



PUBLIC

# How to Work with Crystal Reports in SAP Business One

Release Family 8.8

Applicable Release:

SAP Business One 8.81

All Countries

English

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## Introduction

The SAP Business One 8.8 release provides integration with the Crystal Reports software, version for the SAP Business One application, allowing you to create, view, and manage reports and layouts. The key features of the integration include:

- Crystal Reports software, version for the SAP Business One application

You can save reports and layouts from within the Crystal Reports version for SAP Business One to the SAP Business One database. You can create reports and layouts more easily using an abstraction layer of SAP Business One database tables that are arranged according to the modules in the SAP Business One *Main Menu*.

Using the Crystal Reports software, you can draw data from SAP Business One tables and company databases into selection criteria. Additionally, you can create controls in reports and layouts that are aligned with standard SAP Business One user interface elements.



### Note

This document includes the processes and procedures involved in working with the Crystal Reports software. However, these processes and procedures relate to the SAP Business One context only. For more detailed information about working with the Crystal Reports software, see the Crystal Reports 2008 online help that is accessible from the Crystal Reports software, or from the Crystal Reports DVD.

- Crystal Reports Viewer

A WYSIWYG (What You See Is What You Get) application that provides you with an accurate print preview of reports and documents and enables exporting of reports to PDF and other formats. In addition, you can use the filtering functionality of the viewer, by entering different values in the *Parameter Panel*. For more information, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).

- Report and Layout Management

In SAP Business One 8.8, you can access a report and layout management window, where layouts for printing documents can be defined and saved. From one location, you can manage the properties of reports and layouts created with the Crystal Reports software as well as Print Layout Designer (PLD) layouts. In addition, you can define layout print sequences. The *Report and Layout Manager* window allows you to export and import reports and layouts that are created with the Crystal Reports software. For more information, see [Report and Layout Manager Window](#).

- Master Layouts

You can create a master layout for sales and purchasing documents that can be applied to various other sales and purchasing document types. For example, a master layout that is created for a sales invoice can be applied to sales quotations or deliveries. For more information, see [Creating Master Layouts](#).

- Accessibility of Source Documents

To drill down to a source master data window, you can click a ➡ *Link Arrow* icon when previewing reports in SAP Business One that are created with the Crystal Reports software. For more information, see [Link Arrow Icon](#).



### Note

In addition to the Crystal Reports software, SAP Business One supports Print Layout Designer (PLD). You can use either one to create layouts for SAP Business One documents. For more information about working with PLD, see <http://service.sap.com/smb/sbocustomer/documentation>.

## Prerequisites

- You have installed the Crystal Reports version for SAP Business One.



### Recommendation

The SAP Business One data source provides a hierarchy tree for the database tables that is sorted according to the modules in the SAP Business One *Main Menu*. To ensure that the SAP Business One data source is available in the Crystal Reports version for SAP Business One, we recommend that you first install the Crystal Reports software before installing SAP Business One.

If you cannot first install the Crystal Reports software, follow the procedure below for installing the SAP Business One data source and SAP Business One *Add-ins* menu: [Installing the Crystal Reports Version for SAP Business One](#).

- You have installed SAP Business One 8.8.



### Note

You can run the Crystal Reports version for SAP Business One with either Microsoft SQL Server 2005 or 2008.

## Installing the Crystal Reports Version for SAP Business One



### Recommendation

We recommend that you install the Crystal Reports software before installing SAP Business One 8.8.

Follow the installation sequence below:

1. On the Crystal Reports DVD that is provided with SAP Business One 8.8, locate the setup files for the following and run them in the order shown below:
  - a. Crystal Reports 2008 SP1
  - b. Crystal Reports 2008 FP3
2. Install SAP Business One 8.8.



### Note

For further information about installing the Crystal Reports software and installing and upgrading SAP Business One, see the *Administrator's Guide* that is provided on the SAP Business One product DVD.

## Performing Tasks

This document provides instructions for performing the following tasks:

- [Creating a New Report](#)
- [Creating New Crystal Reports Layout](#)
- [Creating Master Layouts](#)
- [Exporting Reports Created with the Crystal Reports](#)
- [Exporting Layouts Created with the Crystal Reports Software](#)
- [Importing Reports](#)
- [Importing Layouts Created with the Crystal Reports Software](#)

- [Viewing Crystal Reports Layouts and Reports in SAP Business One](#)
- [Working with Preview and Printing Options in SAP Business One](#)
- [Working with Printing Sequences](#)
- [Running Reports Created with the Crystal Reports Software in SAP Business One](#)

## Terms and Definitions

The following terms are used in this document.

Term	Definition
Report in Crystal Reports software	An <code>.rpt</code> file that is created with the Crystal Reports software. When you generate a report using the Crystal Reports software, it is displayed in Crystal Reports Viewer.
Crystal Reports software, version for the SAP Business One application	Software that is designed to work in conjunction with SAP Business One for creating reports and layouts using the Crystal Reports software for SAP Business One reports and documents.
Layout in Crystal Reports software	An <code>.rpt</code> file that is created with the Crystal Reports software. A Crystal Reports layout determines the print preview and printed appearance of a report or document. You can define a Crystal Reports layout as a master layout.
Crystal Reports Viewer	A fully integrated component of SAP Business One 8.8 that lets you view reports and layouts that are created with the Crystal Reports software.
master layout	A Crystal Reports layout that you define to be applicable to multiple document types and reports.
print sequence	A defined set of rules for printing a report. You define these rules in SAP Business One, in the <i>Report and Layout Manager</i> window.
SAP Business One data source	You connect to this data source to get SAP Business One tables arranged by module in a hierarchy tree in the Crystal Reports software.
token	A special format of parameter name containing SQL-syntax code in a report or layout created with the Crystal Reports software. You use tokens to create different types of report selection criteria and their controls for use in SAP Business One.

## Related Documentation

The documents listed below are referred to in this document. The documents are located on the SAP Business One Customer Portal <http://service.sap.com/smb/sbocustomer/documentation> unless indicated otherwise.

- *User Interface Standards & Guidelines*
- Print Layout Designer (PLD) documentation and training available on the Print Layout Designer landing page <http://service.sap.com/smb/sbocustomer/documentation>.
- SDK online help file, *SDK\_EN.CHM*, available on the SAP Business One product DVD or in the download package from SAP Service Marketplace.

- SAP Business One *Administrator's Guide*, available on the SAP Business One product DVD or in the download package from SAP Service Marketplace.
- Crystal Reports 2008 online help; available from within the Crystal Reports software.
- Crystal Reports *User Guide*, available on the Crystal Reports DVD.

## Overview

There are many procedures and sub procedures involved in the processes of working with the Crystal Reports software. A typical high-level flow of procedures for working with .rpt files that are created with the Crystal Reports software is as follows:

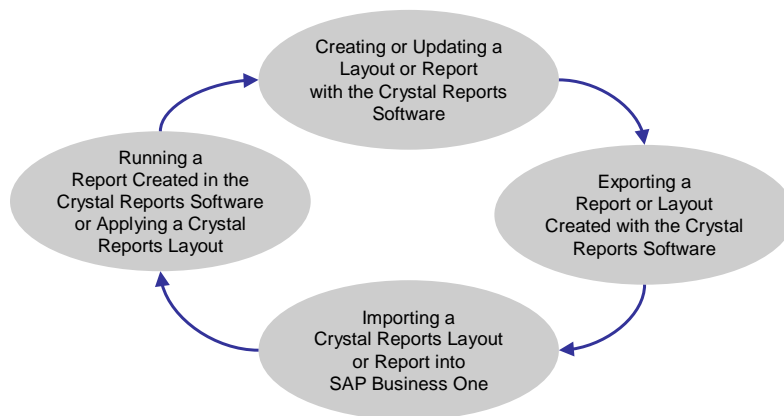
1. Creating a new report or layout
2. Exporting a report or layout
3. Importing a report or layout



### Note

For a more detailed list of the processes and procedures included in this document, see [Performing Tasks](#).

The following is a high-level representation of the workflow for working with the Crystal Reports software:



**Figure 1: Working with Crystal Reports Layouts and Reports**



# Working with Crystal Reports Layouts and Reports for Solutions

You can create Crystal Reports layouts and reports in the Crystal Reports software.



## Note

You do not need to install Crystal Reports Viewer in a separate procedure. It is an integral part of the SAP Business One 8.8 core product.

The procedures for creating Crystal Reports layouts and reports are described in the subsections below.

## Creating a New Report

This section provides the following sequence of procedures involved in creating a new report with the Crystal Reports software:

1. [Connecting to a Data Source](#)
2. [Creating Selection Criteria Dialog Boxes](#)
3. [Saving Crystal Reports .rpt File](#)
4. [Running Reports Created with the Crystal Reports Software](#)

### Prerequisites

- SAP Business One supports the following data sources in the Crystal Reports software:
  - SAP Business One
  - OLE DB (ADO)



## Recommendation

We recommend that you connect to the SAP Business One data source.

You must connect to a data source before you can begin creating a new report in the Crystal Reports software. For more information, see [Connecting to a Data Source](#) and [Installing the Crystal Reports Version for SAP Business One](#).

## Connecting to a Data Source



## Note

For more information about data sources, see the Crystal Reports 2008 online help.

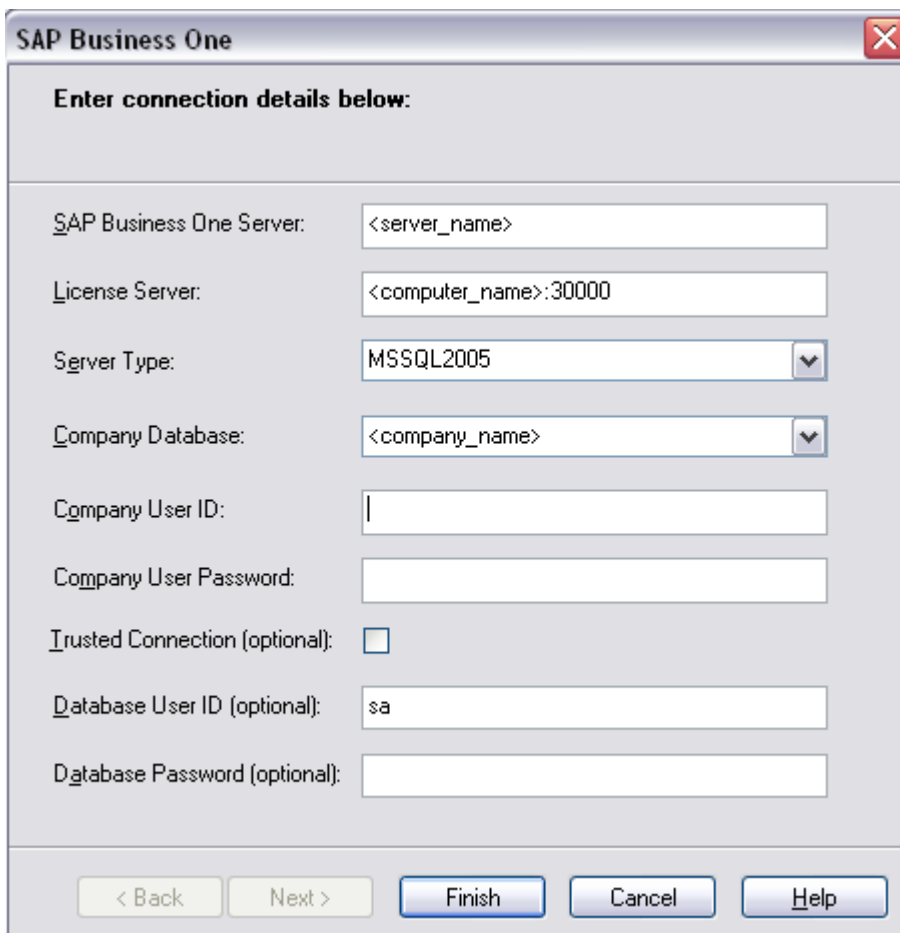
1. In the Crystal Reports *Start Page*, choose *Blank report*.



## Note

If you prefer, you can work with the *Standard Report Creation* wizard. Instead of *Blank report*, choose *Standard Report* and enter the requested information. For more information about the *Standard Report Creation* wizard, see the Crystal Reports online help.

2. In the *Database Expert* window, in the *Available Data Sources* pane on the left side of the screen, select the SAP Business One data source, and in the *SAP Business One* log on screen, enter the required information.




#### Recommendation

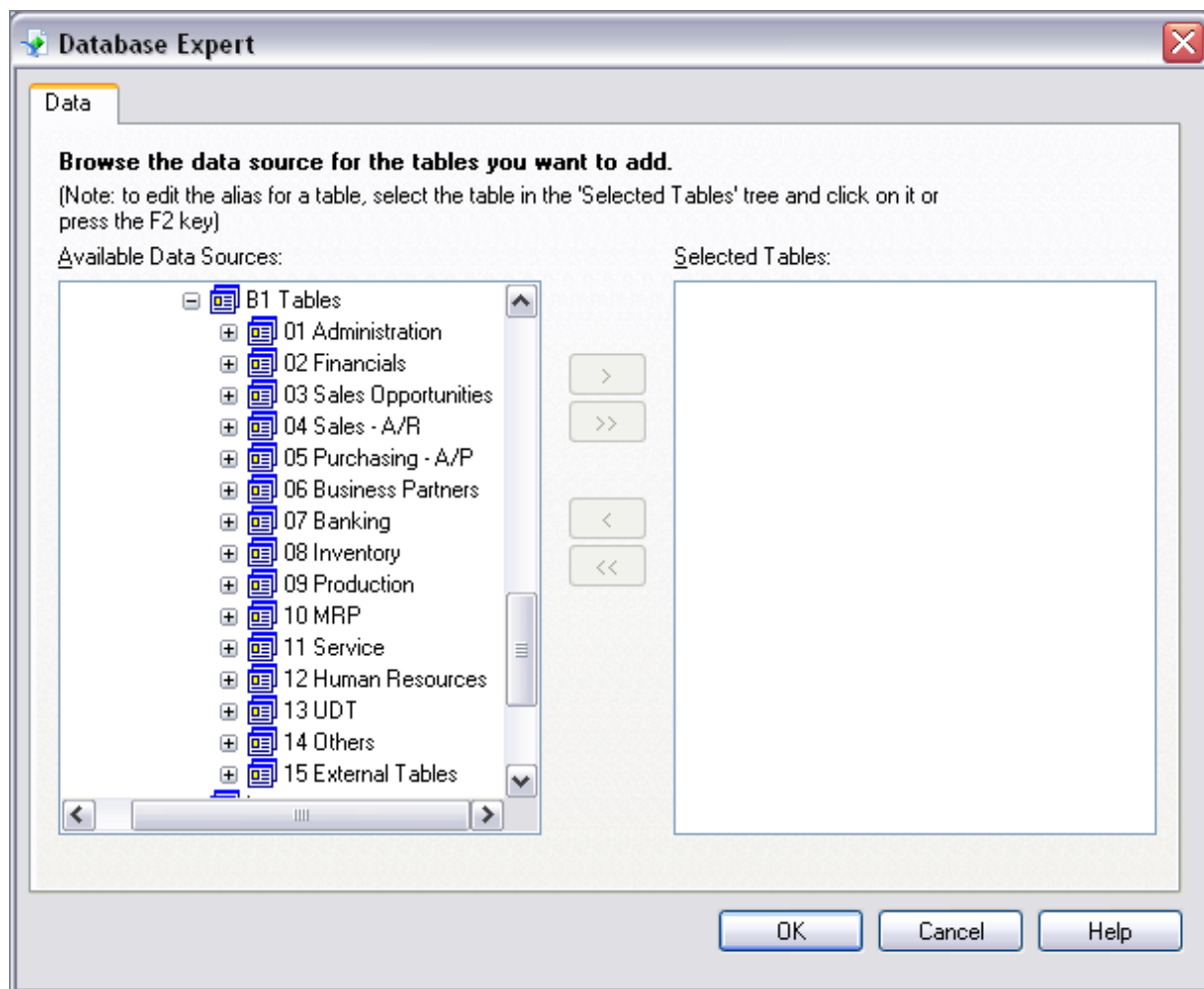
If you select the *SAP Business One* data source, the table names are grouped by type, such as A/R Sales or Human Resources. You can use the *15 External Tables* folder to save and share tables for partner-created add-ons. See the screen capture below.



#### Note

You can choose the *OLE DB (ADO)* data source if you prefer.

3. In the *Database Expert* window, in the *Available Data Sources* pane, do one of the following:
  - If you have connected to the SAP Business One data source, under the *B1 Tables* node, select a categorized table.
  - If you have connected to a different data source, select from all available tables by choosing the following path:  
*<connected database> → dbo → Tables*

**Note**

You can view information about the SAP Business One tables in the data source shown above. For more information see [Viewing Table Information in the SAP Business One Data Source](#).

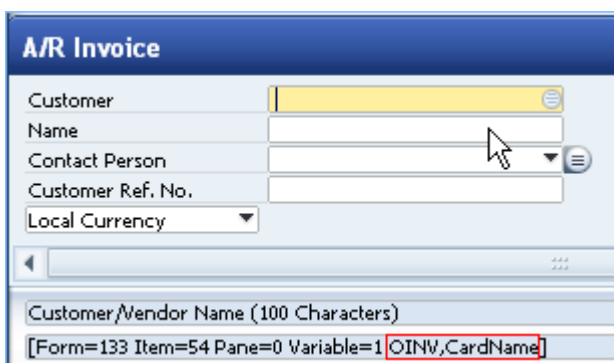
4. Select one or more tables whose data you want to include in the new report and using the *Add (>)* or *Add All (>>)* arrow buttons, move the selected tables to the *Selected Tables* pane.

**Note**

For more information about SAP Business One database tables, see the *SDK\_EN.CHM* file on the SAP Business One product DVD or in the download package.

**Note**

To find out a table name that is related to a specific SAP Business One window, pane, or field, you need to display the system information. To do so, in the SAP Business One menu bar, choose *View → System Information*. Then, by moving your cursor around the window, you can see the window's table information displayed in the SAP Business One status bar at the bottom of the screen. In the example below, the table is `OINV` and the *Name* field that the cursor is pointing to is based on the *CardName* column of the `OINV` table.



5. Choose the **OK** button. If you select more than one table in step 4, the *Links* tab appears and displays the tables and their relationships.

**Note**

The Crystal Reports software automatically creates a foreign key relationship between tables when you select more than one table on which to base a new report.

6. Choose the **OK** button. On the *Design* tab, in the work space on the left, a new report appears in *Design* view.

**Recommendation**

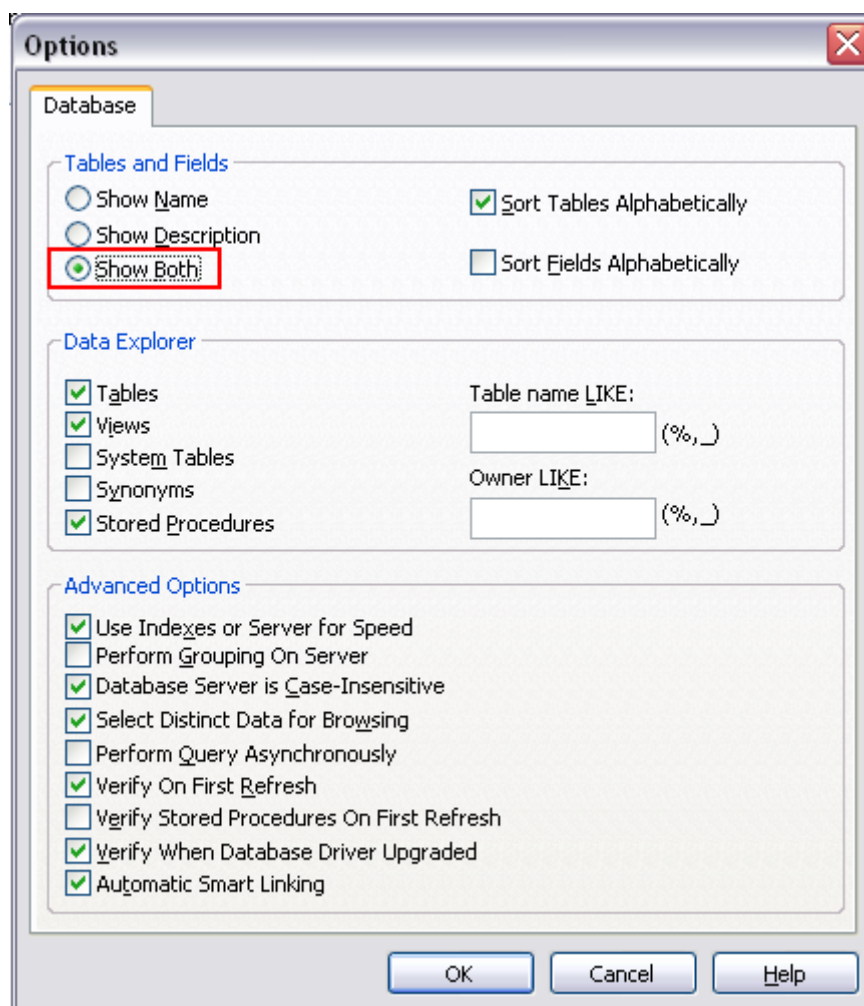
To view a generated report print preview, you can open the *Preview* tab for quick viewing of your report.

In the menu bar, choose: *View → Print Preview*. The *Preview* tab appears next to the *Design* tab on the left side of the screen.

## Viewing Table Information in the SAP Business One Data Source

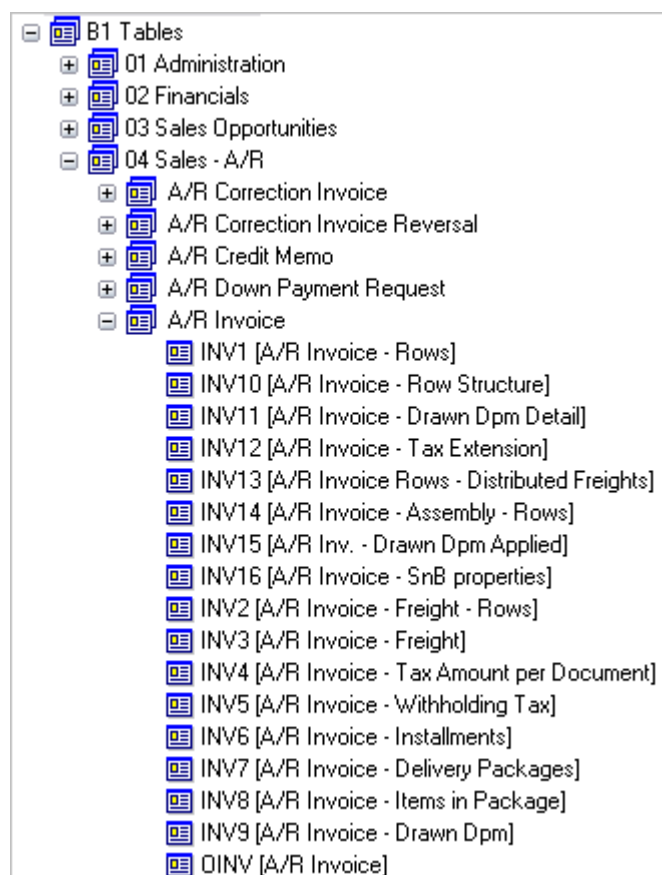
To enable viewing table information in the SAP Business One data source:

1. In the *Database Expert* window, in the *Available Data Sources* pane, in the hierarchy tree under *SAP Business One*, right-click *B1 Tables* and choose *Options*.
2. In the *Options* window, in the *Tables and Fields* area, select the *Show Both* radio button.



3. Choose the **OK** button.

A description is shown for each SAP Business One table in the hierarchy tree as shown below.

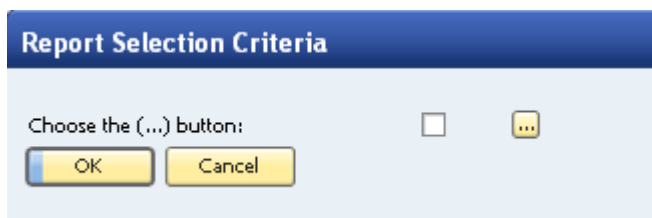


## Creating Selection Criteria Dialog Boxes

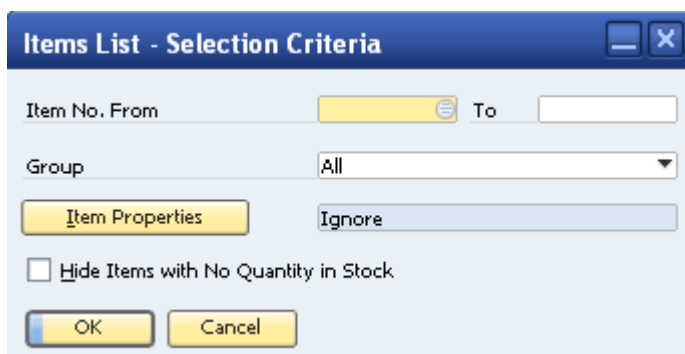
In the Crystal Reports window, on the *Design* tab, you can use tokens to create selection criteria dialog boxes for filtering criteria, such as the selection criteria dialog boxes shown in the examples below:



Example



In the above window, when you choose the *Browse (...)* button, the *Items List - Selection Criteria* dialog box opens, as shown below:



For each selection criteria dialog box that you want to create, you create a blank report (.rpt file), and then you add several parameters, each one containing a different SQL token. For example, when you are creating a new selection criteria dialog box for a report, you use different specific SAP Business One tokens for adding a title, a separator line, or a dropdown list. You can then change the order of these parameters to define the order in which the various related UI elements appear in the dialog box.



Note

For more information about SQL tokens and parameters, see [Working with Selection Criteria Tokens](#).

The procedure described below demonstrates how to create the example selection criteria dialog boxes shown above. Following the procedure, in the [Working with Selection Criteria Tokens](#) section, these subsections provide more specific information:

- [Tokens for Creating SAP Business One Controls](#)
- [Syntax and Rules for Defining Tokens](#)
- [Working with Parameters](#)

### Procedure

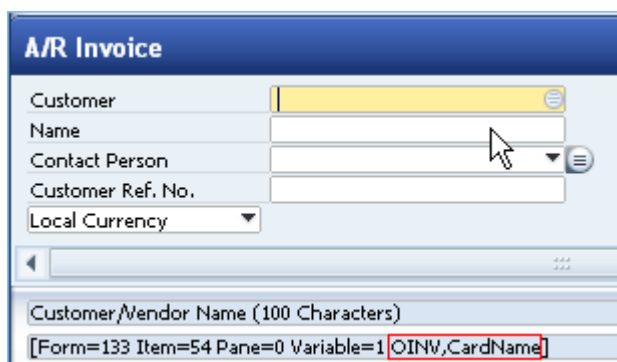
To create the example dialog boxes shown above:

1. In the Crystal Reports window, create a blank report and connect to a data source as described in [Connecting to a Data Source](#) above.
2. In the *Database Expert* window, select the **OITM** (item master data) table and choose the **OK** button.

**Note**

You can work with any SAP Business One tables to create selection criteria dialog boxes. The selection of the `OITM` table in this procedure is for creating the specific example dialog boxes shown above.

To find out a table name that is related to a specific SAP Business One window, pane, or field, you need to display the system information. To do so, in the SAP Business One menu bar, choose *View → System Information*. Then, by moving your cursor around the window, you can see the window's table information displayed in the SAP Business One status bar at the bottom of the screen. In the example below, the table is `OINV` and the *Name* field that the cursor is pointing to is based on the *CardName* column of the `OINV` table.



3. In the *Field Explorer* pane on the right, open the *Database Fields* node, then open the *OITM* node.
4. Drag each of the following fields to the *Design* tab work space on the left and drop them in the *Details* area:
  - *ItemCode*
  - *ItemName*

The fields appear in the *Details* area with their associated labels in the *Header* area. You can edit the label text. For more information, see the Crystal Reports 2008 online help.

5. In the *Field Explorer* pane, close the *OITM* node.
6. In the *Field Explorer* pane, right-click the *Parameter Fields* node and select *New*.

**Note**

For more information about parameters, see [Working with Parameters](#).

7. In the *Create New Parameter* window, in the *Name* field, enter the following token:
 

```
MyParameter@SELECT * FROM OITM
```
8. In the *Value Options* list at the bottom of the window, set the values in one of the following configurations:



- *Choose from List* field

To create the choose-from-list field as shown in the *Report Selection Criteria* dialog box below, set the options according to the table below the screen captures:

When you choose the *Choose from List* icon shown above, the following *List of Items* window appears:



#### Note

It is not necessary to change the value options that do not appear below. For more information about value options settings, see the Crystal Reports 2008 online help.

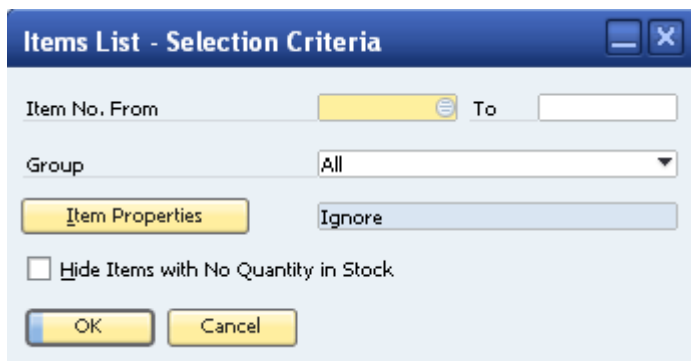
*Choose from List* settings:

Value Options	Setting
<i>Prompt Text</i>	<b>Select an item</b>
<i>Allow multiple values</i>	<b>False</b>
<i>Allow discrete values</i>	<b>True</b>
<i>Allow range values</i>	<b>False</b>

- *Browse (...)* button type

To create the *Browse (...)* button type of *Report Selection Criteria* dialog box shown below:

When you choose the *Browse* button above, the following *Items List - Selection Criteria* dialog box opens:



The dialog box titled "Items List - Selection Criteria" contains the following fields and buttons:

- Item No. From:** A text input field with a yellow background and a small icon to its right.
- To:** A text input field.
- Group:** A dropdown menu currently showing "All".
- Item Properties:** A button with a yellow background.
- Ignore:** A button with a light blue background.
- Hide Items with No Quantity in Stock:** A checkbox that is currently unchecked.
- OK:** A button with a yellow background.
- Cancel:** A button with a yellow background.



#### Note

It is not necessary to change the value options that do not appear below. For more information about value options settings, see the Crystal Reports 2008 online help.

Multiple selection criteria settings:

Value Options	Setting
<i>Prompt Text</i>	<b>Choose the (...) button</b>
<i>Allow multiple values</i>	<b>True</b>
<i>Allow discrete values</i>	<b>True</b>
<i>Allow range values</i>	<b>False</b>

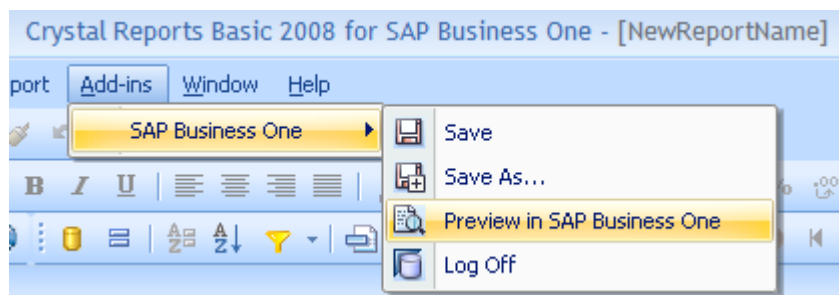
9. In the *Create New Parameter* window, choose the *OK* button.

## Viewing and Running Selection Criteria Dialog Boxes in SAP Business One

After you have followed the steps in the example above, you can view the new dialog box in SAP Business One as described in the following procedure.

### Procedure

1. In the *Crystal Reports* window, in the menu bar, choose *Add-ins* → *SAP Business One* → *Preview in SAP Business One*.



The *Report Selection Criteria* dialog box opens in SAP Business One.

2. Choose the *Choose from List* icon or *Browse (...)* button, depending on which type of selection criteria you set in the previous section.

3. In the selection window that opens, select the required criteria and choose the *OK* button.
4. In the *Report Selection Criteria* dialog box, choose the *OK* button.

The report opens in Crystal Reports Viewer. For more information about Crystal Reports Viewer, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).

You may now save your new report and run it in SAP Business One. For more information, see the following:

- [Saving Crystal Reports .rpt File](#)
- [Running Reports Created with the Crystal Reports Software](#)

## Working with Selection Criteria Tokens

You can create controls that align with standard SAP Business One UI elements.

This section provides explanations about and examples of about SAP Business One tokens as shown in the list below:

- [Tokens for Creating SAP Business One Controls](#)
- [Syntax and Rules for Defining Tokens](#)
- [Working with Parameters](#)

### Prerequisites

- You are familiar with the guidelines for working with the SAP Business One user interface.



#### Note

For more information about working with the SAP Business One user interface, see *User Interface Standards & Guidelines* <http://service.sap.com/smb/sbocustomer/documentation>. *User Interface Standards and Guidelines* provides the best practices for designing the SAP Business One interface. This document describes the structure and appearance of the interface, and the rules used to perform actions that affect the system.

By following these guidelines, you can improve the quality and consistency of the application. The document offers the latest GUI design rules and recommendations. It also includes relevant GUI information, including a glossary, case studies, reusable components, and international support standards.

- You are familiar with SQL syntax, which is required for creating the tokens described in the following sections.

## Tokens for Creating SAP Business One Controls

SAP Business One provides the tokens that are described in the sections below. You can use them to create standard SAP Business One controls.

Most of these tokens contain SQL statements that you can use to dynamically select data from tables and fields in SAP Business One. You can use other tokens to create UI elements such as titles and horizontal separator lines.



#### Note

For more information about SAP Business One databases, tables, and fields, see the SDK online help file, *SDK\_EN.CHM*, on the SAP Business One product DVD or in the download package.

## Basic Token Structure

Use the following basic structure to create SQL tokens in reports that you want to run in SAP Business One:

`<parameter_name>@<SQL_Expression>`



### Example

An example of `<SQL_Expression>` might be:

**SELECT \* FROM OITM WHERE OnHand > 100.**

In this case, the condition in the WHERE subclause specifies the query scope.

## Titles

You can assign a title token to group selection criteria, such as checkboxes. In the example below, *Business Partner Type* is the title.

Business Partner Type	
Customer	<input type="checkbox"/>
Vendor	<input type="checkbox"/>

To create a title, use the following token:

`<parameter_name>@title`

To define the text that you want to appear in the title, in the *Value Options* list, in the *Prompt Text* field, enter the required text. In the example above, the user entered **Business Partner Type** in the *Prompt Text* field.

## Separators

Separators are horizontal lines that span the width of a window. You can use separators to separate selection criteria groups as in the example below:

From	01/01/08	To	12/31/08
From	01/01/08	To	12/31/08
From	01/01/08	To	12/31/08

<input type="checkbox"/> Display Postings Summary
<input type="checkbox"/> Display OB for Periods

To create a separator, use the following token:

`<parameter_name>@separator`

No other specific values are required for this token.

## Item Selection Criteria Groups

This token groups different selection criteria types together. In the example below, the selection criteria relate to item data. If you define a token to select fields from the OITM table (relating to item data), and the parameter is defined as the multi-value type, you can create a selection criteria control such as the one below:

Code	From	<input type="text"/>	To	<input type="text"/>
Item Group	All ▼			
Properties	Ignore			

To create a group of item selection criteria such as the one shown above, use the following token:

```
<parameter_name>@SELECT * FROM OITM
```



### Example

For specific instructions about creating the item token shown above, see [Creating Selection Criteria Dialog Boxes](#).



### Note

If the parameter allows multiple values, a *Browse* button appears in the selection criteria dialog box when you run the report. When you choose the *Browse* button, it opens another window.

If the parameter does not allow multiple values, a field with a *Choose from List* icon appears in the selection criteria dialog box when you run the report. For more information, see [Creating Selection Criteria Dialog Boxes](#).

## Business Partner Selection Criteria

You can define a token that selects business partner data from the OCRD table as in the example shown below.

Code	From	<input type="text"/>	To	<input type="text"/>
Customer Group	All ▼			
Vendor Group	All ▼			
Properties	Ignore			

To create selection criteria controls related to business partners, you can use the following example tokens.

- Use the following token to create a control that includes all types of business partners:  
`<parameter_name>@FROM OCRD`
- Use the following token to create a control that includes only customer-type business partners:  
`<parameter_name>@FROM OCRD WHERE cardType='c'`
- Use the following token to create a control that includes only vendor-type business partners:  
`<parameter_name>@FROM OCRD WHERE cardType='s'`

## Date Format Selection Criteria

You can define date selection criteria using either of the following two types of date controls:

- *Date Selector* calendar window – Allows the user to enter any date by choosing the *Calendar* icons in the fields shown below:

Date From 01/01/08 To 12/31/08

To create this control: in Crystal Reports, define the parameter type as **Date** and select the required range of values.

- *Choose From List* control – Allows the user to choose only specific periods by choosing the *Choose from List* icon as shown in the fields below:

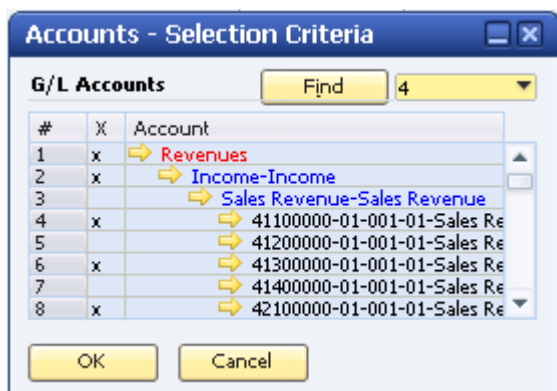
Date From 01.01.2008 To 31.12.2008

To create this specific control, use the following token, which draws data in this case from the OFPR table:

```
<parameter_name>@SELECT * FROM OFPR
```

## Account Tree

The *Account Tree* object in SAP Business One allows the user to view different account levels and multiple selection options of the nodes.



To create an account tree, use the following token, which allows you to define multiple values:

```
<parameter_name>@FROM OACT
```

## By Location and By Warehouse

Location and warehouse information is usually grouped together as tabs as in the examples below.



To create this control, use the following token, which selects data from the `OWHS` table. Make sure to set the *Allow multiple values* value option to **True**.

```
<parameter_name>@SELECT * FROM OWHS
```

## Multiple Selection Grid

Each of the *Browse (...)* buttons in the following dialog box opens the same grid control, shown below, for selecting multiple values. Each *Browse* button includes a checkbox for indicating if a value or values have been selected.

To ensure that a multiple selection grid like the one shown below appears when you choose a *Browse* button in the example above, do the following:

1. In the *Create Parameter* or *Edit Parameter* window, in the *Value* list, enter a list of valid values  
In the example below, the following values have been set:
  - Low
  - Medium
  - High
2. In the *Value Options* area, set the *Allow multiple values* option to **True**.

#	Name	Choose
1	Low	<input checked="" type="checkbox"/>
2	Medium	<input type="checkbox"/>
3	High	<input checked="" type="checkbox"/>



### Note

If you set the *Allow multiple values* option to **False**, a dropdown list appears, such as the example business-partner type control shown below, instead of the *Browse* buttons and checkboxes above.

Enter BP Type Filter:

OK Cancel


C	-	Customer
S	-	Vendor
L	-	Lead

## Link Arrow Icon

You can add drilldown functionality to a Crystal Reports layout or report with a *Link Arrow* icon as shown in the example below. In this case, when you preview it in SAP Business One and click the *Link Arrow* icon next to an item, the *Item Master Data* window opens to display item details.

A/R Invoice

Customer Code	A1		
Document Date	20-April-2009		
Document Num	1		
Company Name	InfoDev1		

Item	Description	Quantity
 I0001	item	1.00

To create this specific example, do the following:

1. Manually insert the *Link Arrow* icon graphic into the Crystal Reports layout.
2. Right-click the graphic and select *Format Graphic*. The *Format Editor* window opens.
3. On the *Hyperlink* tab, do the following:
  - a. In the *Hyperlink Type* area, select the *A Website on the Internet* radio button.
  - b. In the *Hyperlink Information* area, in the *Website Address* field, enter the following string:  
`http://$b1$/link?table=OITM&key=I001`



**Format Editor**

Common Picture Border **Hyperlink**

**Hyperlink type:**

☐ No Hyperlink ☐ An E-mail Address

☒ A Website on the Internet ☐ A File



☐ Current Website Field Value ☐ Current E-mail Field Value

DHTML Viewer Only

☐ Report Part Drilldown ☐ Another Report Object

**Hyperlink information:**

Website Address:


Create enterprise hyperlink

**Helpful hint:**

Use this type of hyperlink to go to an Internet Web site address (URL), for example <http://www.businessobjects.com>

Use the formula button to choose a hyperlink that is based on data from a field in your data source.

OK Cancel Help

4. Click the *Formula* button  to the right of the *Website Address* field. The *Formula Workshop – Format Formula Editor – Hyperlink Text* window opens.



#### Note

The *Formula* button changes color when data has been added to the *Website Address* field. For more information about the *Formula* button, see the Crystal Reports online help.

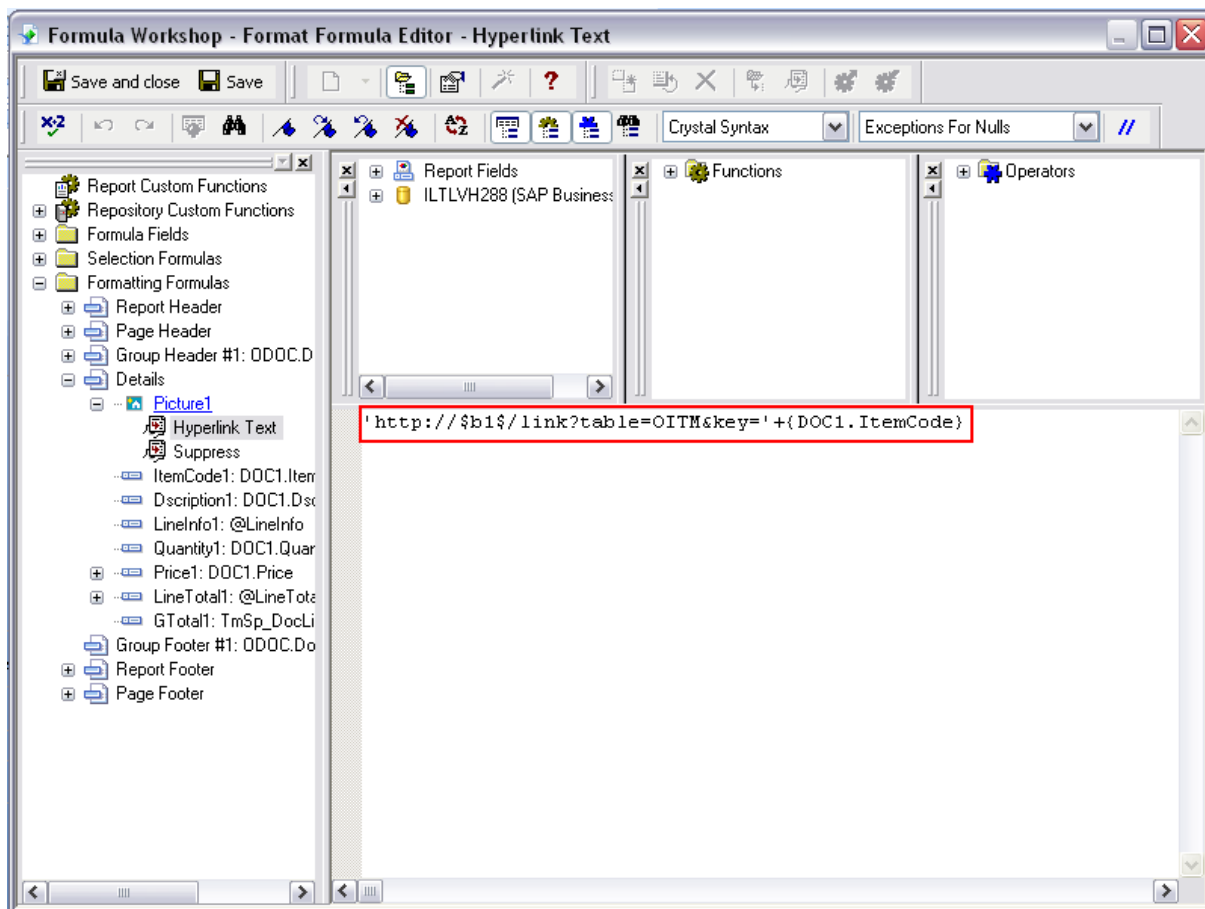
5. In the work area, enter the following string as shown below:

```
'http://$b1$/link?table=OITM&key='+{DOC1.ItemCode}
```



#### Note

In this example, the string includes a reference to the `OITM` table in order to create the drilldown to the *Item Master Data* window. You can insert references to other tables in SAP Business One to create drilldowns to other windows. `<DOC1>` means the first subtable of a main sales or purchasing document. For example, `INV1` is the first subtable of the A/R invoice table (`OINV`), and `PCH1` is the first subtable of A/P invoice table (`OPCH`).



6. In the toolbar, choose the *Save and Close* button.
7. In the *Format Editor* window, choose the *OK* button.

## Syntax and Rules for Defining Tokens

When defining tokens for use in SAP Business One, you must follow the following rules:

- Parameter names must start with an alphanumeric character or an underscore (`_`).
- The at sign (`@`) is reserved for SAP Business One tokens and must follow the parameter name with no space between them.

For example, "My Parameter@" means that this parameter is specific for SAP Business One.

- An SQL statement usually follows the at sign (`@`), with no space after the at sign (`@`).

- The general syntax for creating SAP Business One tokens is:

**<Parameter Name>@ SELECT ... FROM ... WHERE**

When you are creating tokens, the **SELECT** command is not always mandatory for all SAP Business One tables. For example, **SELECT** is not mandatory for the **OCRD** (business partners) and **OACT** (G/L accounts) tables. For an example where **SELECT** is not applied, see [Business Partner Selection Criteria](#).

- A parameter name (that is, token) may include another parameter name. This means that a second parameter may depend on a first parameter. For example, a state parameter depends on a country parameter. If you do not choose a country, the state dropdown list has no data. If you choose **United States** as the country, the states of the United States appear in a *State* dropdown list.

The syntax must include the first parameter name including the at sign (**@**), as in the examples below. The first statement lists all countries, while the second statement calls “**Country**”. For the second statement to work, you must have a parameter called **Country**.



#### Examples

**Country@SELECT distinct Country FROM OCST**

**State@SELECT code, name FROM OCST WHERE (Country = '@Country')**

- The **DocKey@** token is **mandatory** in a Crystal Reports **.rpt** file that you want to use as a layout. The **DocKey@** token is used to identify the current active document. SAP Business One populates its value when you preview or print a layout.

When you apply the **DocKey@** token, in the *Select Expert* window, you need to specify a filter condition, such as:

**{OINV.DocEntry}={DocKey@}**

If the **DocKey@** token does not exist, create a new parameter with the following settings:

- In the *Name* field, enter **DocKey@**
- In the *Type* dropdown list, select **Number**
- In all other fields, leave the default settings



#### Note

For more information about the *Select Expert* window, see the Crystal Reports online help.

- The **ObjectId@** token is recommended for inclusion in Crystal Reports layouts that you want to assign to multiple sales and purchasing documents. For example, you can include the **ObjectId@** token if you want to include dynamic titles that change according to different document types. However, this token is optional in a Crystal Reports **.rpt** file that you want to use as a layout for one document type:

The **ObjectId@** token provides specific document-type information.

If the **ObjectId@** token does not exist, create a new parameter with the following settings:

- In the *Name* field, enter **ObjectId@**
- In the *Type* dropdown list, select **Number**
- In all other fields, leave the default settings

**Note**

For more information about Crystal Reports layouts, see [Creating New Crystal Reports Layouts](#).

**Recommendation**

We recommend that you do **not** use the **ONLY** keyword in Crystal Reports layouts that you want to set as master layouts for multiple sales and purchasing document types.

- The **UserCode@** parameter is an optional token that is recommended for inclusion only in Crystal Reports layouts where you want to display the currently logged on SAP Business One user code, such as “manager”. The parameter type is **string**. This token is only for layouts; you cannot use it in reports.
- The **FolioPref@** and **FolioNum@** parameters are optional tokens that are recommended for inclusion only in Crystal Reports layouts in which you want to display a Folio prefix and a Folio number. SAP Business One populates them with the Folio prefix and Folio number you assign to the document for the first printing. SAP Business One prompts users to enter the Folio prefix and Folio number in some legal documents for the first printing. The values are taken for the subsequent printing. These parameters are available only for Mexico, Chile, Costa Rica, and Guatemala.

## Dropdown Lists and Choose from List Icons

If the SQL query part of a parameter name (token) does not specify which column to select from database, such as **aaa@SELECT \* from OITM**, SAP Business One provides a field with a standard *Choose from List* icon that opens a window with a list, in this case a list of existing items.

If the token specifies columns, such as **bbb@SELECT code, name FROM OCST**, SAP Business One provides a dropdown list control.

If two **SELECT** columns are specified, the first one is used as dropdown list's key, and the second column is used as descriptions for the dropdown list.

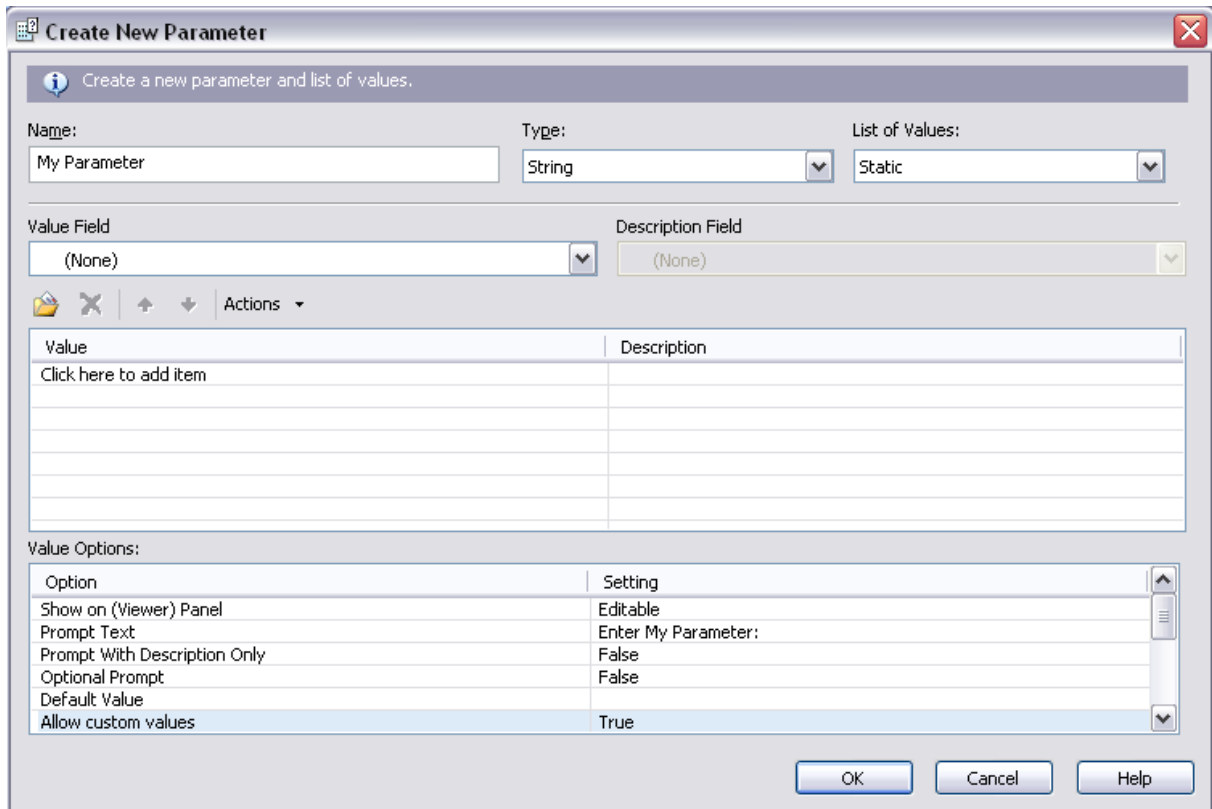
## More Token SQL Code Examples

The table below provides SAP Business One SQL token examples and descriptions.

SAP Business One SQL Token	Description
<code>&lt;parameter_name&gt;@SELECT * FROM OPRJ WHERE PrjName LIKE 'World%'</code>	This expression returns all projects whose name starts with “World”.
<code>&lt;parameter_name&gt;@SELECT CurrCode FROM OCRN WHERE ISOCurrCod &lt;&gt; 'CAD'</code>	This expression returns all currency codes defined in SAP Business One except for the Canadian dollar.
<code>&lt;parameter_name&gt;@SELECT * FROM ODSC WHERE CountryCod = 'US'</code>	This expression returns all U.S. banks defined in SAP Business One.

## Working with Parameters

In the Crystal Reports window, in the *Field Explorer* pane on the right, right-click *Parameter Fields* and select *New*. The *Create New Parameter* window appears.



**Create New Parameter**

Create a new parameter and list of values.

Name: My Parameter      Type: String      List of Values: Static

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

Value      Description


Click here to add item	

Value Options:

Option	Setting
Show on (Viewer) Panel	Editable
Prompt Text	Enter My Parameter:
Prompt With Description Only	False
Optional Prompt	False
Default Value	
Allow custom values	True

OK      Cancel      Help

The following table provides a list of parameter types and their related control types as they appear in SAP Business One:

Parameter Type	Control Type	Values
Boolean	Checkbox	Fixed values: <ul style="list-style-type: none"> <li>• True</li> <li>• False</li> </ul>
Currency	Edit box with a calculator	
Date	Calendar-type date picker; that is, an edit box with a calendar	
Date Time	Calendar-type date picker; that is, an edit box with a calendar	 <b>Note</b> Because SAP Business One does not have a time control, this parameter provides a default time of 00:00.
Number	Edit box with a calculator	
String	Edit box	
Time	Not supported	

## List of Values Options

Values can be defined as one of the following:

- Static

Recommended. A static prompt is one that always contains the same values. For example, if your parameter prompts for a country value, you could create a static prompt because the country list represents a set of values that does not change often. If the token syntax is applied to the parameter name, the option values are dynamically populated for this parameter.

Provides the following options:



### Note

This option provides a field with a *Choose from List* button if *Allow multiple values* is set to **False**, but if you set this value to **True**, it provides a *Browse* button that opens a dialog box with multiple data selection options.

- Simple Parameters (Display options)
- Hard-coded list of values such as Customer/Vendor/Lead
- For complex dynamic values



### Note

If you include a token in the parameter name, SAP Business One fetches the data list from the database dynamically.

- Dynamic

Not recommended. The values of a dynamic prompt are retrieved from the data source and are not stored within the report. For example, if you are prompting for customer name, you could create a dynamic prompt because the names in your customer database probably change frequently.



### Recommendation

You can get the data dynamically and directly from database, but the static type with token and SQL statement provide a better way to get the option list because the user can filter by adding a **WHERE** clause in the SQL part of the parameter name. For example, regarding *Bind to DB Field only*, the customized filter is not allowed.


You can always set the *List of Values* type to **static**. You can either enter fixed values or Crystal Reports reads data from the database using the SQL code in the parameter name.

## Value and Description Fields

The values that you enter in the *Value* fields appear for selection in SAP Business One selection criteria dialog boxes.

## Value Options and Settings

In the *Create New Parameter* or *Edit Parameter* window, you can define settings for value options. See the table below or for more information about these values and settings, see the Crystal Reports 2008 online help.

Value Option	SAP Business One Control Type	Setting Descriptions
<i>Show on (Viewer) Panel</i>	n/a	Determines the <i>Parameter Panel</i> options in Crystal Reports Viewer: <ul style="list-style-type: none"> <li>Do not show</li> <li>Editable (default)</li> <li>Read only</li> </ul>
<i>Prompt Text</i>	n/a	Appears in the SAP Business One control as a UI string providing an instruction to the user, such as "Enter a value".
<i>Prompt With Description Only</i>	n/a	Fixed values: <ul style="list-style-type: none"> <li><b>True</b> – Prompts the user with only a description</li> <li><b>False</b> (default) – Prompts the user with a value and its description</li> </ul>
<i>Optional Prompt</i>	n/a	Set this to <b>True</b> if you want to allow the user to bypass entering a value for this parameter. Set this to <b>False</b> if the parameter is mandatory.
<i>Default Value</i>	n/a	Add a value to this field if you want a default to appear when the program prompts your users to select a value. If the user does not change it, the default value is applied. <div>  <b>Note</b> </div> This option is available only for parameters with static prompts.
<i>Allow custom values</i>	Not supported	n/a
<i>Allow multiple values</i>	Browse button that can pop up a new window to allow user to select multiple values	Fixed values: <ul style="list-style-type: none"> <li><b>True</b></li> <li><b>False</b></li> </ul>

Value Option	SAP Business One Control Type	Setting Descriptions
<i>Allow discrete values</i>	Dropdown list	<p>User can select only one singular value.</p> <p>If you have <i>Allow multiple values</i> selected, you will be able to select more than one discrete value for your parameter field, though those discrete values will continue to function singularly as opposed to a range value. You can choose discrete values for your parameter field after you choose the <i>Refresh Report Data</i> command.</p> <p>Fixed values:</p> <ul style="list-style-type: none"> <li>• <b>True</b> (default)</li> <li>• <b>False</b></li> </ul>
<i>Allow range values</i>	From/To fields	<p>Fixed values:</p> <ul style="list-style-type: none"> <li>• <b>True</b> – Provides <i>From</i> and <i>To</i> dropdown lists</li> <li>• <b>False</b> – Provides a <i>Choose from List</i> icon</li> </ul>
<i>Min length</i>	n/a	<p>Value/From</p> <p>Restricts values, depending on the type. For example, if the type is String, this value becomes “Min Length”. If the type is Date, the value becomes “From”. If the type is number/currency, the value becomes “Min value”.</p>
<i>Max length</i>	n/a	<p>Similar to above.</p> <p>Restricts values, depending on the type. For example, if the type is String, this value becomes “Max Length”. If the type is Date, the value becomes “To”. If the type is number/currency, the value becomes “Max value”.</p>
<i>Edit mask</i>	n/a	n/a



## Saving Crystal Reports .rpt Files

It is in the *Save* or *Save As* option in the *Add-ins* menu that you define your Crystal Reports .rpt file as a report or a layout. When you save an .rpt file using this menu, the report or layout is saved to the SAP Business One database.

### Prerequisite

- You have superuser permissions in SAP Business One.

### Procedure



#### Note

If you want to save a Crystal Reports .rpt file to your local computer, in the Crystal Reports window, choose *File* → *Save* or *File* → *Save As*. If you decide later that you want to save the .rpt file to SAP Business One, you can import it using the Import wizard. For more information, see [Importing Reports](#) or [Importing Layouts Created with the Crystal Reports Software](#)

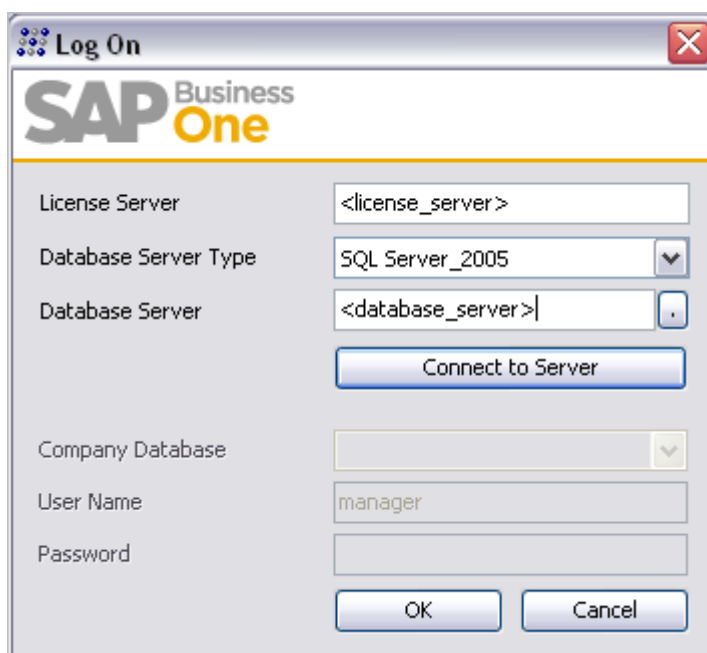
To save your .rpt file:

- In the toolbar, choose *Add-ins* → *SAP Business One* → *Save* or *Save As*.



#### Note

If you are not logged on to SAP Business One, the *Log On* window appears. Enter your details and choose the *OK* button.

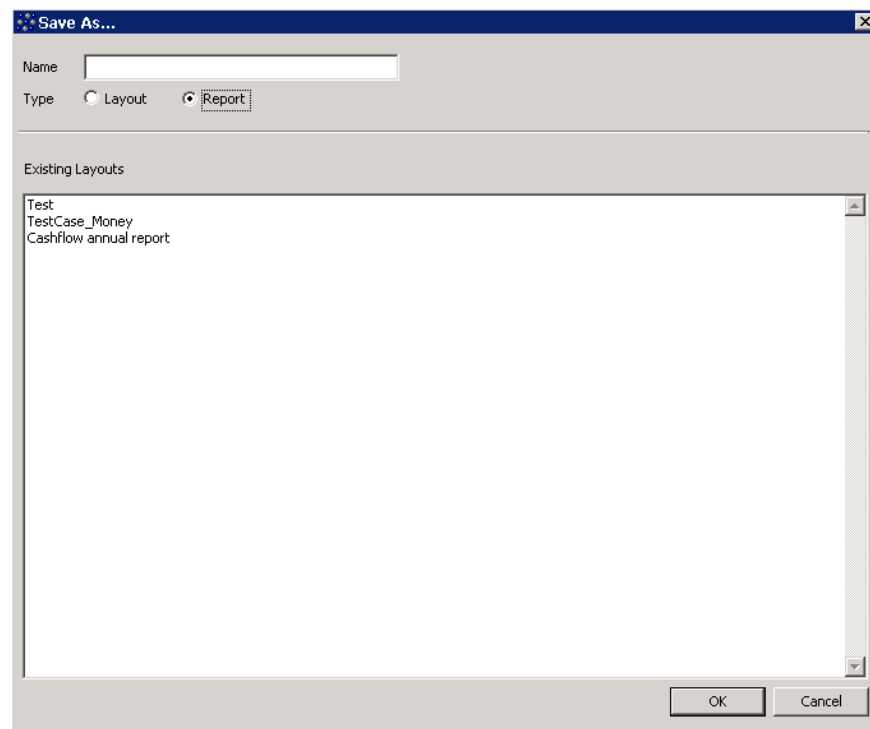


- In the *Save As* window:

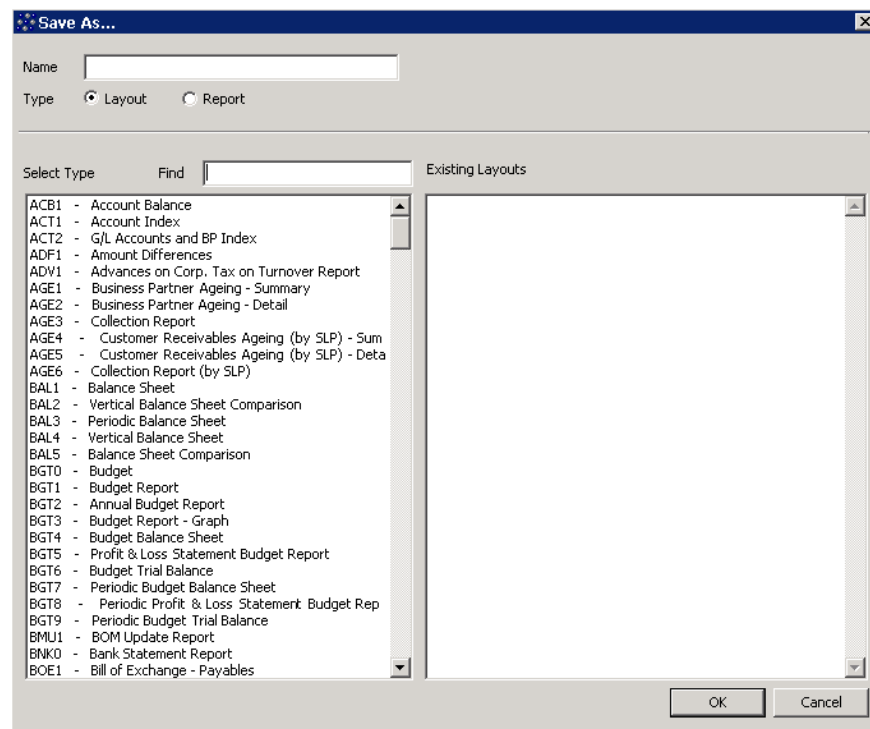
- a. In the *Name* field, enter a name for the .rpt file.
- b. Select one of the following *Type* radio buttons:

■ **Report**

The report is saved to the *Lost Reports* folder in the *Report and Layout Manager* window.



■ **Layout**



- c. In the *Select Type* list, select a type.

- d. Choose the *OK* button. You can now access the file in the *Report and Layout Manager* window, in the *Lost Reports* folder. For more information, see [Lost Reports Folder](#) or [Creating a New Report Folder in the Main Menu](#).

## Running Reports Created with the Crystal Reports Software

If you save the `.rpt` file as a report as described in the previous section, you can run it in SAP Business One.

To run a report created with the Crystal Reports software, do one of the following:

- Run the report from the *Report and Layout Manager* window:
  - a. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
  - b. In the *Report and Layout Manager* window, in the navigation pane on the left, drill down to the report you want to run and select it.



Note

If you have not assigned an imported report to a folder, it may be in the *Lost Reports* folder.

- c. In the work area on the right, choose the *Run Report* button. The relevant selection criteria dialog box appears.
- d. In the selection criteria dialog box, select the criteria you want to appear in the report and choose the *OK* button.

The report appears in Crystal Reports Viewer.



Note

For more information about the viewing reports, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).

- Run the report from its module and folder location in the SAP Business One *Main Menu*.



Note

For more information, see [Running Reports Created with the Crystal Reports Software in SAP Business One](#).

## Viewing Layouts

If you save the `.rpt` file as a layout, you can preview it in SAP Business One.



Note

For more information about previewing, see [Working with Preview and Printing Options in SAP Business One](#).



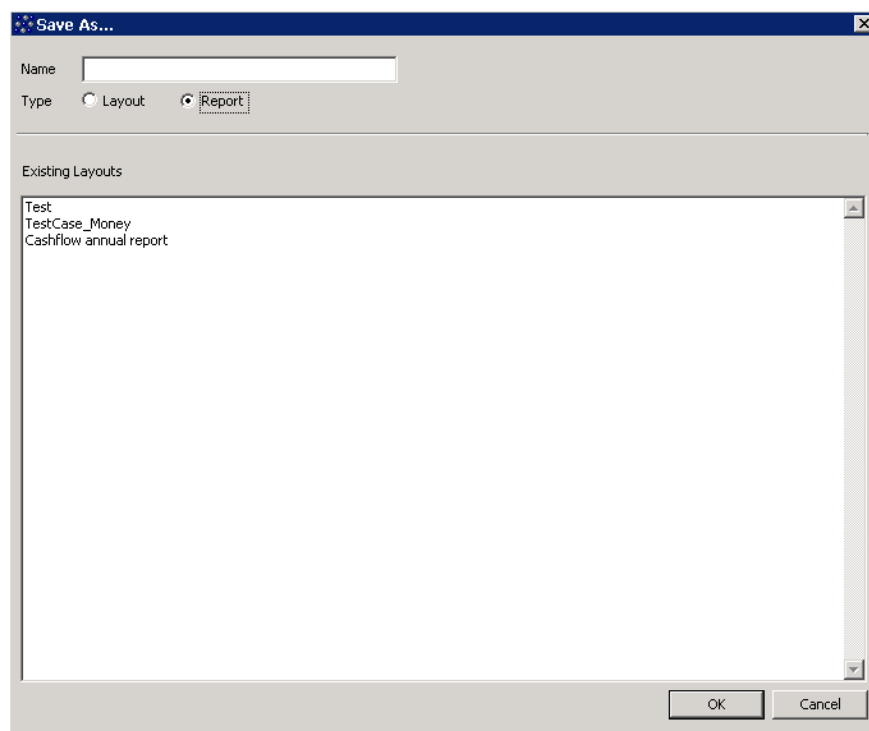
Note

For more information about creating Crystal Reports layouts, see [Creating New Crystal Reports Layout](#).

## Editing Reports

To edit a report created with the Crystal Reports software:

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the navigation pane on the left, drill down to the report you want to edit.
3. In the work space on the right, choose the *Edit* button.  
The Crystal Reports software opens to the report you have selected and you can make any required changes.
4. In the menu bar, do one of the following:
  - Choose *Add-ins* → *SAP Business One* → *Save* to save the changes to the report in the SAP Business One database.
  - Choose *Add-ins* → *SAP Business One* → *Save As* to save the updated report with a new file name in the SAP Business One database.
  - Choose *File* → *Save* to save the changes in your local computer.
  - Choose *File* → *Save As* to save the changes save the updated report with a new file name in your local computer.
5. In the window that opens, choose the *Report* radio button.



6. Choose the *OK* button.



#### Note

Each report that you open for editing appears in a separate Crystal Reports window.

## Deleting Reports



### Note

Only users who have superuser permissions in SAP Business One can delete reports in SAP Business One.

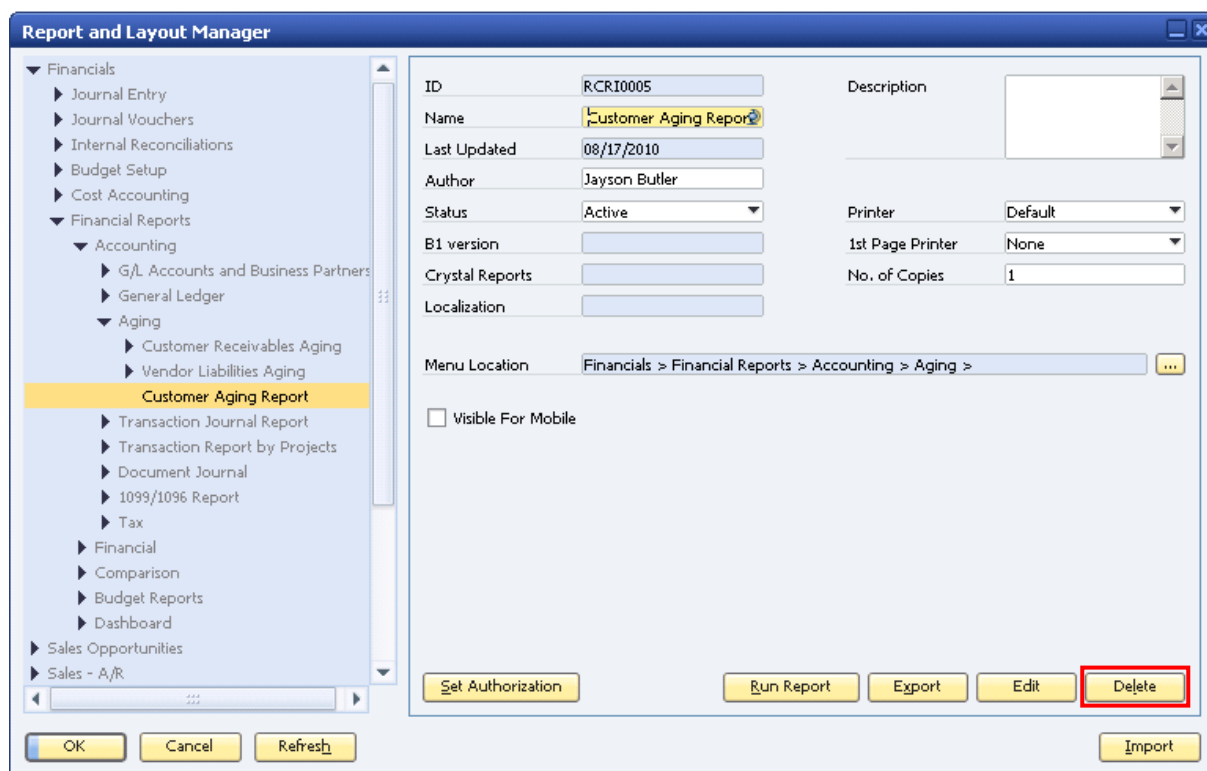


### CAUTION

You cannot delete a system PLD-type report that is provided with the core product.

To delete a report:

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the navigation pane on the left, drill down to the report you want to delete.



3. In the work space on the right, choose the *Delete* button.

## Creating New Crystal Reports Layouts

To create a new Crystal Reports layout:

1. Follow the instructions for creating a new report, [Creating a New Report](#), including [Connecting to a Data Source](#).
2. In the Crystal Reports software, after you have connected to a data source and opened a blank report, you can design a layout for a report or marketing document.



### Recommendation

For more information about creating and formatting layouts in the Crystal Reports software, see the Crystal Reports online help.

**Note**

You can create the layout for one marketing document and apply this layout to another marketing document. When you view the layout for the latter marketing document, SAP Business One automatically redirects you to the tables relevant to that document and displays the correct data, although the layout itself contains the table information relevant to the former marketing document.

For example, you create a layout with the tables OINV, INV1, and so on, which are relevant for an A/R invoice and you apply the layout to a sales order. When you view the layout in sales orders, SAP Business One redirects you to the tables ORDR, RDR1, and so on, which are relevant to sales orders.

To avoid the automatic redirection, do the following:

After you add tables for the layouts in the *Database Expert* window, rename the tables with the postfix “\_ONLY”.

**CAUTION**

It is important to note that a Crystal Reports .rpt file that you want to define as a layout in SAP Business One must contain a parameter with the DocKey@ token. For more information, see [Working with Selection Criteria Tokens](#).

3. Save your Crystal Reports layout according to the instructions in the section [Saving Crystal Reports .rpt File](#).


## Editing Crystal Reports Layouts

To edit a Crystal Reports layout:

1. To open a Crystal Reports layout, do one of the following:
  - a. Open the layout in the *Report and Layout Manager* window:
    - i. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
    - ii. In the *Report and Layout Manager* window, in the navigation pane on the left, drill down to the document type of the layout you want to edit.
    - iii. In the work space on the right, select the Crystal Reports layout you want to edit and choose the *Edit* button.

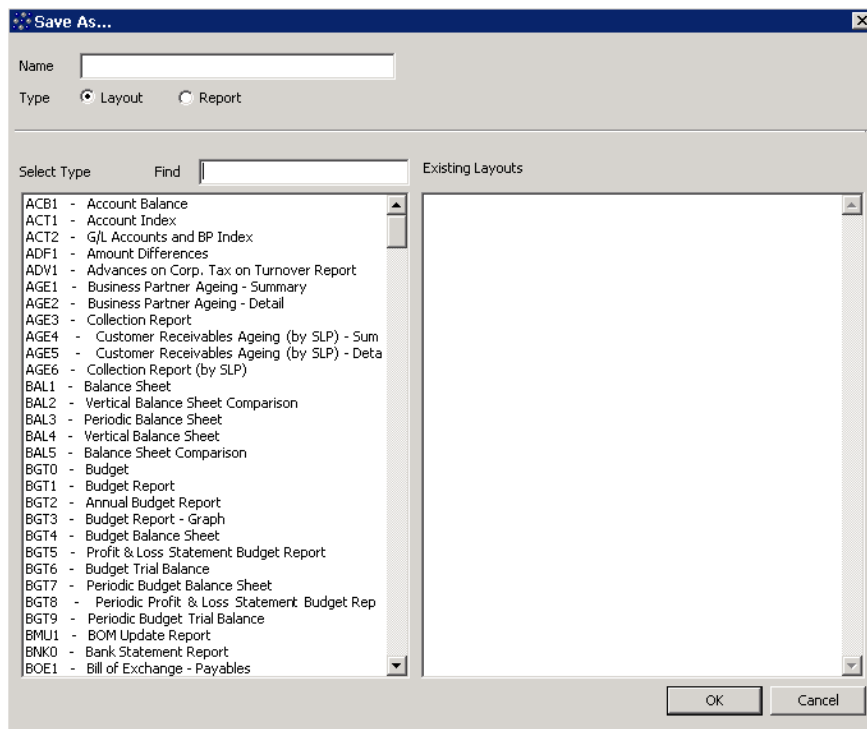
**Note**

If you want to edit a PLD-type layout, select a PLD layout and choose the *Edit* button. The Print Layout Designer opens. For more information, see the Print Layout Designer documentation <http://service.sap.com/smb/sbocustomer/documentation>

- b. Open the layout in the relevant window
    - i. From SAP Business One *Main Menu*, navigate to the relevant window.
    - ii. In the toolbar, Click the  icon.
    - iii. Select the layout you want to edit and choose the *Edit* button.
2. The Crystal Reports software opens to the Crystal Reports layout you have selected and you can make any required changes.
3. In the menu bar, do one of the following:

- Choose *Add-ins* → *SAP Business One* → *Save* to save the changes to the layout in the SAP Business One database.
- Choose *Add-ins* → *SAP Business One* → *Save As* to save the updated layout with a new file name in the SAP Business One database.
- Choose *File* → *Save* to save the changes in your local computer.
- Choose *File* → *Save As* to save the changes save the updated layout with a new file name in your local computer.

4. In the window that opens, select the *Layout* radio button.



5. Choose the *OK* button.



#### Note

Each Crystal Reports layout that you open for editing appears in a separate Crystal Reports window.

## Deleting Crystal Reports Layouts



### Note

Only users who have superuser permissions in SAP Business One can delete Crystal Reports layouts in SAP Business One.

To delete a Crystal Reports layout:

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the navigation pane on the left, drill down to the document type of the layout you want to delete.

#	Layout ID	Layout Name	Type	L.
2	INV10002	CR-AR-Invoice-US	Crystal Reports	
3	INV10003	Invoice - Service (EHP) (System)	PLD	Enr
4	INV10004	A/R Invoice (Service) - CR (US) (System)	Crystal Reports	Enr
5	INV10005	Invoice - Service (System)	PLD	Enr
6	INV10006	CR-AR-Invoice-Generic	Crystal Reports	

Details for selected layout (INV10002):

ID	INV10002	Description	
Name	CR-AR-Invoice-US		
Layout Type	Crystal Reports		
Last Updated	08/13/2009	Printer	Default
Author	manager	1st Page Printer	None
Status	Active	No. of Copies	1
B1 Version		Localization	
Crystal Reports		Language	

Buttons: OK, Cancel, Refresh, Export, Edit, **Delete**, Import

3. In the work space on the right, choose the *Delete* button.



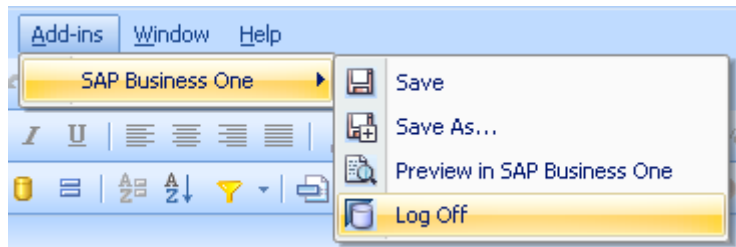
### Note

You cannot delete a PLD-type layout that is provided in the SAP Business One core product.



## Logging Off from a Data Source

To log off from a data source, in the Crystal Reports menu bar, choose *Add-ins* → *SAP Business One* → *Log Off*.



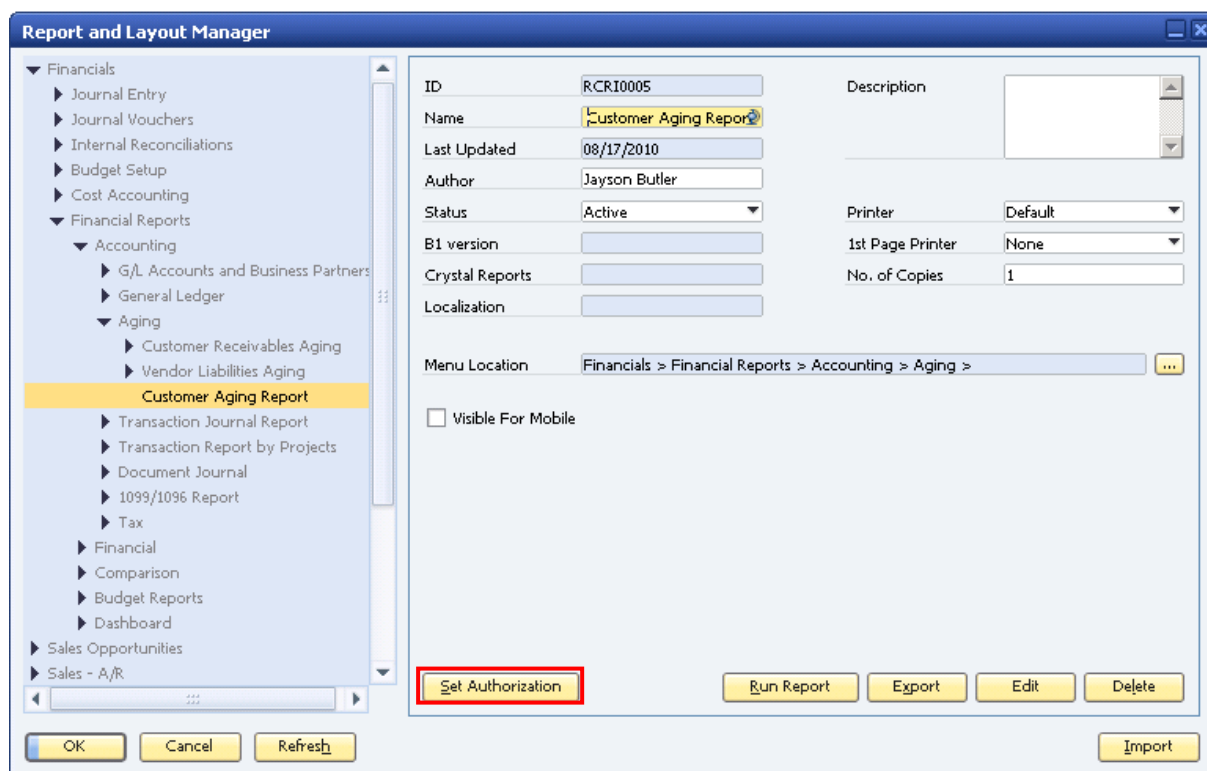
# Setting Authorizations for Reports Created with the Crystal Reports Software

You can define permissions for users in SAP Business One who will be running reports created in the Crystal Reports software.

## Procedure

To set authorizations for a report:

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the pane on the left, navigate to the report whose permissions you want to define and choose the *Set Authorization* button.



3. In the *Authorizations* window, on the left side of the window, select the user whose permissions you want to define.

Subject	Authorization
Crystal Report Feature - Filtering	No Authorization
Tax Only	No Authorization
Change Row Amounts	No Authorization
Change Sales Employee	No Authorization
Sales Employee Update	No Authorization
Confirm Credit Line Deviation	No Authorization
Confirm Debt Line Deviation	No Authorization
Confirm Stock Limit Deviation	No Authorization
Partial Delivery	No Authorization
Document Confirmation	No Authorization
Documents with Zero Amounts	No Authorization
Allow to Change Reconciliation Accounts	No Authorization
Gross Profit	No Authorization

4. In the *Subject* column, select the report whose permissions you want to set for the user you selected in step 3.
5. In the *Authorizations* column, in the dropdown list select one of the following:
- **Full Authorization**
  - **No Authorization**



Note

You cannot apply read-only permissions to reports created with the Crystal Reports software.

6. Choose the *Update* button, then choose the *OK* button.



Note

For more information about setting authorizations in SAP Business One, see the online help.

## Developing Crystal Reports Solutions Using the SDK API

The SAP Business One DI API enables you to create add-ons that import Crystal Reports `.rpt` files either as reports or layouts. The `ReportsLayoutService` object lets you do the following:

- Import an `.rpt` file as a layout and assign it to one or more document types. For more information, see [Creating Master Layouts](#).
- Import an `.rpt` file as a report, which adds the report to the *Lost Reports* folder of the *Report and Layout Manager* window. You can then assign the report a menu entry and permissions.



### Note

For more information about SAP Business One APIs, see the SDK Help Center.

### Procedure

To access the SDK Help Center:

1. Go to <https://www.sdn.sap.com/irj/sdn/businessone>.
2. Under *BUSINESS ONE KNOWLEDGE CENTER*, click the link of the SAP Business One release version you want.
3. Click the SDK Help Center link.

## Creating Master Layouts

Using the Crystal Reports software, you can create master layouts for different sales and purchasing document types in SAP Business One.

You define a Crystal Reports layout as a master layout during the import process. During the import process, you can apply the layout to specific document types and reports.



### Note

You can define and apply master layouts only when you import `.b1p` package files that contains layouts. You cannot define a single imported `.rpt` file as a master layout.

For more information, see [Importing Layouts Created with the Crystal Reports Software](#).

# Exporting Reports Created with the Crystal Reports Software

SAP Business One lets you export reports that you create in the Crystal Reports software. When you export one or more reports, SAP Business One creates a `.b1p` package file containing the reports. SAP Business One `.b1p` package files may contain any number of reports.



## Note

You can export only reports created with the Crystal Reports software, but not standard SAP Business One reports.



## Note

SAP Business One exports all reports in `.b1p` package files. Even if you export a single `.rpt` file, it is included in a `.b1p` package file.

When you import a `.b1p` package file, SAP Business One automatically detects whether the contents are reports or layouts created with the Crystal Reports software. For more information about exporting Crystal Reports layouts, see [Exporting Layouts Created with the Crystal Reports Software](#).



## Note

When you export a batch of `.rpt` files, they must all be of the same type; that is, they must all be either reports or layouts.

## Prerequisites

- You have installed the following:
  - SAP Business One 8.8
  - Crystal Reports software, version for the SAP Business One application
- You have superuser permissions in SAP Business One.
- You have created one or more reports with the Crystal Reports software that are ready to be exported.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the navigation pane on the left, navigate to the module and folder containing the report or reports that you want to export and select a report.

The report details appear in the work area on the right.

**Report and Layout Manager**

**Financials**

- Journal Entry
- Journal Vouchers
- Internal Reconciliations
- Budget Setup
- Cost Accounting
- Financial Reports
  - Accounting
    - G/L Accounts and Business Partners
    - General Ledger
    - Aging
      - Customer Receivables Aging
      - Vendor Liabilities Aging
      - Customer Aging Report**
      - Transaction Journal Report
      - Transaction Report by Projects
      - Document Journal
      - 1099/1096 Report
      - Tax
    - Financial
    - Comparison
    - Budget Reports
    - Dashboard
  - Sales Opportunities
  - Sales - A/R

**Report Details:**

ID	RCRI0005	Description	
Name	Customer Aging Report		
Last Updated	08/17/2010		
Author	Jayson Butler		
Status	Active	Printer	Default
B1 version		1st Page Printer	None
Crystal Reports		No. of Copies	1
Localization			
Menu Location: Financials > Financial Reports > Accounting > Aging >			
<input type="checkbox"/> Visible For Mobile			

**Buttons:** Set Authorization, Run Report, Export, Edit, Delete, OK, Cancel, Refresh, Import

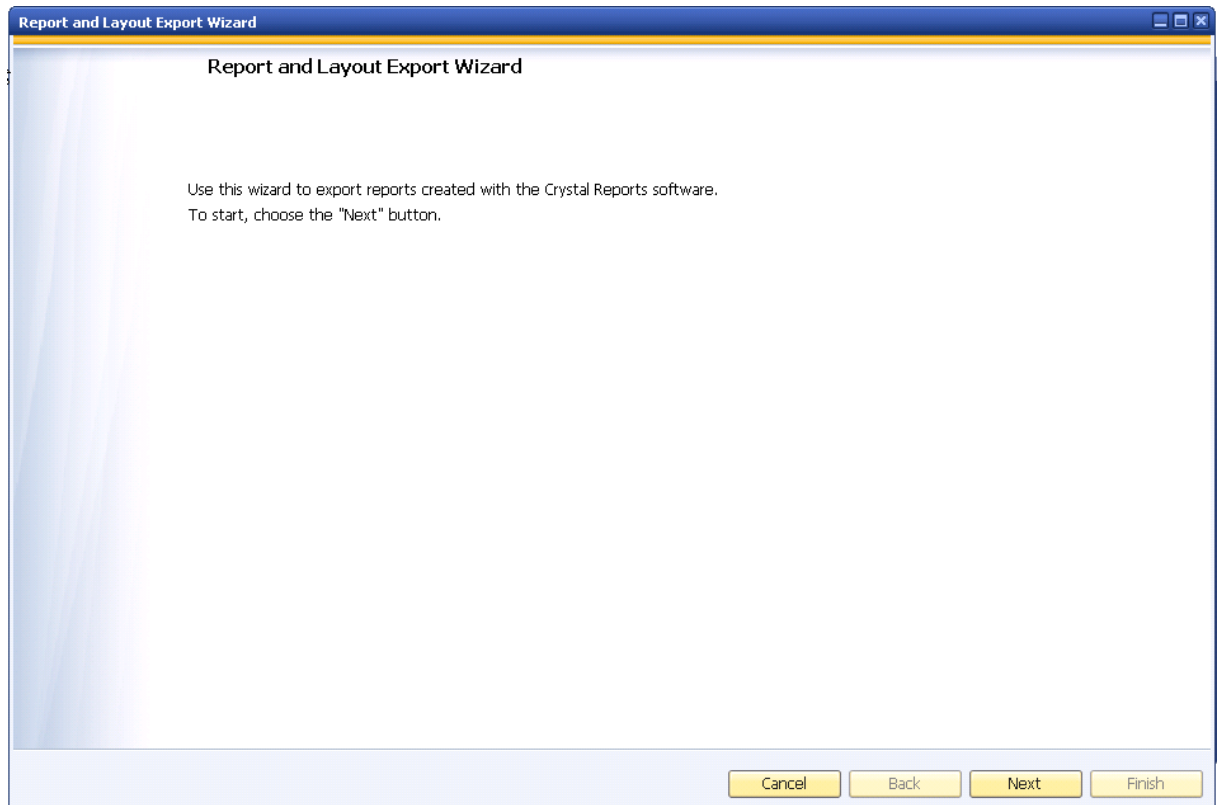


#### Note

You can export only reports created with the Crystal Reports software, and not standard SAP Business One reports. If the report code in the *Report Code* field starts with RCRI, then it is a report that has been created with the Crystal Reports software.

- In the work area on the right, choose the *Export* button.

The *Report and Layout Export Wizard* window opens.

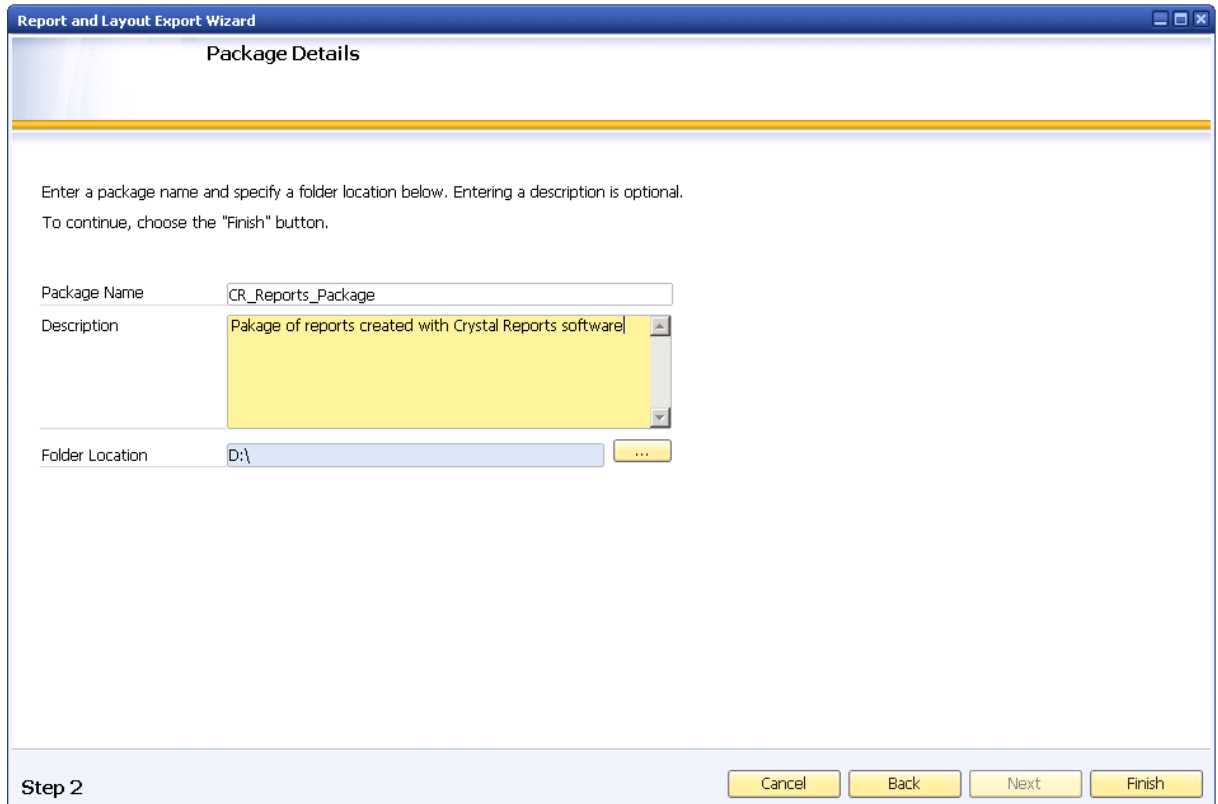


4. To start the export process, choose the *Next* button.
5. In the *Report Selection* window, in the *Name* column, click the arrows to open the nodes containing the reports you want to export.  
To open all the nodes at once, choose the *Expand* button.  
To close all the nodes at once, choose the *Collapse* button.



[illegible]

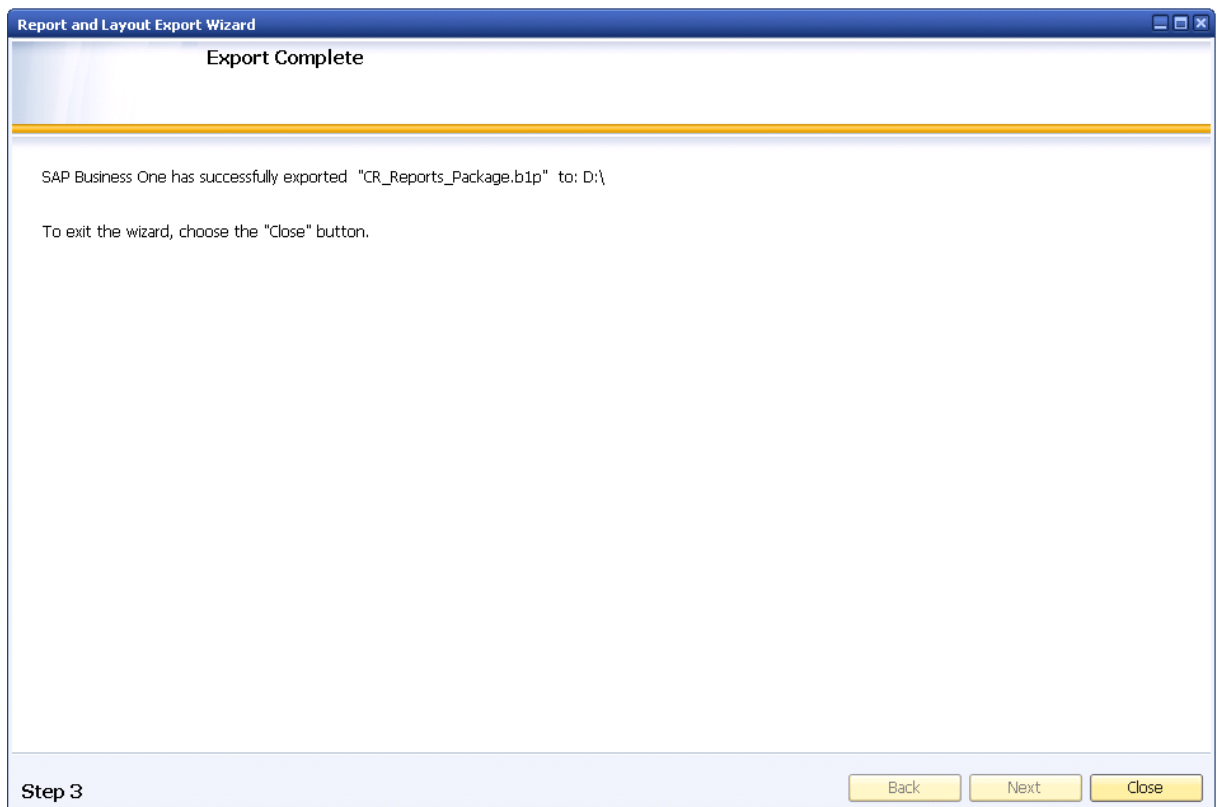
6. Select the checkboxes of the reports you want to export.
7. To continue, choose the *Next* button.
8. In the *Package Details* window, enter the following:
  - Package name
  - Description – Entering a description is optional. The description that you enter here will be visible to the user who imports the file into SAP Business One.
  - Folder location – Specify a location on your computer where you want to save the .b1p file.



The screenshot shows the 'Report and Layout Export Wizard' window, specifically the 'Package Details' step. The window has a blue title bar with the text 'Report and Layout Export Wizard'. Below the title bar is a yellow header bar with the text 'Package Details'. The main area contains instructions: 'Enter a package name and specify a folder location below. Entering a description is optional. To continue, choose the "Finish" button.' There are three input fields: 'Package Name' with the value 'CR\_Reports\_Package', 'Description' with the value 'Package of reports created with Crystal Reports software', and 'Folder Location' with the value 'D:\'. The 'Folder Location' field has a yellow button with three dots to its right. At the bottom of the window, there is a blue bar with the text 'Step 2' on the left and four yellow buttons: 'Cancel', 'Back', 'Next', and 'Finish' on the right.

9. To complete the export, choose the *Finish* button.

An SAP Business One .b1p package file is created. The *Export Complete* window appears, displaying the export details.



The screenshot shows the 'Report and Layout Export Wizard' window, specifically the 'Export Complete' step. The window has a blue title bar with the text 'Report and Layout Export Wizard'. Below the title bar is a yellow header bar with the text 'Export Complete'. The main area contains the message: 'SAP Business One has successfully exported "CR\_Reports\_Package.b1p" to: D:\'. Below this message is the instruction: 'To exit the wizard, choose the "Close" button.' At the bottom of the window, there is a blue bar with the text 'Step 3' on the left and three yellow buttons: 'Back', 'Next', and 'Close' on the right.

10. To exit the wizard, choose the *Close* button.

# Exporting Layouts Created with the Crystal Reports Software

SAP Business One lets you export Crystal Reports layouts that you have created with the Crystal Reports software. When you export one or more Crystal Reports layouts, SAP Business One creates a .b1p package file containing the Crystal Reports layouts. SAP Business One .b1p package files may contain any number of Crystal Reports layouts.



## Note

You can export only layouts created with the Crystal Reports software, but not standard SAP Business One reports.



## Note

SAP Business One exports all layouts in .b1p package files. Even if you export a single .rpt file, it is included in a .b1p package file.

When you import a .b1p package file, SAP Business One automatically detects whether the contents are layouts or reports created with the Crystal Reports software. For more information about exporting reports, see [Exporting Reports Created with the Crystal Reports](#).



## Note

When you export a batch of .rpt files, they must all be of the same type; that is, they must all be either reports or layouts.

## Prerequisites

- You have installed the following:
  - SAP Business One 8.8
  - Crystal Reports software, version for the SAP Business One application
- You have superuser permissions in SAP Business One.
- You have created one or more Crystal Reports layouts that are ready to be exported. For each layout that you want to define as a master layout, you need to include the `objectId@SQL` token. For more information about working with the `objectId@SQL` token, see [Syntax and Rules for Defining Tokens](#).

## Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the *Report and Layout Manager* window, in the navigation pane on the left, navigate to the module and document type of the Crystal Reports layout or layouts that you want to export.

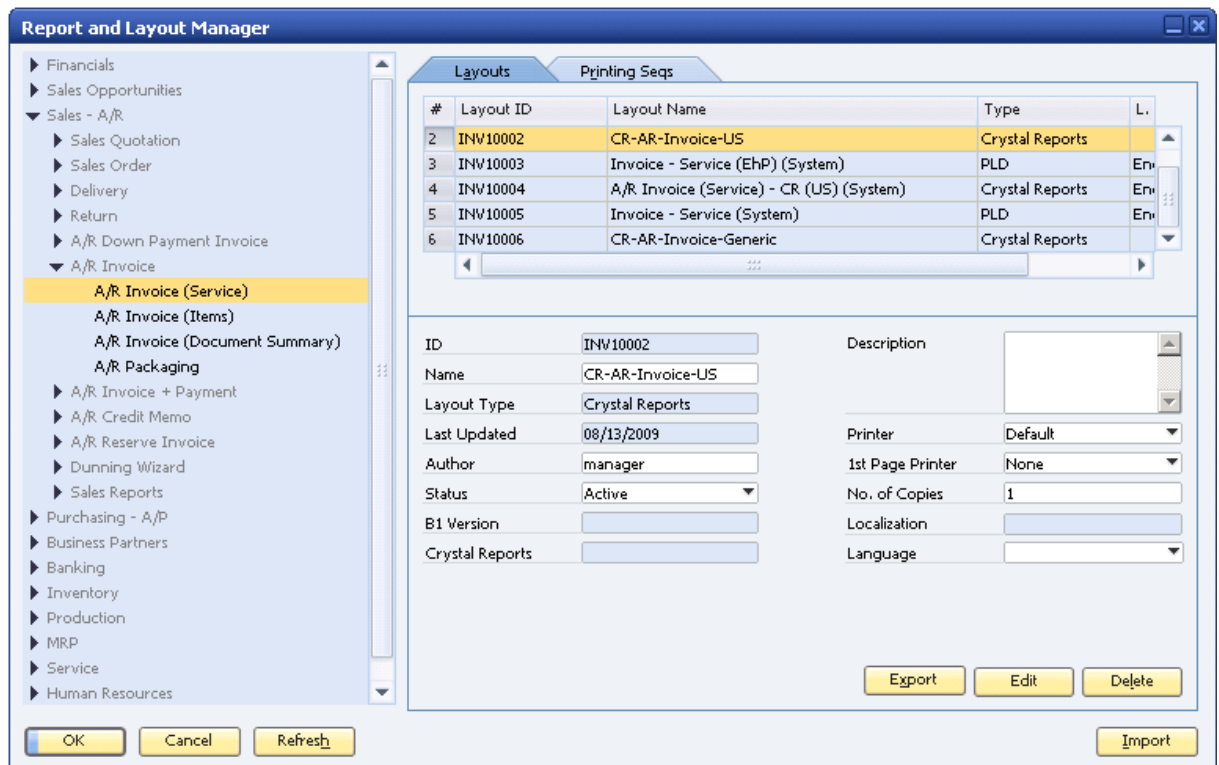
A list of layouts that are defined for the document type appears in the work area on the right.

The layouts for SAP Business One add-ons are located in both the *Add-On Layouts* folder and the document type folder of the SAP Business One module.



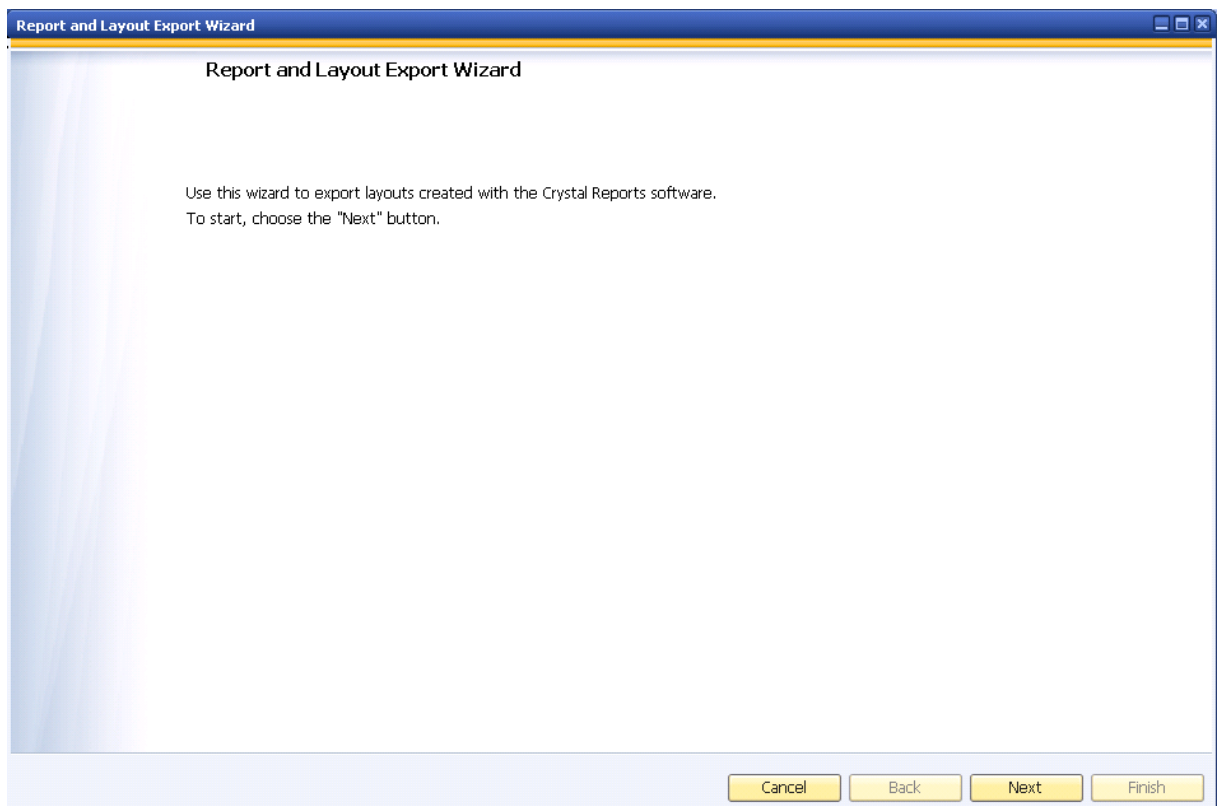
## Note

You can export only Crystal Reports layouts, but not standard SAP Business One layouts that have been created in the PLD. You can check the layout type in the work area on the right, on the *Layouts* tab, in the *Type* column.



In the work area on the right, choose the *Export* button.

The *Report and Layout Export Wizard* window opens.



3. To start the export process, choose the *Next* button.
4. In the *Layout Selection* window, in the *Name* column, click the arrows to open the nodes of the document types for the layouts you want to export.

The add-on layouts appear in the *Add-On Layouts* folder.

To open all the nodes at once, choose the *Expand* button.

To close all the nodes at once, choose the *Collapse* button.

**Report and Layout Export Wizard**

**Layout Selection**

Select the checkboxes of the layouts you want to export. To continue, choose the "Next" button.

Name	ID	Description	Last Updated
▼ Financials			
▼ Journal Entry			
▼ Journal Entry			
<input type="checkbox"/> CRL1	JDT20002	&&CRL1_JE()123/*	01/21/09
▼ Sales - A/R			
▼ A/R Invoice			
▼ A/R Invoice (Items)			
<input type="checkbox"/> AP Invoice1	INV20002		02/24/09
▼ A/R Invoice + Payment			
▼ A/R Invoice (Items)			
<input type="checkbox"/> AP Invoice1	INV20002		02/24/09
▼ A/R Reserve Invoice			
▼ A/R Invoice (Items)			
<input type="checkbox"/> AP Invoice1	INV20002		02/24/09
▼ Purchasing - A/P			
▼ A/P Invoice			
▼ A/P Invoice (Service)			
<input type="checkbox"/> AP Invoice2	PCH10002		02/24/09
▼ A/P Invoice (Items)			
<input type="checkbox"/> AP Invoice2	PCH20002		02/25/09

**Step 1**

Expand Collapse

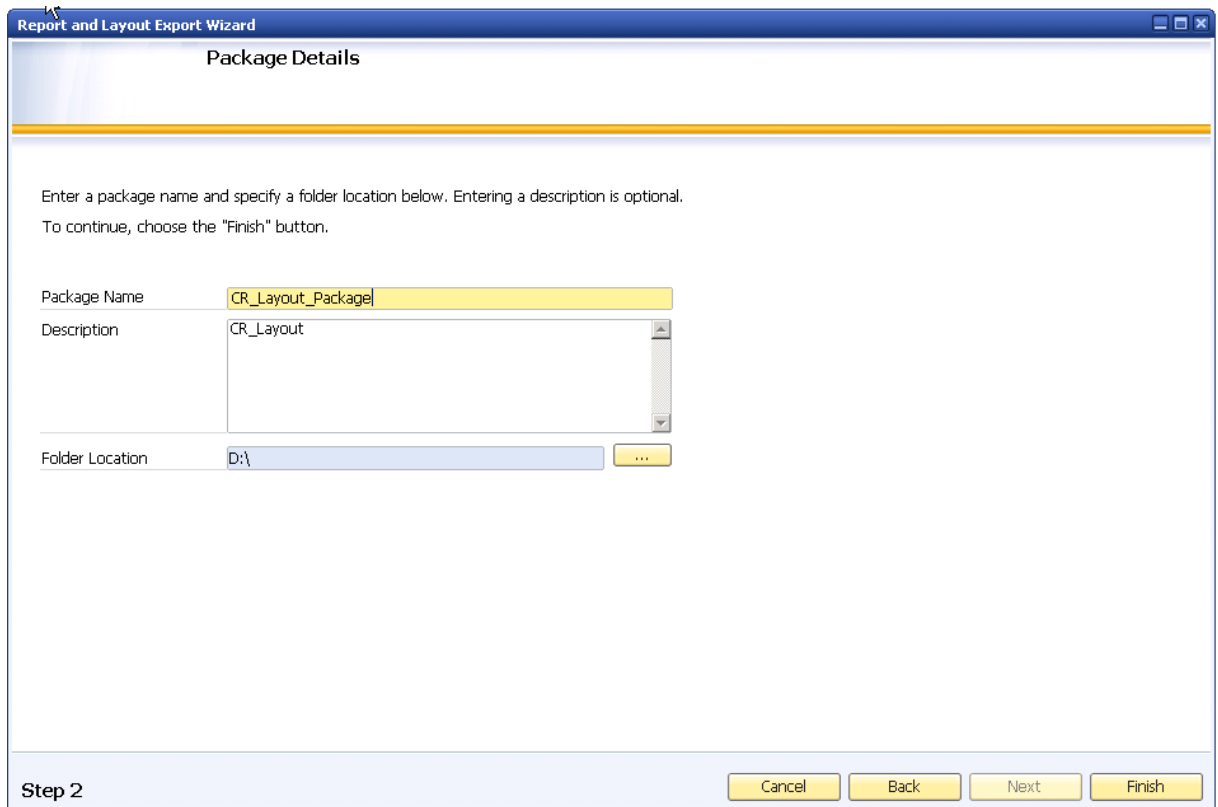
Cancel Back Next Finish

5. Select the checkbox to the left of each layout you want to export.

6. To continue with the export process, choose the *Next* button.

7. In the *Package Details* window, enter the following:

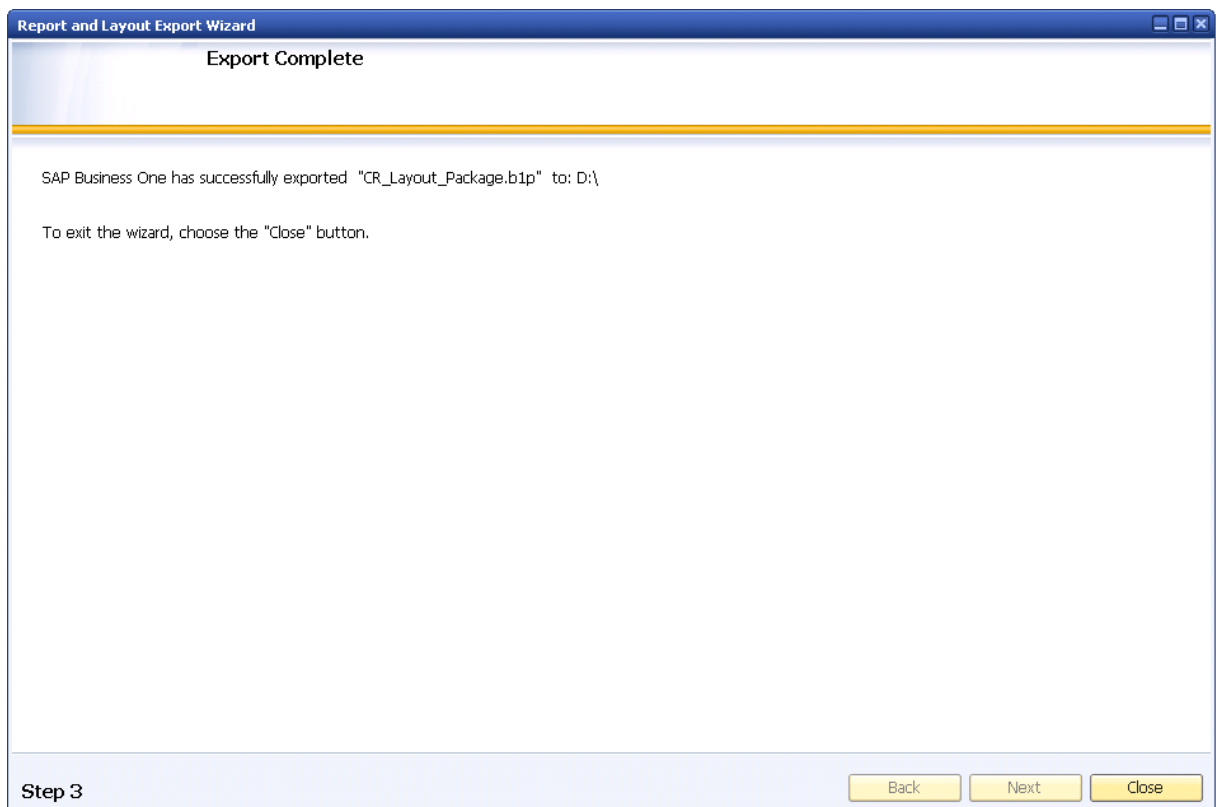
- Package name
- Description – Entering a description is optional. The description that you enter here will be visible to the user who imports the file into SAP Business One.
- Folder location – Specify a location on your computer where you want to save the .b1p file.



The screenshot shows the 'Report and Layout Export Wizard' window, specifically the 'Package Details' step. The window has a blue title bar with the text 'Report and Layout Export Wizard'. Below the title bar is a light blue header area with the text 'Package Details'. The main content area is white and contains the following text: 'Enter a package name and specify a folder location below. Entering a description is optional. To continue, choose the "Finish" button.' Below this text are three input fields: 'Package Name' with the value 'CR\_Layout\_Package', 'Description' with the value 'CR\_Layout', and 'Folder Location' with the value 'D:\'. The 'Folder Location' field has a small yellow button with three dots to its right. At the bottom of the window is a light blue footer area with the text 'Step 2' on the left and four yellow buttons ('Cancel', 'Back', 'Next', 'Finish') on the right.

8. To complete the export, choose the *Finish* button.

An SAP Business One .b1p package file is created. The *Export Complete* window appears, displaying the export details.



The screenshot shows the 'Report and Layout Export Wizard' window, specifically the 'Export Complete' step. The window has a blue title bar with the text 'Report and Layout Export Wizard'. Below the title bar is a light blue header area with the text 'Export Complete'. The main content area is white and contains the following text: 'SAP Business One has successfully exported "CR\_Layout\_Package.b1p" to: D:\'. Below this text is the text: 'To exit the wizard, choose the "Close" button.' At the bottom of the window is a light blue footer area with the text 'Step 3' on the left and three yellow buttons ('Back', 'Next', 'Close') on the right.

9. To exit the wizard, choose the *Close* button.

# Importing Reports Created with the Crystal Reports Software

You can import reports created with the Crystal Reports software into SAP Business One with the report and layout import wizard.

## Prerequisites

- You know the file name and extension (file type) regarding the file you want to import.



### Recommendation

If the file is a Crystal Reports `.rpt` file, verify with the provider whether the file is a layout or report.



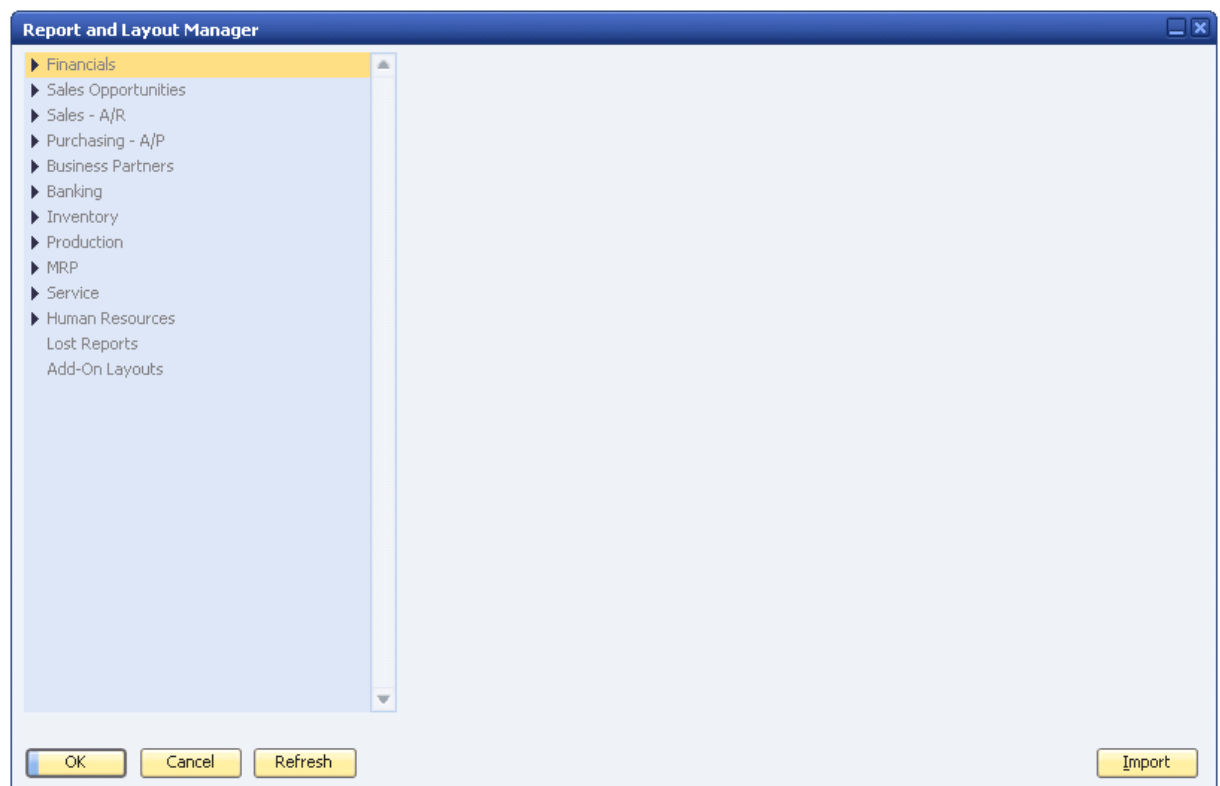
### Note

When you import an SAP Business One `.b1p` file, SAP Business One automatically detects whether the file contains reports or layouts.

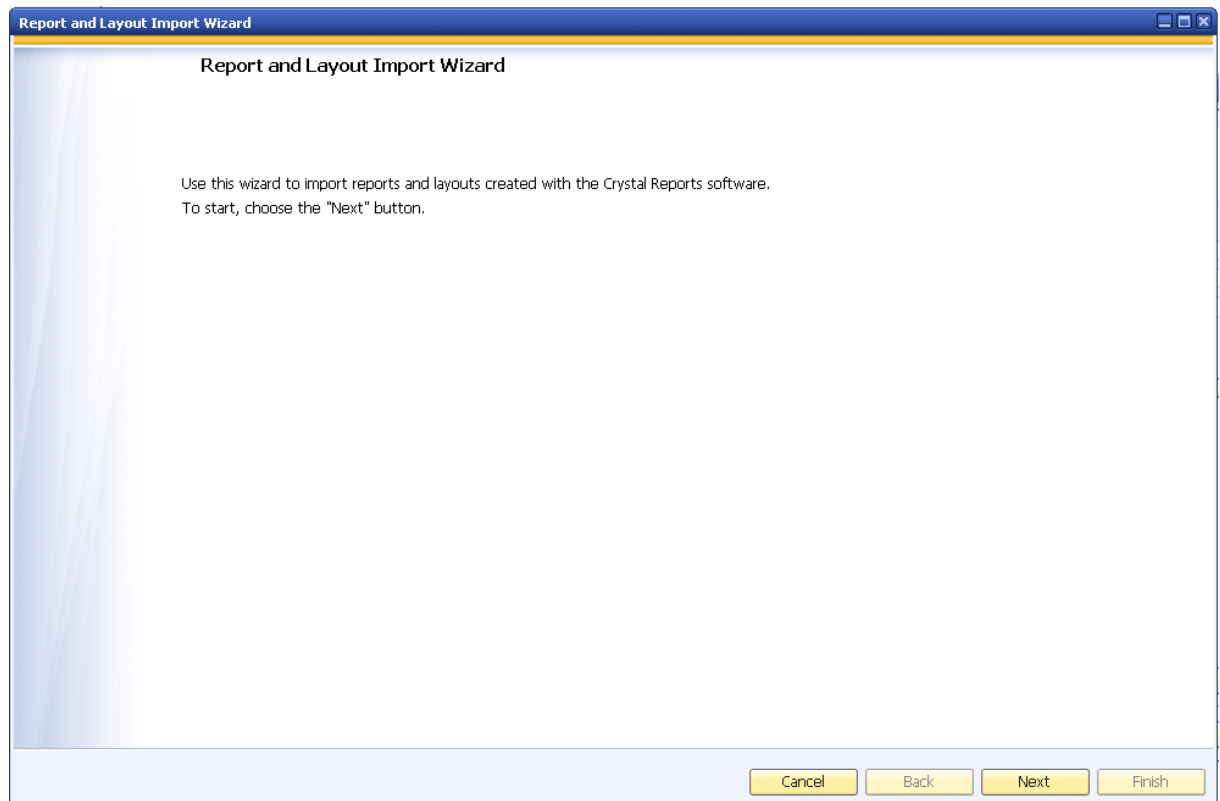
- You have superuser permissions in SAP Business One.

## Importing Report-Type Crystal Reports `.rpt` Files

- From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.



- In the *Report and Layout Manager* window, on the bottom right, choose the *Import* button.  
The *Report and Layout Import Wizard* window opens.



3. Choose the *Next* button.
4. In the *Select Import File* window, choose the *Browse* button.
5. In the *Open* dialog box, navigate to the `.rpt` file you want to import. Choose the *Open* button.
6. Under *Content Type*, select the *Report* radio button.

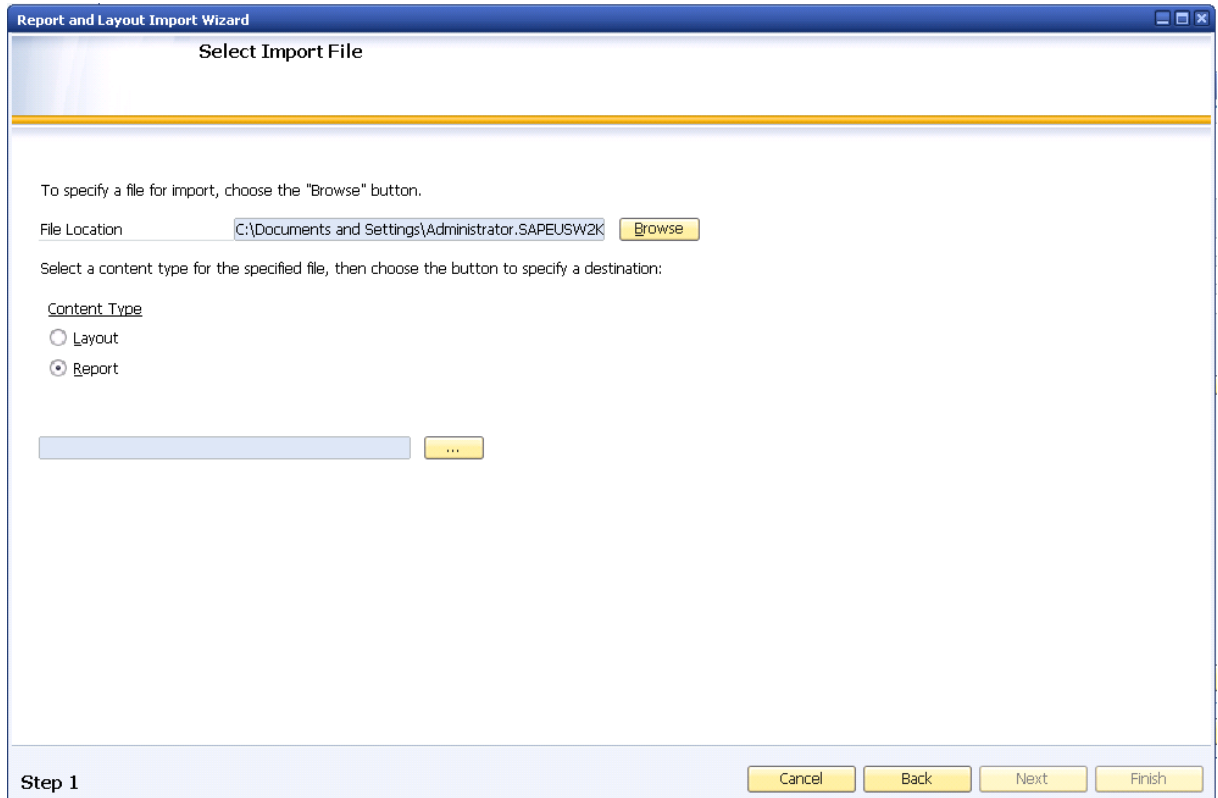
**Note**

If you are not sure whether the `.rpt` file is a report or a layout, verify this with the person who provided the file.

**Note**

If you want to import a layout, see [Importing Layouts Created with the Crystal Reports Software](#).





Report and Layout Import Wizard

Select Import File

To specify a file for import, choose the "Browse" button.

File Location: C:\Documents and Settings\Administrator\SAPEUSWZK Browse

Select a content type for the specified file, then choose the button to specify a destination:

Content Type

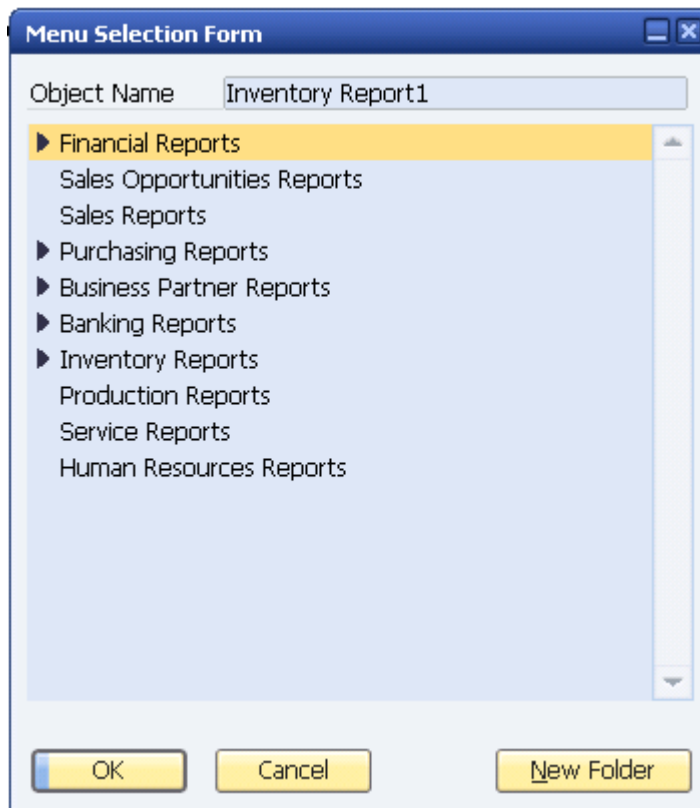
☐ Layout

☒ Report

...

Step 1 Cancel Back Next Finish

7. Choose the *Browse (...)* button. The *Menu Selection Form* window opens.



Menu Selection Form

Object Name: Inventory Report1

- ▶ Financial Reports
  - Sales Opportunities Reports
  - Sales Reports
- ▶ Purchasing Reports
- ▶ Business Partner Reports
- ▶ Banking Reports
- ▶ Inventory Reports
  - Production Reports
  - Service Reports
  - Human Resources Reports

OK Cancel New Folder

8. In the *Menu Selection Form* window, select the SAP Business One report folder where you want to save the new report file.

9. Choose the *OK* button to complete your selection and to return to the *Select Import File* window in the *Report and Layout Import Wizard*.

**Note**

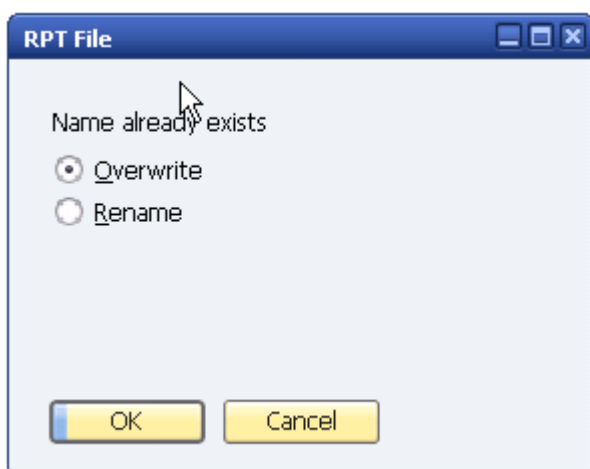
You can create a new folder in the *Main Menu* of SAP Business One. For more information, see [Creating a New Report Folder in the Main Menu](#).

10. In the *Select Import File* window, choose the *Finish* button.

If the *.rpt* file that you want to import already exists in SAP Business One, the *RPT File* window opens.

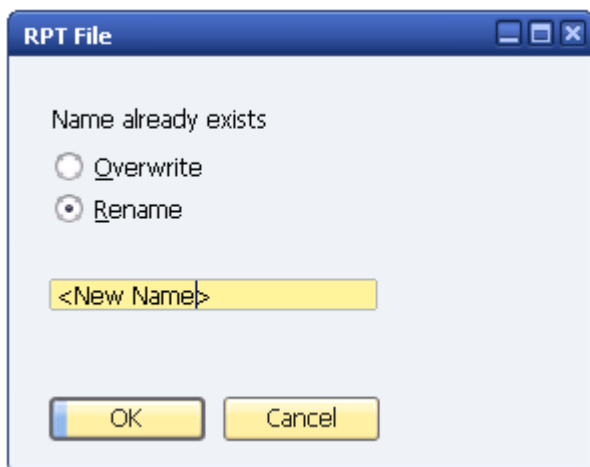
Do one of the following:

- To overwrite the existing *.rpt* file with the new *.rpt* file, select the *Overwrite* radio button, then choose the *OK* button.

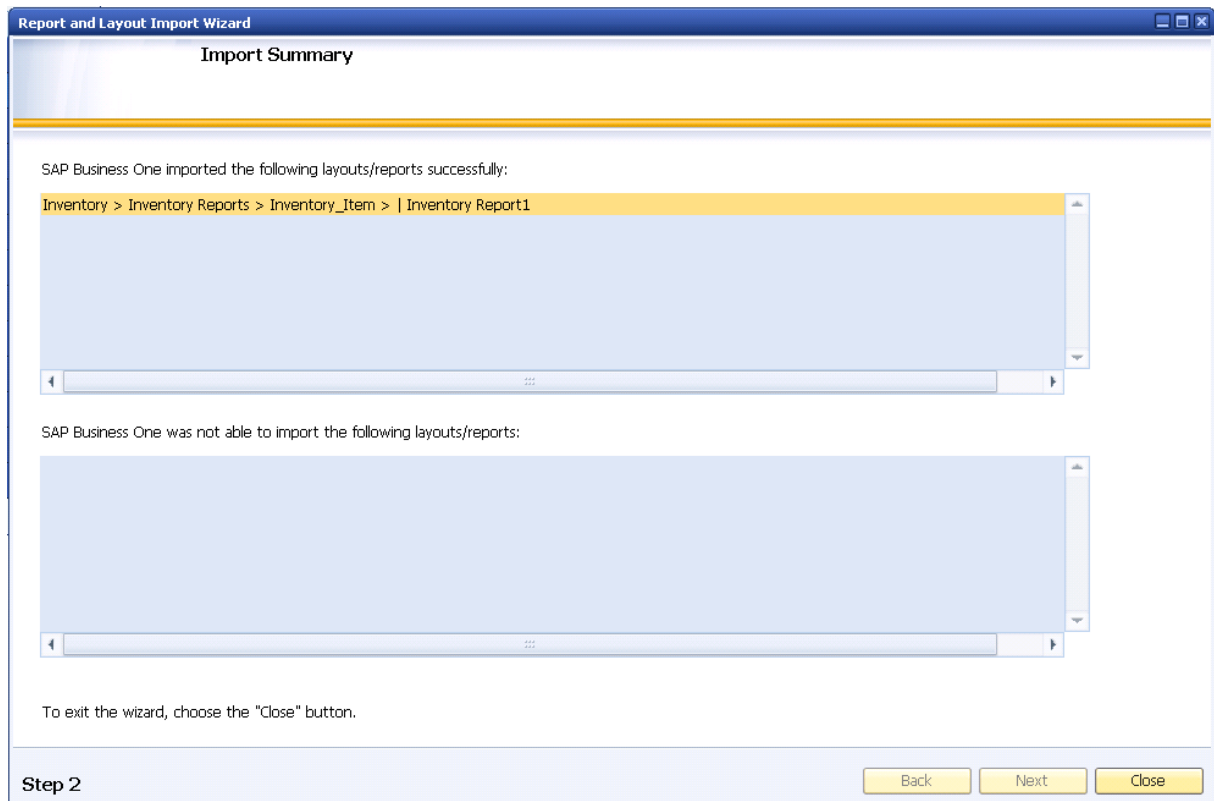
**CAUTION**

When you select the *Overwrite* option, the previous *.rpt* file is permanently deleted, even if it is located in a different folder or module.

- To keep the existing *.rpt* file and continue with the import of the new *.rpt* file, select the *Rename* radio button, enter a new name in the field, and choose the *OK* button.



- In the *Import Summary* window, a summary containing the import results appears. To exit the wizard, choose the *Close* button.



## Creating a New Report Folder in the Main Menu

You can create new folders in the SAP Business One *Main Menu* in either of the following ways:

- During the layout import process. This method is described below.
- In the SAP Business One *Organize My Menu* or *Add to My Menu* window. For more information, see the SAP Business One online help.



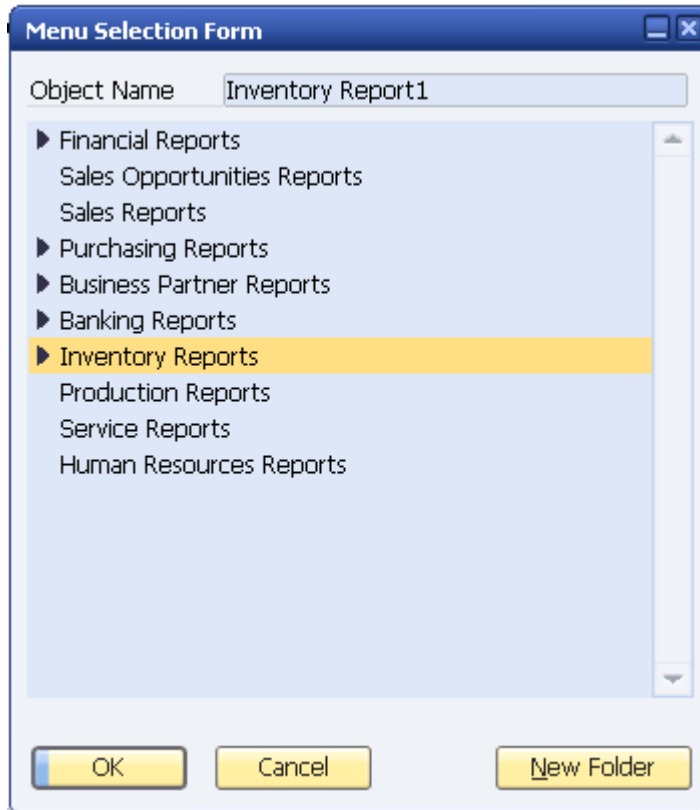
### Note

You cannot create a new folder in the *Administration* folder.

## Procedure

To create a new folder in the SAP Business One *Main Menu* during the layout import process:

1. In the *Menu Selection Form* window, select a module or folder where you want to create a new folder.



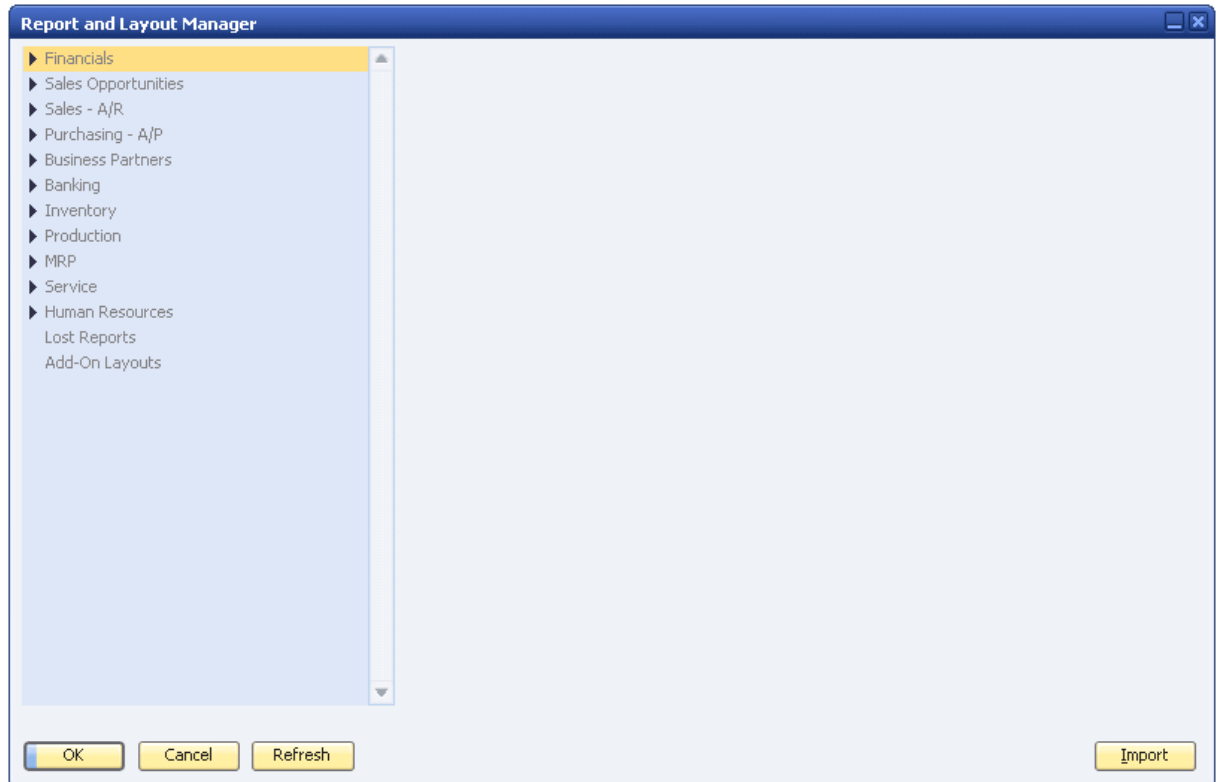
2. Choose the *New Folder* button.
3. In the *Create New Folder* dialog box, enter a name for the new folder.



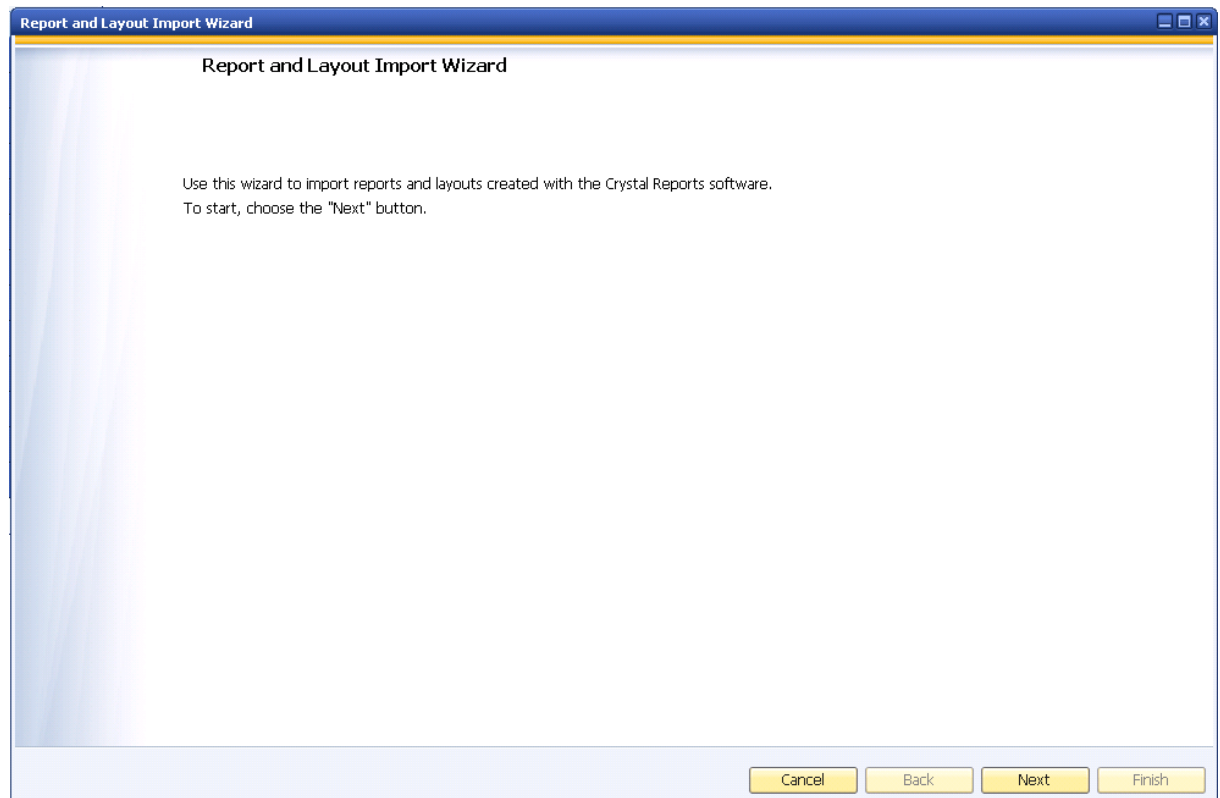
4. Choose the *Add* button.
5. In the *Menu Selection Form* window, choose the *OK* button. The new folder appears in the SAP Business One folder you selected in step 1.

## Importing an SAP Business One .b1p Package File Containing Reports

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.



2. In the *Report and Layout Manager* window, on the bottom right, choose the *Import* button.  
The *Report and Layout Import Wizard* window opens.



3. Choose the *Next* button.
4. In the *Select Import File* window, choose the *Browse* button.
5. In the *Open* dialog box, navigate to the SAP Business One .b1p package file you want to import. Choose the *Open* button.

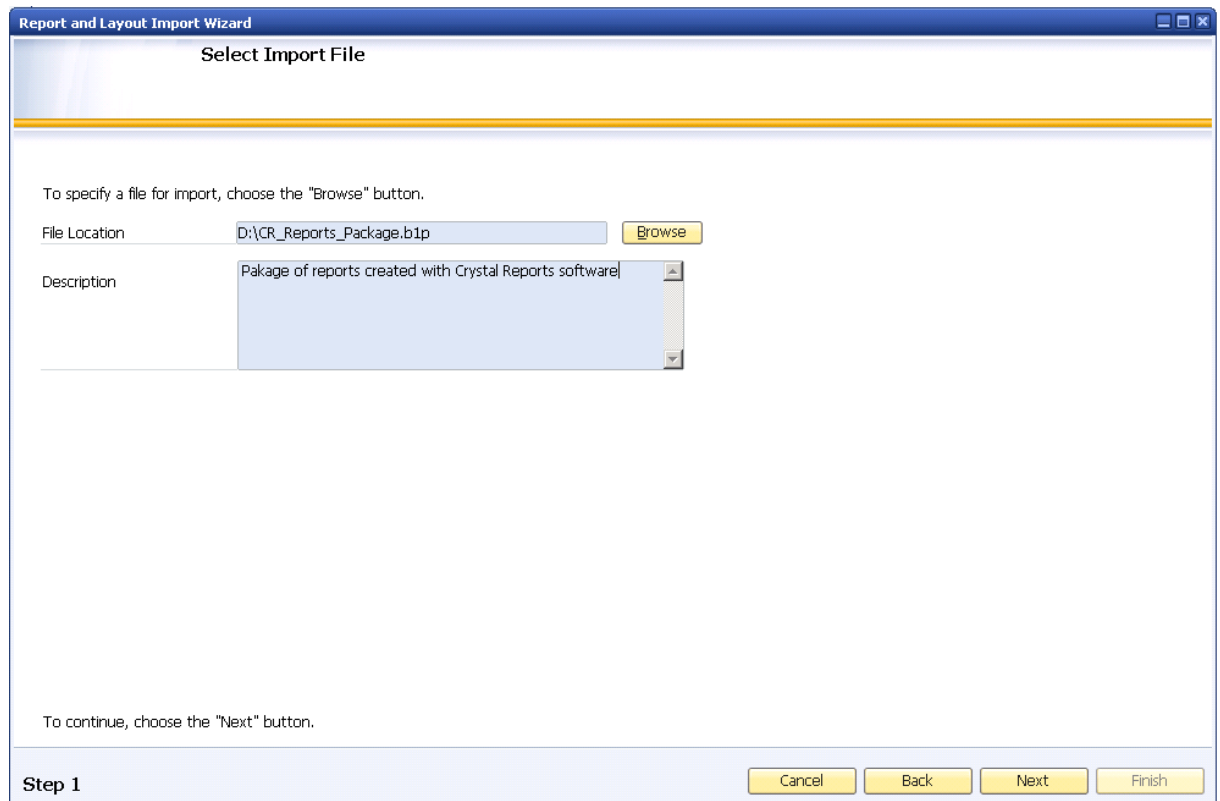
**Note**

SAP Business One automatically detects whether a SAP Business One .b1p package file contains layouts or reports.

A description appears in the *Description* text box if a description has been added in the export process.

**Note**

For more information about the export process, see [Exporting Reports Created with the Crystal Reports Software](#).



Report and Layout Import Wizard

Select Import File

To specify a file for import, choose the "Browse" button.

File Location: D:\CR\_Reports\_Package.b1p [Browse]

Description: Package of reports created with Crystal Reports software

To continue, choose the "Next" button.

Step 1 [Cancel] [Back] [Next] [Finish]

6. Choose the *Next* button.

The *Select Reports for Import* window appears with a list of reports contained in the .b1p package file that you specified in the previous step. In the *Overwrite* column, a checkbox appears for each report that already exists in SAP Business One with the same file name. You can choose whether to rename or overwrite each of these files in a later step.

Add-on layouts appear in the relevant documents.

To open all the nodes at once, choose the *Expand* button.

To close all the nodes at once, choose the *Collapse* button.

**Report and Layout Import Wizard**

**Select Reports for Import**

- Select the checkbox to the left of each report that you want to import.
- If the report name already exists for the menu location, a checkbox appears in the "Overwrite" column.  
To replace the existing report, select the checkbox.  
To keep the existing report, deselect the checkbox. You will be able to rename it later.
- In the "Authorization" column, select an authorization level.
- To complete the import, choose the "Finish" button.

Name	Overwrite	Description	Authorization	Last Updated
▼ Financials				
▼ Financial Reports				
▼ Accounting				
CR1	<input type="checkbox"/>	CR1_Financial Reports>Accounting \$#%	Full ▼	01/20/09
▼ Sales - A/R				
▼ Sales Reports				
CR3	<input type="checkbox"/>	CR3_Sales Reports	Full ▼	01/20/09
▼ Purchasing - A/P				
▼ Purchasing Reports				
▼ New1				
CR5	<input type="checkbox"/>	CR5_Purchasing report>New1	Full ▼	01/20/09

Expand Collapse

Step 2

Cancel Back Next Finish

- In the *Select Reports for Import* window, select the checkbox to the left of each report you want to import.
- In the *Overwrite* column, select the checkbox for each report file that you want to overwrite with the new imported file of the same name.



#### Note

If you do not select the *Overwrite* checkbox for a report, you will be prompted to rename it later on.

- In the *Authorization* column, select one of the following permission levels for each report you are importing:
  - Full – All users are assigned full authorization for the report.
  - None – Only superusers have full authorization for the report.



#### Note

For more information about authorizations in SAP Business One, see the online help.

- Choose the *Finish* button.

The *Rename* window opens if you have not selected the *Overwrite* checkbox in step 8 for one or more reports that you want to import.

- In the *Rename* window, in the *New Name* column, enter a new file name for each report that appears in the *Existing Name* column.



[illegible]

- b. Choose the *OK* button.

The *Import Summary* window appears with a summary of the import details.

Report and Layout Import Wizard

Import Summary

SAP Business One imported the following layouts/reports successfully:

"Accounting | CR1" was imported to "Financials | Financial Reports | Accounting"

"Sales Reports | CR3" was imported to "Sales - A/R | Sales Reports"

SAP Business One was not able to import the following layouts/reports:

To exit the wizard, choose the "Close" button.

Step 3

Back

Next

Close

11. To exit the wizard, choose the *Close* button.

# Importing Layouts Created with the Crystal Reports Software

You can import Crystal Reports layout files into SAP Business One with the *Report and Layout Import Wizard*.

In the layout import process, you can define any Crystal Reports layout as a master layout. This means that you can apply one Crystal Reports layout to several document types. You can define master layouts only during the process of importing `.b1p` package files.



## Recommendation

After you define a master layout but before you start working with its defined document types, make sure the layout appears properly. If not, make the required corrections to the layout.

## Prerequisites

- You know the following information regarding the file you want to import:
  - File name and extension (file type).If the file is an `.rpt` file, verify with the provider whether the file is a layout or report.



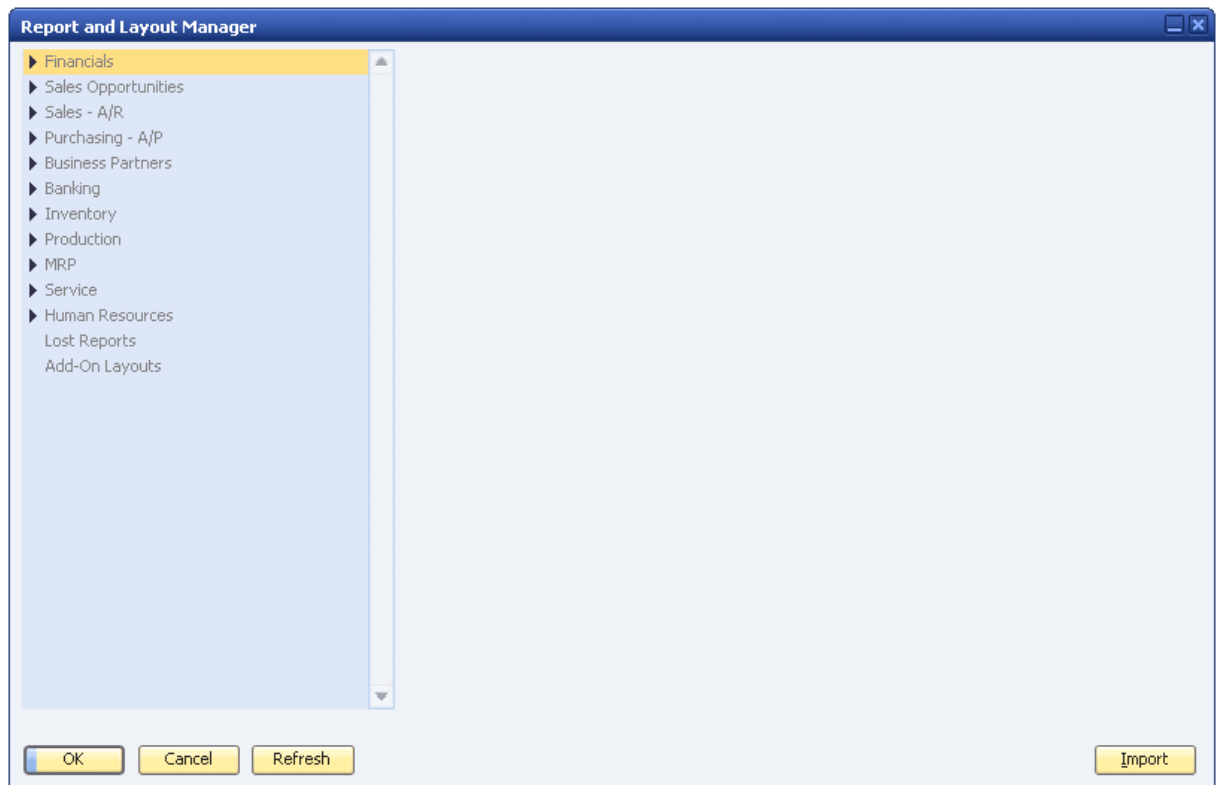
## Note

When you import an SAP Business One `.b1p` file, SAP Business One automatically detects whether the file contains reports or layouts.

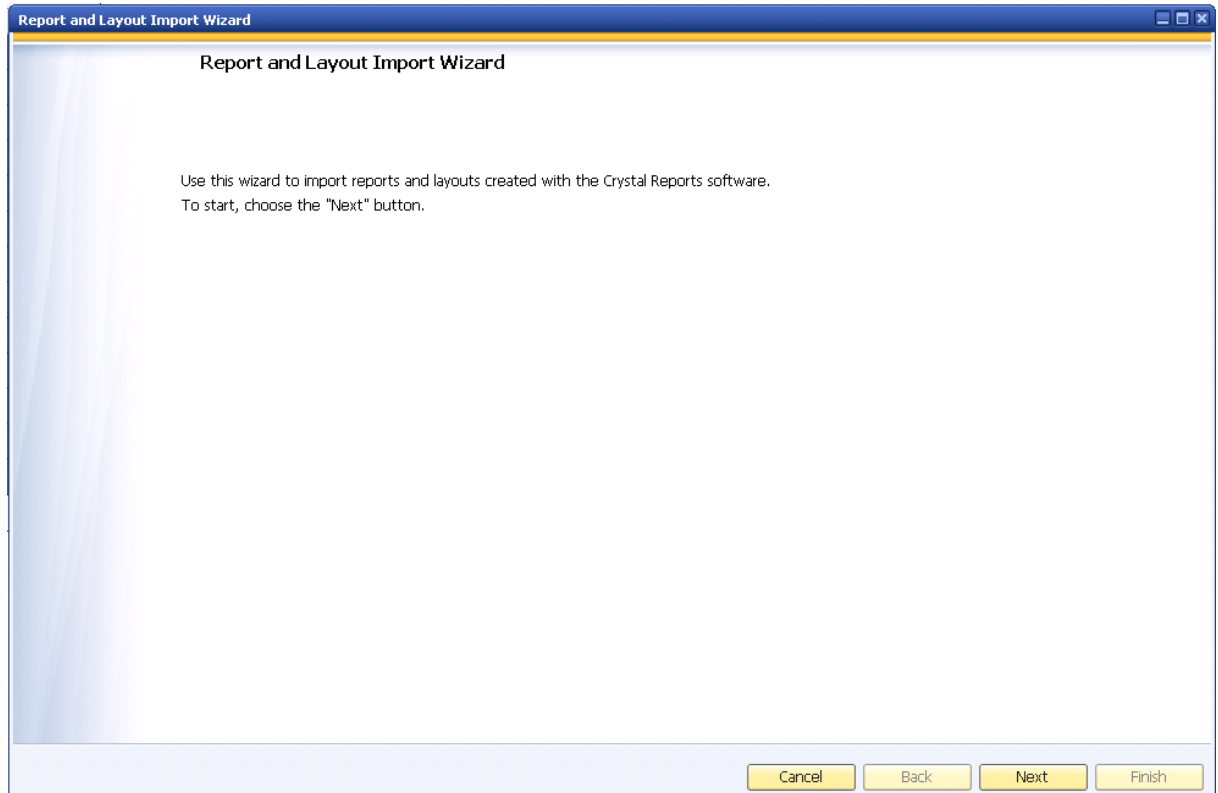
- You have superuser permissions in SAP Business One.

## Importing Layout-Type Crystal Reports `.rpt` Files

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.



2. In the *Report and Layout Manager* window, on the bottom right, choose the *Import* button.  
The *Report and Layout Import Wizard* window opens.



3. Choose the *Next* button.
4. In the *Select Import File* window, choose the *Browse* button.

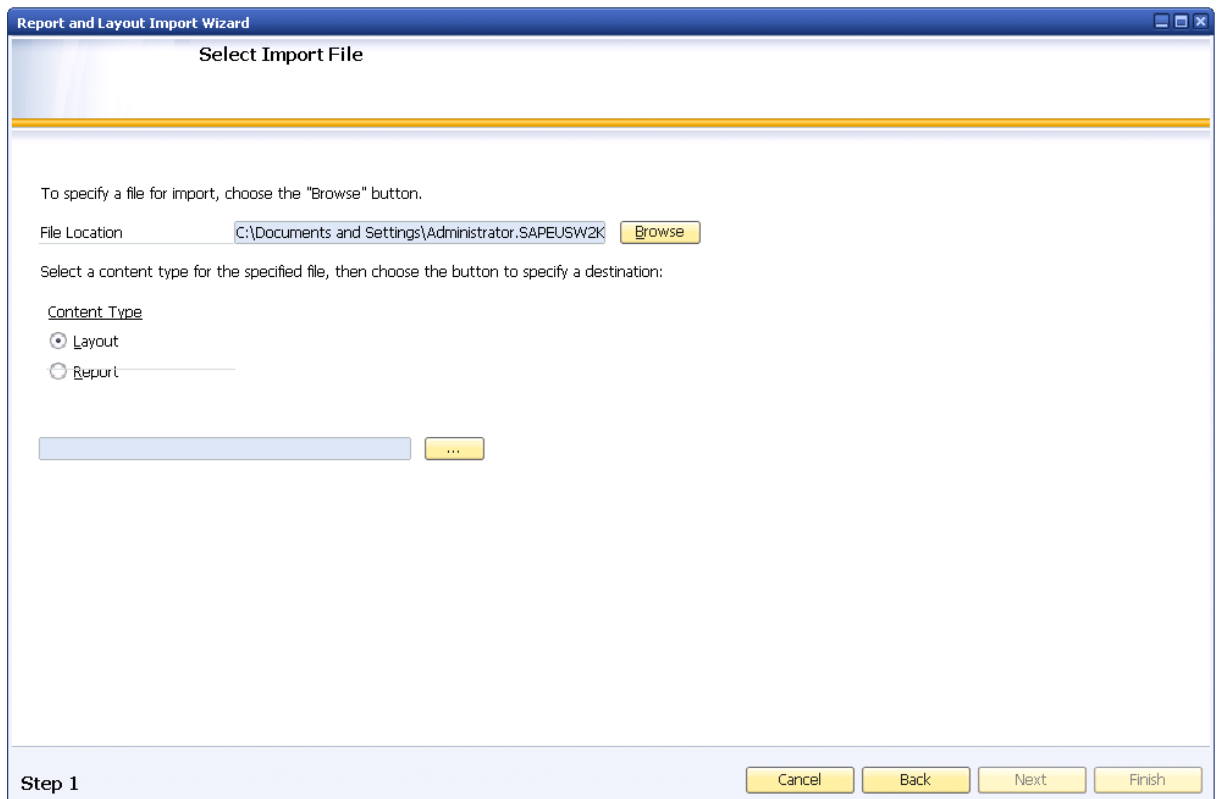
5. In the *Open* dialog box, navigate to the layout-type *.rpt* file you want to import. Choose the *Open* button.
6. Under *Content Type*, select the *Layout* radio button.

**Note**

If you are not sure whether the *.rpt* file is a report or a layout, verify this with the person who provided the file.

**Note**

If you want to import a report, see [Importing Reports Created with the Crystal Reports Software](#).



Report and Layout Import Wizard

Select Import File

To specify a file for import, choose the "Browse" button.

File Location

Select a content type for the specified file, then choose the button to specify a destination:

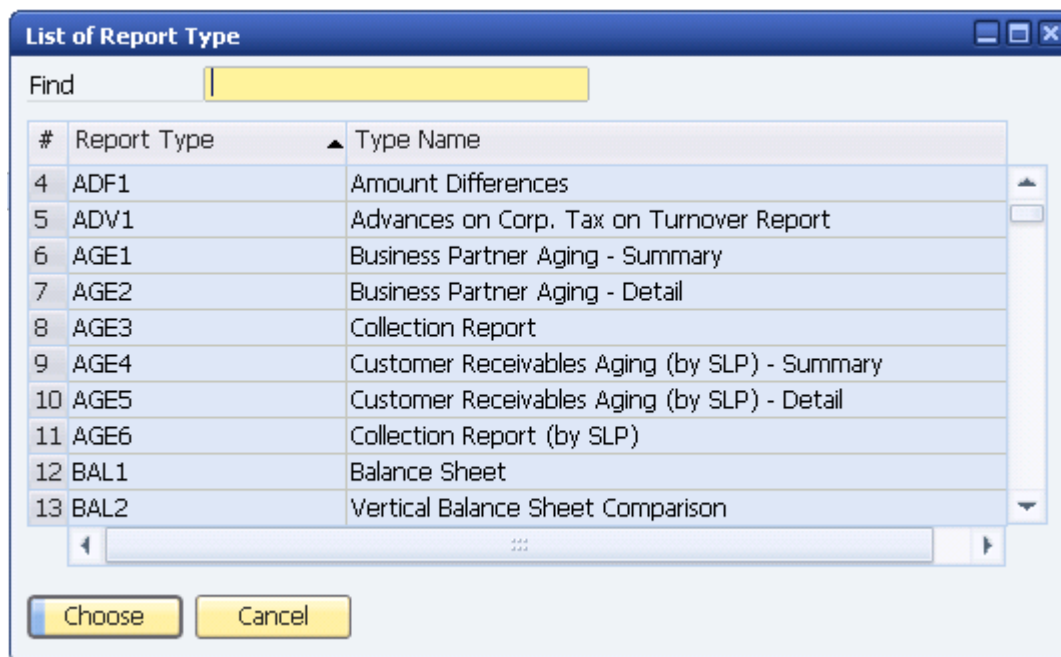
Content Type

☒ Layout

☐ Report

Step 1

7. Choose the *Browse (...)* button. The *List of Report Type* window opens.



8. In the *List of Report Type* window, select the document type or report to which you want to apply the layout.

Select the relevant document type folder for add-on layouts. After import, the add-on layouts appear in both the *Add-On Layouts* folder and the relevant folder of the SAP Business One module.

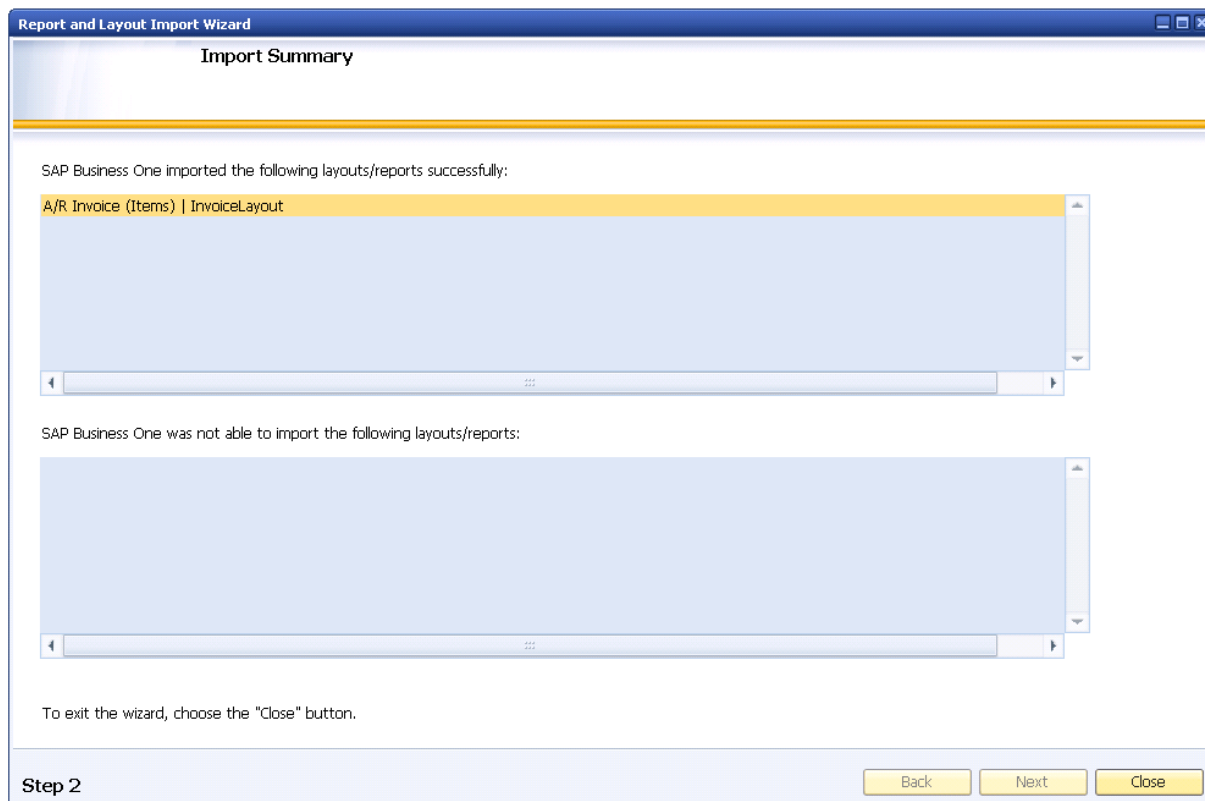


#### Note

In the *List of Report Type* window, the list of document types that appears is similar to the document list in the Print Layout Designer (PLD). There is an entry for each specific document type, such as A/R invoice (items).

9. Choose the *Choose* button to complete your selection and to return to the *Select Import File* window in the *Report and Layout Import Wizard*.
10. Choose the *Finish* button.

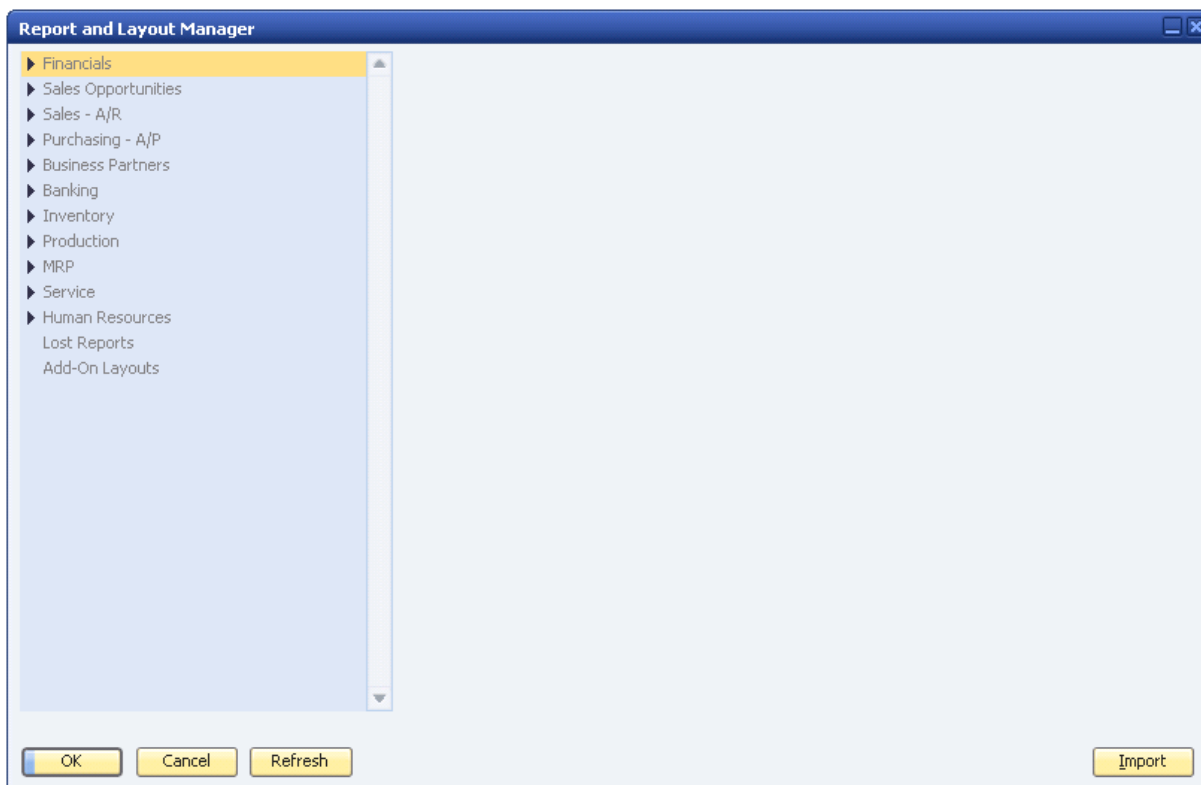
In the *Import Summary* window, a summary appears, containing the import results.



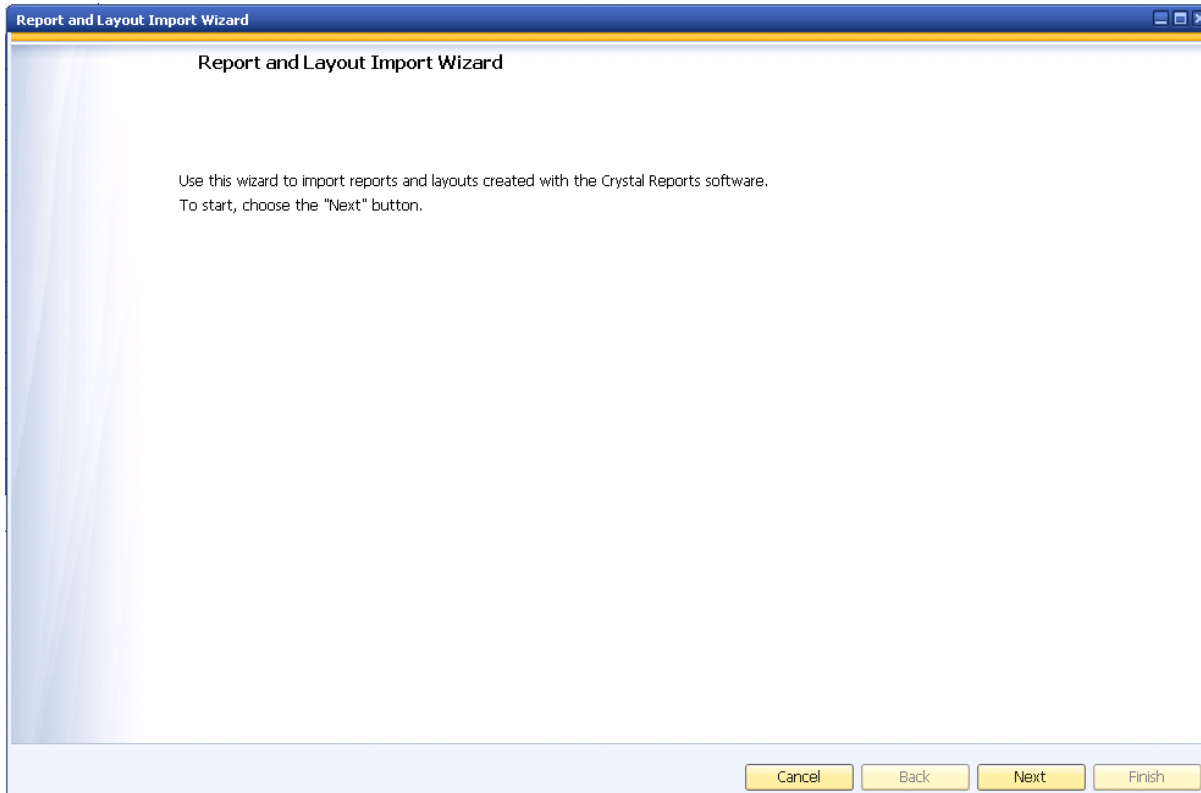
11. To exit the wizard, choose the *Close* button.

## Importing SAP Business One .b1p Package Files Containing Layouts

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.

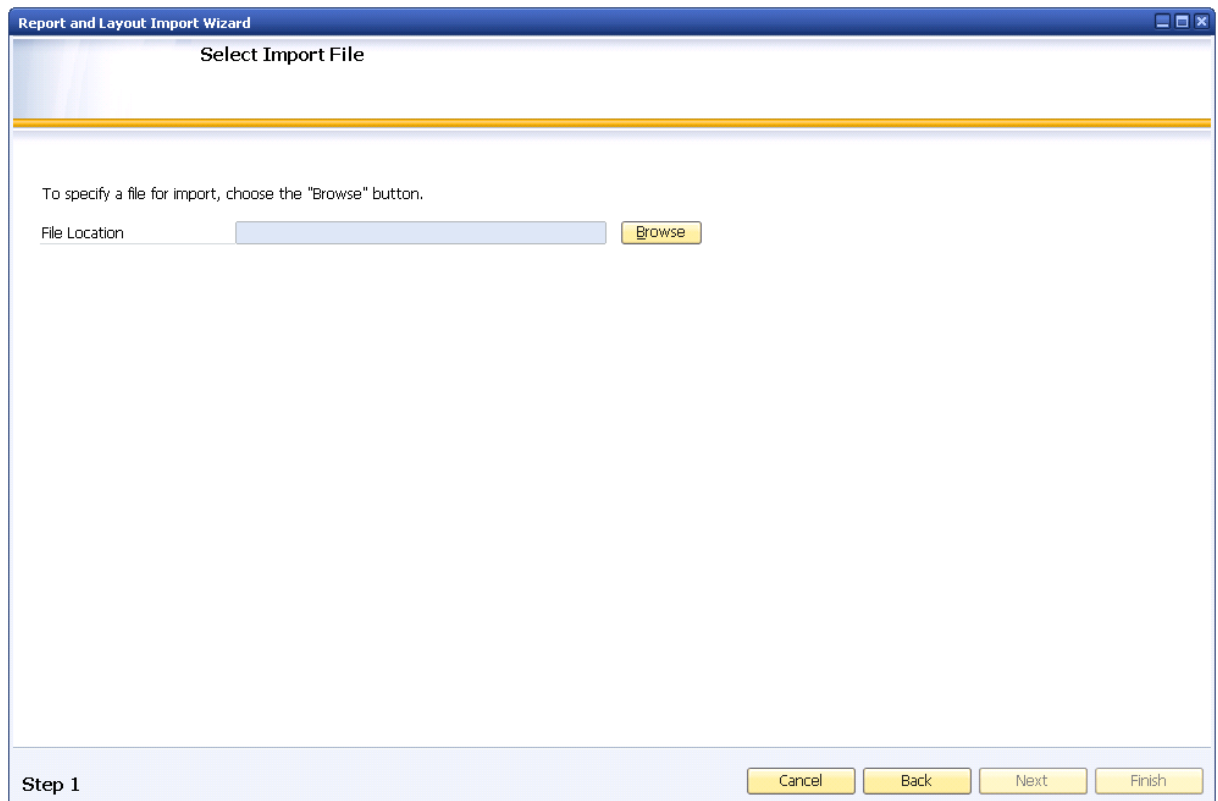


2. In the *Report and Layout Manager* window, on the bottom right, choose the *Import* button.  
The *Report and Layout Import Wizard* window opens.



3. Choose the *Next* button.





4. In the *Select Import File* window, choose the *Browse* button.
5. In the *Open* dialog box, navigate to the SAP Business One .b1p package file you want to import. Choose the *Open* button.



#### Note

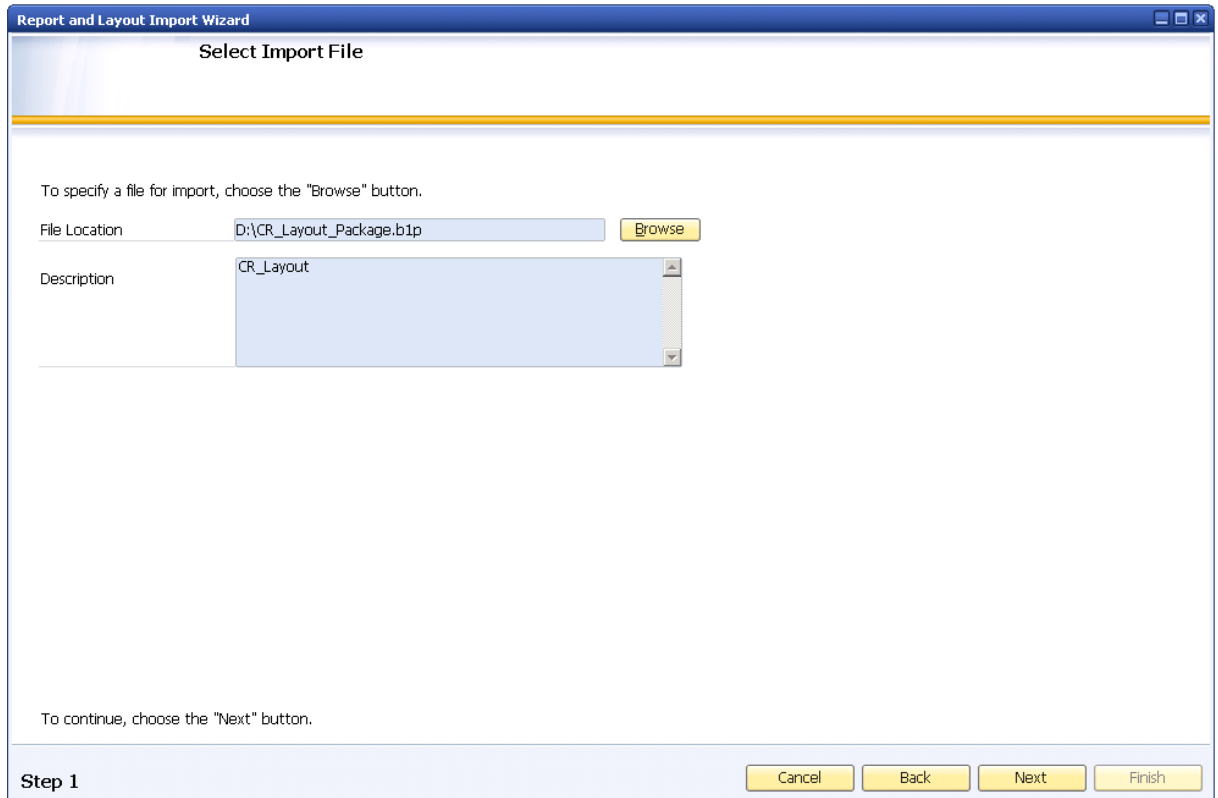
SAP Business One automatically detects whether a SAP Business One .b1p package file contains layouts or reports.

A description appears in the *Description* text box if a description has been added in the export process.



#### Note

For more information about the export process, see [Exporting Layouts Created with the Crystal Reports Software](#).



The image shows a screenshot of the 'Report and Layout Import Wizard' window, specifically the 'Select Import File' step. The window has a blue title bar with the text 'Report and Layout Import Wizard'. Below the title bar, the text 'Select Import File' is centered. The main area of the window contains instructions: 'To specify a file for import, choose the "Browse" button.' Below this, there is a 'File Location' text box containing 'D:\CR\_Layout\_Package.b1p' and a 'Browse' button to its right. Below the 'File Location' text box is a 'Description' text box containing 'CR\_Layout'. At the bottom of the main area, there is a line of text: 'To continue, choose the "Next" button.' At the very bottom of the window, there is a status bar with the text 'Step 1' on the left and four buttons: 'Cancel', 'Back', 'Next', and 'Finish' on the right.

Report and Layout Import Wizard

Select Import File

To specify a file for import, choose the "Browse" button.

File Location: D:\CR\_Layout\_Package.b1p [Browse]

Description: CR\_Layout

To continue, choose the "Next" button.

Step 1 [Cancel] [Back] [Next] [Finish]

6. Choose the *Next* button.

The *Select Layouts for Import* window appears with a list of reports contained in the .b1p package file you specified in the previous step. In the *Overwrite* column, a checkbox appears for each layout file that already exists in SAP Business One with the same file name. You can choose whether to rename or overwrite each of these files in a later step.

To open all the nodes at once, choose the *Expand* button.

To close all the nodes at once, choose the *Collapse* button.

**Select Layouts for Import**

1. Select the checkbox to the left of each layout that you want to import.
2. If the layout name already exists for the document type, a checkbox appears in the "Overwrite" column.  
To replace the existing layout, select the checkbox.  
To keep the existing layout, deselect the checkbox. You will be able to rename it later.
3. To copy document layouts to other document types, select the "Master Layout" checkbox.
4. To complete the import, choose the "Finish" button.

Name	Overwrite	Master Layout	Description	Last Updated
▼ Financials				
▼ Journal Entry				
▼ Journal Entry				
<input type="checkbox"/> CRL1	<input type="checkbox"/>		&&CRL1_JE()123/*	01/21/09
▼ Sales - A/R				
▼ A/R Invoice				
▼ A/R Invoice (Items)				
<input type="checkbox"/> AP Invoice1		<input checked="" type="checkbox"/>		02/24/09

Expand Collapse

7. In the *Select Layouts for Import* window, select the checkbox to the left of each layout you want to import.

The add-on layouts appear in both the *Add-On Layouts* folder and the relevant folder of the SAP Business One module after import.

For each of these layouts, when you select the checkbox in the *Master Layout* column, the *Set Master Layout* window opens.

**Set Master Layout**

1. Select the checkboxes to the left of the document types to which you want to apply the master layout.

2. If the layout name exists, a checkbox appears in the "Overwrite" column. To overwrite the existing layout, select the checkbox. If you do not select the checkbox, you are prompted to rename the imported layout when you choose the "OK" button.

Layout Name

Document Type	Overwrite
<input type="checkbox"/> Goods Receipt	
<input type="checkbox"/> Receipt from Production	
<input type="checkbox"/> A/R Invoice (Service)	
<input checked="" type="checkbox"/> A/R Invoice (Items)	<input type="checkbox"/>
<input type="checkbox"/> A/R Invoice (Document Summary)	
<input type="checkbox"/> Outgoing Excise Invoice	
<input type="checkbox"/> A/P Invoice (Service)	
<input type="checkbox"/> A/P Invoice (Items)	
<input type="checkbox"/> A/P Invoice (Document Summary)	
<input type="checkbox"/> A/P Invoice (Items) - RU	
<input type="checkbox"/> Goods Receipt PO (Service)	
<input type="checkbox"/> Goods Receipt PO (Items)	
<input type="checkbox"/> Goods Receipt PO (Document Summary)	
<input type="checkbox"/> Purchase Order (Service)	
<input type="checkbox"/> Purchase Order (Items)	

- a. In the *Set Master Layout* window, select the checkbox for each document type to which you want to apply the imported layout.



#### Note

After you have completed the import process, the layouts you import appear in the *Report and Layout Manager* window. Before you start working with the defined document types, make sure the layout appear properly. If not, make the required corrections to the layout.

To overwrite a layout file that already exists in SAP Business One with the same name, select the checkbox in the *Overwrite* column.

- b. Choose the *OK* button.

If you have not selected the checkbox in the *Select Layouts for Import* window or in the *Set Master Layout* window, in the *Overwrite* column for a layout, the *Rename* window opens immediately after you choose the *OK* button in the *Set Master Layout* window.

- i. In the *Rename* window, in the *New Name* column, enter a new file name for each Crystal Reports layout that appears in the *Existing Name* column.

**Rename**

To import the files listed below without overwriting the existing files, enter a new name for each file.

To save the new names and return to the report and layout wizard, choose the "OK" button.

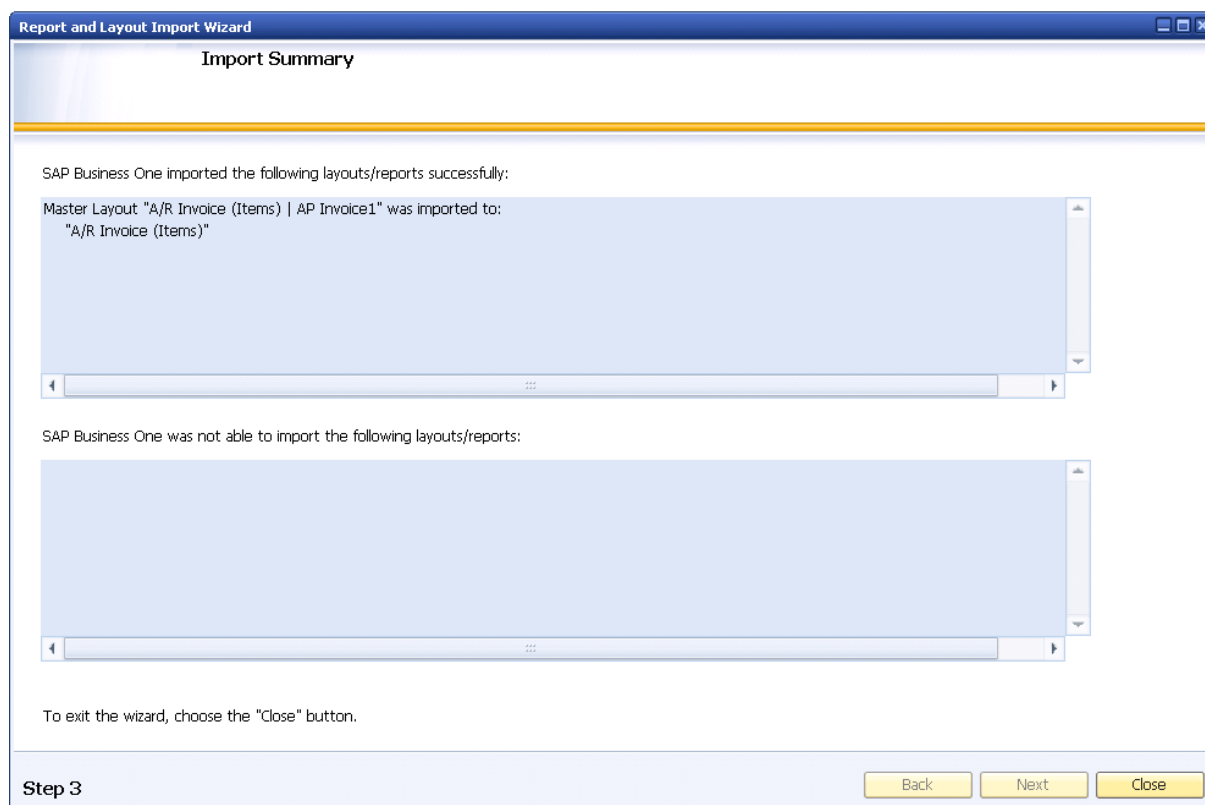
Document Type	Existing Name	New Name
A/R Invoice (Items)	CRL5	<New Name>

OK Cancel

ii. Choose the *OK* button.

7. Choose the *Finish* button.

The *Import Summary* window appears with a summary of the import details.



8. To exit the wizard, choose the *Close* button.

## Report and Layout Manager Window

You can use the *Report and Layout Manager* window to do the following:

- View and change the details of reports created with the Crystal Reports software
- View the details of:
  - Layouts created with the Crystal Reports software
  - Standard SAP Business One layouts (PLD type)
- Access the export wizard for exporting Crystal Reports layouts and reports
- Access the import wizard for importing Crystal Reports layouts and reports
- Access the Crystal Reports software to edit or create Crystal Reports layouts and reports
- Set authorizations for reports created with the Crystal Reports software
- Run reports created with the Crystal Reports software
- Work with print sequences

### Prerequisite

- For following actions, you need to have superuser permissions in SAP Business One:
  - Exporting Crystal Reports layouts and reports
  - Importing Crystal Reports layouts and reports
  - Deleting Crystal Reports layouts and reports



#### Note

The *Import*, *Export*, and *Delete* buttons are inactive for users who do not have superuser permissions.

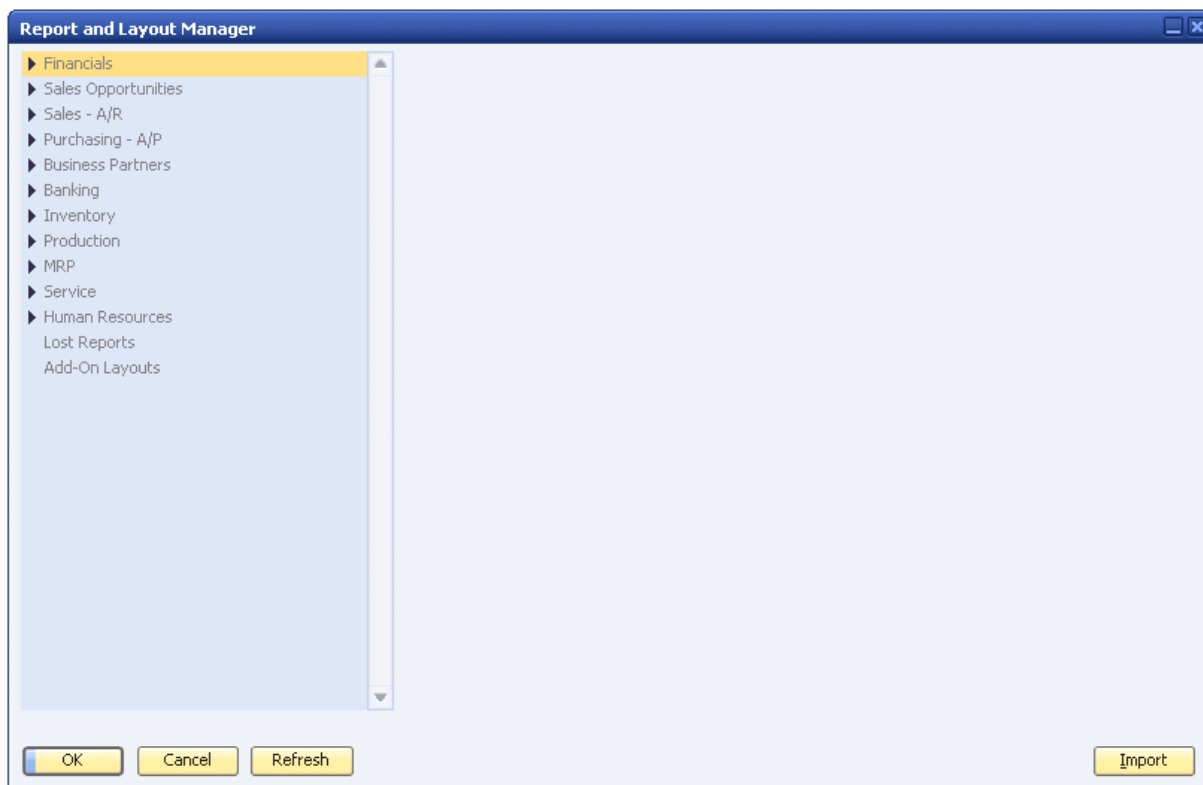
## Interface Details

To open the *Report and Layout Manager* window, from the SAP Business One *Main Menu*, choose:

*Administration* → *Setup* → *General* → *Report and Layout Manager*

## Opening Screen

The following is the opening screen of the *Report and Layout Manager* window:



The table below provides a description of the UI elements of the screen shown above.

UI Element	Description
Navigation pane	Use the navigation pane on the left to drill down to SAP Business One modules and their contents, including Crystal Reports layouts and reports, and standard SAP Business One reports and layouts (PLD type).
Import button	Opens the import wizard. For more information, see <a href="#">Importing Reports Created with the Crystal Reports Software</a> and <a href="#">Importing Layouts Created with the Crystal Reports Software</a> .
Refresh button	Refreshes the layouts.

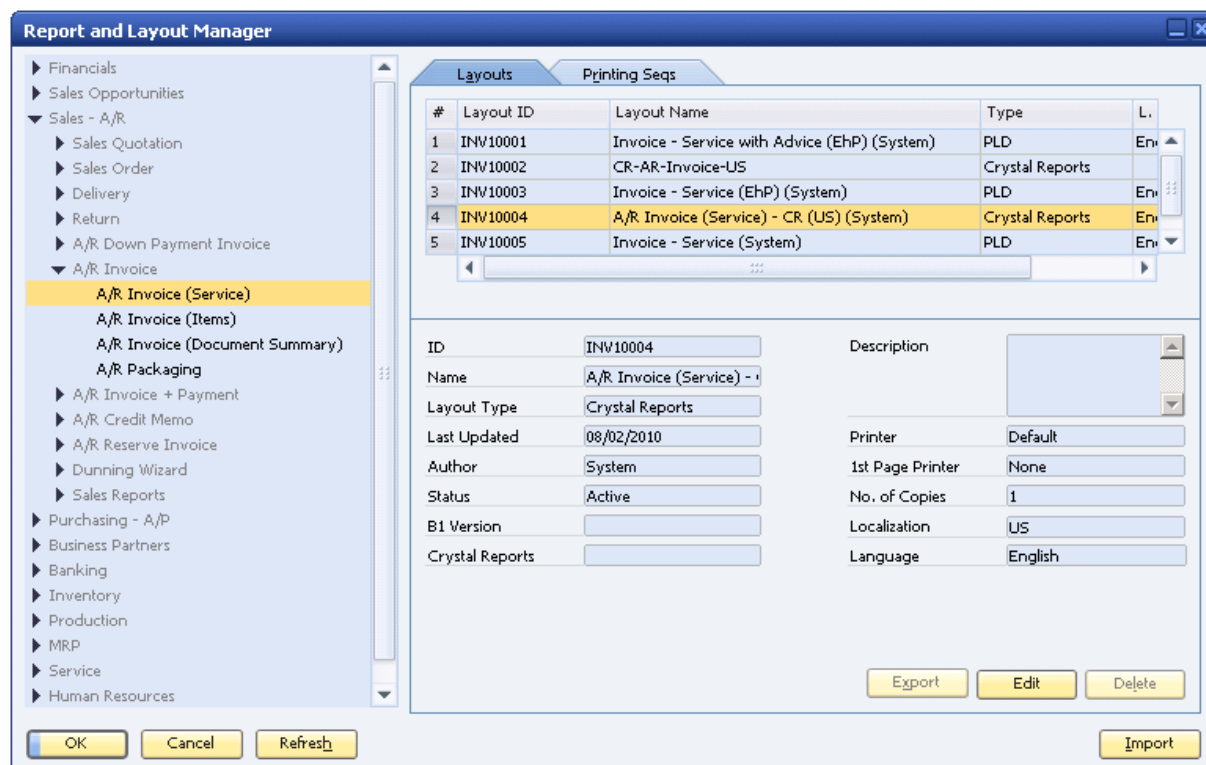
## Document Type Layout and Print Sequence Details

To view the details of specific document type layouts and print sequences, in the navigation pane, drill down and select the document type whose details you want to view.






## Layouts Tab

In the work area on the right, the *Layouts* tab appears.



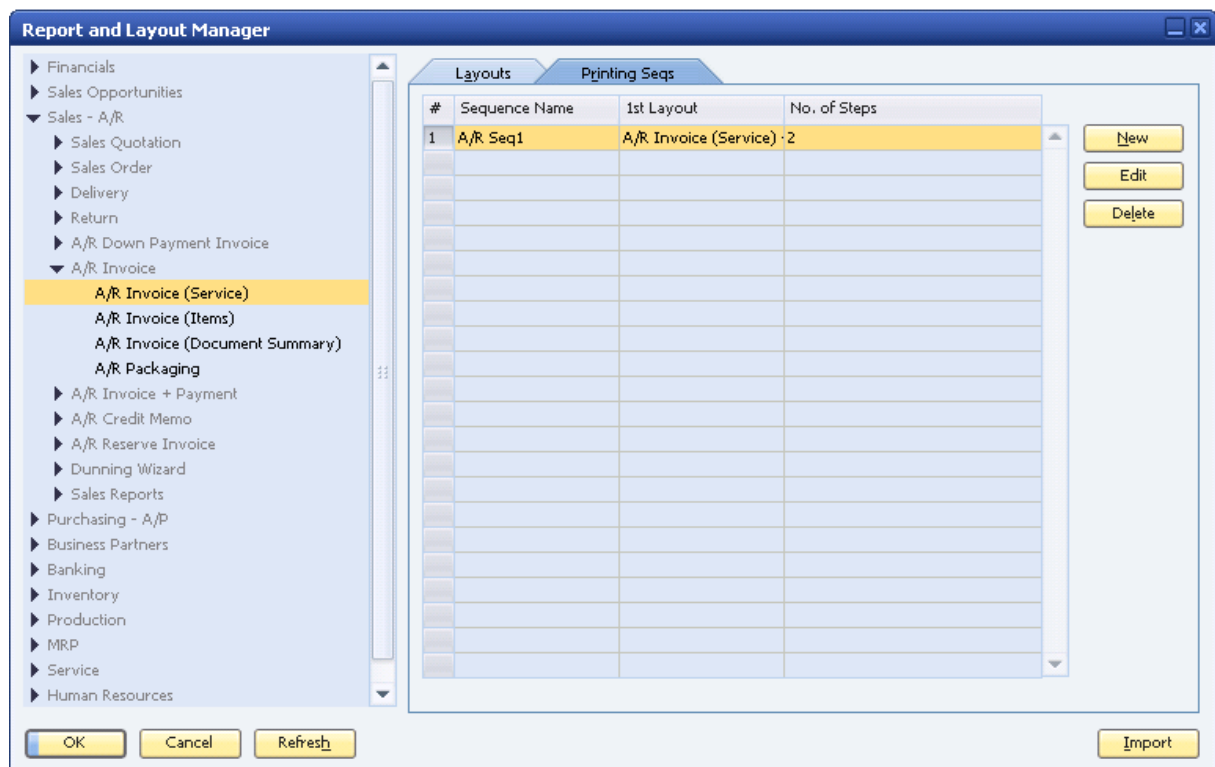
The following table provides descriptions of the UI elements of the *Layouts* tab shown above.

UI Element	Description
<i>Layout ID</i>	The ID code for the layout. The naming convention is: <document_type_acronym>_<sequential_number>
<i>Layout Name</i>	The layout name.
<i>Type</i>	The type of layout.
<i>Language</i>	The assigned language.
<i>ID</i>	The same ID code as shown in the <i>Layout ID</i> column above.
<i>Name</i>	The layout name as shown in the <i>Layout Name</i> column above.
<i>Layout Type</i>	The layout type as shown in the <i>Type</i> column above.
<i>Last Updated</i>	The date that the layout was last updated.
<i>Author</i>	The name of the author who created the layout. If the author name of layout is <i>System</i> , the layout is a system layout and cannot be changed. A system layout may be PLD type, or Crystal Reports type.
<i>Status</i>	Displays <i>Active</i> or <i>Inactive</i> . For system layouts, the status cannot be changed.
<i>B1 Version</i>	The SAP Business One release number.
<i>CR Version</i>	The Crystal Reports release number.
<i>Description</i>	Layout description.

UI Element	Description
<i>Printer</i>	The printer assigned to the layout.
<i>1st page printer</i>	The printer for the first page of a layout.
<i>No. of copies</i>	The number of printed copies.
<i>Localization</i>	The localization assigned to the layout.
<i>Language</i>	The assigned language, as shown in the <i>Language</i> column above. You can change the language for non-system layouts.
<i>Use foreign currency</i>	Select this checkbox to indicate where to apply foreign currency. This setting is available only for PLD-type layouts.
<i>Export</i>	<p>Choose this button to export a Crystal Reports layout using the export wizard. You cannot export PLD-type layouts so the button is inactive for these.</p> <p> <b>Note</b> This button is active only if the logged-on user has superuser permissions.</p>
<i>Edit</i>	Choose this button to change the layout details. If the layout is a Crystal Reports type, the Crystal Reports software opens. If the layout is PLD-type, Print Layout Designer (PLD) opens.
<i>Delete</i>	<p>Choose this button to delete a layout that is not a system layout.</p> <p> <b>Note</b> This button is active only if the logged-on user has superuser permissions.</p>
<i>Import</i>	<p>Choose this button to import .rpt and .b1p files into SAP Business One using the import wizard.</p> <p> <b>Note</b> This button is active only if the logged-on user has superuser permissions.</p>

## Printing Seqs Tab

In the work area on the right, select the *Printing Seqs* tab. For more information about the buttons and fields on this tab, see [Working with Printing Sequences](#).



## Report Details

To view the details of specific reports, in the navigation pane, drill down and select the report whose details you want to view.

You can change the information in the following fields:

- *Name*
- *Author*
- *Status*
- *Printer*
- *1st Page Printer*
- *No. of Copies*
- *Menu Location*

**Report and Layout Manager**

**Financials**

- Journal Entry
- Journal Vouchers
- Internal Reconciliations
- Budget Setup
- Cost Accounting
- Financial Reports**
  - Accounting
    - G/L Accounts and Business Partners
    - General Ledger
    - Aging
      - Customer Receivables Aging
      - Vendor Liabilities Aging
      - Customer Aging Report**
      - Transaction Journal Report
      - Transaction Report by Projects
      - Document Journal
      - 1099/1096 Report
      - Tax
    - Financial
    - Comparison
    - Budget Reports
    - Dashboard
  - Sales Opportunities
  - Sales - A/R

**Details:**

ID: RCRI0005  
 Name: Customer Aging Report  
 Last Updated: 08/17/2010  
 Author: Jayson Butler  
 Status: Active  
 B1 version:  
 Crystal Reports:  
 Localization:  
 Description:  
 Printer: Default  
 1st Page Printer: None  
 No. of Copies: 1  
 Menu Location: Financials > Financial Reports > Accounting > Aging >  
☐ Visible For Mobile

Buttons: Set Authorization, Run Report, Export, Edit, Delete, Import, OK, Cancel, Refresh.

## Lost Reports Folder

In the *Report and Layout Manager* window, in the navigation pane on the left, at the bottom of the hierarchy tree is the *Lost Reports* folder. This folder contains:

- Any .rpt files that you have saved in SAP Business One from the *Add-ins* menu in the Crystal Reports software.
- Currently unassigned .rpt files whose folders may have been deleted.



### Note

For information about creating new report folders in the SAP Business One *Main Menu*, see [Creating a New Report Folder in the Main Menu](#).

## Add-On Layouts Folder

The *Add-On Layouts* folder appears in the *Report and Layout Manager* window, in the navigation pane on the left, at the bottom of the hierarchy tree. This folder contains the layouts for SAP Business One add-ons. Each add-on layout is located in both the *Add-On Layouts* folder and the folder of the SAP Business One module.

For example, the Crystal Reports layout for the FA history sheet is located in the following folders:

- Add-On Layouts* → *Fixed Assets*
- Financials* → *Fixed Assets* → *Asset History Sheet*



### Note

For information about creating new report folders in the SAP Business One *Main Menu*, see [Creating a New Report Folder in the Main Menu](#).

# Viewing Crystal Reports Layouts and Reports in SAP Business One

You can view Crystal Reports layouts and reports in SAP Business One using Crystal Reports Viewer. Crystal Reports Viewer is fully integrated in the SAP Business One core product and provides the following functionality:

- Exporting reports
- Working with report parameters
- Showing and hiding the group tree
- Navigating to specific report pages
- Searching for text



## Note

You do not need to install Crystal Reports Viewer as a separate procedure. It is an integral part of the SAP Business One core product.



## Note

When an SAP Business One language is not supported in Crystal Reports Viewer, English is displayed. The following languages are supported in Crystal Reports Viewer:

- Chinese-Simplified
- Chinese-Traditional
- German
- Dutch
- English
- Spanish
- French
- Italian
- Japanese
- Korean
- Brazilian Portuguese
- Swedish

## Prerequisites

You have done one or more of the following:

- You have imported a Crystal Reports layout or report into SAP Business One. For more information, see [Importing Reports](#) and [Importing Layouts Created with the Crystal Reports Software](#).
- In the Crystal Reports window, in the menu bar, you have chosen *Add-ins* → *Save* or *Save As* to save a report in SAP Business One. For more information, see [Saving Crystal Reports .rpt File](#).

## Viewing Layouts or Reports

### Procedure

To view a report created with the Crystal Reports software, do one of the following:

- Run the report from the *Report and Layout Manager* window. For more information, see [Running Reports Created with the Crystal Reports Software in SAP Business One](#).
- Run the report from the SAP Business One *Main Menu*:
  - a. From the SAP Business One *Main Menu*, choose the module, folder, and report you want to view.
  - b. In the report selection criteria window, enter the required data.
  - c. Choose the *OK* button.

The report is displayed in Crystal Reports Viewer.

### Procedure

To view a layout created with the Crystal Reports software:

1. In SAP Business One, open a document whose layout you want to view.
2. Choose one of the following menu paths:
  - *File → Preview*  
Choose this option if the default layout of the document type has been defined with a Crystal Reports-type layout.
  - *File → Preview Layouts*  
Choose this option if you want to select a non-default layout that has been created with the Crystal Reports software.

The document appears in Crystal Reports Viewer.



#### Note

You can create the layout for one marketing document and apply this layout to another marketing document. When you view the layout for the latter marketing document, SAP Business One automatically redirects you to the tables relevant to the latter marketing document and displays the correct data, although the layout contains the table information relevant to the former market document.

For example, you create a layout with the tables OINV, INV1, and so on, which are relevant for an A/R invoice, and you apply the layout to a sales order. When you view the layout in sales orders, SAP Business One redirects you to the tables ORDR, RDR1, and so on, which are relevant to sales orders.

To avoid the automatic redirection, do the following:

1. Open the layout.
2. In the *Database Expert* window, rename the tables with the postfix “\_ONLY”.
3. Save the layout. For more information, see [Saving Crystal Reports .rpt Files](#).

When you are viewing a report or layout in Crystal Reports Viewer, you can perform the following:

- [Exporting Crystal Reports Layouts or Reports](#)
- [Displaying and Hiding the Parameter Panel](#)
- [Filtering Report Parameters](#)

- [Displaying the Group Tree](#)
- [Navigating to Report Pages](#)
- [Searching for Text](#)
- [Changing the Zoom Factor](#)

You can perform the following on reports only:

- [Displaying and Hiding the Parameter Panel](#)
- [Filtering Report Parameters](#)
- [Displaying the Group Tree](#)


## Exporting Crystal Reports Layouts or Reports

You can export a Crystal Reports layout or report to your computer as any of the following file types:

- Crystal Reports (\*.rpt)
- PDF (\*.pdf)
- Microsoft Excel [97-2003] (.xls)
- Microsoft Excel [97-2003] Data-Only (.xls)
- Microsoft Word [97-2003] (.doc)
- Microsoft Word [97-2003] - Editable (.rtf)
- Rich Text Format (RTF) (\*.rtf)
- XML (\*.xml)

### Procedure

To export a layout or report:

1. In Crystal Reports Viewer, in the toolbar, click the *Export Report*  icon.
2. In the *Export Report* window, navigate to the folder on your computer where you want to save your report.
3. In the *File name* field, enter a name for the file you are exporting.
4. In the *Save as type* dropdown list, select a file type.
5. Choose the *Save* button.

## Working with the Parameter Panel

In the Crystal Reports Viewer *Parameter Panel*, you can modify the report parameters to create different report views.

### Displaying and Hiding the Parameter Panel

To display or hide the *Parameter Panel*, in the toolbar, click the *Toggle Parameter Panel*  icon.

**Note**

To work with the functionality in the next subsections, you need to make sure the *Parameter Panel* is displayed.

## Filtering Report Parameters

You can change the view of a report by filtering its parameters in Crystal Reports Viewer.

**Note**

You cannot filter the parameters of every report type. Some report types may not have different parameters available for different views. In these cases, to filter parameters, you need to rerun the report in SAP Business One.

You can access the report parameters through the following:

- Parameter dropdown list
- Advanced dialog box

## Parameter Value List

You can modify the report parameters in the list of parameter values in the *Parameter Panel*, including the following possible types:

- Dropdown list: Select an option.
- Field: Enter a valid value.



To change the parameter values of a report, do one of the following:

- To work with the values in the list in the *Parameter Panel*:
  - a. For each parameter you want to modify, select or enter a valid value.
  - b. Choose the *Apply* button at the top of the *Parameter Panel*.

The new report view appears in the workspace on the right.

**Note**


If a parameter is not defined as mandatory, you can delete it in the *Parameter Panel* by selecting it and then choosing the *Delete* button at the top of the *Parameter Panel*.

- To work with the values in an advanced dialog box, do the following for each parameter in the list in the *Parameter Panel*:
  - a. In the *Parameter Panel*, click in the field or dropdown box of a parameter. An icon  appears to the right of the field or dropdown box.
  - b. Click the icon. The *Enter Parameter Values* dialog box appears.
  - c. Do one of the following:
    - If the parameter values appear in a dropdown list, select an option.
    - If a parameter field appears, enter a valid value.
  - d. Choose the *OK* button.
  - e. At the top of the *Parameter Panel*, click the *Apply* icon .








## Displaying the Group Tree

To show or hide the *Group Tree* panel:

1. In the toolbar, click the *Group Tree*  icon.
2. In the *Group Tree* panel, select a group.  
A red box appears in the report to highlight the relevant data in the report.


## Navigating to Report Pages

To navigate to different pages of a report, do one of the following:

- In the toolbar, click any of the following icons:
  - Go to First Page 
  - Go to Previous Page 
  - Go to Next Page 
  - Go to Last Page 
- In the toolbar, in the page number field , enter a page number.


## Searching for Text

To search for text in the report:

1. In the toolbar, click the *Find Text*  icon.
2. In the *Find Text* dialog box, in the *Find What* field, enter the text you want to find.
3. Choose the *Find Next* button. To find multiple instances of the text, choose the *Find Next* button as many times as you require.

## Changing the Zoom Factor

To change the zoom factor in a report:

1. In the toolbar, click the *Zoom*  icon.
2. In the list, select an option.

To define a zoom factor that does not appear in the list:

1. In the *Zoom* list, select *Customize*. The *Zooming* dialog box appears.
2. In the field, enter a value from 25 to 400.
3. Choose the *OK* button.

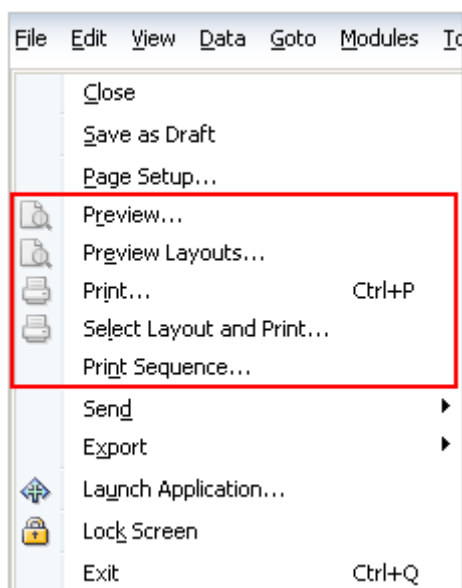
## Working with Preview and Printing Options in SAP Business One



You can preview and print Crystal Reports layouts and reports in the following SAP Business One menus:

- *File* menu  
Lets you preview and print Crystal Reports layouts that you have imported into SAP Business One. For more information about importing Crystal Reports layouts, see [Importing Layouts Created with the Crystal Reports Software](#).
- *Tools* menu  
Lets you preview Crystal Reports layouts and reports that you have not imported into SAP Business One.


### File Menu Options

In the SAP Business One toolbar, in the *File* menu, you can select any of the following preview and printing options:




- *Preview*  
Provides a preview window displaying a printing preview of the open document or report based on the default layout. If the document or report has a default Crystal Reports layout, the print preview opens in Crystal Reports Viewer. Alternatively, you can click the  icon in the toolbar. For more information about Crystal Reports Viewer, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).
- *Preview Layouts*  
Opens the *Choose Layout* window, displaying both Crystal Reports layouts and PLD-type layouts. You can select a layout other than the default layout to view the open document or report. If you select a Crystal Reports layout, the document or report is displayed in Crystal Reports Viewer. Alternatively, you can click the  icon in the toolbar. For more information about Crystal Reports Viewer, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).

- *Print*

Opens the standard Microsoft Windows *Print* dialog box. Alternatively, you can click the  icon in the toolbar.

- *Select Layout and Print*

Opens the *Choose Layout* window, displaying both Crystal Reports layouts and PLD-type layouts. You can select any layout to print the open document or report. The standard Microsoft Windows *Print* dialog box opens. Alternatively, you can click the  icon in the toolbar.

- *Print Sequence*

Opens the *Print Sequence* window. Select a print sequence that you want to apply for an open sales or purchasing document, and choose the *Print* button. For more information about printing sequences, see [Working with Printing Sequences](#).



#### Note

When you choose *File* → *Print Sequence*, the *Print Sequence* window opens, but there are no items listed if no print sequence has been created for the specific open sales or purchasing document



#### Note

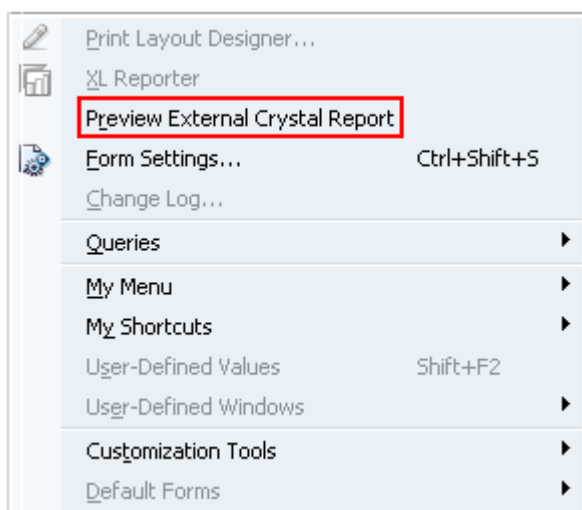
For more information about printing in SAP Business One, see *Printing in SAP Business One* in the online help.

## Tools Menu Option

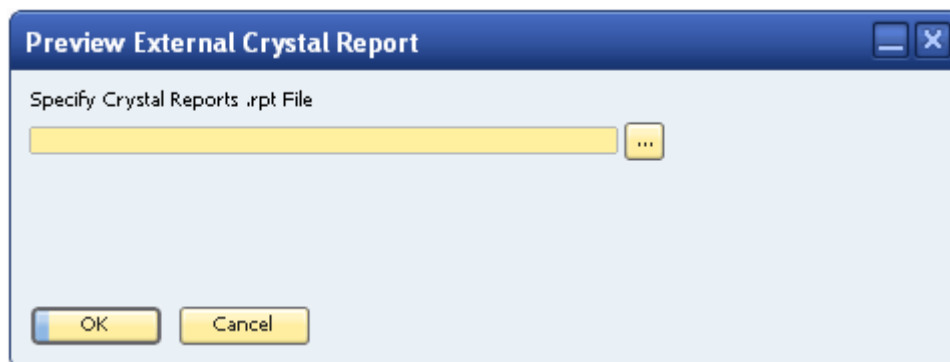
You can preview Crystal Reports layouts and reports that you have not yet imported into SAP Business One.

### Procedure

1. In the SAP Business One toolbar, in the *Tools* menu, select *Preview External Crystal Report*.



2. In the *Preview External Crystal Report* window, choose the *Browse* button.



3. In the *Select Crystal Reports .rpt File* window, specify a file on your computer that you want to preview in SAP Business One.
4. Choose the *Open* button.
5. In the *Preview External Crystal Report* window, choose the *OK* button.
6. The external report appears in Crystal Reports Viewer.



#### Note

You may need to enter selection criteria the same way as you would when you run a report created with the Crystal Reports software. For more information, see [Running Reports Created with the Crystal Reports Software in SAP Business One](#).

## Working with Printing Sequences

You can create printing sequences for reports, layouts, and documents in SAP Business One. You can apply printing sequences to the following:

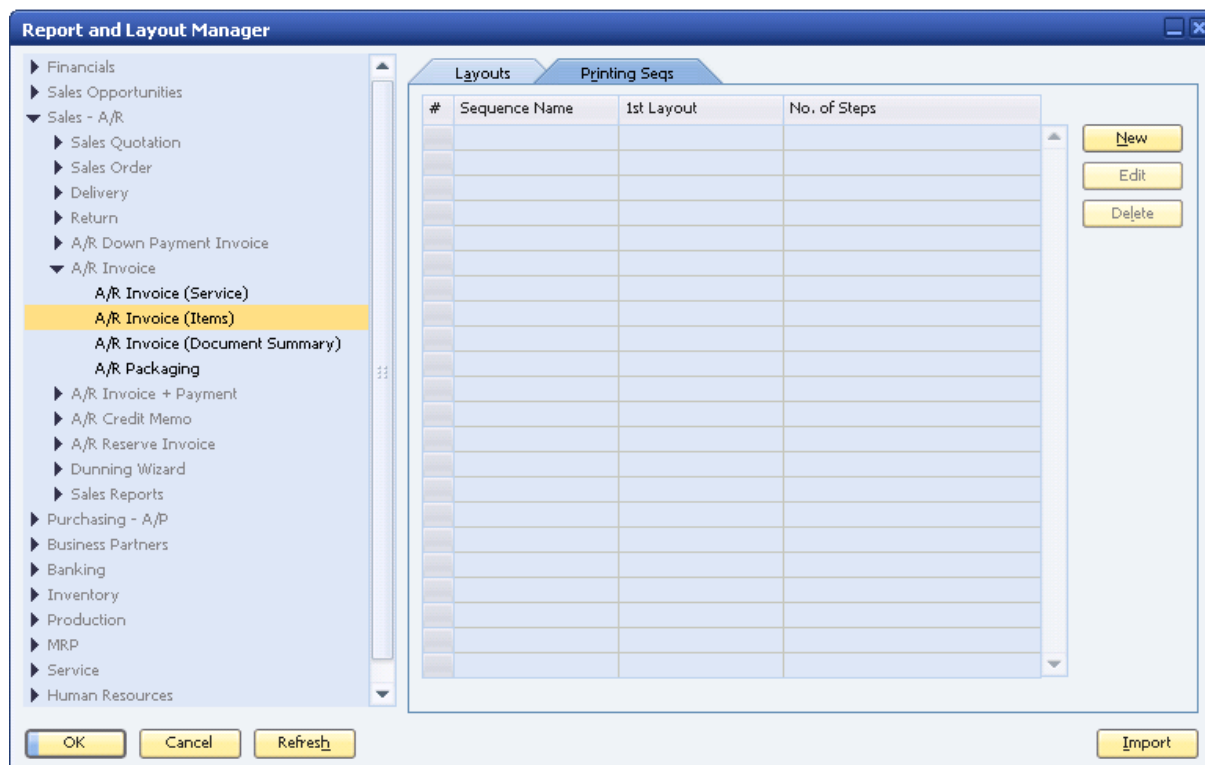
- Standard SAP Business One reports and layouts
- Layouts that you have created or edited using Print Layout Designer (PLD)
- Crystal Reports layouts

### Prerequisite

- Only users who have superuser permissions in SAP Business One can perform the following actions regarding printing sequences:
  - Create a printing sequence
  - Modify a printing sequence
  - Delete a printing sequence

## Creating Printing Sequences

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*. The *Report and Layout Manager* window opens.
2. In the navigation pane on the left side of the window, select a document type for which you want to create a new printing sequence, such as *A/R Invoice (Items)*.
3. In the work area on the right side of the window, select the *Printing Seqs* tab.



4. On the *Printing Seqs* tab, choose the *New* button. The *Sequence Details* window opens.

#	Object	Layout	Copies	Printer	1st Page Printer
1	A/R Invoices	(Default)	1	(Default)	(None)
2		(Default)	1	(Default)	(None)

5. In the *Sequence Details* window, do the following:

- a. In the *Sequence Name* field at the top of the window, enter a printing sequence name.



#### Note

The document type for the new sequence is indicated in the *Document Type* field at the top right of the window. This field cannot be edited. If you want to create a printing sequence for a different document type, close the *Sequence Details* window and in the navigation pane on the left, select a different document type.

- b. In the *Object* column, in the dropdown list, select a document subtype for which you want to create this new printing sequence.
- c. In the *Layout* column, select a layout.
- d. In the *Copies* column, enter the number of copies that you want to be printed each time this sequence is used.
- e. In the *Printer* column, select a printer that you want to print each time this printing sequence is used.
- f. In the *1st Page Printer* column, select a printer for printing the first page of the printing sequence.



#### Note

This step is optional. If you do not select a first-page printer, the printer you select in the *Printer* column prints the entire sequence including the first page.

- g. Choose the *Add* button.

The new printing sequence appears in the table on the *Printing Seqs* tab.

## Running Printing Sequences

To run a printing sequence:

1. Open the document whose printing sequence you want to run.
2. In the SAP Business One toolbar, choose *File* → *Print Sequence*.
3. In the *Print Sequence* window, select a sequence and choose the *Print* button.



4. The document is printed according to the defined printing sequence.

## Modifying Printing Sequences

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*. The *Report and Layout Manager* window opens.
2. In the navigation pane on the left side of the window, select a document type for which you want to modify a printing sequence, such as *A/R Invoice (Items)*.
3. In the work area on the right side of the window, select the *Printing Seqs* tab.
4. On the *Printing Seqs* tab, select the row of the printing sequence you want to modify and choose the *Edit* button. The *Sequence Details* window opens.
5. In the *Sequence Details* window, change the required parameters.
6. Choose the *Update* button, then choose the *OK* button.  
The printing sequence now includes the revised parameters.

## Deleting Printing Sequences



### CAUTION

Deleting a printing sequence is irreversible.

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*. The *Report and Layout Manager* window opens.
2. In the navigation pane on the left side of the window, select a document type for which you want to delete a printing sequence.
3. In the work area on the right side of the window, select the *Printing Seqs* tab.
4. On the *Printing Seqs* tab, select the row of the printing sequence you want to delete and choose the *Delete* button.

The printing sequence is permanently deleted from SAP Business One.



# Running Reports Created with the Crystal Reports Software in SAP Business One

You can run reports created with the Crystal Reports software in SAP Business One in any of the following ways:

- From the *Report and Layout Manager* window
- From the SAP Business One *Main Menu*
- From the Crystal Reports software

When you run a report created with the Crystal Reports software, the report appears in Crystal Reports Viewer. For more information about Crystal Reports Viewer, see [Viewing Crystal Reports Layouts and Reports in SAP Business One](#).

## Running Reports from the Report and Layout Manager Window

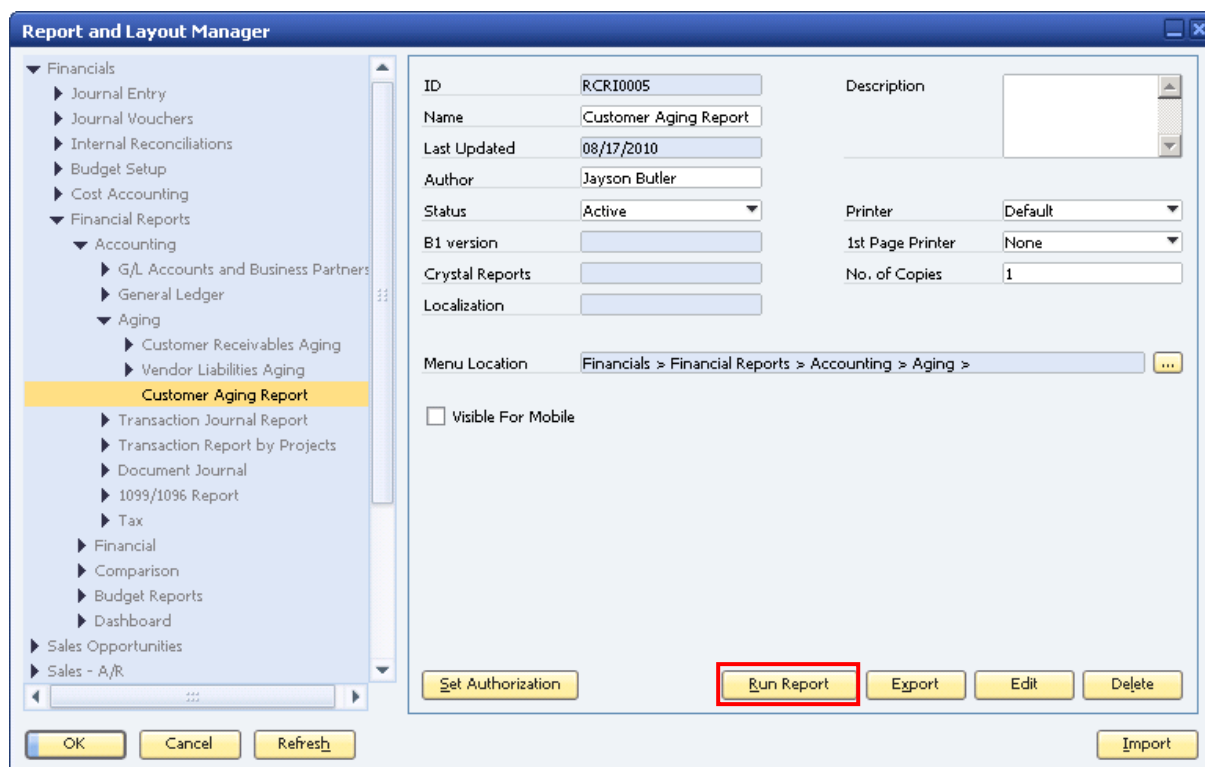
1. From the SAP Business One Main Menu, choose *Administration* → *Setup* → *General* → *Report and Layout Manager*.
2. In the navigation pane on the left, drill down to the report you want to run.




### Note

You can perform this step on reports created with the Crystal Reports software **only**. You run standard PLD-type reports from the SAP Business One *Main Menu*. For more information, see [Running Reports from the Main Menu](#).

3. Choose the *Run Report* button. The report is displayed in Crystal Reports Viewer.



## Running Reports from the Main Menu

1. From the SAP Business One *Main Menu*, choose the module, folder, and report you want to generate.  
If the report selection criteria window is associated with the Crystal Reports software, a Crystal Reports  icon appears to the left of the report name.
2. In the report selection criteria window, select the relevant parameters for the report you want to generate and choose the *OK* button.

## Running Reports from the Crystal Reports Software

1. In the Crystal Reports software, you have opened a report.
2. In the toolbar, choose *Add-ins* → *SAP Business One* → *Preview in SAP Business One*.
3. The report opens in SAP Business One.

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