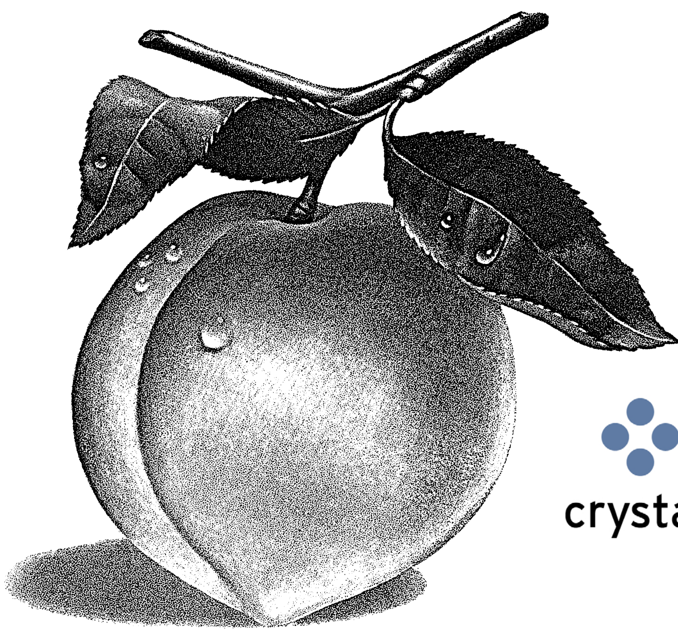
Getting Started Guide

Crystal Reports®
for Peachtree®



crystal decisions

A SEAGATE COMPANY

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
Second Edition, November 2001

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Introduction

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• 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 six 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.

If you haven't already installed the Crystal Reports for Peachtree program, follow the instructions in the *Crystal Reports User's Guide*, the chapter entitled "Installing Standalone Crystal Reports." Once the 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 5.

What's in This Guide

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

Chapter 1: Introduction This chapter gives you a program overview, a brief description of the six 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.

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. For detailed information on working with the program, consult this guide. When additional information is available either in the *Crystal Reports User's Guide* or online, we will cross-reference it. Be sure to watch for cross-references as you read.

The Standard Crystal Reports

The Crystal Reports for Peachtree program 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.

Where the Reports Are Stored

When you install the Crystal Reports for Peachtree program, these six 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 six 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 a free copy 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.

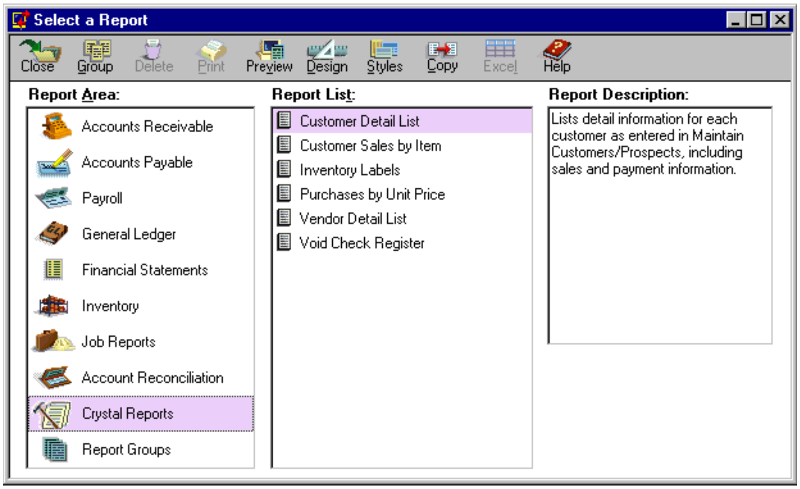
How to Access the Reports

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.

...and from the Select a Report window.



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 for Peachtree 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 17 of this guide.
- For more information on using the **Design** option, look up "Design tab" in the Crystal Reports for Peachtree 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.

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

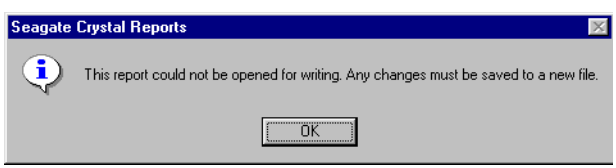
The program must be installed on all machines The program needs to be installed on all networked machines where it will be used; *the program will not work properly if installed on and accessed from a central server*.

However, 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.”

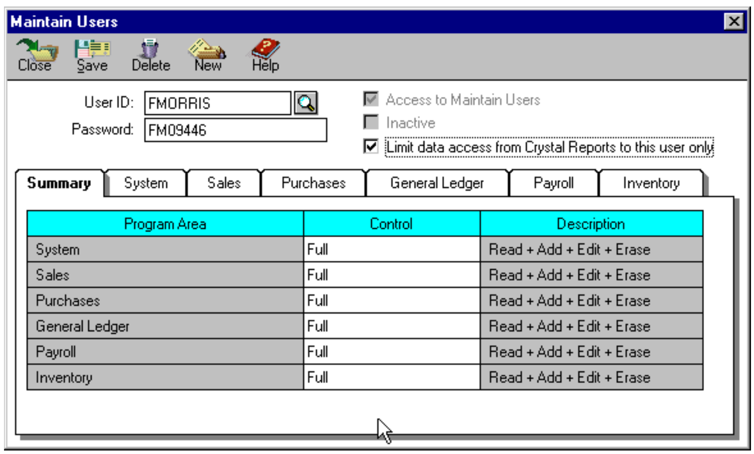


If you want to save your changes, use the **Save As** option on the **File** menu to save the file under a new name. Once saved, this new custom report will be fully editable.

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 toolbar, 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 for Peachtree Online Help index.

Previewing Crystal Reports

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Standard Crystal Reports

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

The following six reports are shipped with Crystal Reports for Peachtree:

Customer Detail List

This report lists detail information about customers you have added to Peachtree through Maintain Customers/Prospects.

Bellwether Garden Supply
Customer Detail List
CHAPMAN-MURPHY-01 to WILLIAMSON-01

CHAPMAN-MURPHY-01

Chapman-Murphy Law Offices

ADDRESS INFORMATION

Bill To Address: 12554 Lawrenceville Hwy.
Lilburn, GA 30095-1120

Ship To Address:

CONTACT INFORMATION

Contact Person: Felecia Chapman
PhoneNumber: 770-555-8858
Phone Number 2: 770-555-8859
Fax Number: 770-555-8860
E - mail Address: fchapman@sample.peachtree.com
Web Address: www.peachtree.com
Prospect: No

CUSTOMER INFORMATION

Inactive: No
Customer Type: LAND
Customer Since: 1/11/99

SALES INFORMATION

Open PO:
Credit Limit: 18,000.00
Pricing Level: 1
GL Sales Account: 40000
Resale No:
Sales Rep Name:

PAYMENT INFORMATION

Terms: Standard
Sales Tax ID: GAGWINN

CUSTOM INFORMATION

Custom Field 1: Larry Murphy
Custom Field 2: Yes
Custom Field 3: Yes
Custom Field 4: Yes
Custom Field 5: Internet

HISTORY INFORMATION

Last Invoice Date:
Last Invoice Amount 0.00
Last Payment Date:
Last Payment Amoun 0.00
Last Statement Date:

The report 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.

Bellwether Garden Supply
Customer Sales by Item
3/1/2003 to 3/31/2003
AVRY-10100 to EQFF-13110

Inventory ID and Description	CustomerID	Date	Invoice	Totals Quantity
AVRY-10100 - Bird House Kit				
	CUNNINGHAM-01	3/13/03	10307	1.00
	RETAIL-01	3/15/03	10308	2.00
		Total Sold for AVRY-10100		3.00
AVRY-10140 - Thistle Bird Seed Mix-6 lb.				
	RETAIL-01	3/5/03	CASH030503	4.00
	RETAIL-01	3/15/03	10308	2.00
		3/14/03	587231	150.00
		Total Sold for AVRY-10140		156.00
BOOK-11010 - BGS Gardening Handbook				
	RETAIL-01	3/5/03	CASH030503	3.00
		Total Sold for BOOK-11010		3.00
EQFF-13110 - Fertilizer Compression Sprayer				
	ERTLEY-01	3/3/03	10301	1.00
		Total Sold for EQFF-13110		1.00

The report includes the following information:

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

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 BusinessChecks & Forms catalog. Each label lists the following information:

AVRY-10100	**EQFF-13100**	**EQLW-14150**
Bird House Kit	Fertilizer Pump Sprayer	Elect. Nylon String Trimmer
ARBOR-01	BRENNAMAN-01	SOGARDEN-01
AISLE 1	AISLE 4	AISLE 4
AVRY-10110	**EQFF-13110**	**EQLW-14160**
Bird House-Pole 14 Ft.	Fertilizer Compression Sprayer	Seed Spreader - Broadcast
ARBOR-01	BRENNAMAN-01	SOGARDEN-01
AISLE 1	AISLE 4	AISLE 4
AVRY-10120	**EQFF-13120**	**EQLW-14170**
Bird House-Red 12-Room Unit	Hand Sprayer/Mister	Seed Spreader - Drop
ARBOR-01	BRENNAMAN-01	SOGARDEN-01
AISLE 1	AISLE 4	AISLE 4
AVRY-10130	**EQFF-13130**	**EQLW-14180**
Bird Feeder-Plastic Hanging	Hose-End Sprayer	Power Tiller-Rotary Cultivator
ARBOR-01	BRENNAMAN-01	SOGARDEN-01
AISLE 1	AISLE 4	AISLE 4

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.

Each label lists the following information:

- Item ID
- Item description
- Vendor ID
- Location

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.

Bellwether Garden Supply
Purchases by Unit Price
3/1/03 to 3/31/03

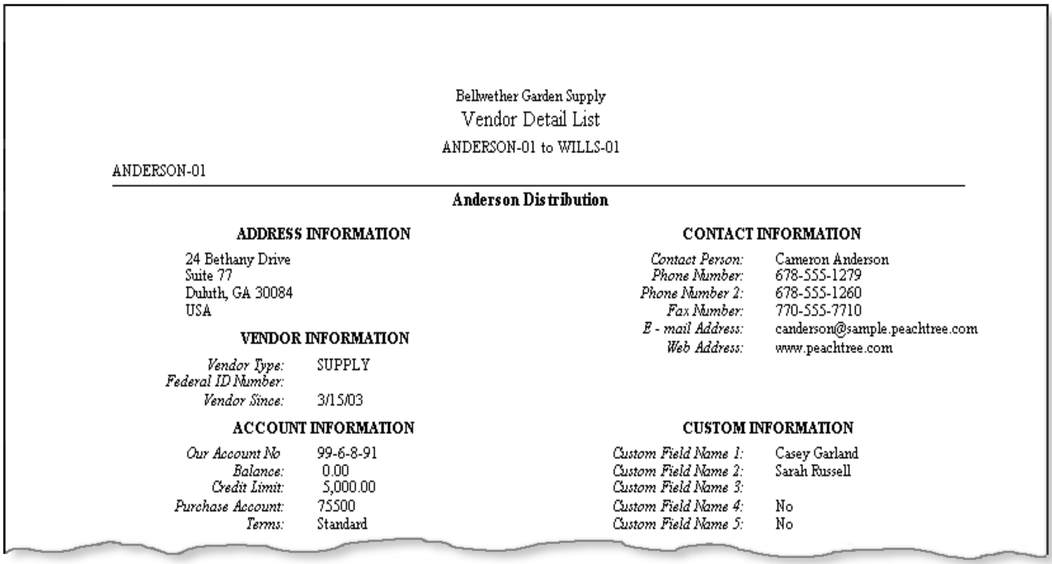
Item ID and Description					
Date	**Vendor ID**	**Invoice**	**Quantity**	**Unit Price**	**Total**
AVRY-10140 Thistle Bird Seed Mix-6 lb.					
3/13/03	ARBOR-01	AR1303	150.00	7.95	1,192.50
		Total for AVRY-10140:	150.00		1,192.50
BOOK-11030 BGS Vegetable Garden Primer					
3/10/03	ARBOR-01	22113	6.00	5.20	31.20
		Total for BOOK-11030:	6.00		31.20
EQFF-13100 Fertilizer Pump Sprayer					
3/12/03	BRENNAMAN-01	116655	6.00	19.95	119.70
		Total for EQFF-13100:	6.00		119.70
EQFF-13140 Soil Test Kit					
3/12/03	BRENNAMAN-01	116655	10.00	7.95	79.50
		Total for EQFF-13140:	10.00		79.50
FERT-16130 House Plant Food 8 oz.					
3/12/03	BRENNAMAN-01	116655	24.00	2.35	56.40
		Total for FERT-16130:	24.00		56.40
FERT-16170 Rose Food 32 oz.					
3/12/03	BRENNAMAN-01	116655	8.00	5.25	42.00
		Total for FERT-16170:	8.00		42.00

The report includes the following information:

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

Vendor Detail List

This report lists detail information about vendors you have added to Peachtree through Maintain Vendors.



Bellwether Garden Supply
Vendor Detail List
ANDERSON-01 to WILLS-01

ANDERSON-01

Anderson Distribution

ADDRESS INFORMATION

24 Bethany Drive
Suite 77
Duluth, GA 30084
USA

VENDOR INFORMATION

Vendor Type:	SUPPLY
Federal ID Number:	
Vendor Since:	3/15/03

ACCOUNT INFORMATION

Our Account No	99-6-8-91
Balance:	0.00
Credit Limit:	5,000.00
Purchase Account:	75500
Terms:	Standard

CONTACT INFORMATION

Contact Person:	Cameron Anderson
Phone Number:	678-555-1279
Phone Number 2:	678-555-1260
Fax Number:	770-555-7710
E - mail Address:	canderson@sample.peachtree.com
Web Address:	www.peachtree.com

CUSTOM INFORMATION

Custom Field Name 1:	Casey Garland
Custom Field Name 2:	Sarah Russell
Custom Field Name 3:	
Custom Field Name 4:	No
Custom Field Name 5:	No

The report 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.

Bellwether Garden Supply
Void Check Register
3/1/03 to 3/31/03

Check Number	Void Date	Payee	Cash Account	Amount
10201V	3/15/03	Brennaman Chemical Supply	10200	124.68
10204V	3/17/03	Duffey Lawn Pro, Inc.	10200	335.50
10206V	3/27/03	Jones Auto Repair	10200	274.56
			Report Total	**734.74**

The report includes the following information:

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

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.

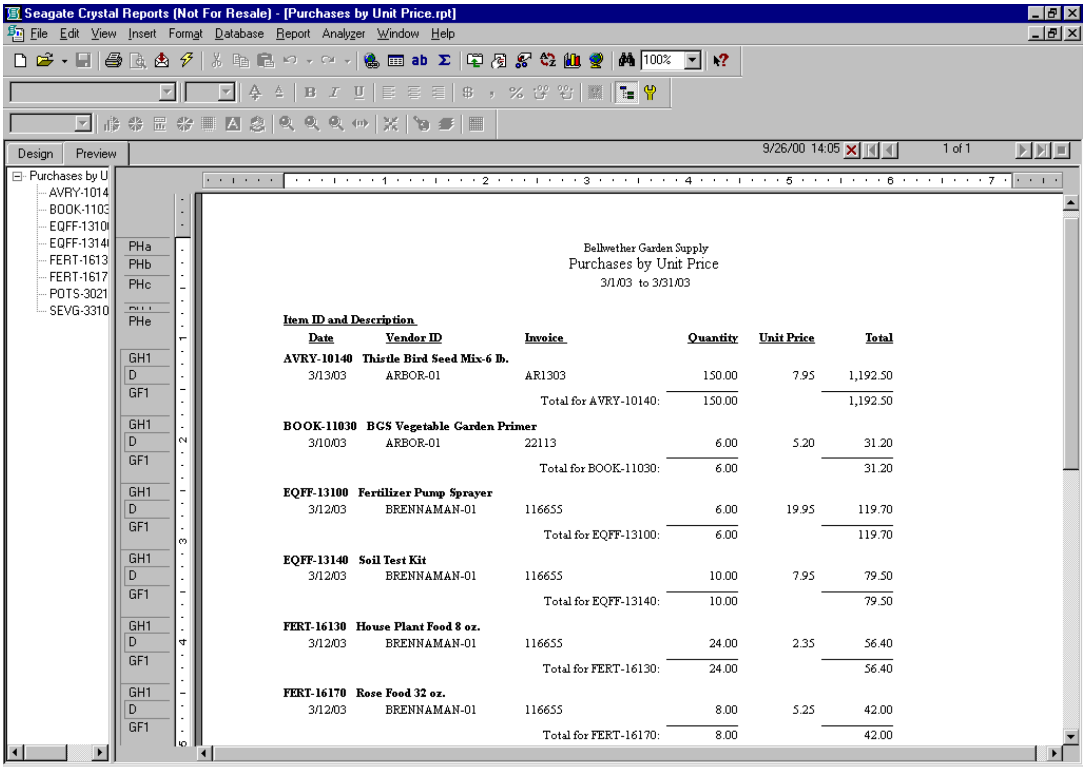
Set Up Reports to Appear in Preview Mode

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

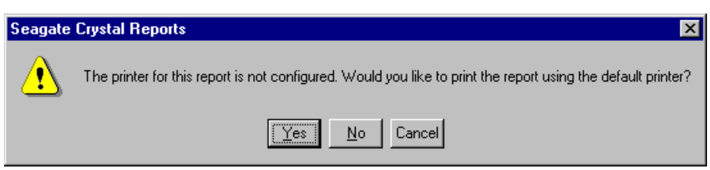
The Crystal Reports Design window appears with the report displayed on the **Preview** tab.



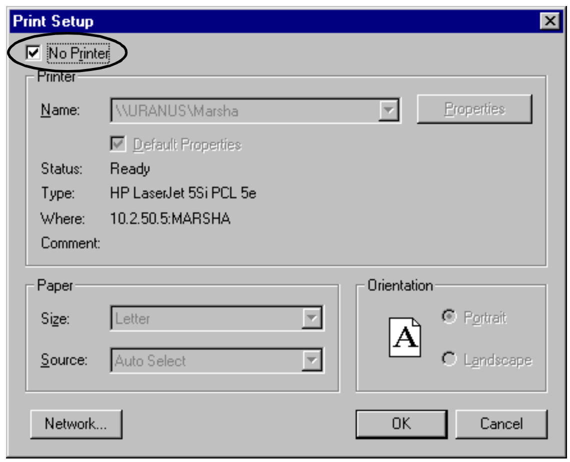
For more information on using the Crystal Reports for Peachtree Preview tab, look up "Preview Tab" in Crystal Reports for Peachtree Help. See also the *Crystal Reports User's Guide*, the "Introduction to Reporting" chapter.

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.

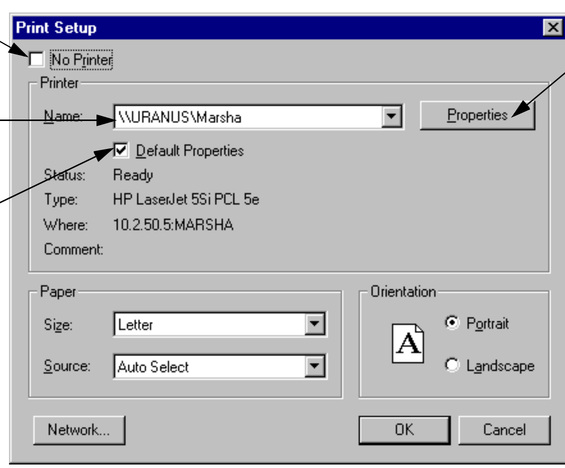


- To print the report using the default printer you have set up with the Windows **Settings>Printers** option, select **Yes**.
- To set up a new printer for the report, select **No**.



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. Now, if you leave the **Default Properties** check box checked, the report will always print using the printer you have set up.



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 Project.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.

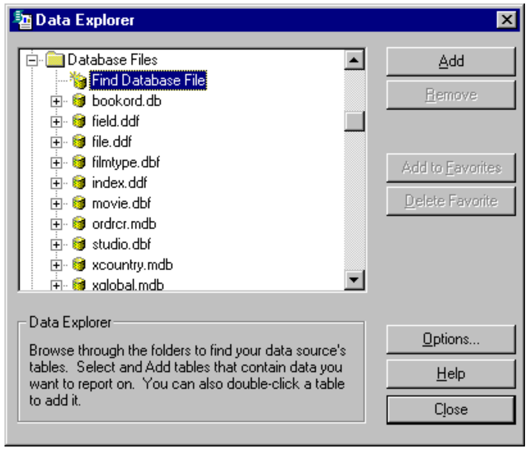
The following section outlines how to select and link tables used in Crystal reports. For more detailed information, see the *Crystal Reports User's Guide*, the "Understanding Databases" chapter.

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 **Add Database to Report**.

The Crystal Data Explorer window appears.



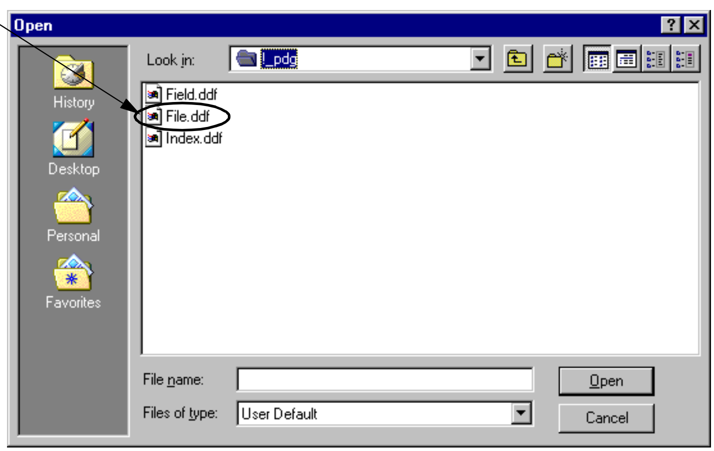
2 Find the **Database Files** folder in the list, and double-click to open it.

3 Double-click the **Find Database File** option.

4 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*.

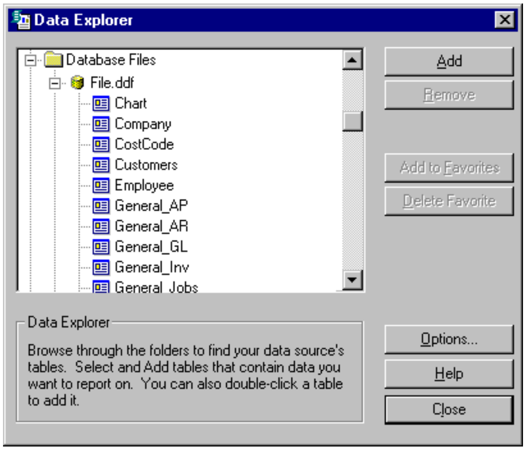


5 Select *File.DDF*, and then select the **Open** button.

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*.

6 The Data Explorer 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 Company table contains all the company fields present in the Company.DAT file, and the Employee table contains all the payroll fields present in Employee.DAT.

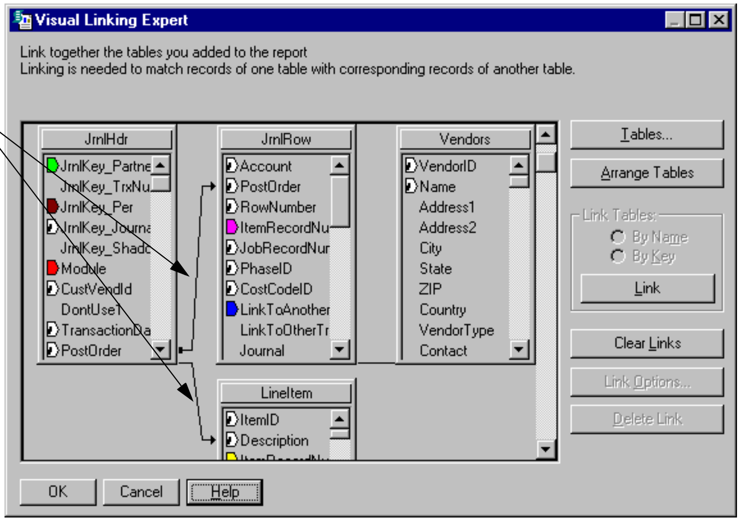
7 Select as many tables in the list as you want to include in the report. To select a table, do one of the following:

- highlight the table and click **Add**
- highlight and double-click the table

8 When finished, select **Close**.

The Visual Linking 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 Visual Linking 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.

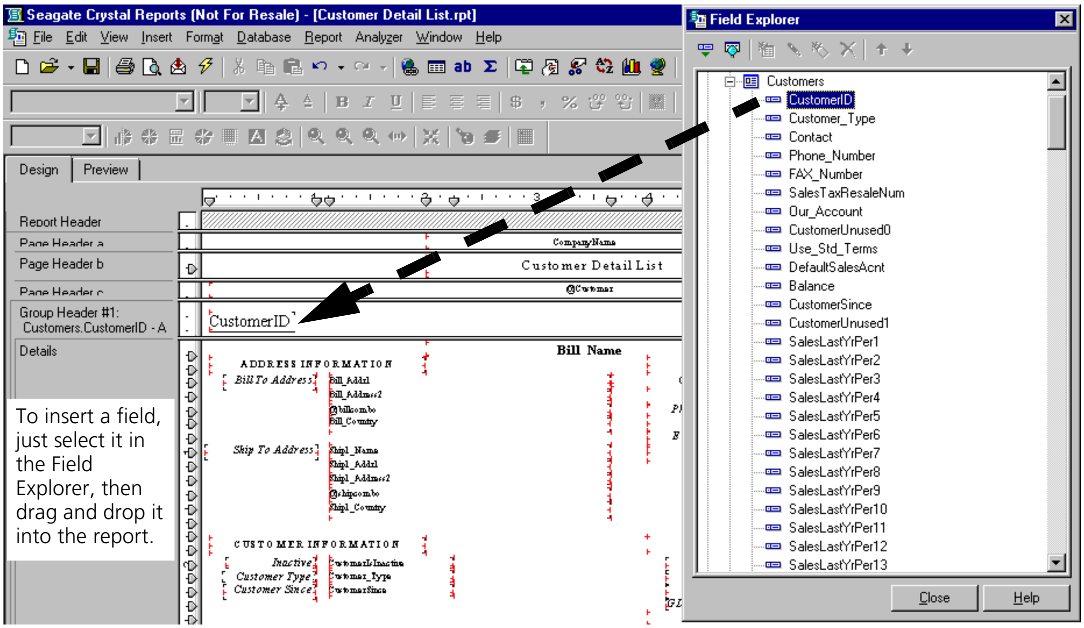


You can make new links or dissolve old ones as explained in Crystal Reports Online Help. Select the **Help** button in the Visual Linking Expert window.

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 **Customer Record** field in the JrnlRow database table to the **Customer Record** field in the Customer table. This way, transaction information for each customer would be credited to the proper customer ID in the report.

9 When finished working in the Visual Linking Expert, select **OK** to close the window.

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.

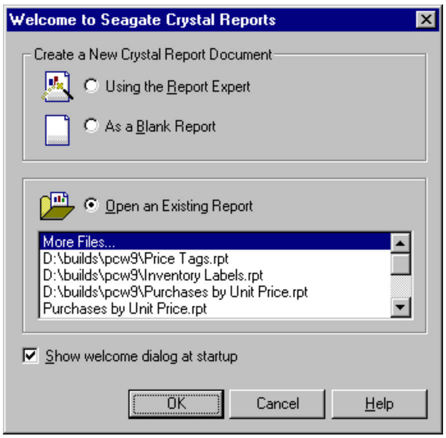
Lesson 1—Modifying Inventory Labels to Create Price Tags

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.

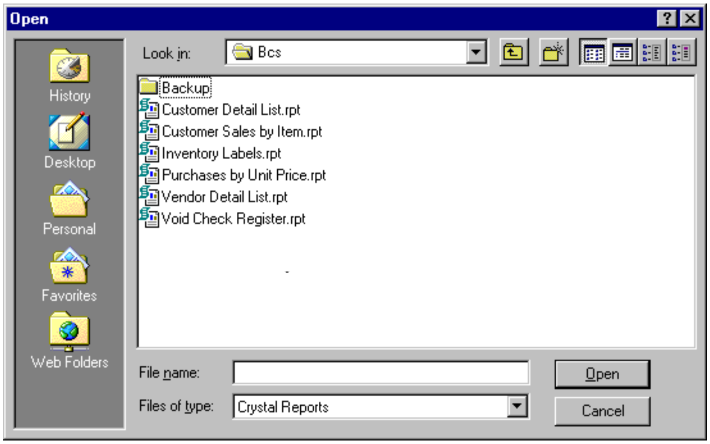
Use "Save As" to Create a Working Version of the Report

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.

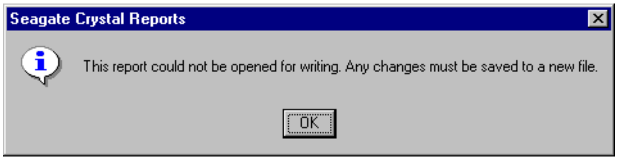
1 If Crystal Reports isn't currently running on your computer, start it now.



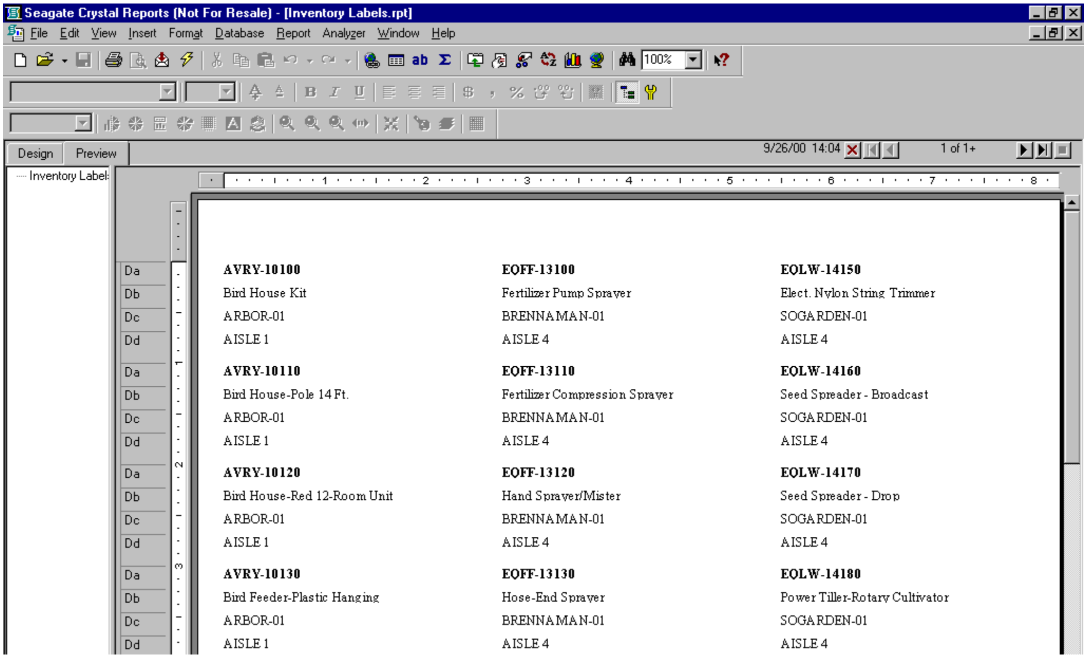
2 Select **More Files**, and then navigate to the BCS folder in the Peachw directory; this is where Bellwether Garden Supply company data is located. (If Crystal Reports is already running, select **Open** in the **File** menu, and then navigate to the Bellwether company folder.)



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

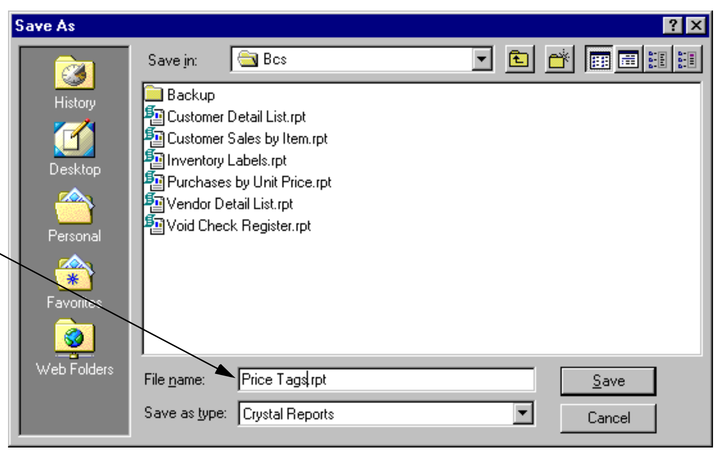


4 The message tells you that you cannot write to (edit) the report. Click **OK**.



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

When you enter the new filename for the file you want to save, be sure to retain the .rpt extension.

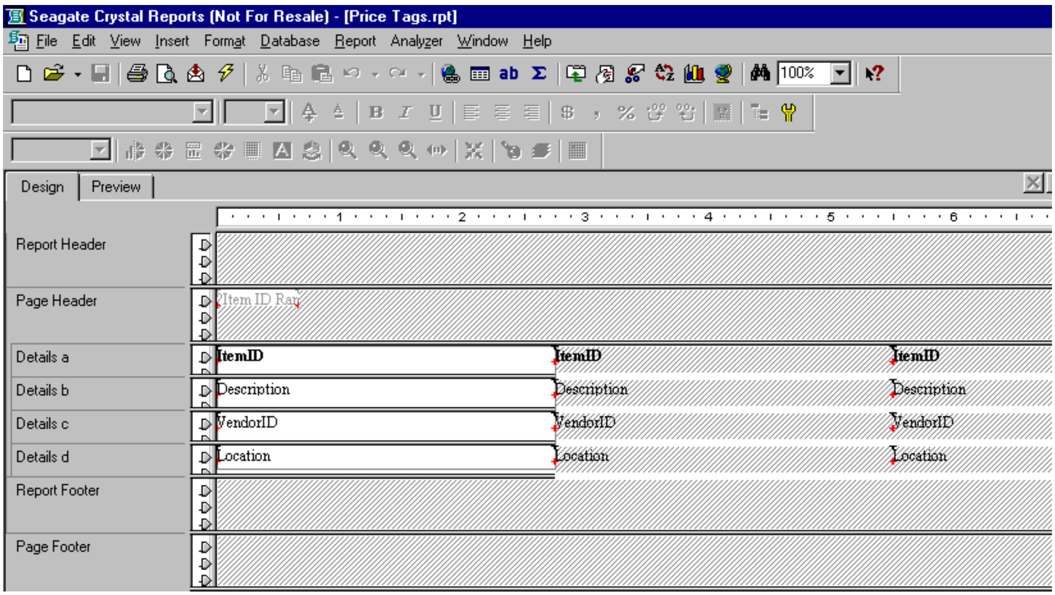


6 In the **File name** box, enter "Price Tags," keeping the .rpt extension; see the illustration above. Then select **Save**.

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.

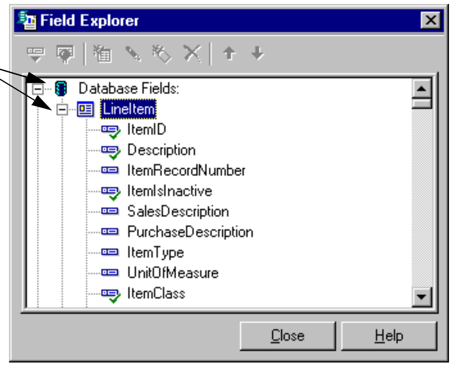
An object frame appears around the field, and the cursor turns into a cross with four arrowheads. The field is now editable.

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

The field is deleted.

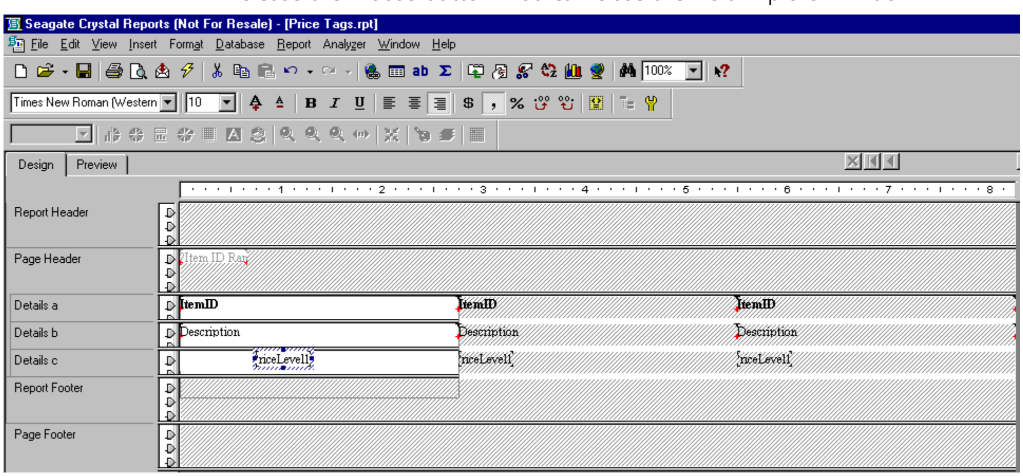
6 Select the **Insert Fields** button in the Standard toolbar.

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.

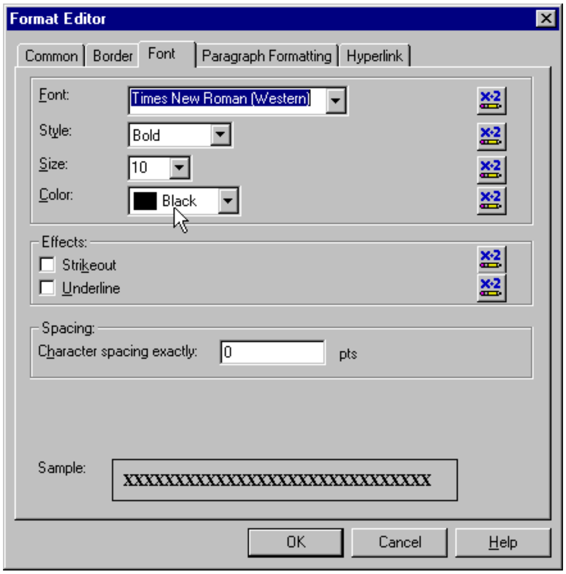
8 Find the **UnitPriceLevel1** field; select it; and drag it into the Detail c section. Release the mouse button. You can close the Field Explorer window.



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 **Font**.

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 **Unit Price Level 1 Field**. Select it, and right mouse click. Select **Font**.

14 In the Font Editor, Use the **Font** drop-down list to select **Arial** (or some other sans serif font you fancy more).

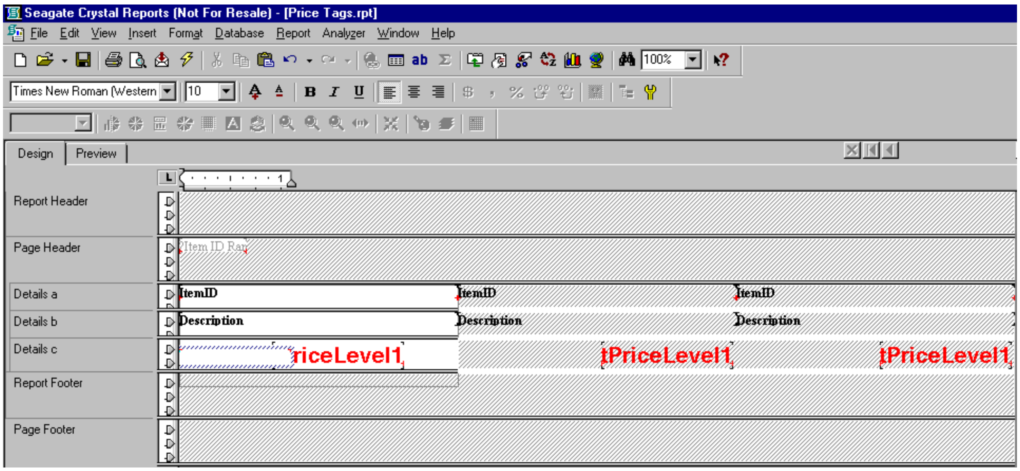
15 Use the **Style** drop-down list to select **Bold**.

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

17 Use the **Color** drop-down list to select **Red**.

18 When finished, select **OK**.

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.)



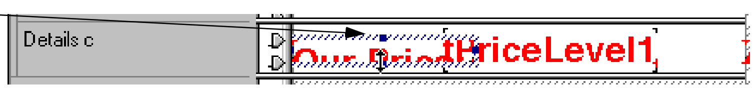
20 Click once to place the frame in the section.

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 Font. Now make the font settings exactly as in steps 11 through 16.

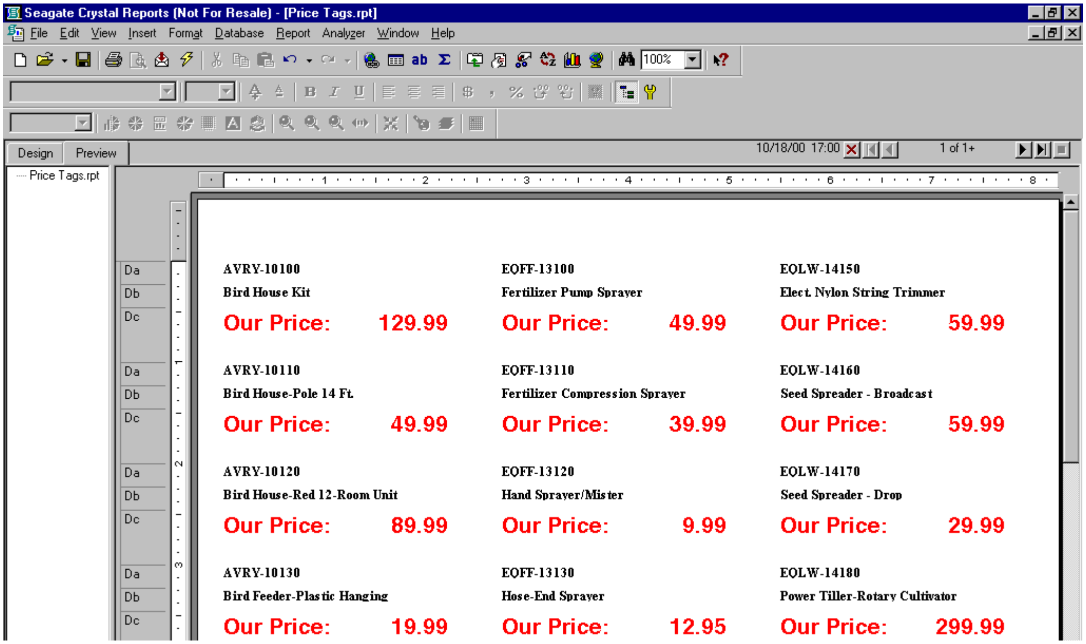
23 The text will probably appear a bit cut off at the bottom, so select the bottom frame handle (the small black square at the top of the frame), and drag it downward until you can see the text plainly.

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 **UnitPriceLevel1** 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 **PriceLevel1** 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 **PriceLevel1** 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 **Insert Fields** 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.

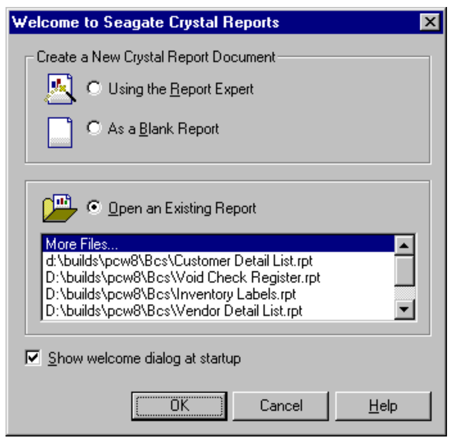
Lesson 2—Designing a Customer Contact List

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.

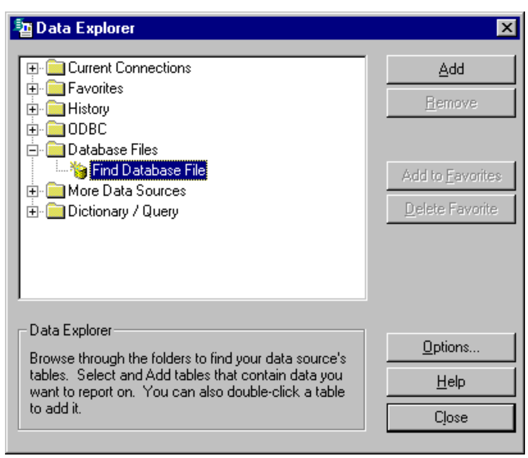
Select the Report Database

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**.

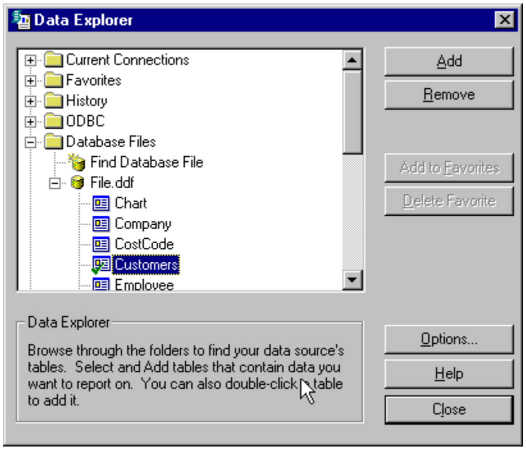


3 In the Data Explorer, double-click the **Database Files** folder; then double-click **Find Database File**.

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 **Add** button.

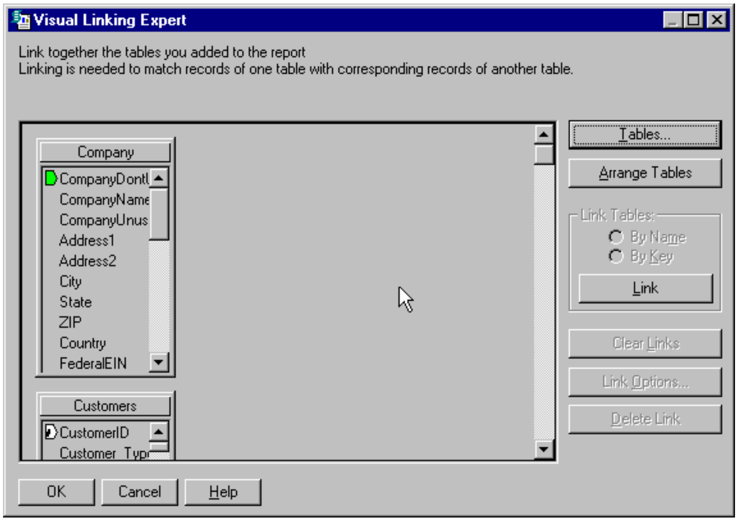


7 Now do the same for the Company table. Select the **Company** field, and either double-click it or select the **Add** button.

8 When finished, select **Close**.

The Visual Linking Expert appears with the two chosen tables displayed. All fields in the tables are listed in scroll boxes.

The chosen tables are displayed as scroll boxes. Within each box are listed all the fields in the table. When needed, you can link fields between or among database tables.

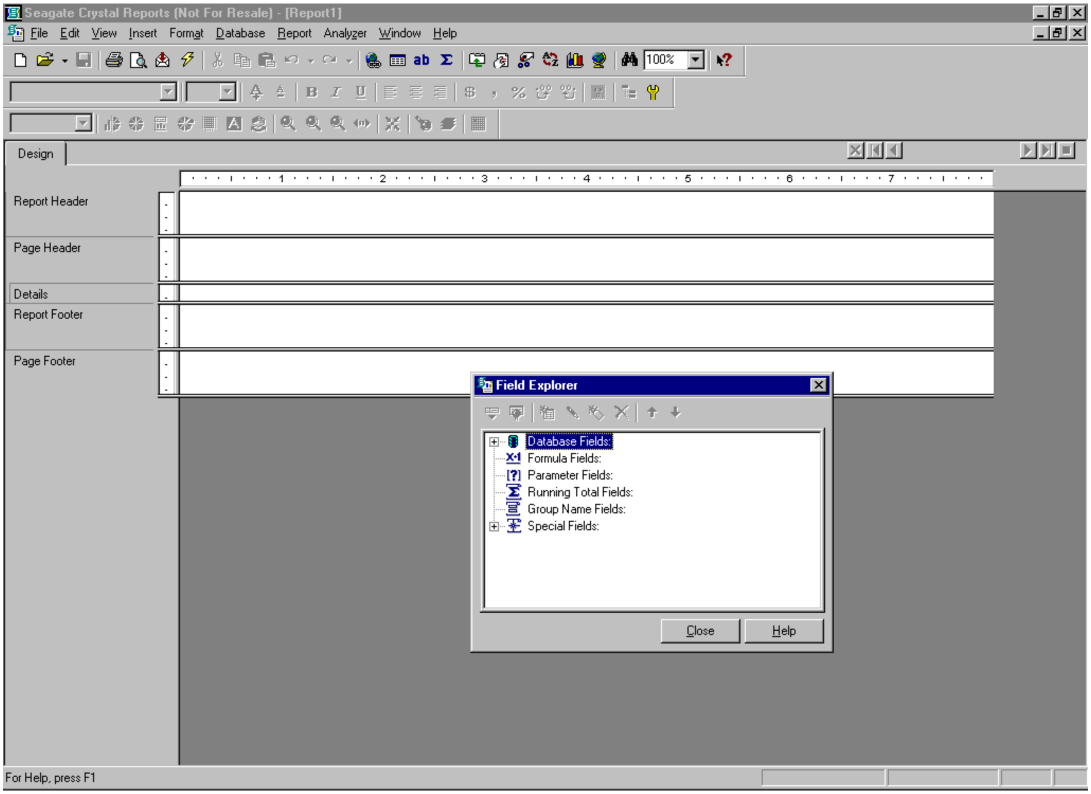


9 The Crystal Smart Linking feature is turned on by default. If you keep it turned on, which is recommended, Crystal will automatically link any fields that can be linked within the tables. You can change or add links as desired. In this case, none of the fields between the two tables needs to be linked, so just select **OK** to close the window.

Note

When you select **OK**, you will see a message stating, “Your current link configuration contains multiple starting points. Please be advised that this is generally not supported.” This will not cause a problem in the report we’re designing. Select **OK** to remove the message.

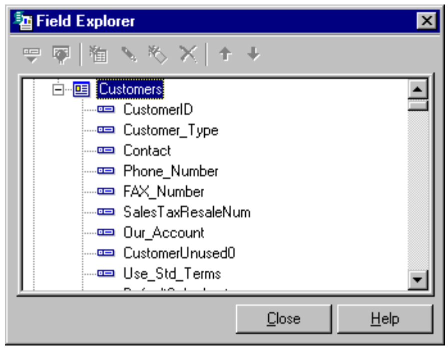
Once you clear the message, the Report Designer appears with the Field Explorer window open.



Select and Insert Fields

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

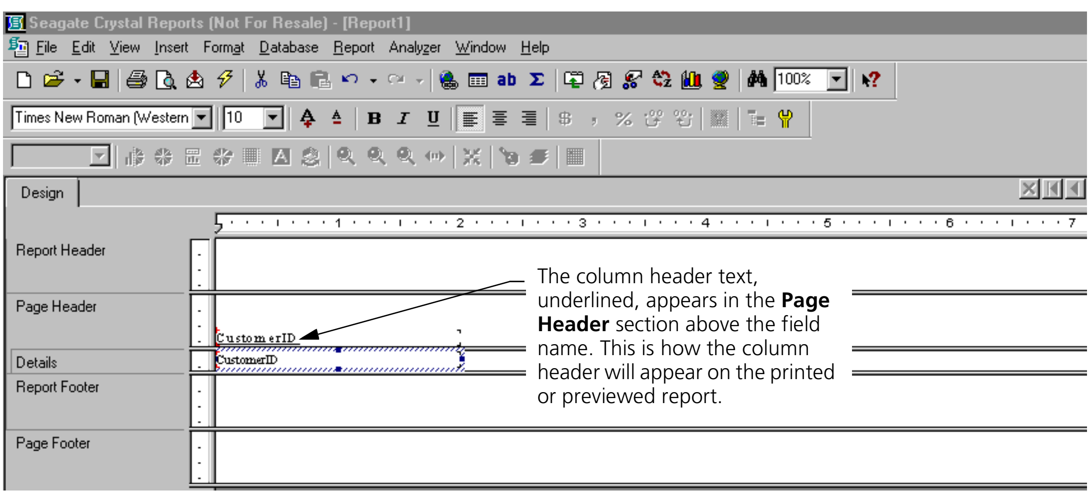
1 Double-click **Database Fields** and then **Customers**.



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.

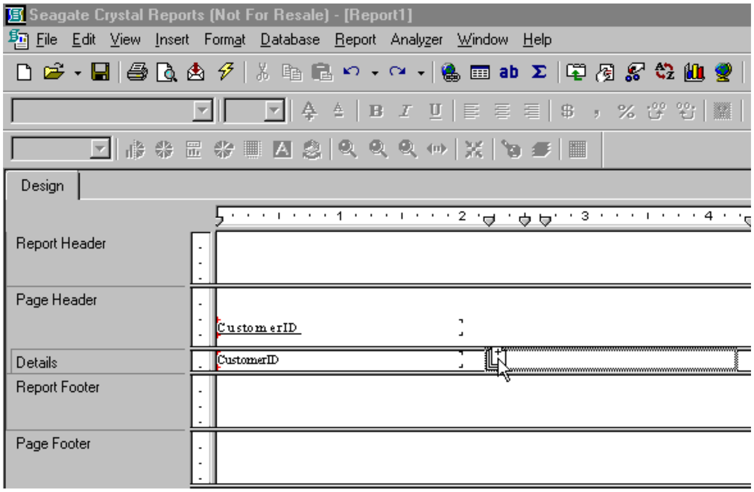


Note the following:

- 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.

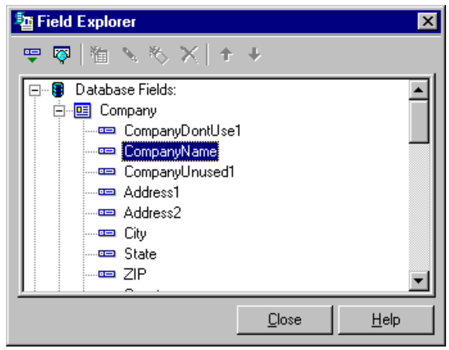
As you drag the fields, an object frame appears with the cursor shaped like an arrow atop stacked sheets of paper marked with a plus. This indicates that you are inserting multiple fields at once.



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, double-click **Company** to open the Company table, and then double-click the **CompanyName** field.

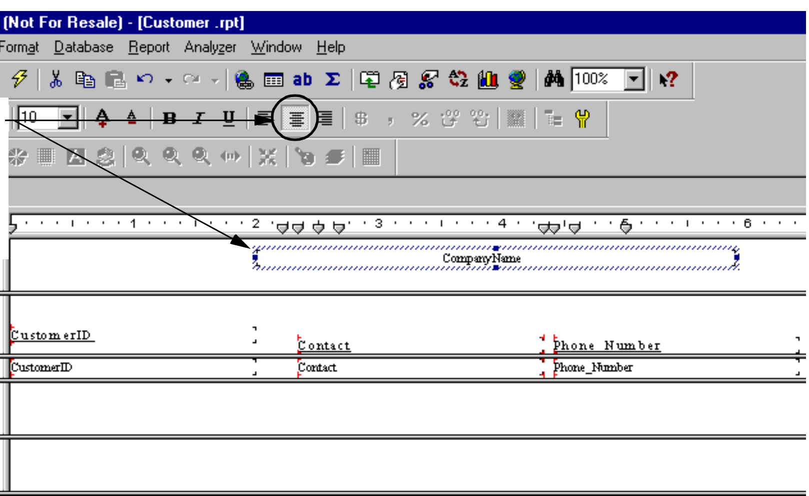


7 Drag the field to the Report Header section, and click to place it at the top of the section, centering it within the section.

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

8 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.

To center the company name, select the object frame around the **CompanyName** field, and then select the **Align Center** button in the toolbar.



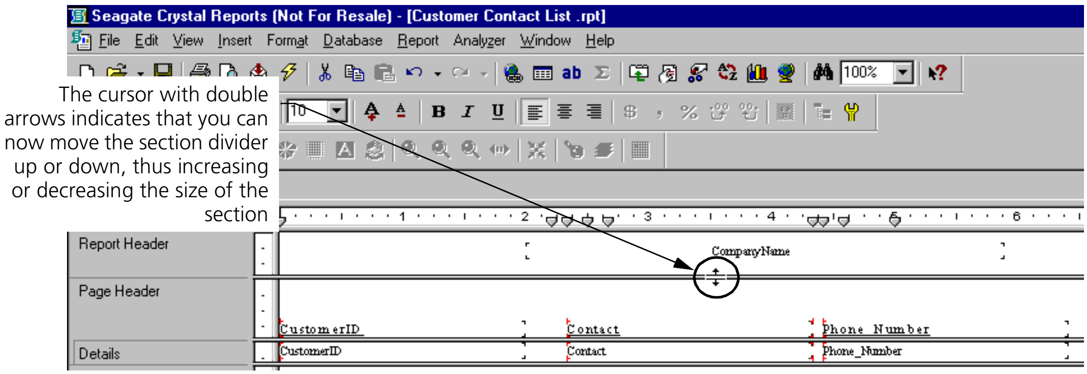
The field name is now centered in the object frame, indicating that the field will be centered on the printed or previewed report.

Title and Preview the Report

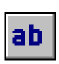
Finally, we want to add a title to the report. To do so, we'll need to slightly increase the size of the Report Header section.

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.

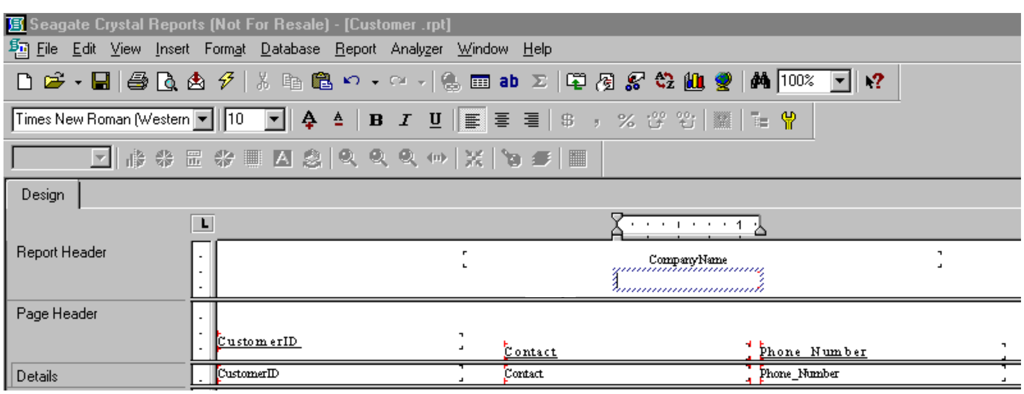


2 Hold down the left mouse button, and move the dividing line down perhaps a quarter of an inch, just enough to insert the report title.



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 **CompanyName** field. Click the mouse button.

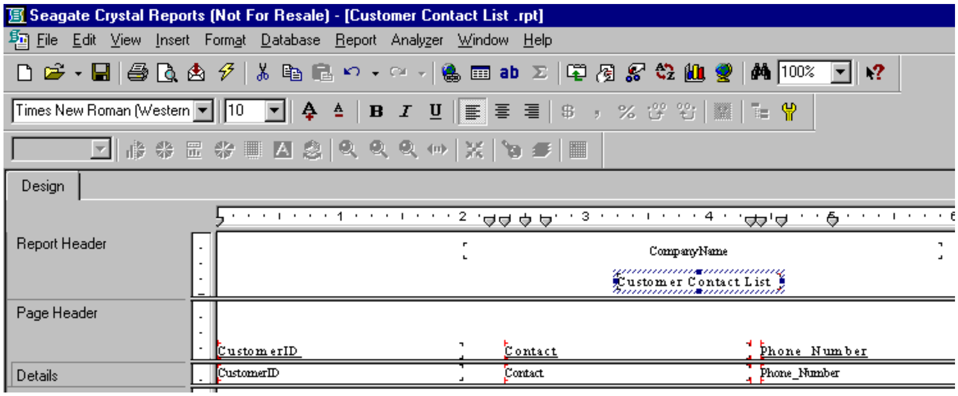
An object frame appears with the text cursor at the left side of the frame.



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

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

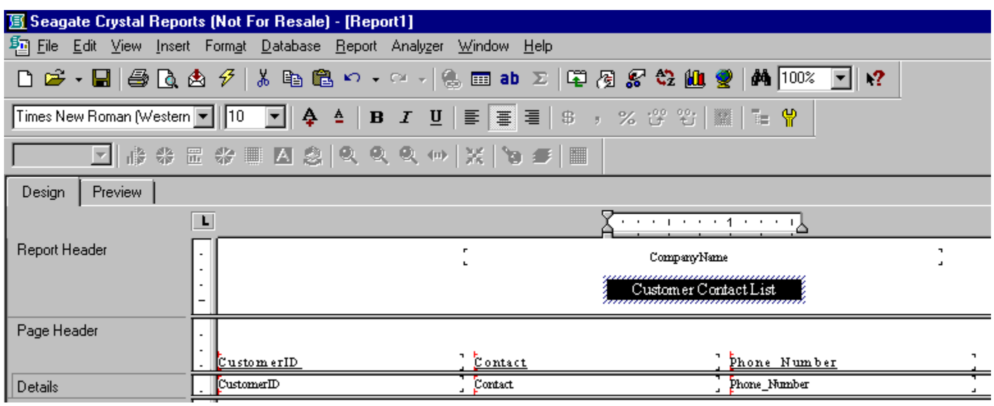
The text appears centered within the object frame.



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.

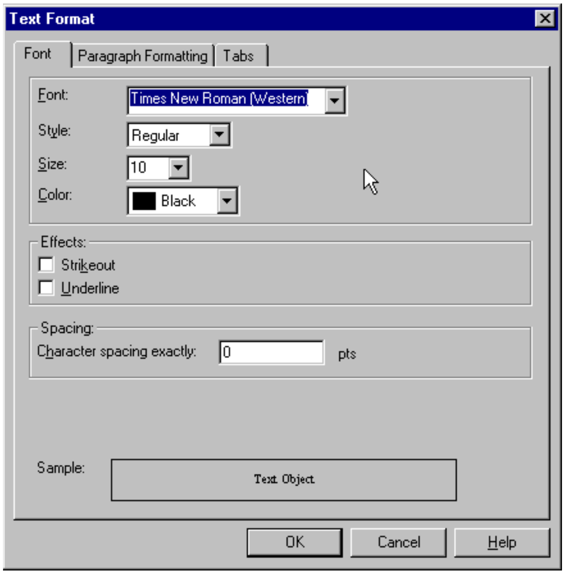
7 From the pop-up menu that appears, select **Edit Text Object**.

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 **Change Font**.

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

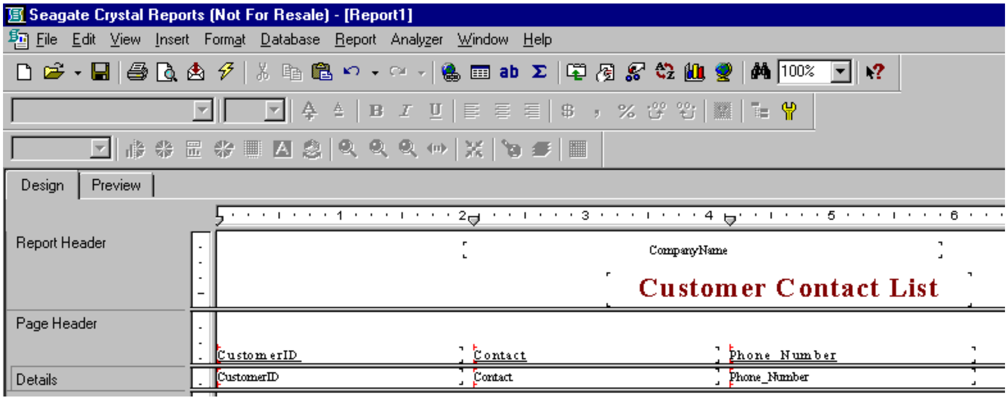


10 From the **Style** drop-down list, select **Bold**.

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

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

13 When finished, select **OK**.



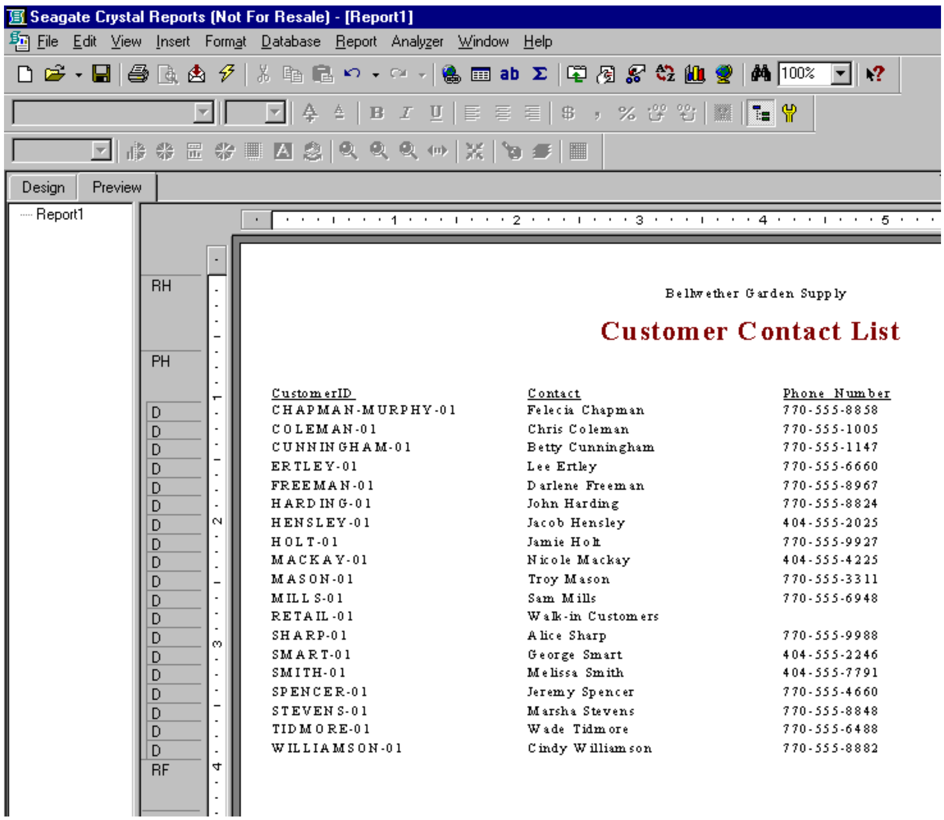
14 The title will be a bit off center, so select the object frame; drag it to center it; and then release the mouse button.

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 35), 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 Data Explorer window to find 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 have the Smart Linking feature turned on (which is recommended), Crystal Reports will automatically link the selected tables for you, if links are 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.

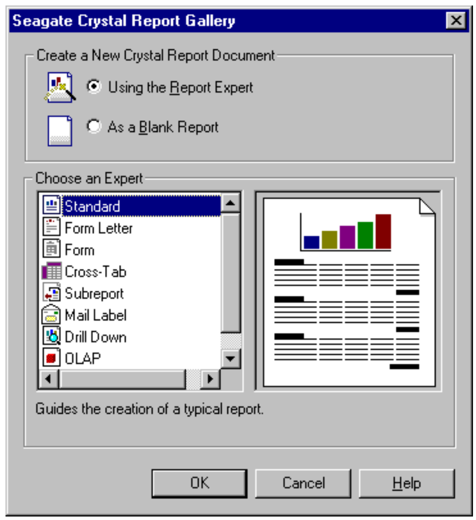
Lesson 3—Designing a Quotes Good Through List

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 Expert guide us.

Use the Report Expert to Build the Report

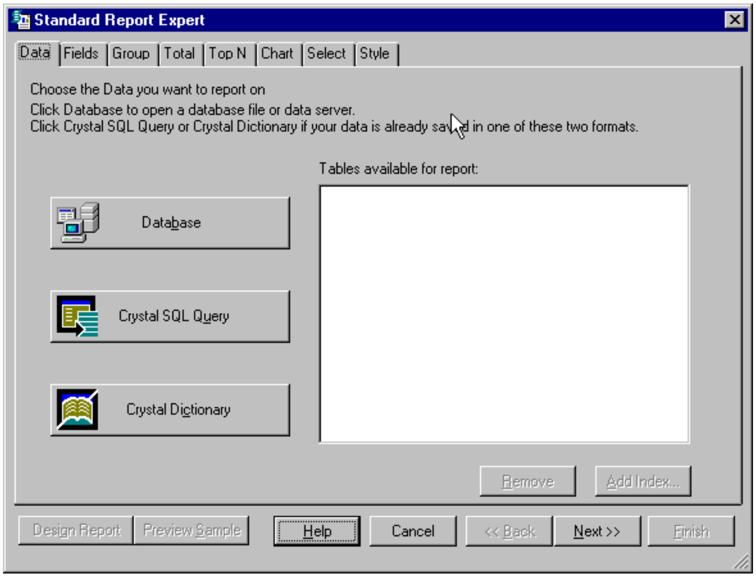
1 From the **File** menu, select **New**.



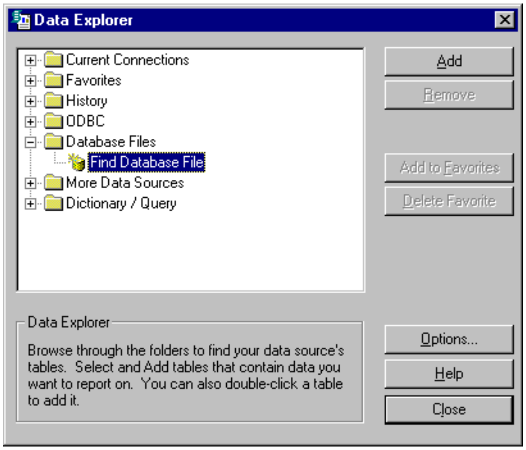
2 In the **Create a New Crystal Report Document** box, select **Using the Report Expert**.

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

The Standard Report Expert window appears with the **Data** tab selected.



4 The Expert asks you to select a data source. Click the **Database** button.

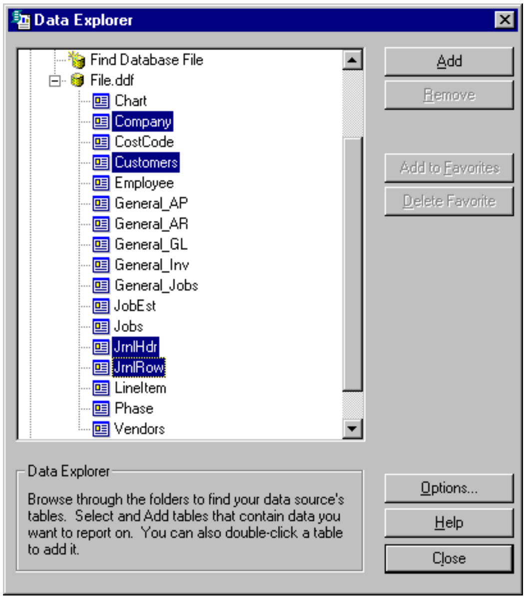


5 Double-click the Database folder to open it, and then double-click the **Find Database Files** icon.

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

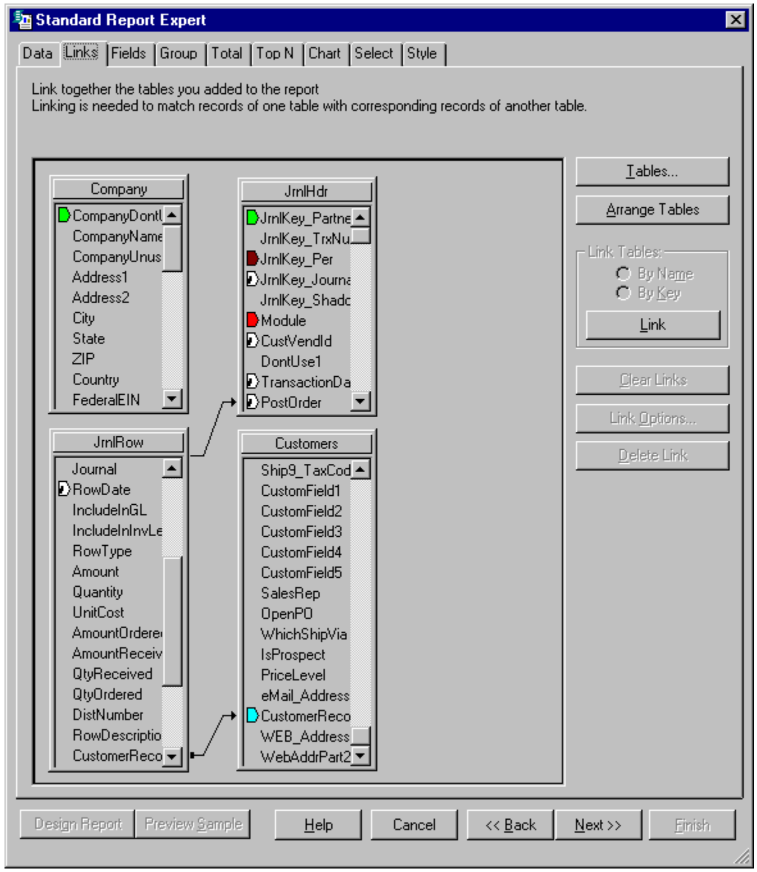
7 From the list of Peachtree DDFs, select **File.DDF**, and then select the **Open** button.

8 From the list of displayed tables, select **Company**. Then hold down the **Ctrl** key, and select **Customers**, **JrnlHdr**, and **JrnlRow**. Click the **Add** button.



9 When finished, select **Close**.

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

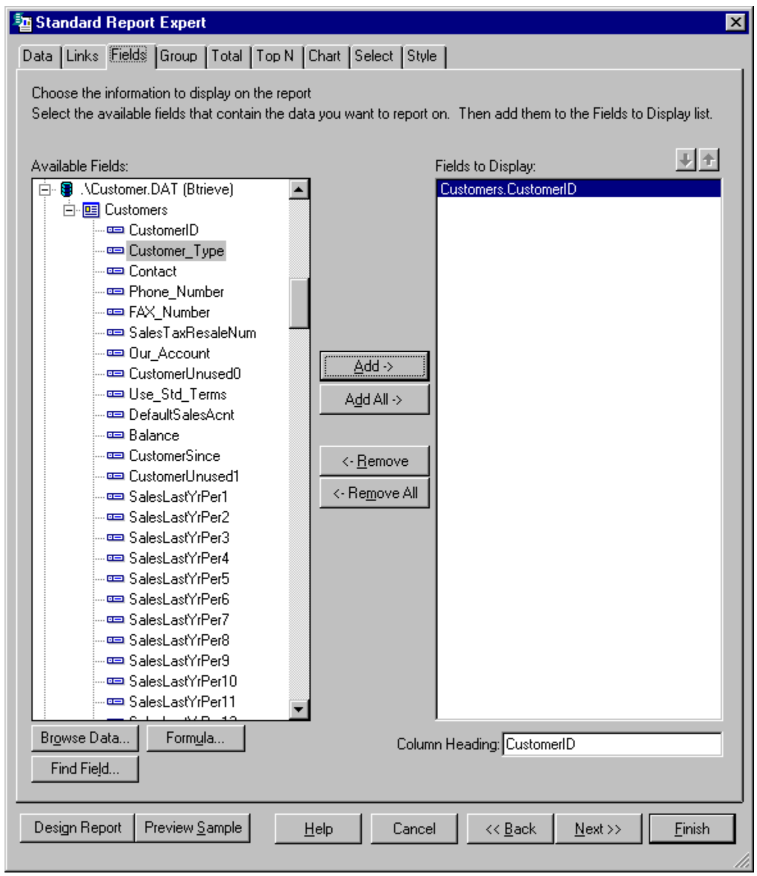


10 With Smart Linking turned on (which is the default), the Expert has linked the **PostOrder** field in the JrnlHdr and JrnlRow tables and the **CustomerRecord** fields in the JrnlRow and Customers tables. Accept these links by selecting the **Next** button at the bottom of the window.

Note

When you select **Next**, you will see a message stating, "Your current link configuration contains multiple starting points. Please be advised that this is generally not supported." This will not cause a problem in the report we're designing. Select **OK** to remove the message.

Once you clear the message, the **Fields** tab appears.



11 In the **Available Fields** box, double-click the Customer.DAT (Betrieve) folder to open it; then double-click the Customers table to open it. Select the **CustomerID** field, and then click the **Add** button.

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

12 In the **Column Heading** box toward the bottom of the window, insert a space between "Customer" and "ID" so that the column heading will read "Customer ID."

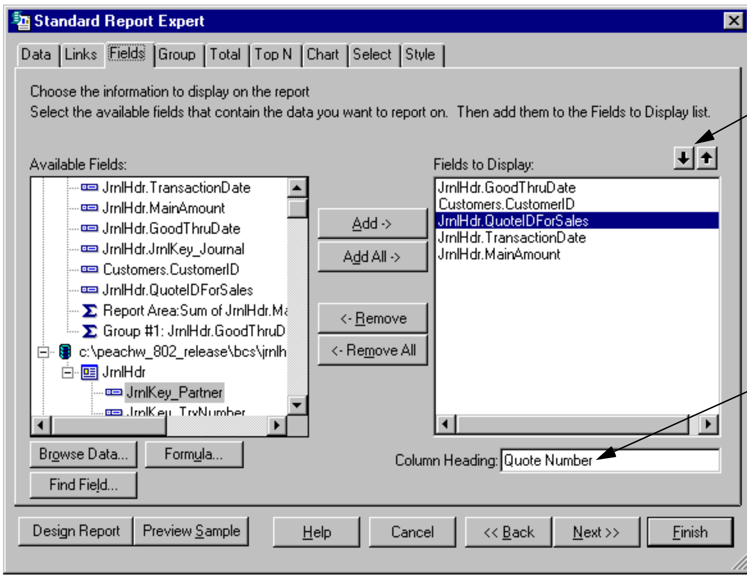
13 In the **Available Fields** box, double-click the JrnlHdr.DAT (Betrieve) folder to open it; then double-click the JrnlHdr table to open it. Press the **Ctrl** key, and select the **GoodThruDate**, **QuoteIDForSales**, **TransactionDate**, and **MainAmount** field, and then click the **Add** button.

14 Use the **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**

15 Now we want to give the fields more identifiable names to act as column headings on the report:

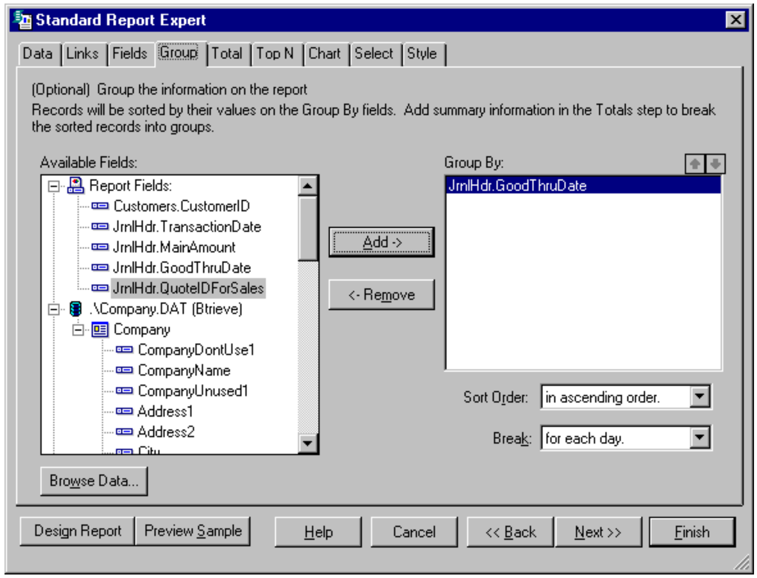
- Select **GoodThruDate**, and in the **Column Heading** box, change it so that it appears as “Good Through Date.”
- Select **QuoteIDForSales**, and change it to “Quote Number.”
- Select **TransactionDate**, and change it to “Quote Date.”
- Select **MainAmount**, and change it to “Quote Amount.”



Use the **Arrow** buttons to change the order of the fields to display...

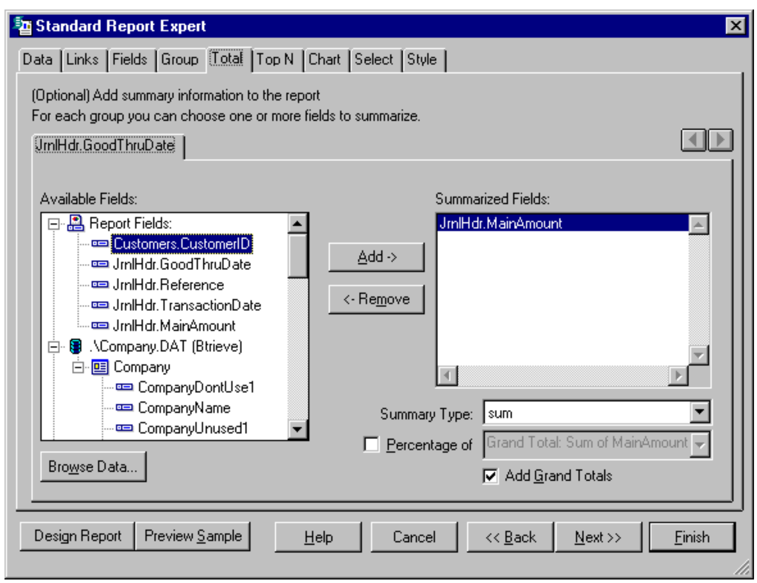
...and then enter the desired column heading text for each of the fields.

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

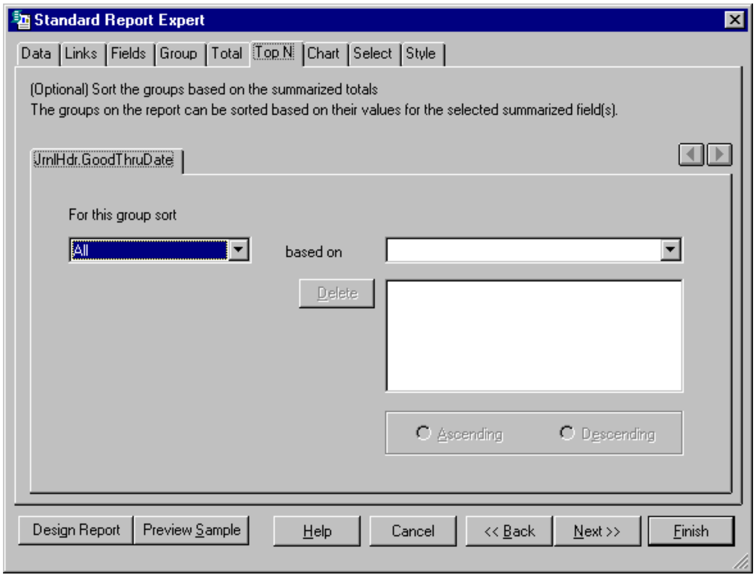


17 We want to group our data by the **GoodThruDate** field, so select it in the **Available Fields** box, and then click the **Add** button.

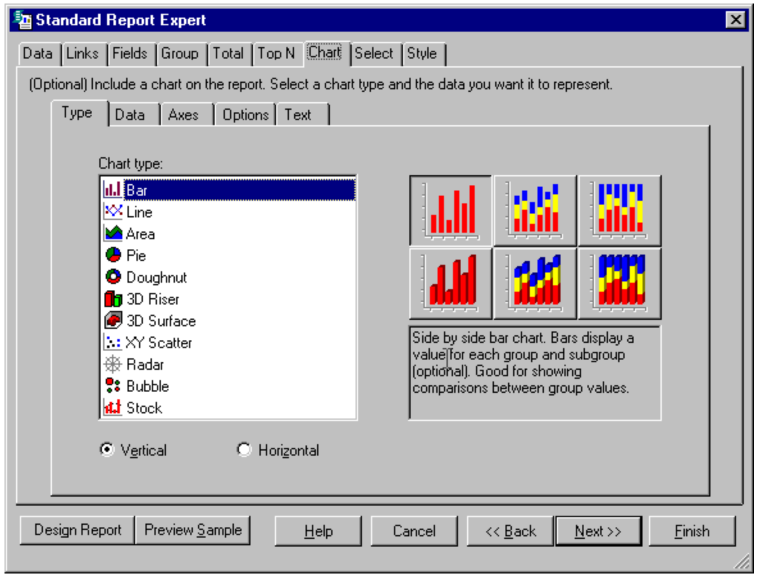
18 The preselected sort order and break are acceptable, so select the **Next** button.



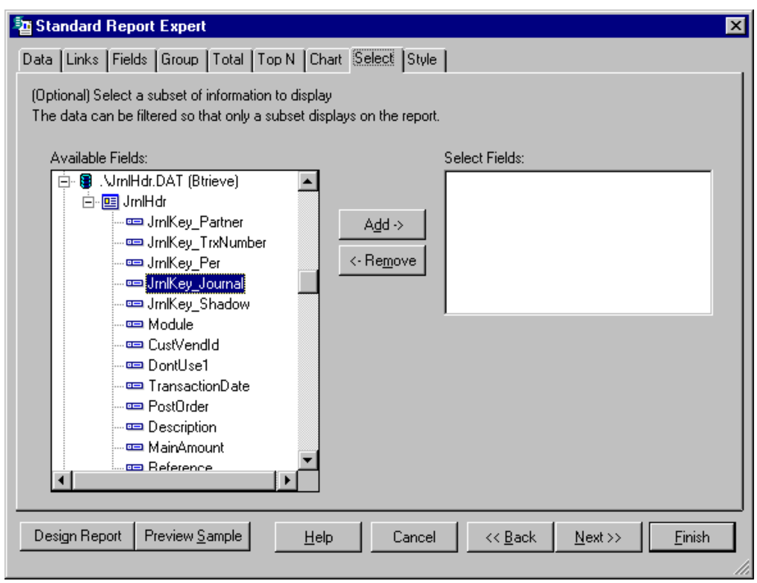
19 We want to include summary information to appear on our report, and the **Total** tab lets us do this. The Expert has intelligently preselected the **MainAmount** field as the field to summarize and has also checked the **Add Grand Totals** check box, which will give us a grand total area on our report. Both of these choices are acceptable, so select the **Next** button.



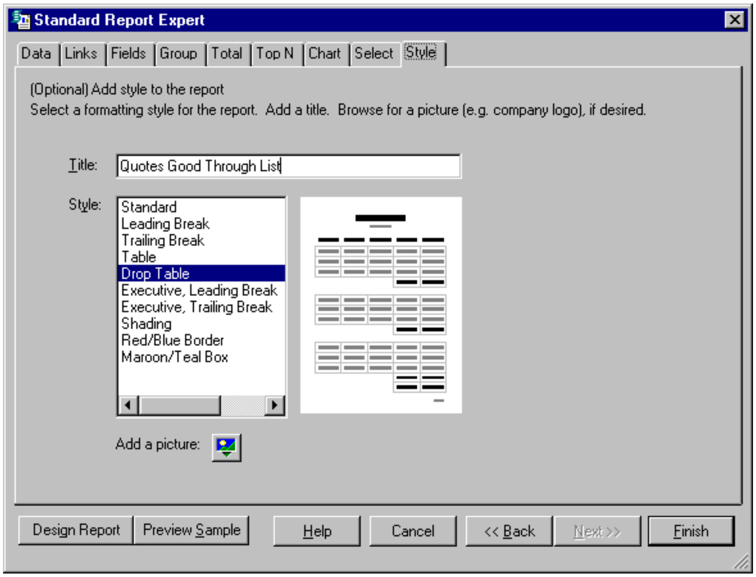
20 The **Top N** tab lets us sort groups based on summarized totals. This could be useful if we wanted to see, for example, which sales rep made the most sales in a month, but for our current report sorting is not important. So select the **Next** button without making any changes to the settings.



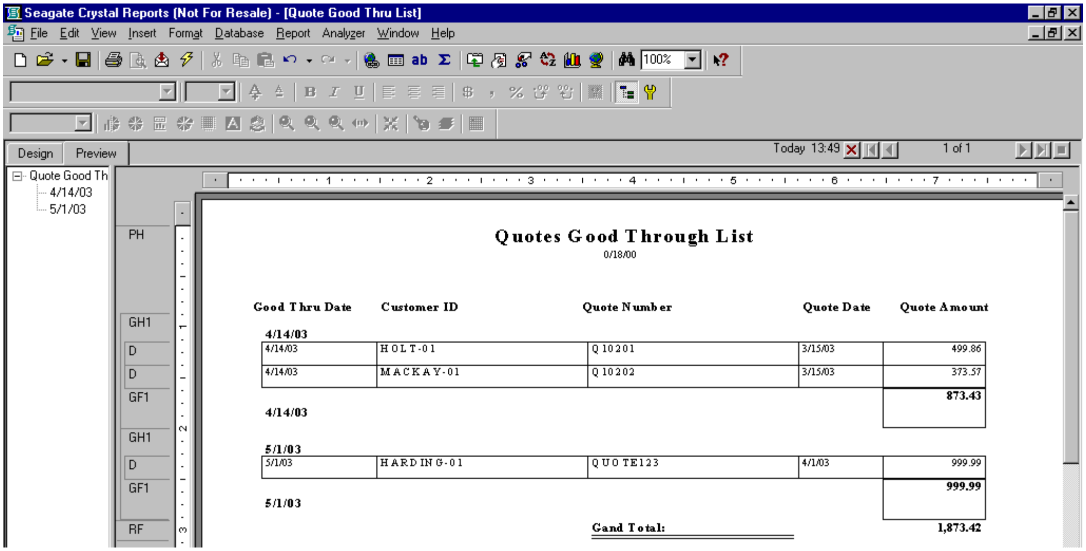
21 Again, a chart would be valuable for visually representing sales per sales rep or per geographic area, but for our report charting is not important. So select **Next** without choosing a chart option.



22 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. Click the **Add** button. When finished, select **Next**.



23 The last tab, the **Style** tab, lets you select a style for the report. This report might look good as a table, so from the **Style** box, select **Drop Table**. Then in the **Title** box, enter the report title "Quotes Good Through List." When finished, select **Finish**.



Notice that the finished 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.

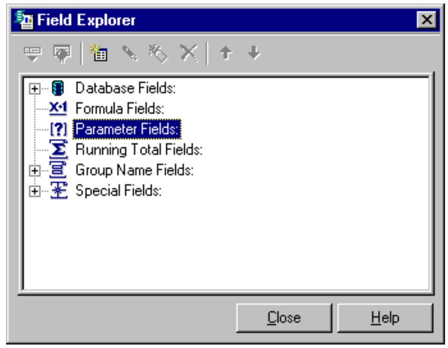
24 Now test your memory. Insert the "Bellwether Garden Supply" company name on the report. If you don't remember how, consult the section of Lesson 1 where we discuss putting the company name on a report.

Filter the Report

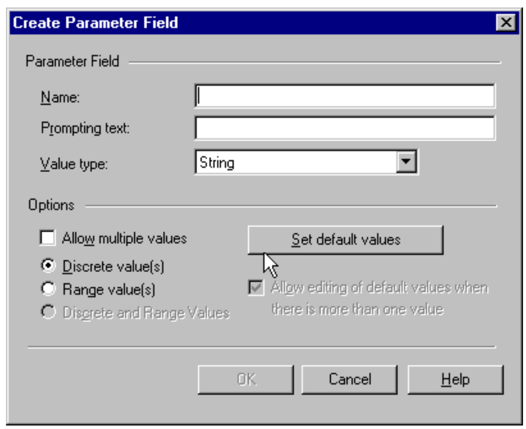
> For step-by-step instructions on using parameter fields, look up **"Parameter Fields"** in the Crystal Reports Help index.

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**.

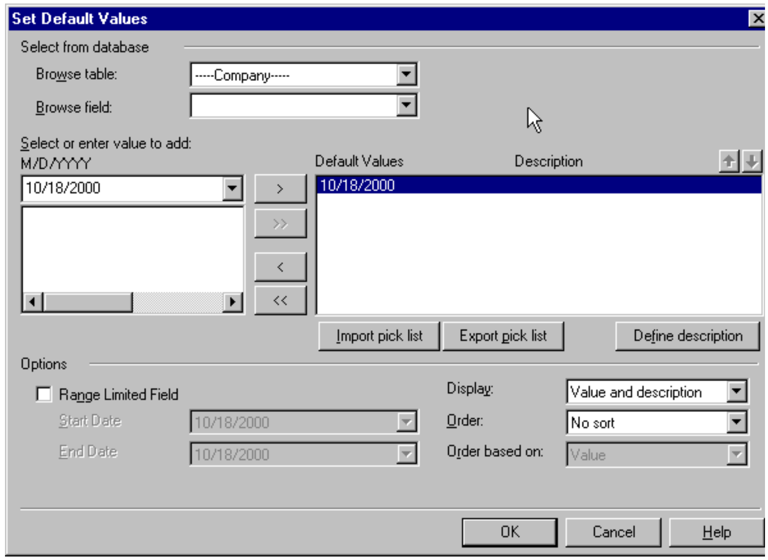


3 In the **Name** field, enter “QuoteExpirationDate.”

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

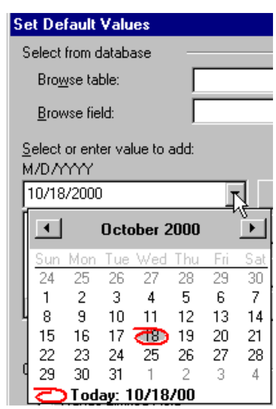
5 In the **Value type** field, use the drop-down list to select **Date**.

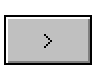
6 Click the **Set default values** button.



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, 2003, 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, 2003, and then select it.



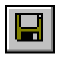


8 Now, click the **Right Arrow** button next to the field to populate the **Default values** box with this date.

9 When finished, click **OK**, **OK**, and then **Close**.

Now the report will include only those quotes with an expiration date that falls after April 1, 2003.

10 To see the effect of the filter we have added, select the **Refresh** button in the Standard toolbar; then click **OK**.



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

Review of Lesson 3

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

- The Report Expert lets you choose the database, database tables, and links that will operate in the report much as you would do if you had gone to the **Database** menu and selected **Add Database to Report**.
- The **Fields** tab of the Report Expert 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 **Group** tab lets you group all information in the report by one or more of the chosen fields.
- The **Total** tab lets you chose 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 **Top N** tab 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** tab lets you add a chart to the report, a visual representation of facts and figures in the report.
- The **Select** tab 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 **Style** tab gives you a variety of formatting options for your report.
- 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**.

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