the Database Fields folder to open it, and then double-click the LineItem table to open it.

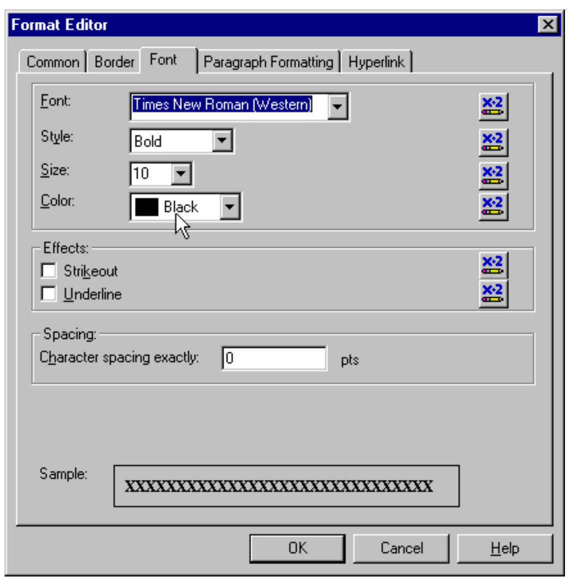
8 Find the **PriceLevel1Amount** field; select it; and drag it into the Detail c section. Release the mouse button. You can close the Field Explorer window.



9 Now we want to modify the font used for the **Description** field. Select the field, and then right mouse click.

10 From the pop-up menu that appears, select **Format Field**.

The Format Editor window appears with the **Font** tab selected.



11 From the **Style** drop-down list, select **Bold**.

12 When finished, select **OK**.

13 Now let's change the font of the **PriceLevel1Amount** field. Select it, and right mouse click. Select **Format Field**.

14 Select the **Font** tab of the Format Editor, and use the **Font** drop-down list to select **Arial** (or some other sans serif font you fancy more).

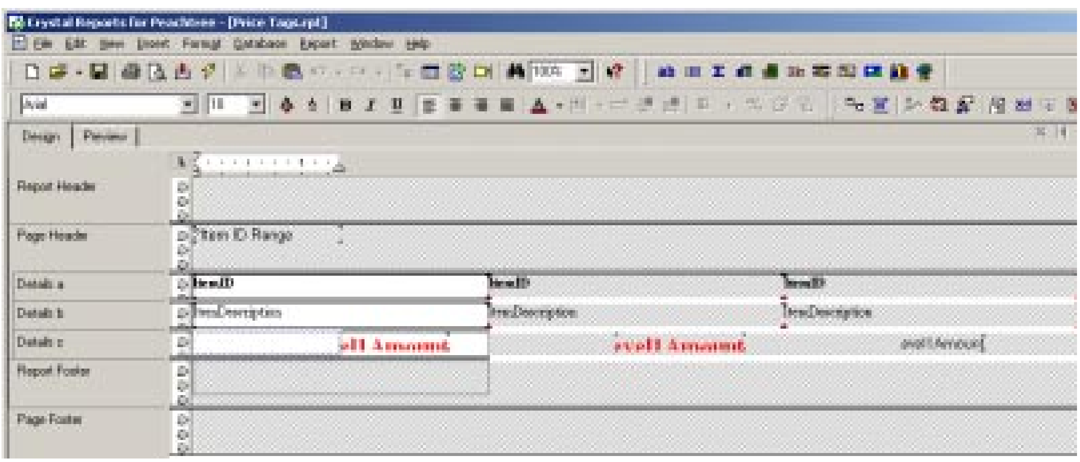
15 Use the **Style** drop-down list to select **Bold**.

16 Use the **Size** drop-down list to select **16** points.

17 Use the **Color** drop-down list to select **Red**. When finished, select **OK**.

18 With the **PriceLevel1Amount** field still selected, click the **Align Left** button in the Standard Toolbar at the top of the window.

19 Next we want to insert an "Our Price" marker. Select the **Insert Text Object** button in the Standard toolbar, and then drag the object frame to the far left side of the Detail c section. (We'll discuss object frames in further detail in the next lesson.)



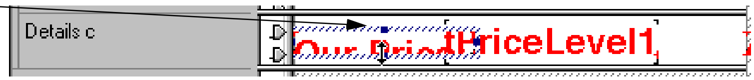
20 Click once to place the frame in the section.

21 A text cursor appears at the right side of the object frame. Type in the following: "Our Price: $."

22 Select the object frame, and then right click. From the pop-up menu select **Format Field**. Now make the font settings exactly as in steps 11 through 16.

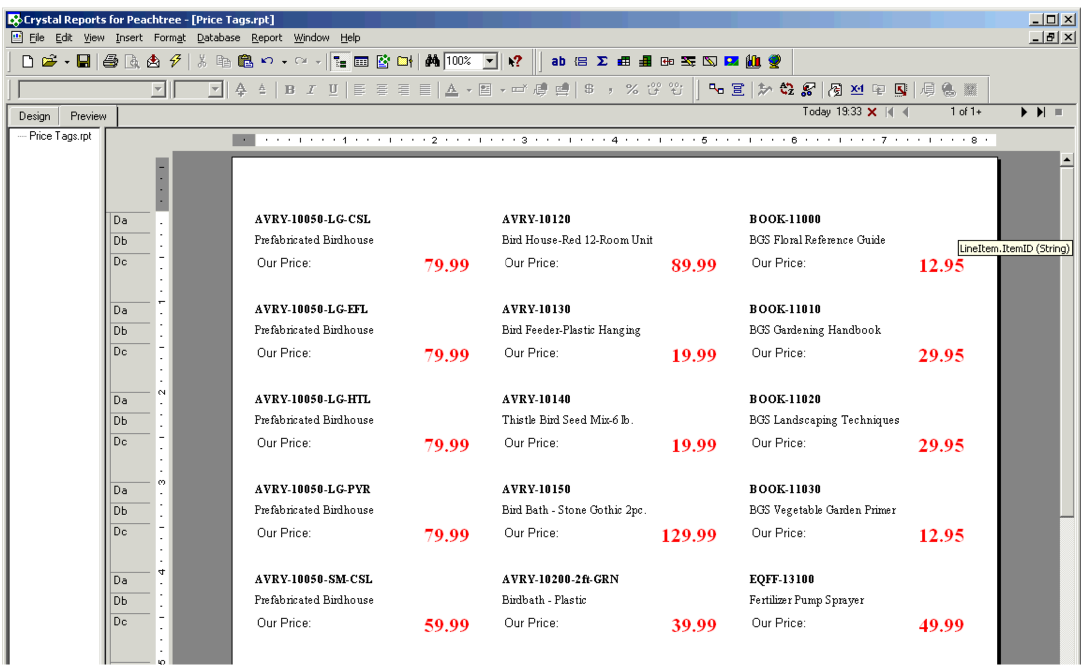
23 The text will probably appear a bit cut off at the bottom, so select the bottom frame handle (the small black square at the top of the frame), and drag it downward until you can see the text plainly.

Select the frame handle to change the size of a frame. The cursor will turn to a double-headed arrow.



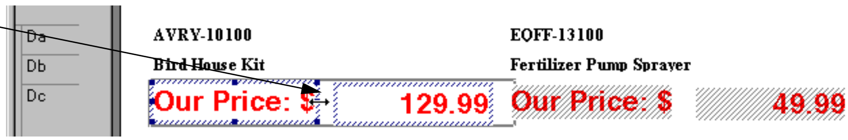
24 Select the object frame, and move it up so that it more or less aligns with the **PriceLevel1Amount** field.

25 To make more precise adjustments, we need to go to the **Preview** tab.



26 Our labels look pretty good already, but first we need to expand the "Our Price" object frame so that the dollar sign shows, *making sure that there is a slight space between the* ***"Our Price"*** *object frame and the* ***PriceLevel1Amount*** *object frame*. Select the first **"Our Price"** object frame in the window. When the frame handles appear, click on the one at the right side of the frame, and drag the frame to the right.

When you increase the width of the "Our Price" object frame, make sure there is a slight space between the two object frames.



27 The **"Our Price"** field is rather far away from the dollar sign, so let's close up the space. Select the **PriceLevel1Amount** field (in the illustration above, it would be the **129.99** value). When the object frame appears, click the **Align Left** button in the standard toolbar at the top of the window.

Compare this illustration with the one above. Note that the **129.99** value has moved to the left as a result of left alignment.

This way, if the **PriceLevel1** field has a large value in it (1,000.00 or more), the field will expand to the *right* to accommodate the longer string of numbers. Our price tags are now complete.

28 Finally, from the **File** menu, select **Save As**, and save the report under the name "Price Tags."

Review of Lesson 1

Let's review some of the ideas we covered in Lesson 1:

- Since the standard reports that come with Crystal Reports for Peachtree are read-only, if you want to customize one of the reports, you must first save it under a new filename.
- When you are working with data fields within a report, select them and right click to see a pop-up menu that lets you format, delete, and copy fields, as well as perform other functions.
- To insert data fields, use the **Field Explorer** button in the Standard toolbar. To insert text fields, use the **Insert Text Object** button in the same toolbar.

- To move a field, first select it. The cursor will change into a cross with four arrowheads, indicating that you can now manipulate the frame. To move the frame, simply drag and drop it.
- To expand or contract an object frame, select the frame; click the appropriate frame handle (at either right, left, top, or bottom of the frame); and then drag and release the frame.

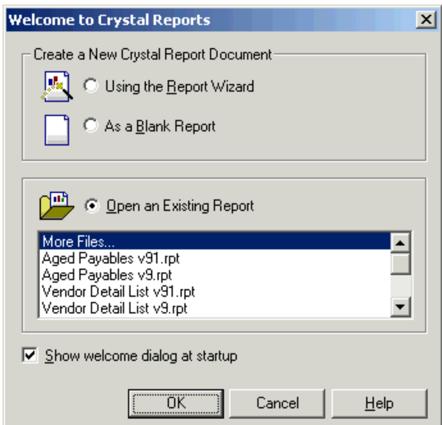
Lesson 2—Designing a Customer Contact List

The second lesson covers the design of a contact list you can use to help keep track of your customer base. It will list customer company name, contact name, and phone.

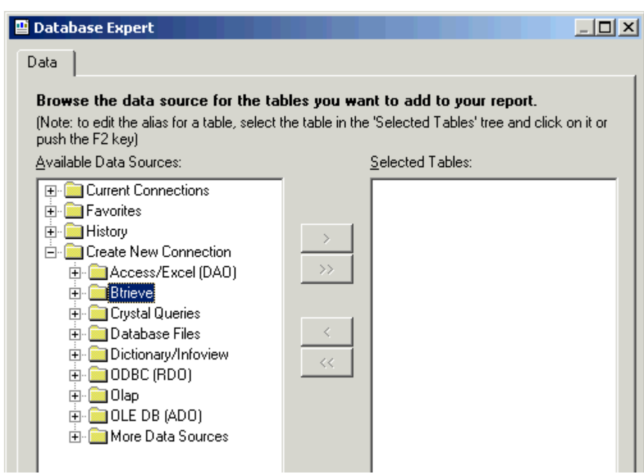
Select the Report Database

First we need to select the tables whose database information we'll use to build the report.

1 If Crystal Reports isn't currently running on your computer, start it now. (If Crystal Reports is already running, select **New** in the **File** menu.).



2 In the **Create a New Crystal Report Document** box, select **As a Blank Report**, and then select **OK**.

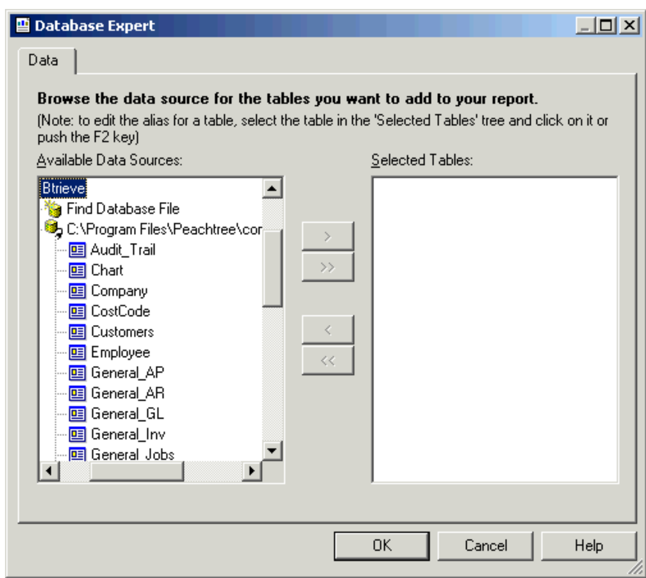


3 In the Database Expert, double-click the **Btrieve** folder.

4 In the Open window, use the **Look in** drop-down list to navigate to the folder containing your Peachtree company files.

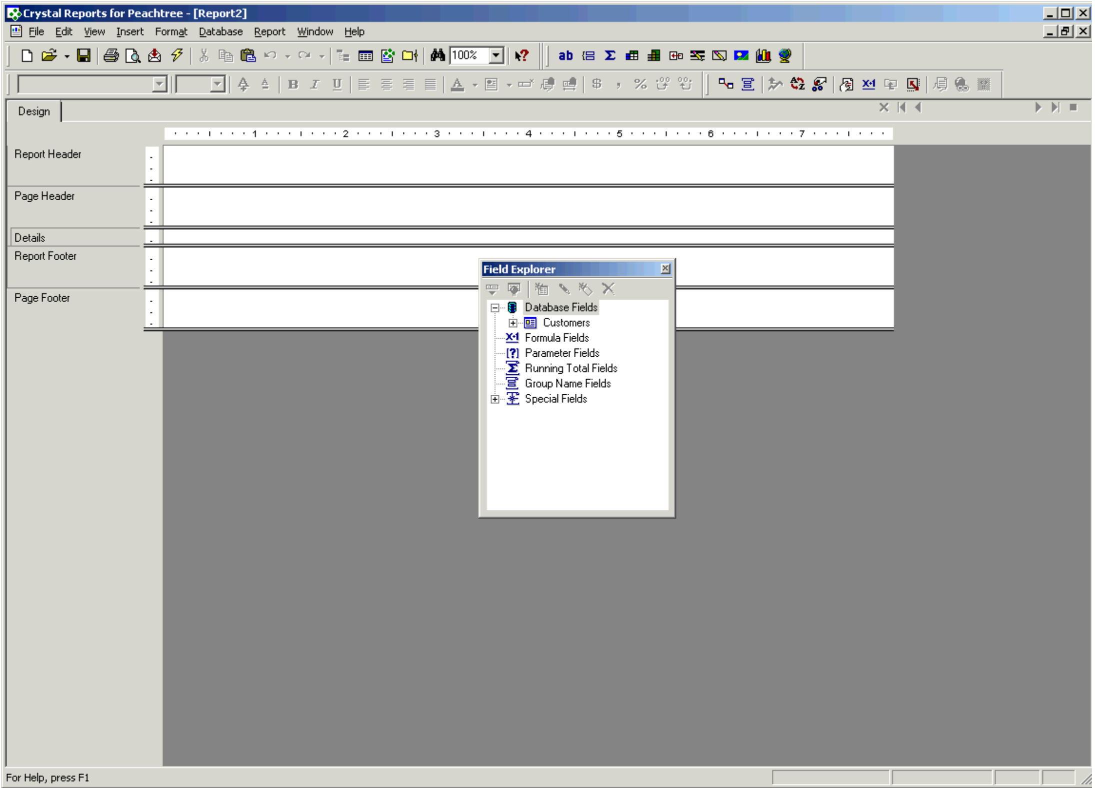
5 From the list of Peachtree DDFs, select **File.DDF**, and then select the **Open** button.

6 From the list of displayed tables, select **Customers**; either double-click it or select the **Right Arrow** button.



7 When finished, select **OK**.

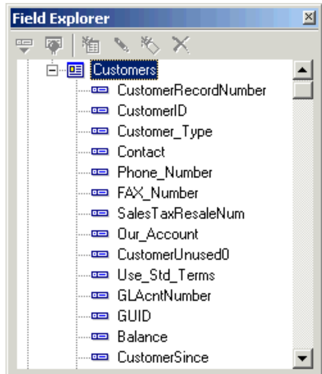
8 From the Standard Toolbar, select **Field Explorer**.



Select and Insert Fields

Now we want to place the appropriate fields in exactly the right spots within the report.

1 Double-click **Database Fields** and then **Customers**.

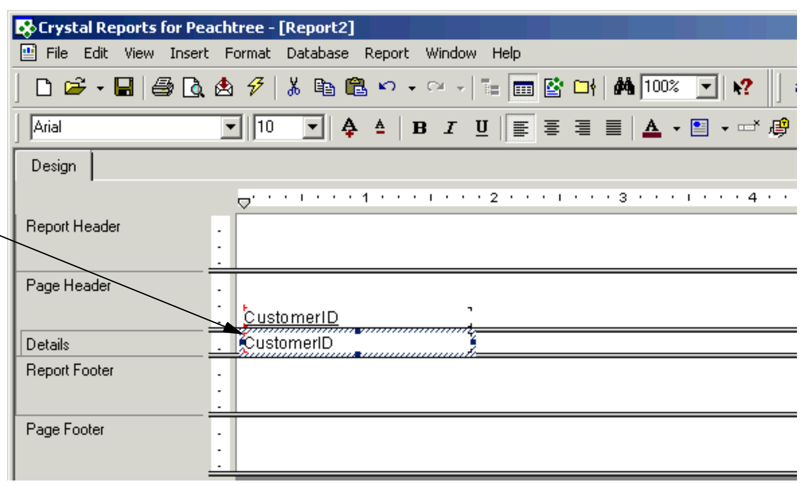


2 From the list of customer fields, select **Customer ID**, and then drag it to the far left of the **Details** section of the Report Designer.

An object frame with the cursor shaped like an arrow appears as you drag the field.

3 To insert the field, release the mouse button.

The column header text, underlined, appears in the **Page Header** section above the field name. This is how the column header will appear on the printed or previewed report.

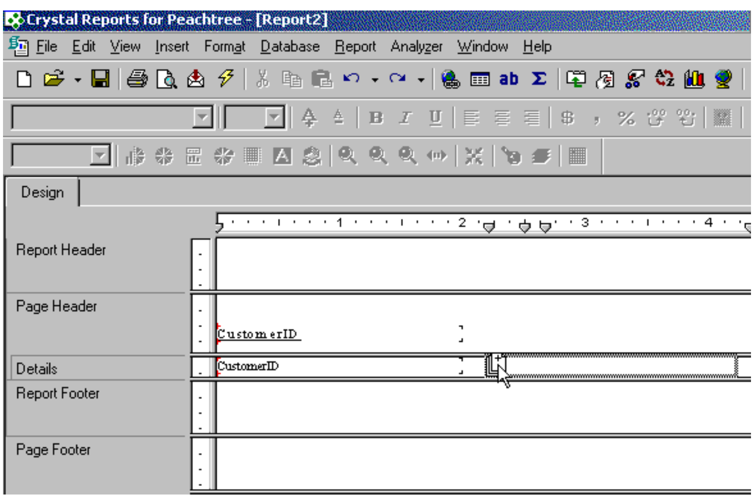


Note the following:

- The object frame indicates that when the report is either printed or previewed, the field value will appear where the field name now appears.
- The width of the object frame indicates the maximum allowable width of the printed or previewed field. It is set to display the maximum number of characters in the field, but you can change this by resizing the object frame.
- The field name is repeated above, underlined, in the Page Header section. This represents the column header text for the field and is how the header will appear on the printed or previewed report.
- The font and style used in displaying both the field value and the column header indicate the font and style selected for the characters that appear in both these elements. Later, we'll tell you how to change the font and style of text characters.

4 Now we want to add two additional fields to the report. In the Field Explorer window, select the **Contact** field; press the **Ctrl** key; and then select the **Phone_Number** field. Drag the fields and place them to the right of the **CustomerID** field.

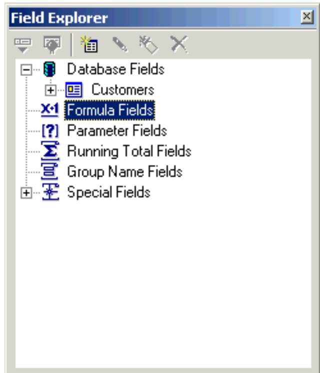
As you drag the fields, an object frame appears with the cursor shaped like an arrow atop stacked sheets of paper marked with a plus. This indicates that you are inserting multiple fields at once.



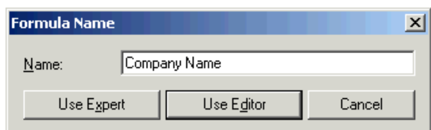
5 Click the mouse button to insert the fields.

The fields appear in the same order in which you selected them in the Field Explorer window, namely, **Contact** followed by **Phone_Number**.

6 Next we want to place the company name at the top of the report. In the Field Explorer window, select Formula Fields, and select the **New** button.



The Formula Name window appears.

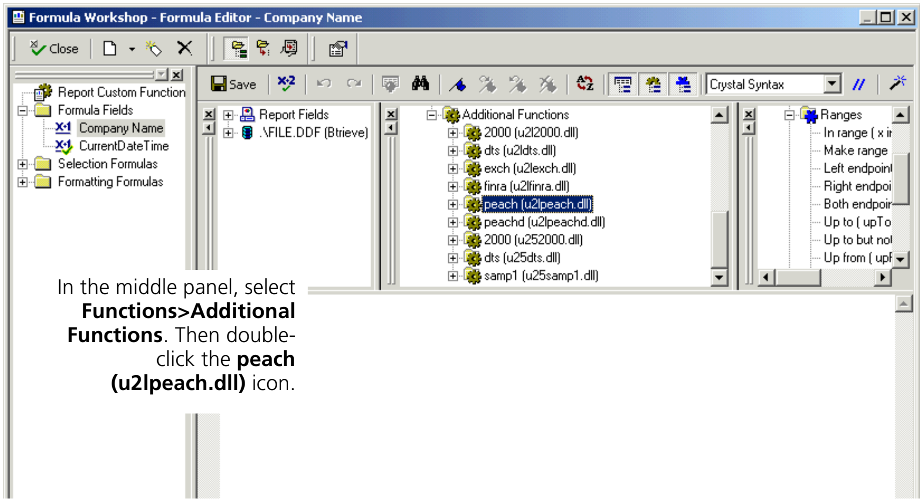


7 Type in "Company Name," and then select the **Use Editor** button.

The Formula Workshop window appears.

8 In the middle panel, double-click the **Functions** icon to expand the list of function categories. Find and double-click **Additional Functions** to further expand the list

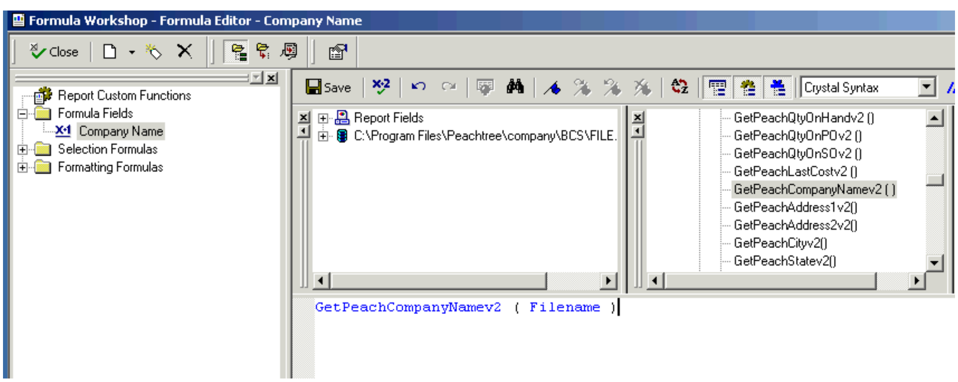
9 Find and double-click the **peach (u2lpeach.dll)** icon.



In the middle panel, select **Functions>Additional Functions**. Then double-click the **peach (u2lpeach.dll)** icon.

This expands the list to display the list of custom Peachtree functions. The functions marked “v2” are Crystal Reports for Peachtree Version 9 custom functions.

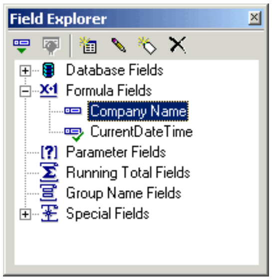
10 Double-click the function **GetPeachCompanyNamev2**.



This is the function that will display the company name when placed in a formula and then applied to a report.

11 Select the **Close** button in the upper left corner of the Formula Editor.

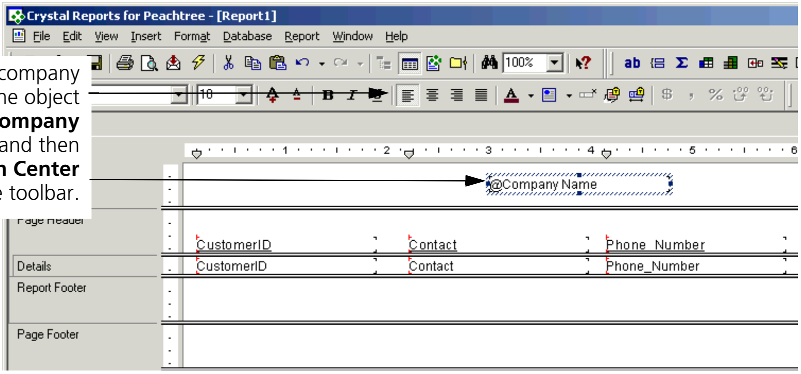
The Company Name formula appears in the list of formulas in the Field Explorer window.



12 Drag the field to the Report Header section, and click to place it at the top of the section, centering it within the section.

The field name aligns with the left side of the object frame.

13 To center the field name so that the company name is centered on the printed or previewed report, select the object frame and then select the **Align Center** button in the Formatting toolbar.



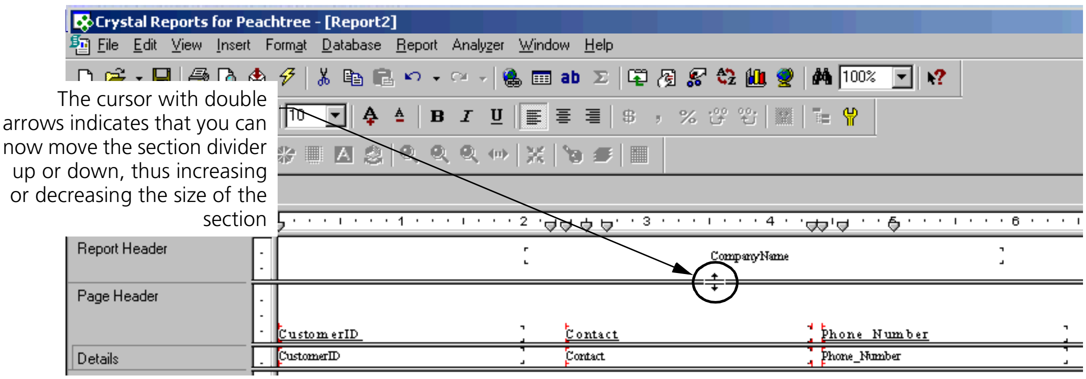
The formula name is now centered in the object frame, indicating that the formula will be centered on the printed or previewed report.

Title and Preview the Report

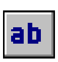
Finally, we want to add a title to the report. To do so, we'll need to slightly increase the size of the Report Header section.

1 Place the cursor on the dividing line between the Report Header and Page Header sections.

The cursor now has double arrows, indicating that you can use it to move the divider between sections.

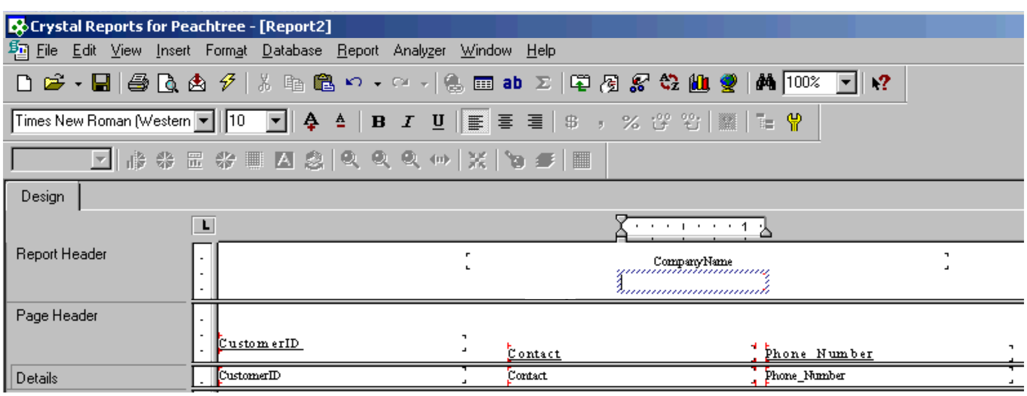


2 Hold down the left mouse button, and move the dividing line down perhaps a quarter of an inch, just enough to insert the report title.



3 To insert the title, click the **Insert Text Object** button in the Standard toolbar, and drag the cursor to the space just below the **Company Name** formula. Click the mouse button.

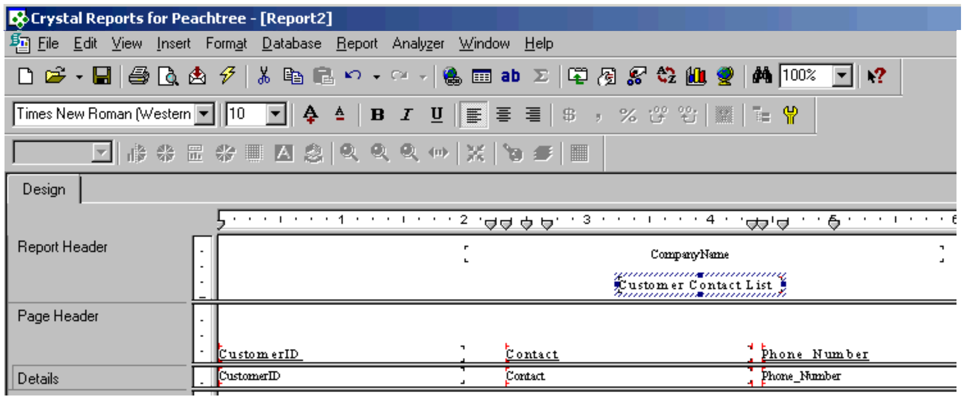
An object frame appears with the text cursor at the left side of the frame.



4 In the object frame, type "Customer Contact List."

5 Next, let's center the title just as we did the **Company Name** formula. Select the object frame around the report title, and then click the **Align Center** button.

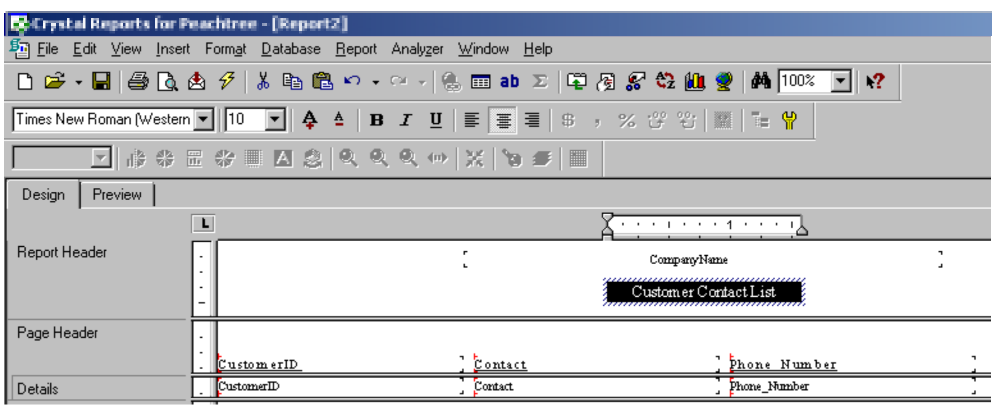
The text appears centered within the object frame.



6 Now we want to change the font and style of the report title. Select the object frame around the title, and then right mouse click.

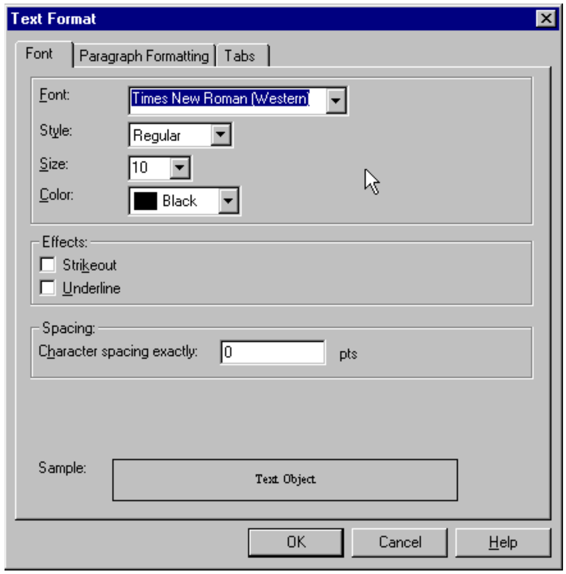
7 From the pop-up menu that appears, select **Edit Text**.

8 When the text cursor appears, select the "Customer Contact List" text to highlight it, and right mouse click again.



9 From the pop-up menu that appears, select **Text Formatting**.

The Text Format window appears with the **Font** tab selected.

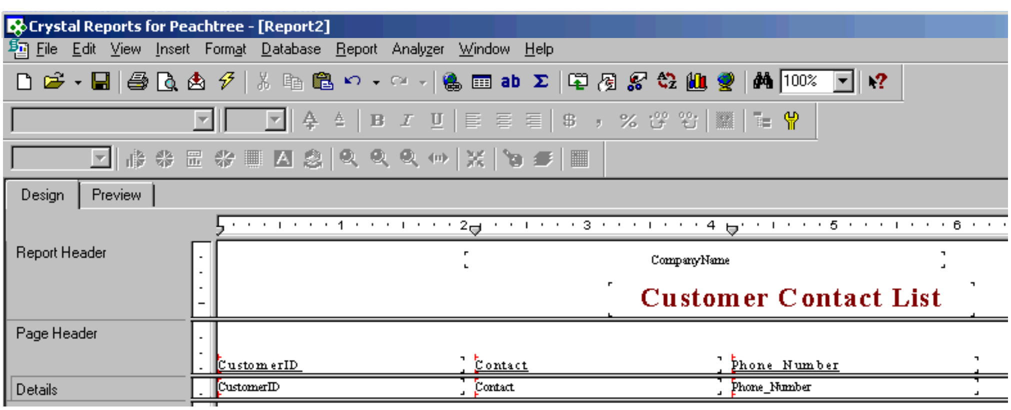


10 From the **Style** drop-down list, select **Bold**.

11 From the **Size** drop-down list, select **18** points.

12 From the **Color** drop-down list, select **Maroon**.

13 When finished, select **OK**.



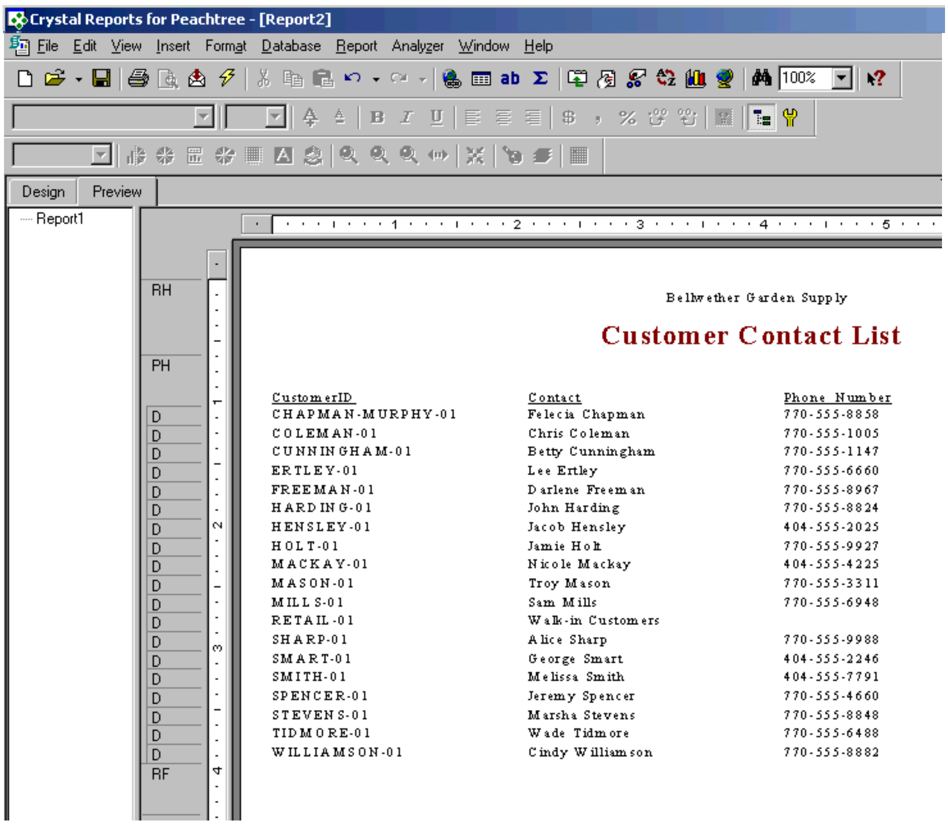
14 The title will be a bit off center, so select the object frame; drag it to center it; and then release the mouse button.

15 Now let's preview the report to make sure it will look all right when printed. Do one of the following:

- From the **File** menu, select **Print Preview.**

- From the Standard toolbar, select the **Refresh** button.

A new tab, the **Preview** tab, appears. It shows how the report will look in printed form.



To make any desired changes, such as changing the placement of fields for a more esthetically pleasing effect, select the **Design** tab, and work with the fields there. As you learned in Lesson 1 (page 37), it's possible to change report elements on the **Preview** tab, but it's generally easier working on the **Design** tab.

16 Finally, from the **File** menu, select **Save As**, and save the report under the name "Customer Contact List."

Review of Lesson 2

Let's review some of the ideas we covered in Lesson 2:

- Use the Database Expert window to connect with the DDF that contains the database tables you want in your report. Use this window also to find and select the tables you want to include. (If you add more than one table to the report and have the Smart Linking feature turned on, which is recommended, Crystal Reports will automatically link the selected tables for you where linking is possible.)
- To add fields to the table, use the Field Explorer to find and select the appropriate fields within the included database tables. You can select multiple fields by highlighting the fields and then selecting the **Ctrl** button.
- To resize any of the sections in the report, just select the section divider, and holding down the left mouse button, drag the divider to the position you want.
- To center text within an object frame, use the **Align Center** button.
- To add text to the report, use the **Insert Text Object** button
- To change the font properties of a text object, select the object and right mouse click. From the pop-up menu, select **Edit Text Object**. Highlight the text; right click again; and select **Change Font**. When the **Font** tab of the Text Format window appears, make the appropriate changes.
- To preview a report before printing, select **Print Preview** from the **File** menu, or select the **Refres**h button in the Standard toolbar.

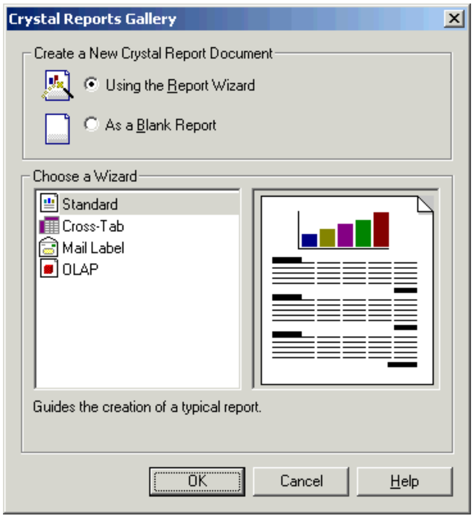
Lesson 3—Designing a Quotes Good Through List

The third lesson covers the design of a list of quotes issued to customers arranged by good-through (quote expiration) date. The report will list the initial date of the quote, the customer, the quote amount, and the good-through date.

To show more of the design capabilities of Crystal Reports, this time we'll let the Report Wizard guide us.

Use the Report Wizard to Build the Report

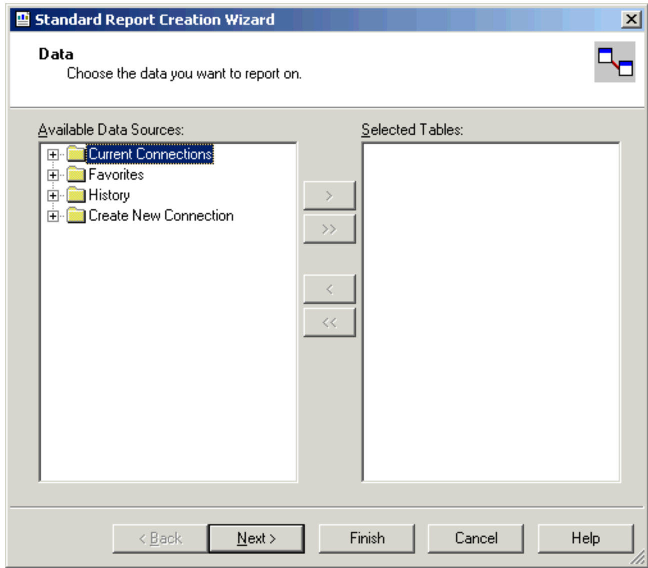
1 From the **File** menu, select **New**.



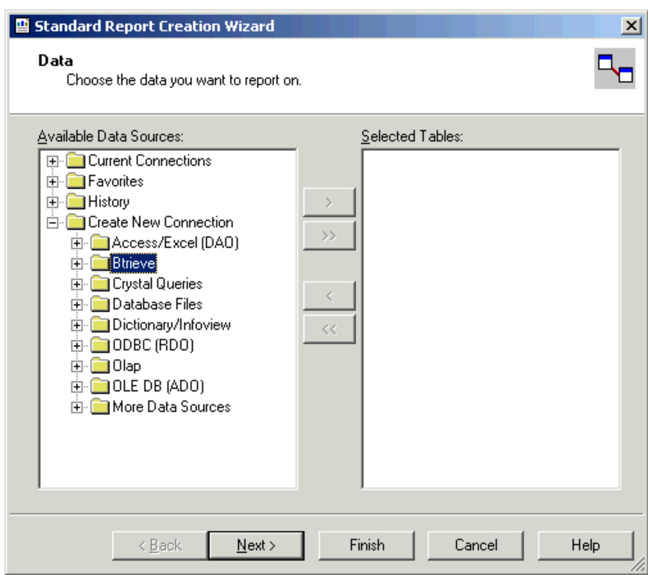
2 In the **Create a New Crystal Report Document** box, select **Using the Report Wizard**.

3 Note that in the **Choose a Wizard** box, **Standard** is preselected. This is what we want, so click **OK**.

The Standard Report Creation Wizard starts with the Data window.



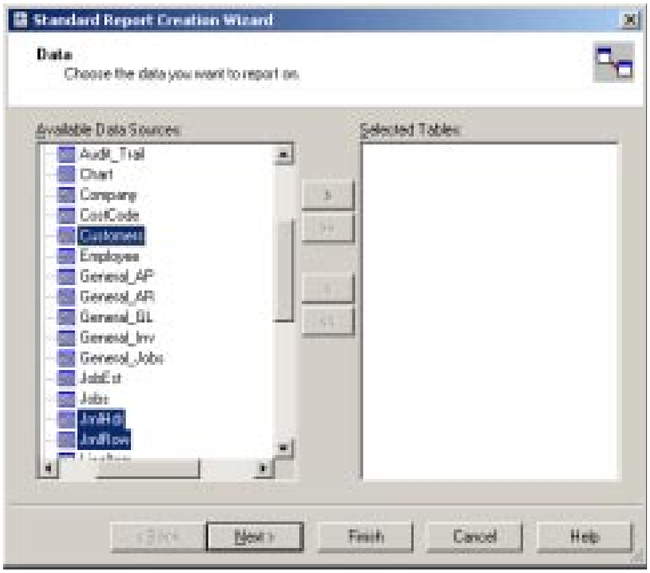
4 Double-click the **Create New Connection** folder to open it, and then double-click **Btrieve**.



5 In the Open window, use the **Look in** drop-down list to navigate to the folder containing your Peachtree company files.

6 From the list of Peachtree DDFs, select **File.DDF**, and then select the **Open** button.

7 From the list of displayed tables, select **JrnlRow**; then select the right arrow button.



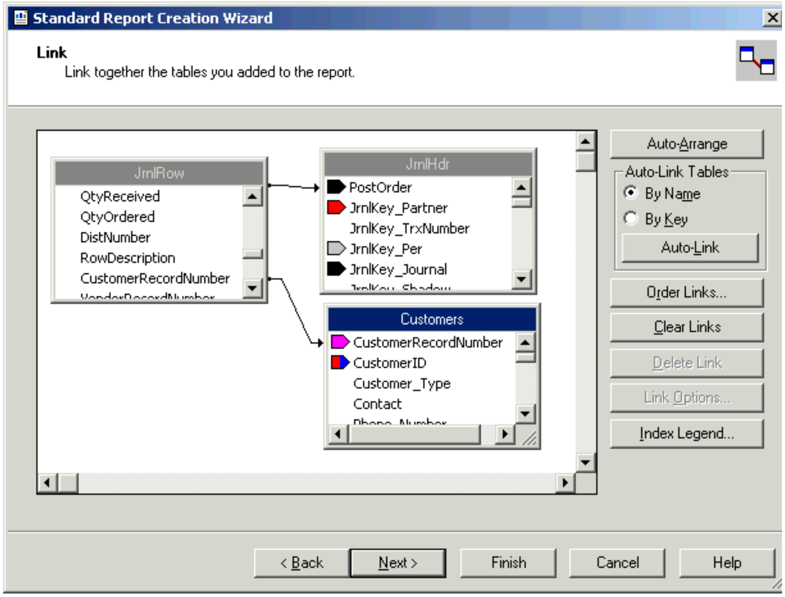
The table appears in the **Selected Tables** box on the right.

8 Repeat for the JrnlHdr and Customer tables.

For Smart Linking to work properly, selection order is *very* important, so be sure to select tables in the prescribed order: **JrnrlRow, JrnlHdr, Customer**.

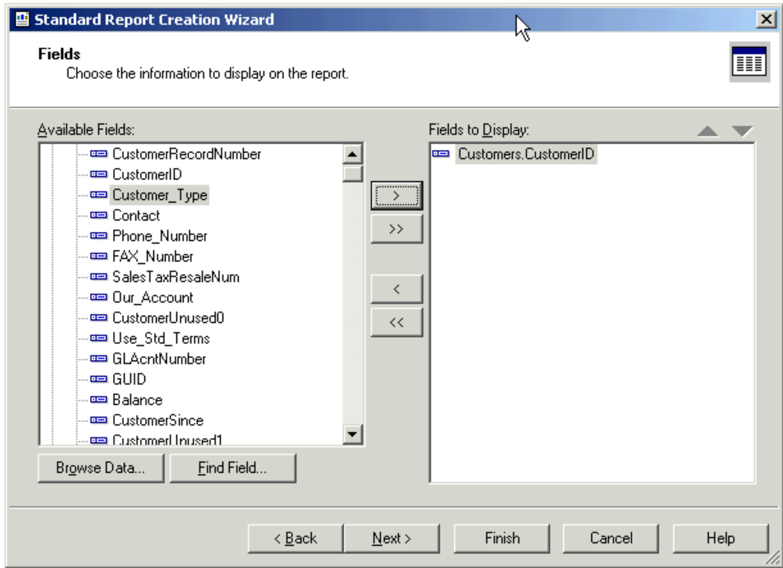
9 When finished, select **Next**.

The Links window appears, asking you to link the tables as needed.



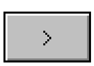
10 With Smart Linking turned on (which is the default), the Expert has linked the **PostOrder** field in the JrnlHdr and JrnlRow tables and the **CustomerRecord** fields in the JrnlRow and Customers tables. Accept these links by selecting the **Next** button at the bottom of the window.

The Fields window appears.



11 In the **Available Fields** box, double-click the Customer table if it is not already open. Select the **CustomerID** field, and then click the **Right Arrow** button.

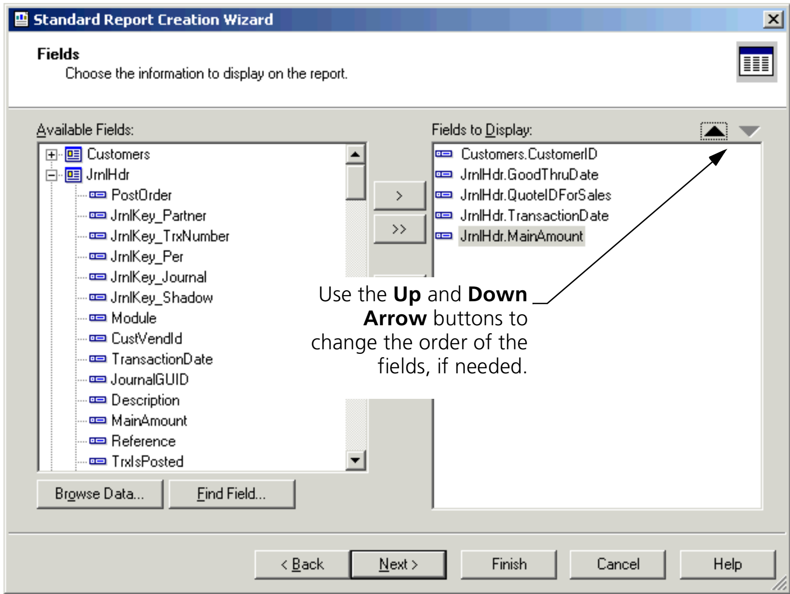
The **CustomerID** field moves to the **Fields to Display** box at the right side of the window.



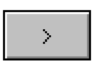
12 In the **Available Fields** box, double-click the JrnlHdr table to open it. Press the **Ctrl** key, and select the **GoodThruDate**, **QuoteIDForSales**, **Transaction Date**, and **MainAmount** fields, and then click the **Right Arrow** button.

13 Use the **Up** and **Down Arrow** buttons above the **Fields to Display** box to place the fields in the following order (if they aren't already):

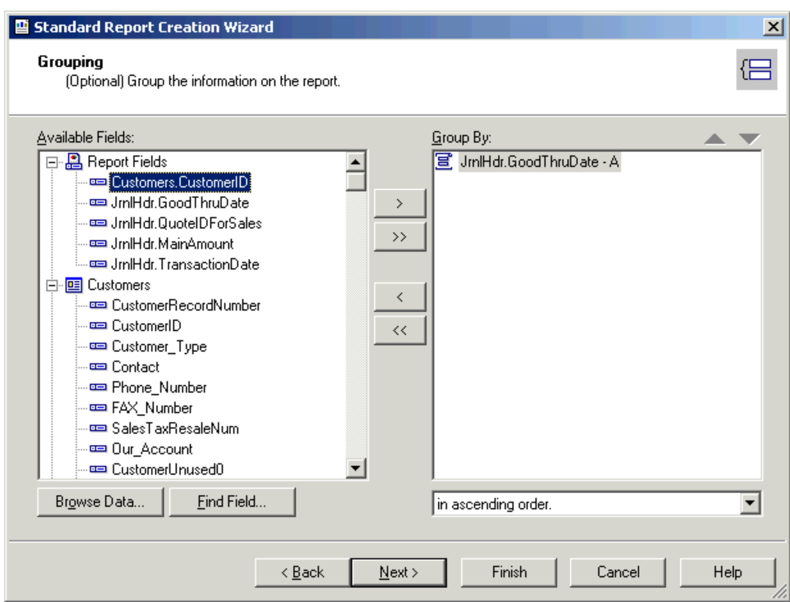
- GoodThruDate
- CustomerID
- QuoteIDForSales
- TransactionDate
- MainAmount



14 When finished, select the **Next** button.

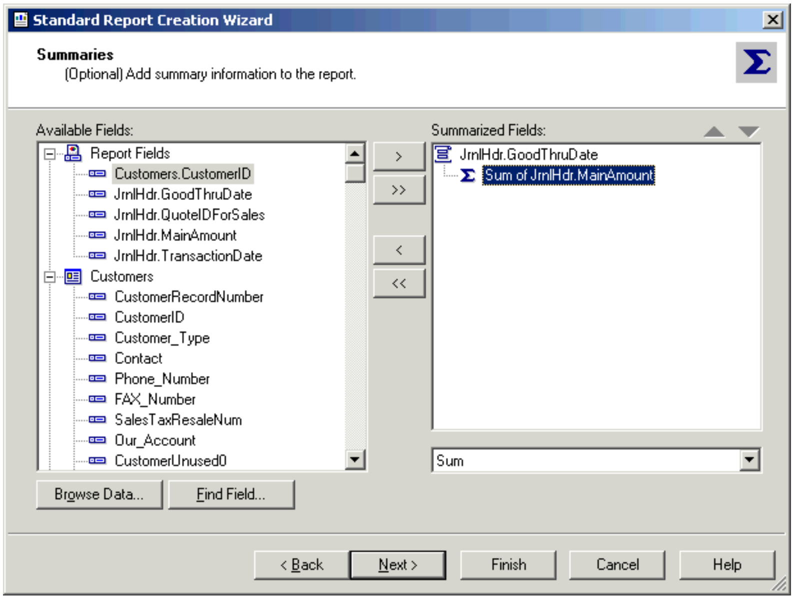


15 We want to group our data by the **GoodThruDate** field, so select it in the **Available Fields** box, and then click the **Right Arrow** button.

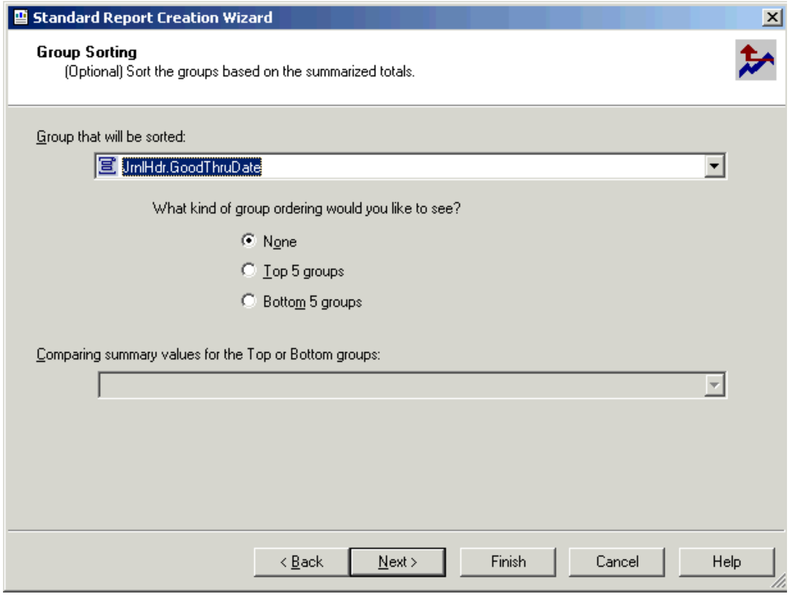


16 The preselected sort order is acceptable, so select the **Next** button.

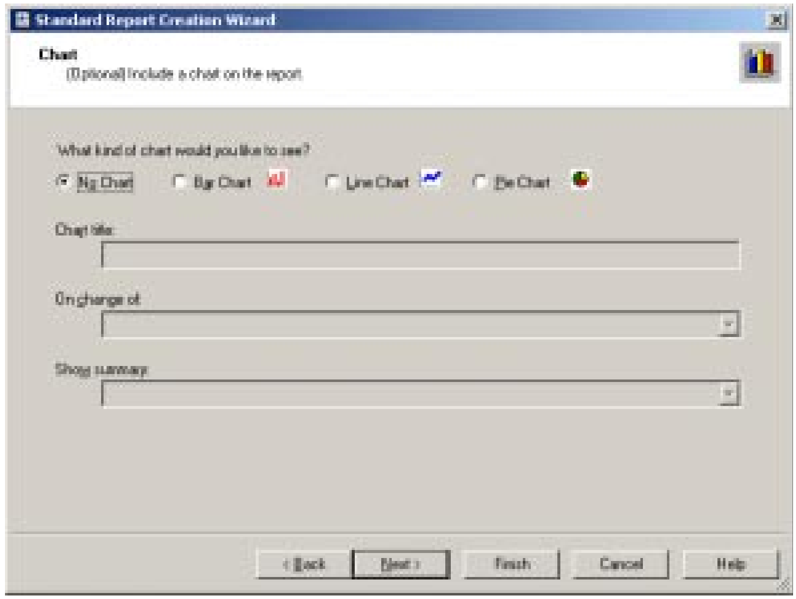
17 We want to include summary information to appear on our report, and the **Summaries** window lets us do this. The Wizard has intelligently preselected the **MainAmount** field as the field to summarize. Select the **Next** button.



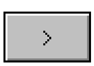
18 The Group Sorting window lets us sort groups based on summarized totals. This could be useful if we wanted to see, for example, which sales rep made the most sales in a month, but for our current report sorting is not important. So select the **Next** button without making any changes to the settings.



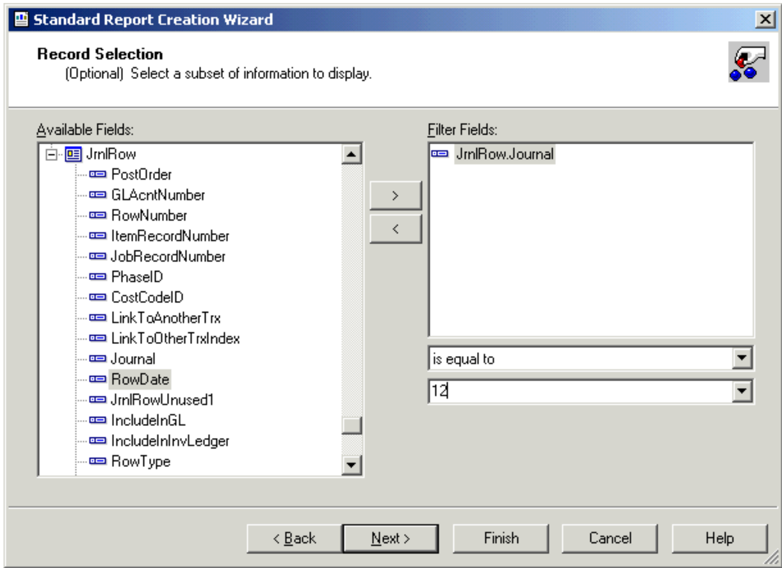
19 Again, a chart would be valuable for visually representing sales per sales rep or per geographic area, but for our report charting is not important. So select **Next** without choosing a chart option.



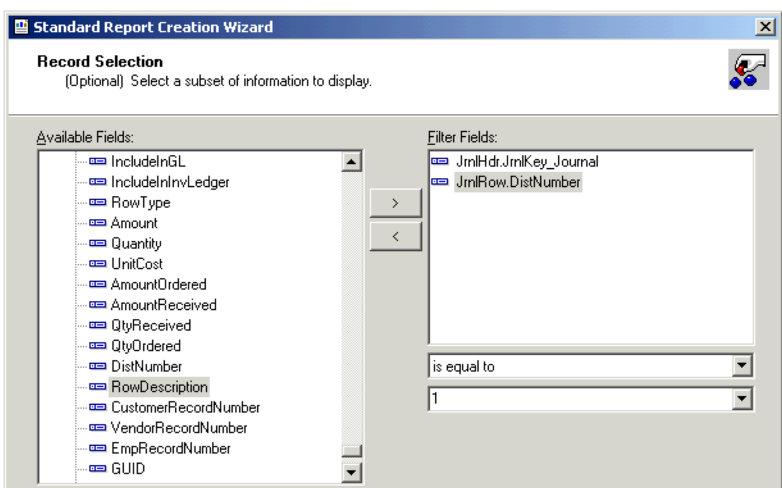
20 In the Record Selection window (shown after step 21 below), we want to make sure that only quotes appear in our report. To do so, in the **Available Fields** box, double-click the JrnlHdr.Dat (Btrieve) folder to open it; then double-click the JrnlHdr table to open it. In the list of fields, select **JrnKey_Journal**. This will tell Crystal that of all the company information contained in the journal header file, we want only quote information to appear in the report. Finally, click the **Right Arrow** button.



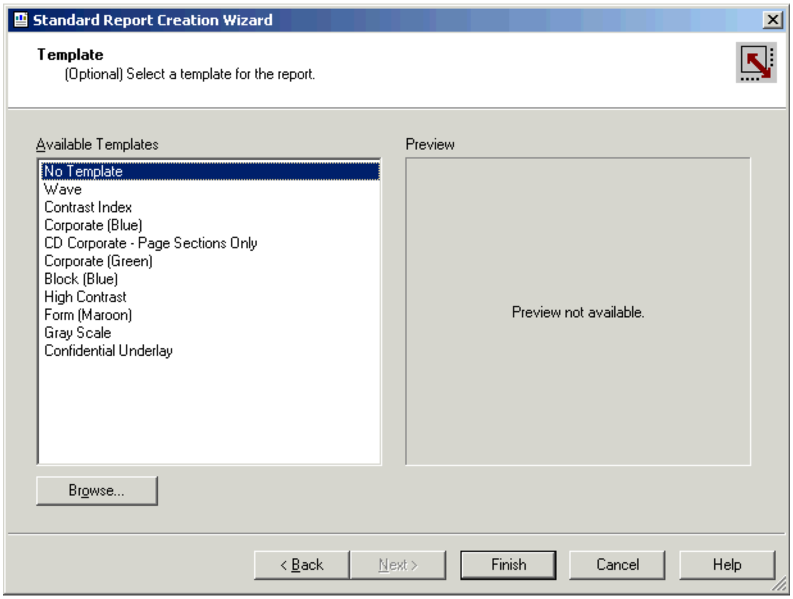
21 From the drop-down list immediately underneath the **Filter Fields** box, select **is equal to**. And in the other drop-down list box that appears, type **12**.



22 Now, repeat steps 20 and 21 for the DistNumber field. In the **Available Fields** box, double-click the JrnlRow table to open it. Select **DistNumber**, move it to the **Filter Fields** box on the right side of the window, and then select the **is equal to** parameter from the first drop-down list. But in the second drop-down list box, type **1**, as shown below.

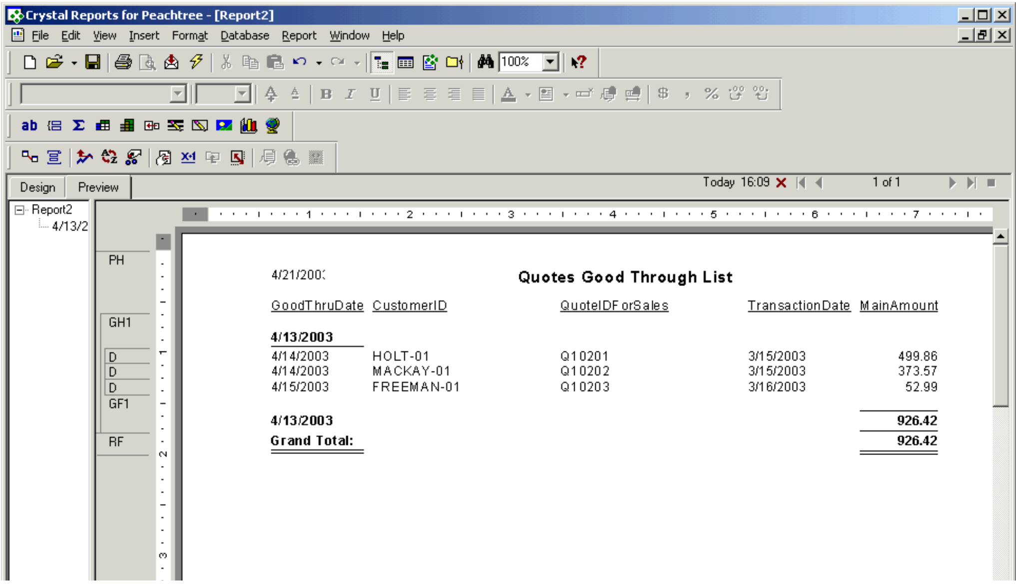


23 When finished, select **Next**.

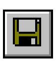


The last window, the Template window, lets you add a little predesigned pizzazz to your report. To familiarize yourself with the available templates, click each to see a preview. However, for our current report we want a plain format, so we're going to stick with the **No Template** option.

24 Select **Finish** to see the completed Quotes Good Through report.



Notice that the report is displayed on the **Preview** tab to show what it will look like when printed. To achieve the look seen above, you may need to make minor adjustments to the column headings. For information on how to do so, see the *Crystal Reports User's Guide*, the "Quick Start" chapter.



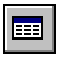
25 Finally, select the **Save** button in the Standard toolbar, and save the report under the name "Quotes Good Through List."

26 Now test your memory. Insert the "Bellwether Garden Supply" company name on the report. If you don't remember how, consult the section of Lesson 1 where we discuss putting the company name on a report.

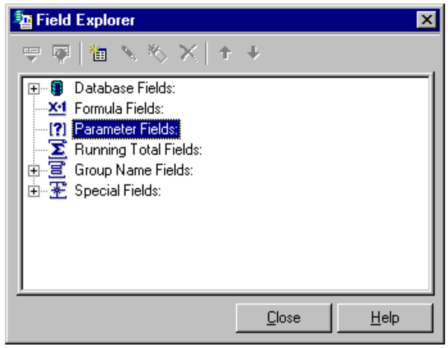
Filter the Report

> For step-by-step instructions on using parameter fields, look up **"Parameter Fields"** in the Crystal Reports Online Help index.

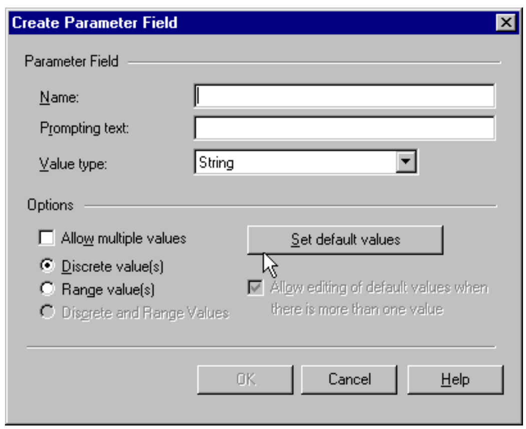
Finally, we want to add a *parameter field*, which will make the report more useful by limiting the amount of data displayed. The parameter field we want to add will filter the **GoodThruDate** field by a cutoff date so that no quotes with an expiration date earlier than the cutoff date will appear on the report.



1 in the Standard toolbar, select the **Insert Fields** button.



2 When the Field Explorer window appears, select **Parameter Fields** and right click. From the pop-up menu, select **New**.

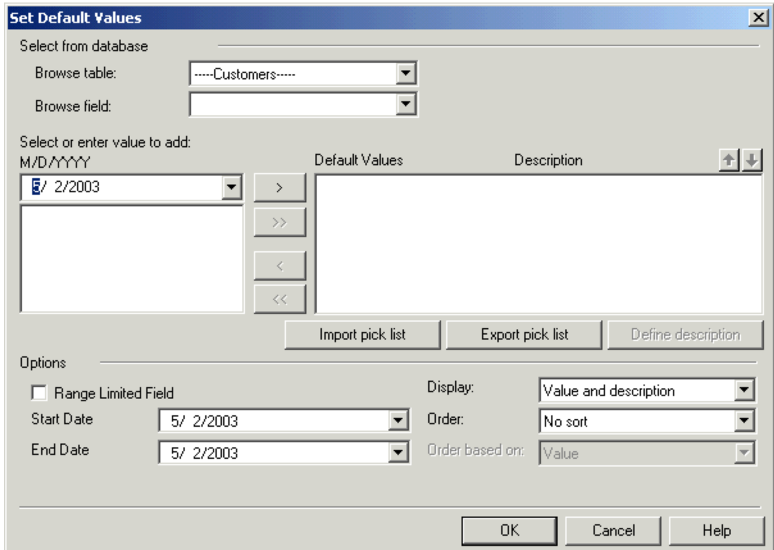


3 In the **Name** field, enter "QuoteExpirationDate."

4 In the **Prompting** text field, enter "Enter desired Quote Good Through Date."

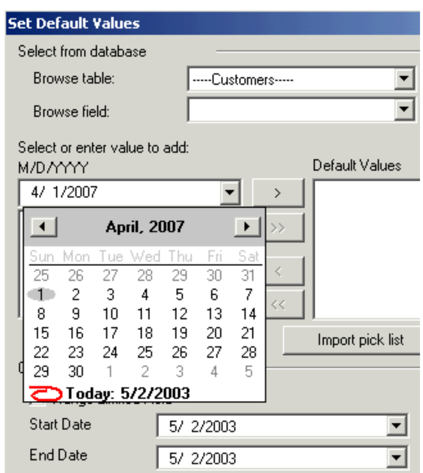
5 In the **Value type** field, use the drop-down list to select **Date**.

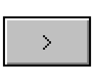
6 Click the **Set default values** button.



The **Select or enter value to add** box displays the current date (the system date from your computer). Since we want to limit the expiration date for quotes listed on the report to April 1, 2007, we want to select that date and then make it the default date for the report.

7 In the **M/D/YYYY field**, use the drop down list to display a calendar. Navigate through the calendar until you find April 1, 2007, and then select it.





8 Now, click the **Right Arrow** button next to the field to populate the **Default values** box with this date.

9 When finished, click **OK** twice.

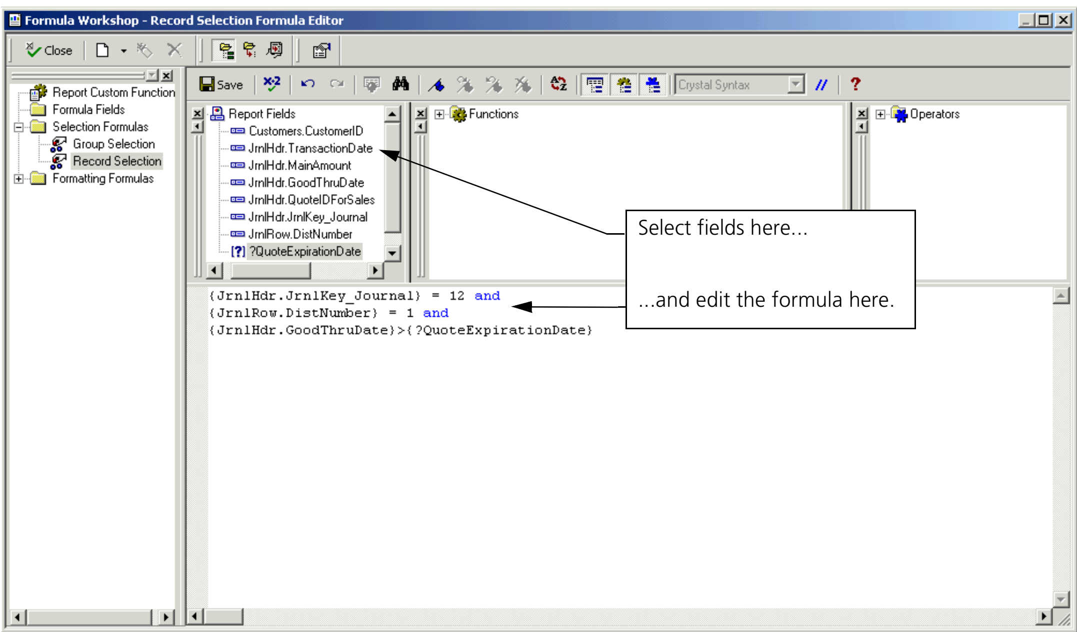
10 Next, we want to create a report selection formula that will filter the report to show quotes that fall before the expiration date of April 1, 2007. From the **Report** menu, choose **Selection Formulas** and then **Records**.

The Record Selection Formula Editor appears.

11 Place the cursor on the last line of formula, which should read {**JrnlRow.DistNumber = 1**}. Type a space and then the word "and." Press **Enter** to go to the next line.

12 In the panel on the left side of the window, double-click the **Reports Fields** icon to open it, and then double-click the **GoodThruDate** field. It will appear as part of the selection formula. Type a greater than (**>**) sign after it.

13 Next, select the **Report Fields** icon at the top of the left panel; then find and select (double-click) the **?Quote Expiration Date** field. It should appear as part of the selection formula; see below.



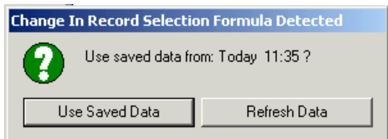
14 The formula is now complete, so select **Close** to close the Record Selection Formula Editor.

A message appears asking "Do you want to save your changes?"

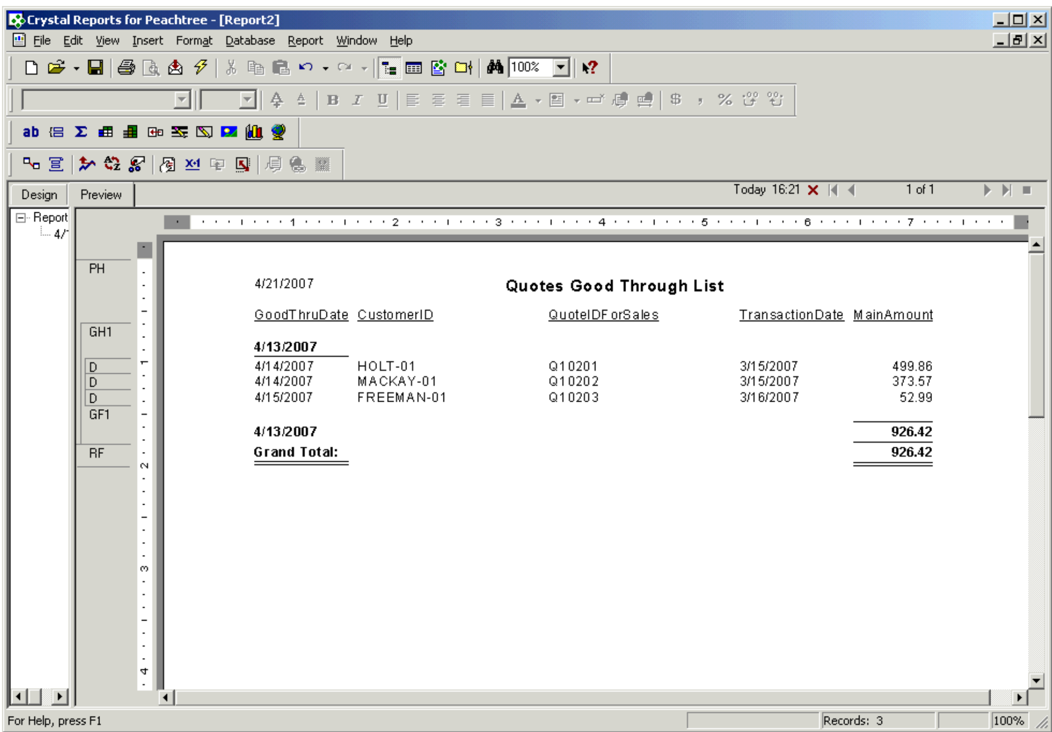
15 Click **Yes**.

16 When the Enter Parameter Values window appears, accept the default by clicking the **OK** button.

Since we have previously saved the report, a message appears telling us that Crystal has detected a change.



17 Select the **Refresh Data** option.



18 Now select **Save** again to save the final version of our report.

Review of Lesson 3

Let's review some of the ideas we covered in Lesson 3:

- The Standard Report Creation Wizard lets you choose the database, database tables, and links that will operate in the report much as you would do if you had started with the Database Expert.
- The **Fields** window of the Wizard lets you add fields to the report and also select the order of those fields and the column headings that will identify them in the report.
- The **Grouping** window lets you group all information in the report by one or more of the chosen fields.
- The **Summaries** window lets you choose a field or fields that will provide summary information in the report. It also lets you chosen whether or not to include a grand total as part of the summary information.
- The **Group Sorting** window lets you sort groups based on summarized totals. This could be useful in the case of reports reflecting information such as sales, where you will want to track sales reps or units doing the best business.
- The **Chart** window lets you add a chart to the report, a visual representation of facts and figures in the report.
- The **Record Selection** window lets you use one or more of the fields to filter the information that appears on the report. This will limit the amount and nature of data you see.
- The **Template** tab lets you overlay your report with a predesigned template, to give your report added flair.
- If you want to further limit the data appearing on the report, adding one or more parameter fields to the report will be the answer. Go to the Field Explorer, select **Parameter Fields**, right click, and select **New**.

Upgrading Crystal Reports to Peachtree 2004

4

• Upgrading Crystal Reports to Peachtree 2004 •

Overview

Note

If you used Crystal Reports for Peachtree with a prior release, you need to update your customized reports to the new Peachtree 2004 data formats. (This essentially allows you access to new or modified data fields introduced in Peachtree 2004.) To learn how to quickly update your customized reports, look up “convert, custom Crystal reports to new Peachtree Release format” in the Peachtree Help index.

If you have upgraded to Peachtree Accounting, Peachtree Complete Accounting, or Peachtree Premium Accounting 2004 but *have not* upgraded Crystal Reports for Peachtree from Version 8, your custom Crystal reports will work with Peachtree following data conversion. However, if you have upgraded to a version of Peachtree 2004 *and* upgraded to Crystal Reports for Peachtree Version 9, you will also need to verify the data source location for your custom reports before converting report data to Version 9 format.

The instructions that follow cover both instances. Complete these instructions, and you should be using your custom Crystal reports in no time. Before we discuss upgrading, however, we want to note three changes in Version 9 of Crystal Reports for Peachtree, two of which impact working with reports.

Join Type

One important change noted in these instructions is that the default join type for linking tables has changed in Version 9. In Version 8, the default join type was **Left Outer Join**. The default type in Version 9 is **Inner Join**, which we recommend you *not* use. Because it provides links between same-name fields in report tables, using the **Inner Join** type results in tables with a minimum of linkages and no redunancy. However, this join type can also result in reports that are missing important data, so you should always set up your reports to have links of the type **Left Outer Join**. Note that these two join types are the only ones available in Crystal Reports for Peachtree.

For more information on join types, look up “linking options” in the Crystal Reports Online Help index.

Relative Datapath

As noted in the instructions that follow, Version 9 of Crystal Reports for Peachtree requires that all custom reports be in the same datapath as the company files they draw on for their data. To make sure that a report will always be able to access the right company data, you need to set the relative datapath for the report. Follow these steps:

In Crystal Reports for Peachtree, open the report.

1. From the Database menu, select **Set Datasource Location**.

   The Set Datasource Location window appears.

2. In the **Current Datasource** box at the top of the window, double-click the **Properties** icon to see the list of report properties.
3. Right-click on the **Data File** line, and from the pop-up menu, select **Edit**.
4. Edit the selection so that it reads "Data File: ./FILE.DDF."
5. Press the **Enter** or **Tab** key.

Once a report is saved with the relative datapath of ./FILE.DDF, you can move it to any company folder, and you will be able to use it for that company without having to reset the datasource location.

Repository Explorer

In the Crystal Reports for Peachtree Version 9 Design window, you will notice a button called the **Repository Explorer** button. It opens the Repository Explorer window, a feature that is discussed in Version 9 documentation. This feature does not work with Peachtree 2004. If you open the Repository Explorer while working in a Crystal report, you will see no data in the window. Please ignore this feature and references to it the *Crystal Reports User's Guide* and Crystal Reports Online Help.

Upgrading to Peachtree 2004 Using Crystal Reports for Peachtree Version 9

Note

When you convert to Peachtree 2004 *and* Crystal Reports for Peachtree Version 9, the company folders for companies created in older releases of Peachtree will contain standard Crystal reports in both Version 8 and Version 9 formats. However, if you create a new company through new company setup in Peachtree 2004, your company folder will contain only Version 9 standard Crystal reports. Also, the Peachtree 2004 sample companies (such as Bellwether Garden Supply) contain only Version 9 standard reports. Version 9 standard reports are marked with a “v9” notation (for example, *Customer Detail List v9*).

If you are upgrading Peachtree 2004 *and* upgrading to Crystal Reports for Peachtree 9, there is an important initial step you should take to make sure your custom reports will work properly. After you complete the step, you can follow the instructions outlined under “Upgrading to Peachtree 2004 Using Crystal Reports for Peachtree Version 8” on page 77.

Verify and Set Data Source Location

Version 9 of Crystal Reports for Peachtree requires that the report you are working with is in the same datapath as the company files it draws its data from. If it is not, wrong or missing data will show up in the report, so you must verify that your custom report is indeed in the right datapath. Follow these steps:

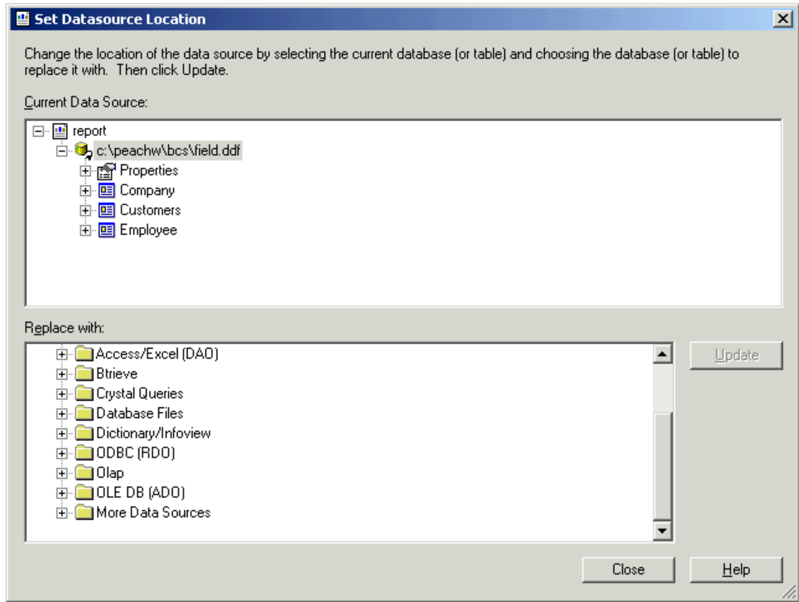
1 Open the appropriate company in Peachtree, and from the **Reports** menu, select **Crystal Reports**.

2 From the **Report** List box, select the custom report you want to convert.

3 Click **OK** to proceed; the selected report appears.

If the current datasource location matches exactly the datapath location of your custom report, or if the datasource location is set to .\FILE.DDF, you can skip to step 5.

4 From the **Database** menu, select **Set Datasource Location**.

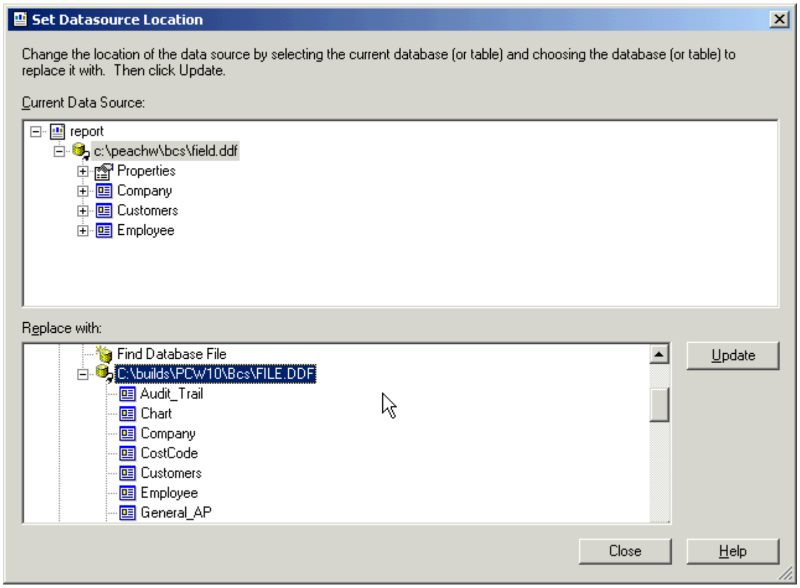


The Set Datasource Location window lets you change the location of the current data source (that is, the DDF file) for the report. This might be necessary for a number of reasons, including

- the report has been copied into the company directory of a new company
- you have newly installed Peachtree and have backed up your company data into a dummy company
- the company data has been moved to a new machine with a different datapath

5 In the **Replace with** list box, click **Btrieve** to open the folder. The **Find Database File** icon appears.

6 Click **Find Database File** to locate the datapath where the Peachtree 2004 data source is located. When you find the proper data source, select it.



7 The **Update** button becomes available. Select it, and then select **Close**.

The data source location has now been established and the database verified for the report. Since verification has already occurred, proceed to “Map Unmapped Fields” on page 78.

Upgrading to Peachtree 2004 Using Crystal Reports for Peachtree Version 8

If have upgraded to Peachtree 2004 and are using Version 8 of Crystal Reports, basically you have two tasks to complete: verifying the database and reestablishing links among database tables.

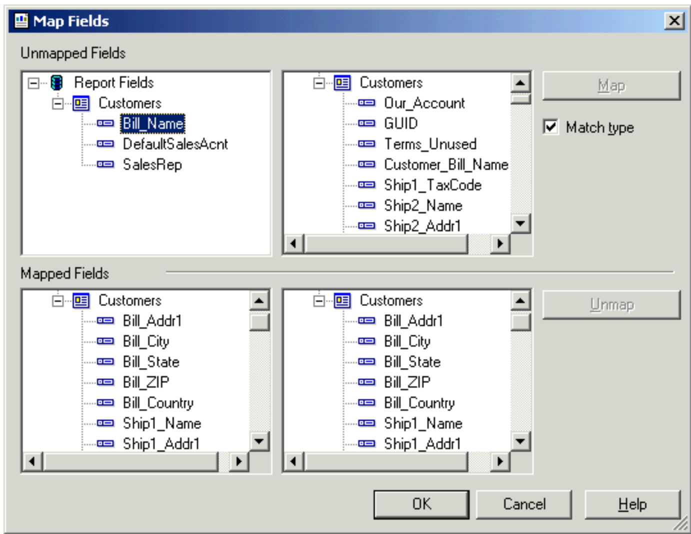
Verify the Database

1. Open the appropriate company in Peachtree, and from the **Reports** menu, select **Crystal Reports**.
2. From the **Report** List box, select the custom report you want to convert.
3. Click **OK** to proceed; the selected report appears.
4. From the **Database** menu, select **Verify Database**.

   Crystal Reports automatically compares the database tables used in the custom report with tables used by Peachtree 2004. It compares field names in the existing tables with names used in the new tables and then maps the fields. If any fields remain unmapped—that is, the field names don't match—Crystal lists the unmapped fields and invites you to map them.

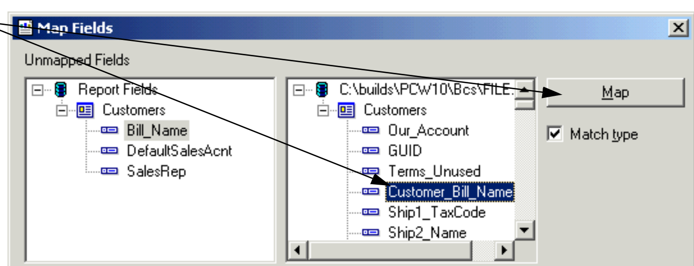
Map Unmapped Fields

In the illustration that follows, we are updating the Customer Detail List report. We've selected **Verify Database**, and Crystal has found that four fields in the report remain unmapped to fields in the new database table. These three fields from the Customers table appear in the **Unmapped Fields** list box on the left side of the window.



1 To map a field, select it in the **Unmapped Fields** box, and then find its equivalent in the list box on the right side of the window. In the case of the first unmapped field, *Bill_Name*, the field name has changed for Peachtree 2004. It is now called *Customer_Bill_Name*. So you would select that field in the list box on the right side of the window.

In the list box on the right side of the Map Fields window, select the new field name that you want to map to. The **Map** button becomes available.

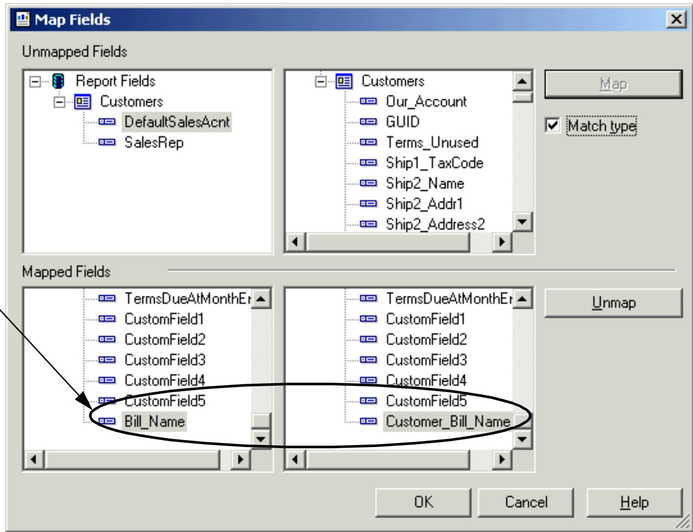


The **Map** button now becomes available.

2 To map the fields, select the **Map** button; keep the **Match type** check box checked.

The old field is now matched to the new one, as seen in the two **Mapped Fields** list boxes at the bottom of the window.

The formerly unmapped *Bill_Name* field is now mapped to the new *Customer_Bill_Name* field.



3 Repeat steps 5 and 6 for any other fields that remain unmapped.

Note that you don't have to map every field; some fields may not have new equivalents that need to be matched to them.

4 When finished, select **OK** to return to the report.

Relink Database Tables

Now that all fields are properly mapped, you're ready to make sure that links between database tables are valid and in place. If links are not valid, Crystal Reports issues an error message at this point. But even if you don't see a message, it's always a good idea to make sure all links are in place.

This is true if your custom report contains account numbers or employee IDs. In older versions of Peachtree, the Chart and Employee tables were linked using employee IDs. In Release 2004 of Peachtree, however, the links are established using *employee record numbers*. So if you are upgrading from an older version of Peachtree links to the Chart and Employee tables will certainly be broken.

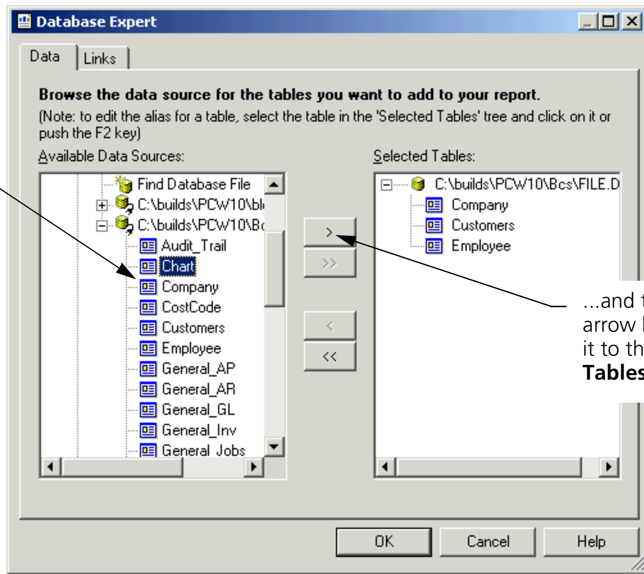
To relink the tables, follow these steps:

1 From the **Database** menu, select **Database Expert**.

The **Data** tab contains a list of data sources you can add to the database tables for the report. In the illustration below, we are still working on the Customer Detail List. We need to add the *Chart* database source to the report's database tables, so we have selected it in the **Available Database Sources** list box.

2 In the Database Expert, select the database source you want to add to the list of tables, and then click the first arrow button to the lefts of the **Available Database Sources** list box.

Select the appropriate database source here...



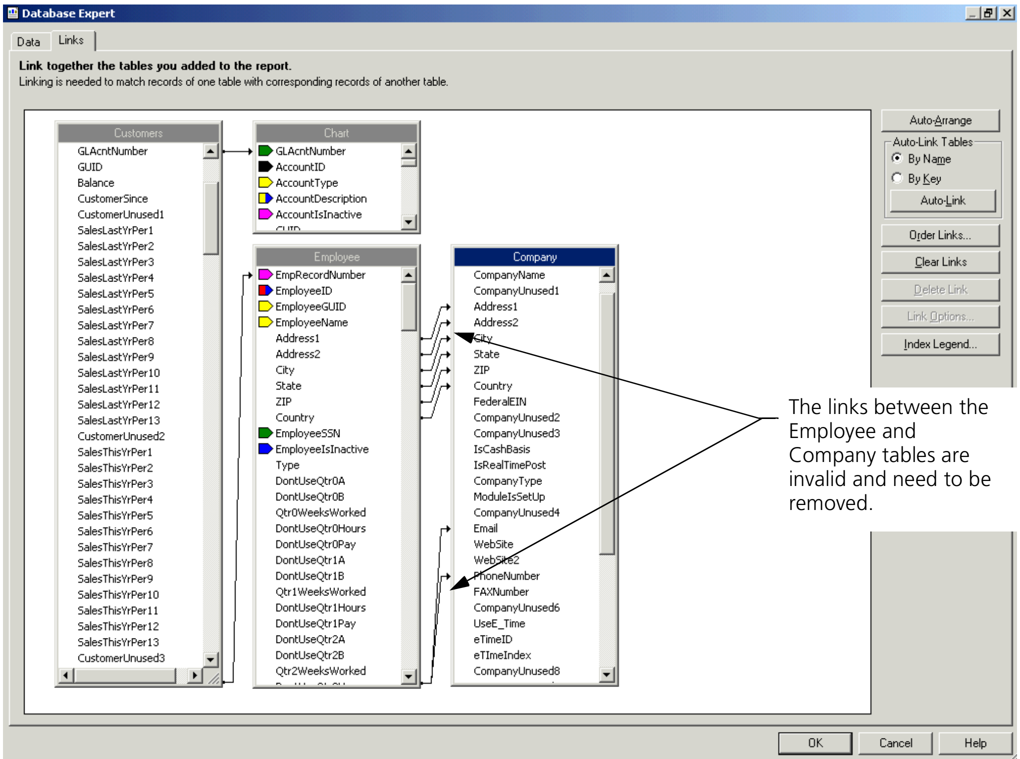
...and then click the arrow button to move it to the **Selected Tables** list box.

The source moves to the **Selected Tables** list box.

3 Repeat step 2 to move any needed additional data sources to the **Selected Tables** list box.

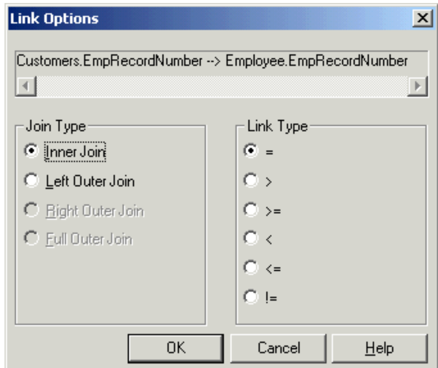
4 When finished, select the **Links** tab.

This tab displays the links between the database tables. In our example, the Customer Detail List, note that links have been reestablished between the Customers table and the Chart and Employee tables.



5 Even though the links are in place, next you need to make sure the link types are correct. Select a link line, and then select the **Link Options** button.

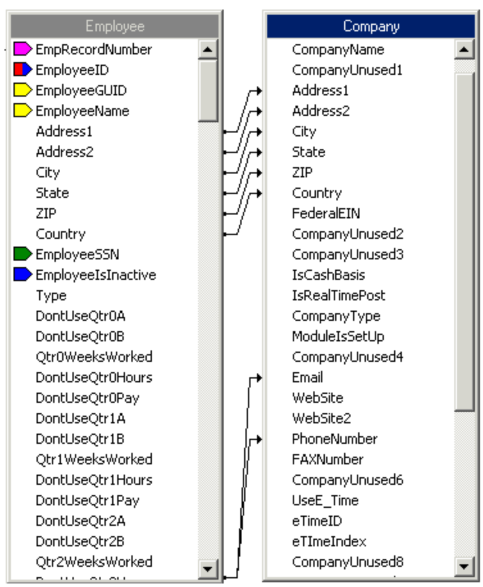
The Link Options window shows the type of link that exists between the tables. The default join type for Version 9 of Crystal Reports for Peachtree is *Inner Join*, but for your custom reports you should always choose instead *Left Outer Join* as the join type.



6 Select the **Left Outer Join** option button. Then select **OK** to return to the Database Expert.

7 Repeat steps 5 and 6 for each link whose type you need to change.

Next, check also that there are no inappropriate links between tables. In the detail of Database Expert **Links** tab shown below, note the links between the Employee and Company tables.



Since the example we're using is the *Customer* Detail List, the report doesn't need to draw on employee record fields such as employee's street address, e-mail address, and phone number. So these links need to be broken.

8 If there are any inappropriate links between tables, select one of these links and right-click. From the pop-up menu, select **Delete Link**. Repeat for each link that should not exist.

9 When finished, select **OK** to accept the changes and return to the report.

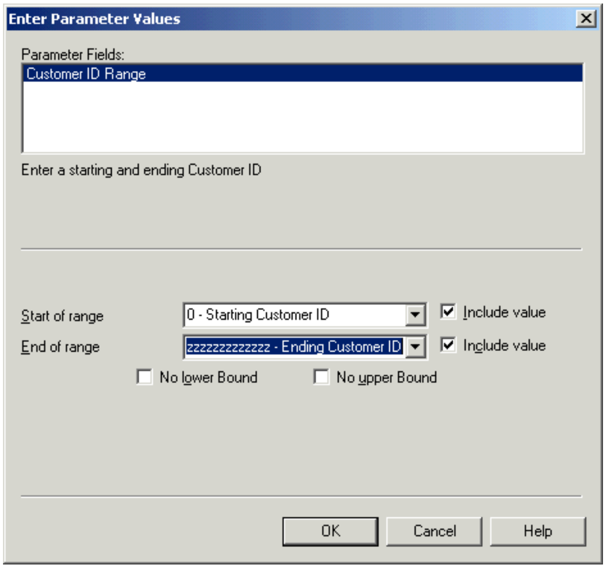
Note

If you are upgrading to Version 9 of Crystal Reports for Peachtree, at this point you will see a message that reads "The database is now up to date." Click **OK** to dismiss the message; then proceed with step 10.

10 You're ready now to refresh the data. Select the **Refresh** button.

11 In the Refresh Report Data window, select **Prompt for new parameter values**.

12 In the Enter Parameter Values window, use the **End of range** drop-down list to select the very end of the range; it will be represented by a series of z's, as in the example below.

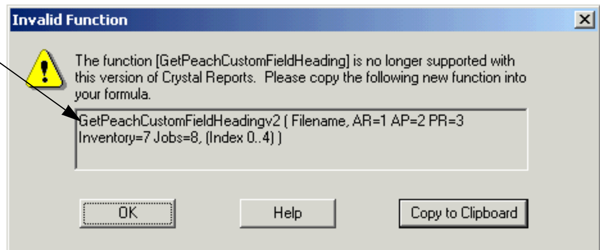


13 Select **OK** to accept the setting and return to the report.

You should now be ready to work with your custom report in Peachtree 2004.

However, in some cases you will see an error message stating that one of the functions you used in putting together the report is not valid in this version of Crystal.

The new function is marked with “v2” to indicate it’s a Crystal Reports for Peachtree Version 9 function.



- **If you are still working with Crystal Reports for Peachtree Version 8,** the old report functions will actually still work, so you can disregard this message. Click **OK** to dismiss it.
- **If you have upgraded to Version 9 of Crystal Reports for Peachtree,** you need to follow the steps below to replace the old report function with a new one compatible with Version 9.

Replacing Old Report Functions in Crystal Reports for Peachtree Version 9

The Invalid Function window shown above indicates that one of the custom formulas in your report will not work in Crystal Reports for Peachtree Version 9. The reason is that one or more of the functions used to set up the formula has changed in the new version. The window in the illustration informs us that the function **GetPeachCustomFieldHeading** is not supported in Version 9 and must be replaced with the current function. The new function is marked with “v2” (**GetPeachCustomFieldHeadingv2**), indicating it is a Version 9 function.

For more information on working with formulas and functions, refer to the “Using Formulas” chapter of the *Crystal Reports User’s Guide*. For information on custom Peachtree functions and how to use them in report formulas, look up “custom Peachtree functions (Crystal Reports)” in the Peachtree online Help index.

Copy the New Function and Paste into the Custom Formula

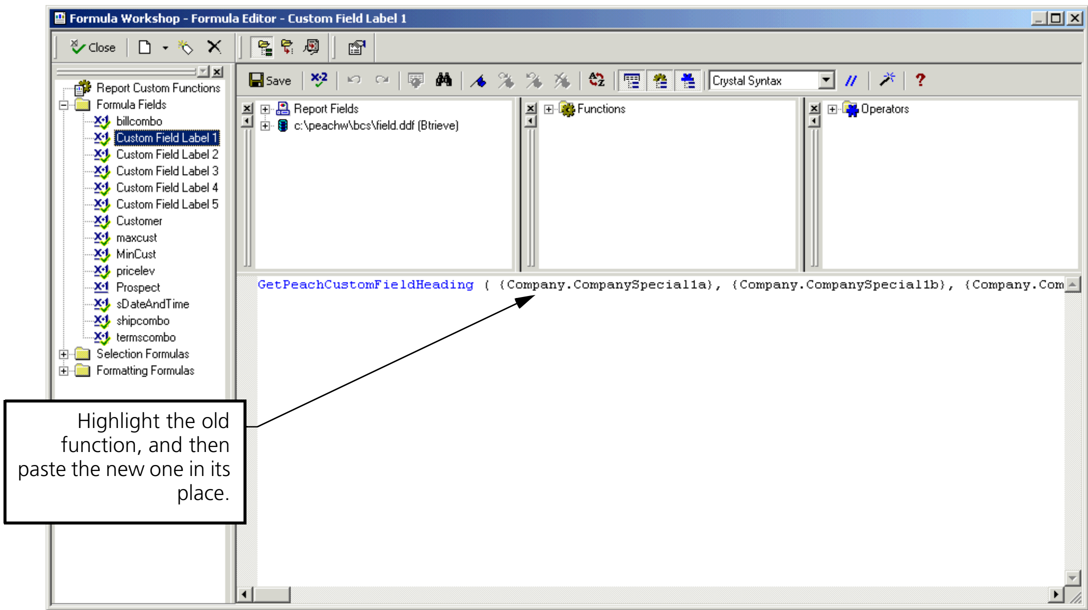
1. You need to copy and paste a version of the current function into your custom formula. So click the **Copy to Clipboard** button to copy the function to the Windows Clipboard.
2. Click **OK** to dismiss the message.

3 In the Crystal Reports Design window, select the **Design** tab.

4 Select the formula for which the custom function needs replacing.

5 Right-click, and from the pop-up menu, select **Edit Formula**.

The Formula Workshop window appears showing the old function that needs to be replaced.



6 Use the mouse pointer to highlight this function, and then press **Ctrl+V** to paste the current (Version 9) function into the custom formula.

For certain functions, you may have to enter parameters or edit the syntax of a function. In these cases, you would receive a message: “There is an error in this formula. Do you want to save it anyway.” Click No, and add any necessary parameters.

For more information on editing functions, look up “functions, Peachtree in Crystal Reports” in your Online Help index.

7 When finished, select **Save** to save the formula; then select **Close**.

8 The Invalid Function error message may appear for additional old functions that need to be replaced. Repeat steps 1 to 4 to replace all functions that need it.

Once all old functions have been replaced, your custom report is ready to go in Crystal Reports for Peachtree Version 9.

Linking Report Tables in Version 9

5

Overview

Peachtree Report Tables and Linking Fields

• Linking Report Tables in Crystal Reports for Peachtree Version 9 •

Overview

If you are working with Version 9 of Crystal Reports for Peachtree, you may find that report tables do not Smart Link (autolink) exactly as they did in Version 8. This is true because some tables are no longer used, and the function of some has changed. This chapter discusses the tables used to generate Peachtree custom reports and the fields that should be used to link them.

For more information on linking databases, refer to the "Understanding Databases" and "Crystal SQL Designer" chapters of the *Crystal Reports User's Guide*.

Peachtree Report Tables and Linking Fields

The following is a list of tables used for building Peachtree custom reports. Some do not function as they did in Version 8, so before linking tables manually in the Crystal Database Expert, be sure to consult this chapter of *Getting Started*.

The tables are listed in alphabetical order, but perhaps you'll want to look at "JrnlHdr" and "JrnlRow" first. These two tables are the two most important for report building, and all other tables must link to them before data can show up properly in reports.

Audit Trail

The Audit Trail table has no indexed fields, or "keys", and only one field that can link to another table. You can link the **PostOrder** field to JrnlRow or JrnlHdr.

For more information on indexed fields, look up "indexed fields" in the Crystal Reports Online Help index.

Chart

If your report lists some or all of the accounts your company's chart of accounts, then the Chart table will be the primary table involved. Otherwise, it will be a secondary table linked to others by the **GLAcntNumber** field.

Company

The Company table is not used in building reports in Version 9. In this version, special custom functions, not a table, are used to insert company information into the report.

Cost Code

Except in reports merely listing cost codes, this table is a secondary one. It has several indexed fields, the primary ones being **CostRecordNumber** and **CostCodeID**.

- *With JrnlRow as the primary table,* the Cost Code table links to the **CostCode** field by the **CostCodeID** field.
- *With JobEst as the pimary table,* the Cost Code table links to the **CostCode** field by the **CostRecordNumber** field.

Customer

Except in reports including a customer list, this table is a secondary one. The most important indexed field in the table is **CustomerRecordNumber**, which you should use to link the Customer table to primary tables (JrnlRow or JrnlHdr).

Employee

Except in reports including a employee list, this table is a secondary one. The most important indexed field in the table is **EmpRecordNumber**, which should be used to link the Employee table to primary tables (JrnlRow or JrnlHdr).

General.DAT Tables

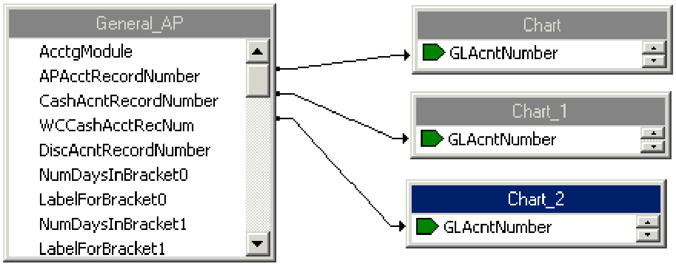
The General.DAT file is made up of five individual tables, listed below.

General_AP

This table has no indexed fields. Instead, it has a number of account record number fields that should link to the Chart tables in Chart.DAT through the **GLAcntNumber** field. The account record number fields in General_AP will not SmartLink to this field in the Chart tables, but you can link them manually in the Database Expert.

Note

If you want more than one account number to appear in a report, for each additional account you want to show you need to set up a separate alias of the Chart table and link to it from the General_AP table. The illustration below shows these links to alias version s of the Chart table.



For more information on working with aliases, refer to the "Understanding Databases" chapter of the *Crystal Reports User's Guide*, or look up "alias" in the Crystal Reports Online Help index.

General_AR

This table has no indexed fields. Instead, it has a number of account record number fields that should link to the Chart tables in Chart.DAT through the **GLAcntNumber** field. The account record number fields in General_AR will not SmartLink to this field in the Chart tables, but you can link them manually in the Database Expert.

As with the General_AP table, in order to show more than one account number you must set up alias versions of the Chart table and link them to the General_AR table in the manner shown in the illustration above.

General_GL

This table has no indexed fields. Instead, it has a number of account record number fields that should link to the Chart tables in Chart.DAT through the **GLAcntNumber** field. The account record number fields in General_GL will not SmartLink to this field in the Chart tables, but you can link them manually in the Database Expert.

As with the General_AP table, in order to show more than one account number you must set up alias versions of the Chart table and link them to the General_GL table in the manner shown in the illustration above.

General_Inv and General_Jobs

Neither of these tables has fields that can be linked to other tables during report building.

Peachtree Report Tables (Continued)

Jobs

Except in reports including a list of existing jobs, this table is a secondary one. The most important indexed field in the table is **JobRecordNumber**, which should be used to link the Jobs table to primary tables (JrnlRow or JrnlHdr).

JrnlHdr

In some reports, the JrnlHdr can act as the primary table. If all information needed in the report is contained in the JrnlHdr table, then the JrnlRow table (usually the primary table for a report) is not needed, but JrnlHdr will link to all secondary tables.

If JrnlRow contains needed report information, then JrnlRow will be the primary table. JrnlHdr will be a secondary table linking to JrnlRow through the indexed field **PostOrder**.

JrnlRow

Except as noted above under “JrnlHdr,” JrnlRow is always the primary table and provide core database information for report building. JrnlRow contains the raw data making up accounting transactions. In all reports that need to include transaction data (except when JrnlHdr contains all fields needed to build the report), JrnlRow will serve as primary table, and all other tables will be secondary. JrnlRow should *never* act as a secondary table.

LineItem

Except in reports including a list of inventory items, this table is a secondary one. The most important indexed field in the table is **ItemRecordNumber**, which you should use to link the LineItem table to primary tables (JrnlRow or JrnlHdr).

Raise History

This is a new table introduced for use with Crystal Reports for Peachtree Version 9. It is used only in Peachtree Premium Accounting payroll reports. The Raise History table should be linked only to the Employee table through the field **EmpRecordNumber**.

Tax Authority

This table has no indexed fields. In general, the table will need only to be linked to the *JrnlRow* table. In such cases, the ID field in the Tax Authority table will be linked to the **TaxAuthorityCode** field in the JrnlRow table.

Tax_Code

This table has no indexed fields. In general, the table will need only to be linked to the *JrnlHdr* table. In such cases, the ID field in the Tax_Code table will be linked to the **SalesTaxCode** field in the JrnlHdr table.

Ticket

This table has no indexed fields. In general, the table will need only to be linked to the Employee or Vendor table through the field **EmpVendRecordNumber**.

Vendor

Except in reports including a list of vendors, this table is a secondary one. The most important indexed field in the table is **VendorRecordNumber**, which should be used to link the Vendor table to primary tables (JrnlRow or JrnlHdr).

Appendix: Filtering Report Data

A

Overview

Filtering Reports Using Specific Fields

Filtering Reports to Eliminate Null Values

• Appendix: Filtering Report Data •

Overview

Certain fields in the JrnlRow and JrnlHdr tables can help you filter your custom Crystal reports so that you see exactly the kind of data you want to see. In this appendix, you'll learn which fields are especially useful in this respect and how to use them as filters.

In addition, you can use certain fields to filter your reports for information you *don't* want to see—for example zero-dollar or void transactions. In order to do this, you need to edit the selection formulas for these included report fields. The appendix will tell you how to do this also.

For complete listings of the fields contained in Peachtree data (.DAT) files, look up **".DAT files"** in the Peachtree online Help index.

Filtering Reports Using Specific Fields

The JrnlRow Table

Three fields in the JrnlRow table are especially useful for filtering reports: **RowNumber**, **RowType**, and **Journal**.

RowNumber

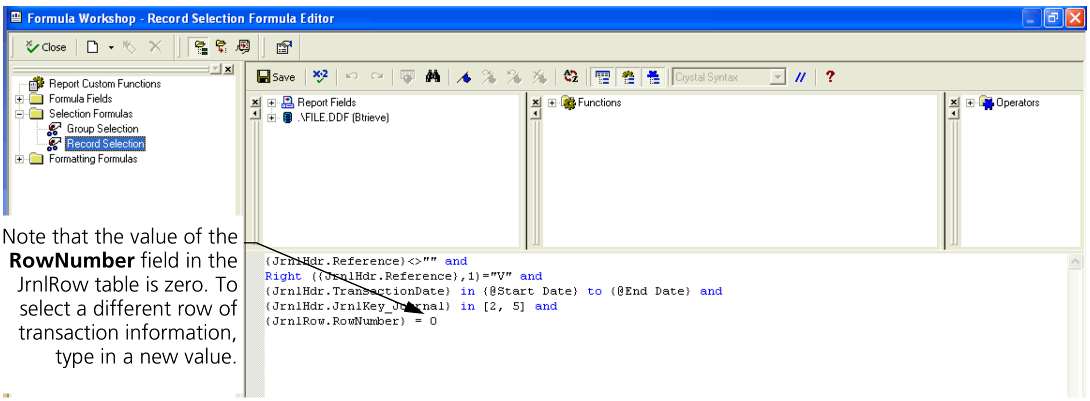
The **RowNumber** field is used to order transactions consistently in a report and is numbered according to the number of data elements in the individual transaction. So you could select **RowNumber** as the field to link in the JrnlRow table. You could then create a *selection formula* that would tell Crystal which specific row in the transaction to draw on. For example, your selection formula might set the value of the **RowNumber** field to zero. The zero value means that the report will draw on the "top-most row," or most basic level of information in the transaction. That translates to the dollar amount figure in most transactions, such as customer or vendor invoices.

To set the value of a field like the **RowNumber** field, you use either the Crystal Record Selection Formula Editor or Select Expert. To get to one or the other of these two windows

1. Open the appropriate report in the Crystal Design window.
2. From the **Reports** menu, choose **Selection Formulas.**
3. Do one of the following:

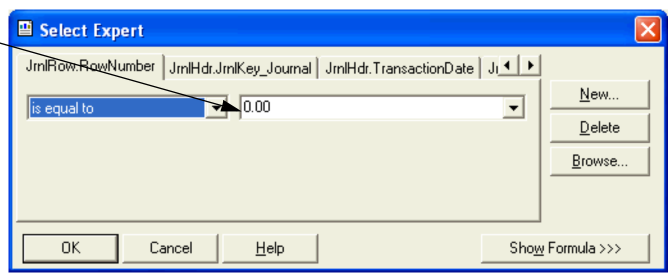
- To open the Record Selection Formula Editor, from the **Report** menu, choose **Selection Formulas** and then **Record**.

The illustration below shows the Record Selection Formula Editor as it appears for the Crystal Void Check Register report (Version 9). Notice that the value of the **RowNumber** field is set to zero. You could simply type in a new value in order to draw on other rows of data besides the top row in the transaction.



Note that the value of the **RowNumber** field in the JrnlRow table is zero. To select a different row of transaction information, type in a new value.

- To open the Select Expert, from the **Report** menu, choose **Select Expert.**



Again, the value of the **RowNumber** field in the JrnlRow table is zero. To select a different row of transaction information, type in or select a new value in the drop-down list box.

The **JrnlRow.RowNumber** tab shows that the **RowNumber** field is set to **0.00**. You can either type in a new value or select it from the drop-down list.

RowType

Similar to **RowNumber**, the **RowType** field has a number of valid types, including **JrnlRowType_Normal**, which draws information from basic transactions such as invoices, credit memos, and sales orders. Beside JrnRowType_Normal, a number of other values are available for this field; they are listed in the Peachtree online Help topic for the JrnlRow.DAT.

Journal

The **Journal** field is very useful since its function is to draw on information in the Peachtree journals, such as the General Journal. Below is a table of the valid values for this field and the Peachtree journals corresponding to each value.

Value	Peachtree Journal
0	General Journal
1	Cash Receipts
2	Cash Disbursements
3	Sales
4	Purchase
5	Payroll
7	Inventory Adjustments
8	Assemblies
10	Purchase Orders
11	Sales Orders
12	Quotes

Just as in the case of the **RowNumber** field above, you can set the value of the **Journal** field in either the Crystal Record Selection Formula Editor or Select Expert. For example, if you set the value of the field to three, then your custom report would draw on the Sales Journal for its information.

For instructions on setting the value of a field by creating a selection formula, see “RowNumber” on page 94.

The JrnlHdr Table

The JrnHdr table, too, has at least one field that will help you filter reports, the **TransactionDate** field. This field will let you make sure the report contains information only for a journal transaction that occurred on a specific date. As with other fields discussed above, you can change the value of the **TransactionDate** field in either the Record Selection Formula Editor or Select Expert.

Filtering Reports to Eliminate Null Values

Oftentimes, you won't want your Crystal reports loaded with empty bits of information, including transaction fields for which there is no dollar total, no date, or no reference number of some sort (for example, invoice or purchase order number.) You can do this by creating special selection formulas for the fields you use to build your Crystal report.

Selection Formulas for Filtering Out Null Values

Null Dates For example, suppose you wanted your report to filter out all sales order transactions that were lacking a ship-by date. You would set up the report to include the **ShipByDate** field from the JrnlHdr table. Then, in either the Record Selection Formula Editor or Select Expert, you would set the value of this field so that the report returned only sales orders with non-null ship-by dates. In the Record Selection Formula Editor, the **ShipByDate** field selection formula should look like this:

```
{JrnlHdr.ShipByDate}<>Date(0,0,0)
```

The result: The report would include a ship-by date from the original Peachtree transaction only if that date were greater or less than 0 month/0 day/0 year—in other words, non-null.

Null Currency Amounts Similarly, if one of your reports lists your company's inventory items, you could filter out all null occurrences of last unit cost. You would do this by including the **LastCost** field from the LineItem table and setting the value of the field so that it would return only non-null values for the field. In the Record Selection Formula Editor, the **LastCost** field selection formula should look like this:

```
{JrnlHdr.LastCost}<>0
```

The result: The report would include a last unit cost from the original Peachtree item record only if the cost were greater or less than zero.

Null Strings You can filter your reports so that transaction fields lacking information don't show up on the report. Let's say you wanted to filter your report so that a reference number would show up only if the original Peachtree transaction had a non-null entry for the number. You could do this by selecting the **Reference** field in the JrnlHdr table and setting it so that the report returned only non-null values for transaction reference numbers. In the Record Selection Formula Editor, the **Reference** field selection formula should look this:

```
{JrnlHdr.Reference}<>””
```

The result: The report would include the reference number from the original Peachtree transaction only if it was not blank.

In Summary....

To filter null Peachtree transaction records out of your Crystal reports, use the following values in your report selection formulas:

- Use **0** to filter out missing currency amounts.
- Use **Date(0,0,0)** to filter out missing dates.
- Use **“”** to filter out missing string values, such as transaction reference numbers.

• Index •