Exercise 6 – Sales Report Grouped by Sales Employee

**Exercise Objectives**

At the conclusion of this exercise, you will be able to:

1. Use the Group Expert
2. Use the Record Select Expert
3. Create a report with basic Sub-Totals

**Exercise Introductions**

You would like to start a new report using the Blank report option. The report is based on invoices and sales employees, and will be filtered by invoice amount. Finally, you will choose to display a summary report with an option to drill down to each section.

**Exercise Steps**

1. Choose to create a new blank report using *Crystal Reports Designer*.
2. Use the same AMAZON data source.
3. From the “B1 Tables” tree add the OINV - A/R Invoices and OSLP - Sales Employee table to the report
4. Confirm the table linkages. What is the JOIN field? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Use the field explorer to add the following fields from the OINV table to the details area:
	1. DocNum
	2. CardCode
	3. CardName
	4. DocDate
	5. DocTotal
6. Print preview the report with F5 (Refresh)
7. Format the date field. Select the **03/01/1999** format
8. Choose to group the report by the Sales Employee Name from the OSLP table.
9. Choose to **Repeat Group Header on Each Page** when you setup the group
10. Choose to insert subtotals and grand totals using the Insert Summary icon or the Menu Option
11. Choose to format the document total field as **Currency. Hint – Format Font**.
12. Adjust the fields width to match the data
13. Take the field **Group Name #1** from the Group Header #1 and place it in the *Group Footer #1* area next to the group sub-total using drag and drop.Add the Text “Sales Total for:” in front of the Sales Persons Group Name.
14. Preview the report. There too much of space between “Sales Total for:” and the sales person’s name. Create a Formula to solve this problem no matter how long or short the sales person’s name is.
15. Suppress the Group Header #1 section in its entirety.
16. Rename the column titles as follow: Invoice #, Code, Name, Date and Total.
17. Use the *Insert Text object* icon to create a title in the *Report Header* area. Type: **Sales Report by Sales Employee.**
18. Format the field to use font 20, with the SAP orange color
19. Choose to filter the report to show only invoices with a Doc Date greater than or equal to 2007 AND Invoice Totals over $2,500 using the *Select Expert Record.*
20. Refresh the report.
21. Your users would like to have Invoices over $10,000 highlighted in Bold Red on this report. Use the Highlighting Expert or Font Field Formatting Formula to make this happen.
22. Also the users would like (those pesky users always wanting stuff) want to have a Page Break after each Sales Persons total. Can you make this happen? Do you now want to move your Report Headers to your Page Header section?
23. Print the selection Record Selection Criteria your report uses in the Page Header so that your uses know why all Invoices are not shown in this report. Hint Low tech for now, Text field
24. Choose to save the report in SAP Business One by the name: **Sales Report by Sales Employee**

**Report Sample**

****