



2011

# *Report Designer 10*

Report Designer 10 is a report creator for the Quotemaster application. It produces report layouts that can be used from within Quotemaster and is an extremely powerful application. There is a learning curve associated that you may prefer to outsource to our design team, nevertheless, there is nothing to prevent you designing or modifying your own report layouts using the same tool that we use ourselves.



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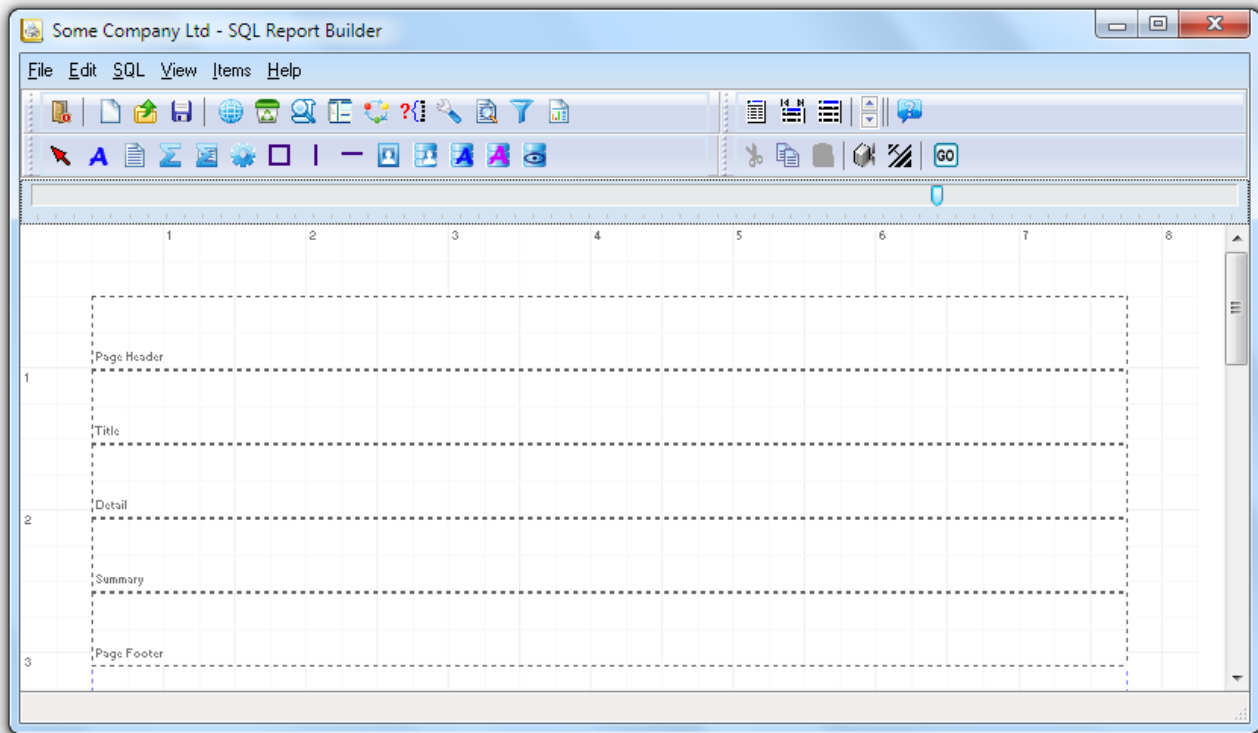
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# Introduction

Report Designer 10 is a database aware, banded report writer capable of accessing multiple SQL tables or views simultaneously to produce printed reports or PDF's.

The resulting .rpt layouts can simply be loaded from within Quotemaster and executed to produce the output.



## Key features

### General:

- Supports bands or single form design
- Inbuilt system functions
- Formula expressions with accumulators
- Jpeg Images (fixed and from database)
- Rich text memo fields
- Line shapes and borders
- Group aggregation of data
- Multiple Child bands with conditional printing
- Prompting for user input on printing
- Built in PDF generator
- SQL query builder with multiple datasets
- Zoom preview

## Getting started

When beginning a new report it is important to do some planning in order to avoid revisiting the design layout. You may find it useful to use a word processor to draft up a rough that will guide you in the overall design.

In general it is not a good idea to alter the foundations after having built the house, and in particular adding bands successfully is dependent on the order that you create them, for example, if you need child bands for a parent band then create the child bands immediately after the parent and not after additional bands.

## Working with a plan

There is a pattern to creating reports with a minimum of fuss and it goes something like this...

1. Open a new blank form and set the Page Settings, size, bands and default dataset.
2. Build the report dataset views and test the query results.
3. Set the data filters and input prompts if required.
4. Drop background objects onto the form first, then data fields and labels etc on top.
5. Make regular backups of the report using a different name each time – some objects cannot be removed once created (data views).
6. Previewing regularly helps.

If you adhere to this organized approach then you will be fine.

## Design components

Design components are the objects that you place on the form to achieve the result you need.

### ***Bands***

Think of a band as a section on the report that has a particular personality. A report can consist of a single band or many bands all with different personalities, for example, a Header Band has the personality that it prints only once per page at the top, a Detail Band prints once for every record in a dataset, a Footer Band prints once per page at the bottom, and so on...

Bands will expand automatically to accommodate the information that they need to contain – if that is part of their personality, so for example, a Header Band always remains at its design height but a Detail band will expand to accommodate memo fields and/or images. Detail bands will repeat over and over again with each record in the record set. In this way, report data will span as many pages as is needed to complete the printed output.

### ***Core Band types and properties***

There are eight types of band...

1. Page Header
2. Title band
3. Column Header
4. Group Header
5. Detail Band
6. Sub Detail
7. Summary Band
8. Page footer

These are listed in the order that they will normally appear on the form. There is one more special type of band – a **Child Band**. Every ordinary band can have a Child Band and forms a subordinate to its parent. We will explain this in detail later.

## **Page Header**

Prints once per page and is the first band printed. You can elect whether to print the first page header.

## **Title band**

Prints only once per report and is the second band printed

## **Column Header**

Prints once per page column(s) and is the third to be printed

## **Group Header**

Prints before a detail band and once per dataset record or by Expression

## **Detail Band**

Prints once per dataset record and is the fourth band printed (apart from its group header)

## **Sub Detail**

This is NOT a subordinate to a Detail Band.

Prints once per dataset record. This is the detail band in a Master/Detail relationship. You can also make it master of another detail band and so create many levels of sub detail.

## **Summary Band**

Prints after detail bands once per report

## **Page footer**

Prints once per page as the last item on the page. You can elect whether to print the last page footer.

## **Special bands**

### ***Child Bands***

Use child bands when you need to extend an existing band, for example, if you have a self expanding memo field but need a label to always appear below it no matter how high it is then put the label on a child band of the existing band.

### ***SwitchChild Bands***

Detail bands can have a special type of child band called a SwitchChild and there can be many SwitchBand children to a detail band. The detail band can be instructed to print on a specific switchchild according to a data condition, once per record.

This will be important in quote items where there may be headings, paragraphs, line items and subtotals in the quote body that need to be formatted differently depending on what line type they are. In this scenario you would have a Heading Switchband, a Paragraph Switchband, a Line Item Switchband and a Subtotal Switchband, each with different formatting.

The detail band could be instructed to “switch” to one of the child bands to print the record depending on the condition of each quote “line type” such as “H” for header or “S” for subtotal.

### ***Group Footers***

A Group Header can have a Group Footer.

## Band Properties

RightClicking on a band will bring up its property editor to allow settings to be made. The following detail outlines these settings and properties.

### Common Properties

#### Align to Bottom

Use Align to Bottom to force a band to print at the bottom of a page instead of at the top - Report Designer will leave room for a page footer band if such exists.

If Align to Bottom is ticked for a detail band, the effect will be that only one detail band is printed per page.

#### Force Column

The band will always start a new column (this will be a new page in single column reports)

#### New Page

Instructs the printer to start a new page before printing this band.

#### Has Child

If ticked, a child band is placed automatically below its parent.

### Some-Bands-Only Properties

#### Has Footer

Group Headers and Sub Detail bands can have a footer band by setting this property to on.

#### Has Header

Sub Detail bands can have a header band by setting this property to on.

#### Print Before

Forces this band to print before its parent

#### Print Empty

Forces this band to print even if it contains no data

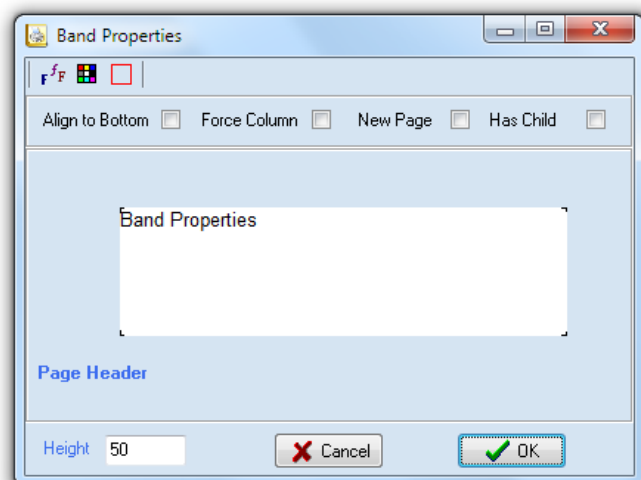
### Page Header Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



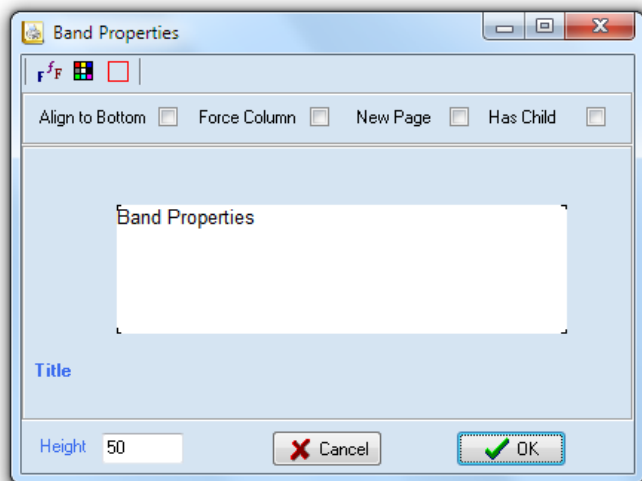
## Title band Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



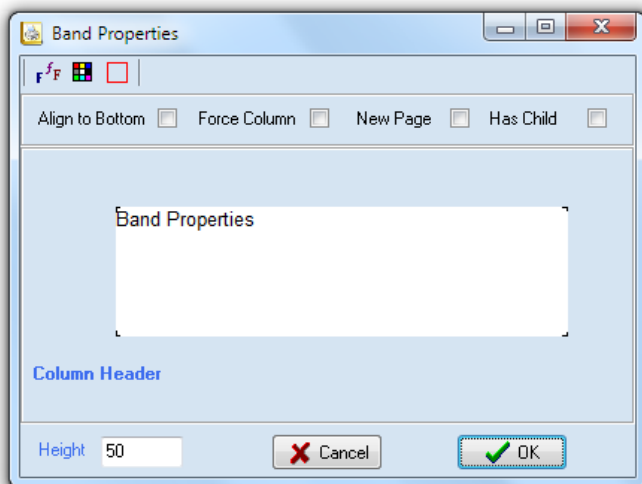
## Column Header Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



## Group Header Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

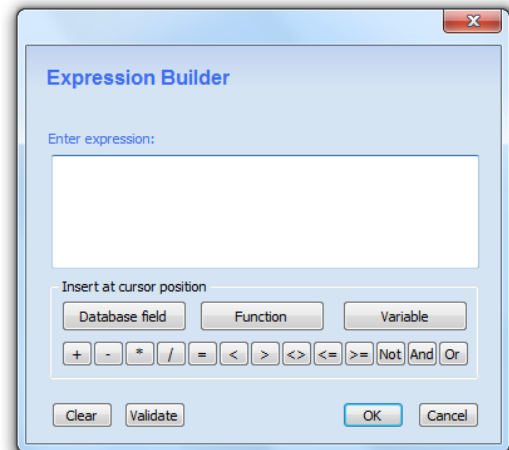
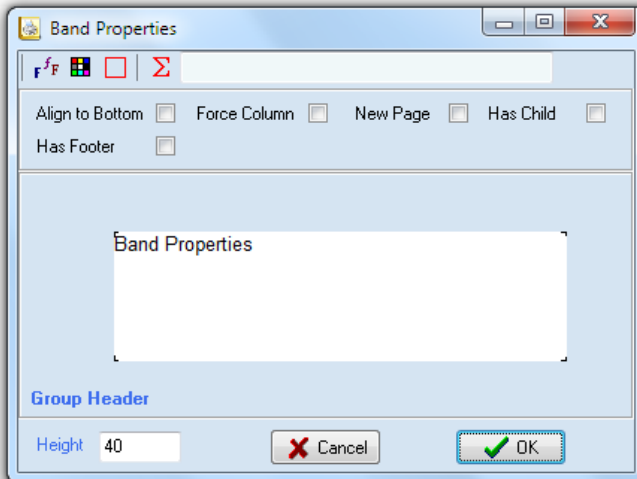
**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.

**Has Footer** - If set then a footer band is created below this band.



Group Headers can have an expression associated with the band. On clicking the E button, a property editor will appear to allow settings to be created as per the Special Bands explanation above.



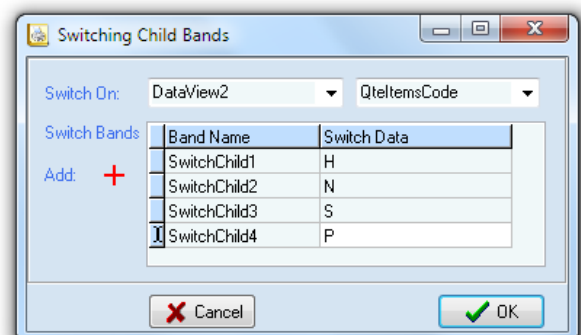
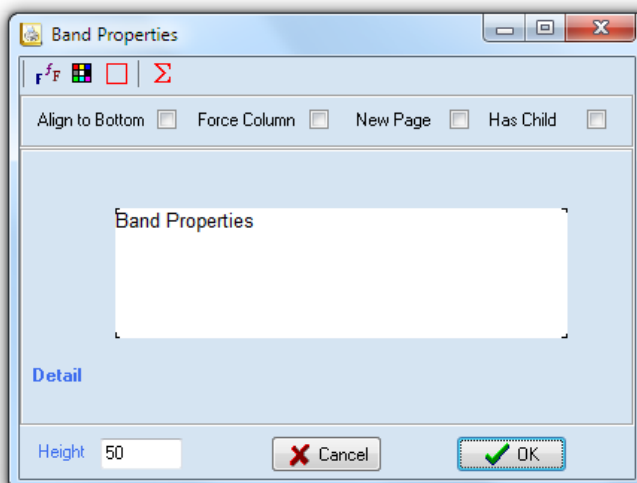
## Detail Band Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



A detail band has another very important feature – it can contain SwitchChild bands as children. When the E button is clicked a property editor will appear and allows these SwitchChild bands to be set and a data field chosen to base the decision on. **This is an extremely important feature for quote detail management** as per the Special Bands explanation above.

## Sub Detail Properties

This is NOT a subordinate to a Detail Band and prints once per dataset record. This is the detail band in a Master/Detail relationship. You can also make this band another sub detail's master and so create many levels of sub detail.

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

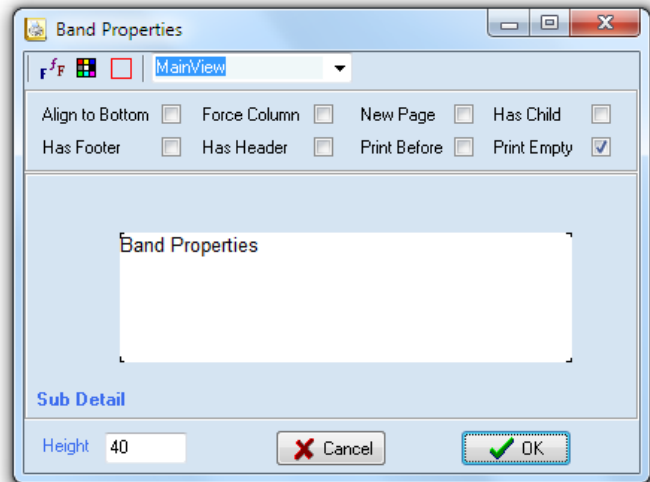
**Has Child** - if set to true, a child band is placed automatically below its parent.

**Has Footer** - If set then a group footer band is created below this band.

**Has Header** - If set then a group header band is created above this band.

**Print Before** – If set then this band is printed before its parent band.

**Print Empty** – If set then this band will print even if there is no data to print taking up space on the page.



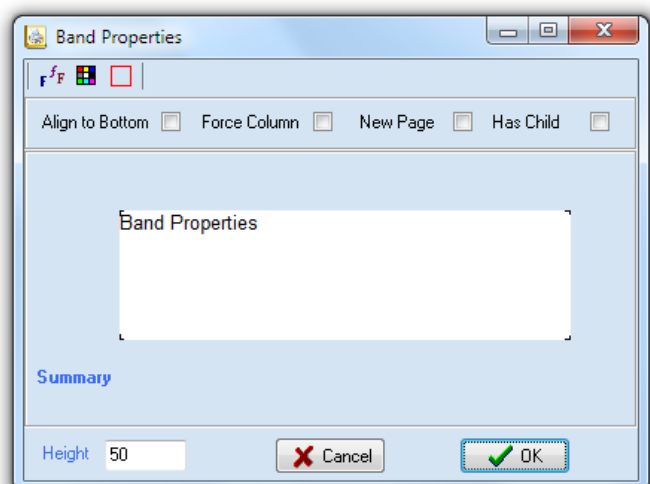
## Summary Band Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



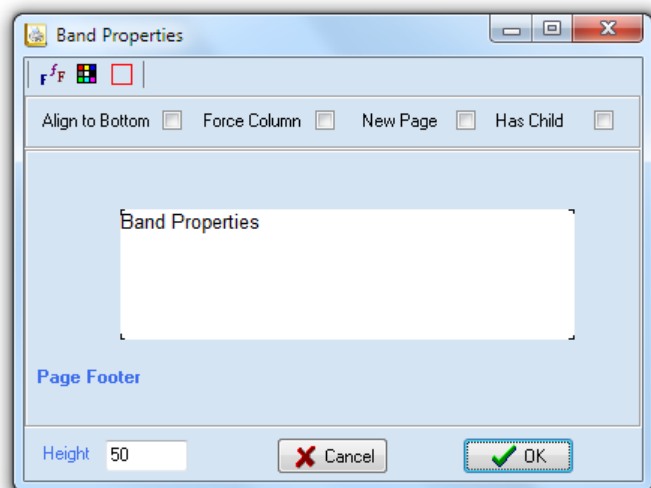
## Page footer Properties

**Align to Bottom** - Use to force a band to print at the bottom of a page instead of at the top. The report will leave room for a page footer band if such exists. If this property is set for a detail band the effect will be that only one detail band is printed per page.

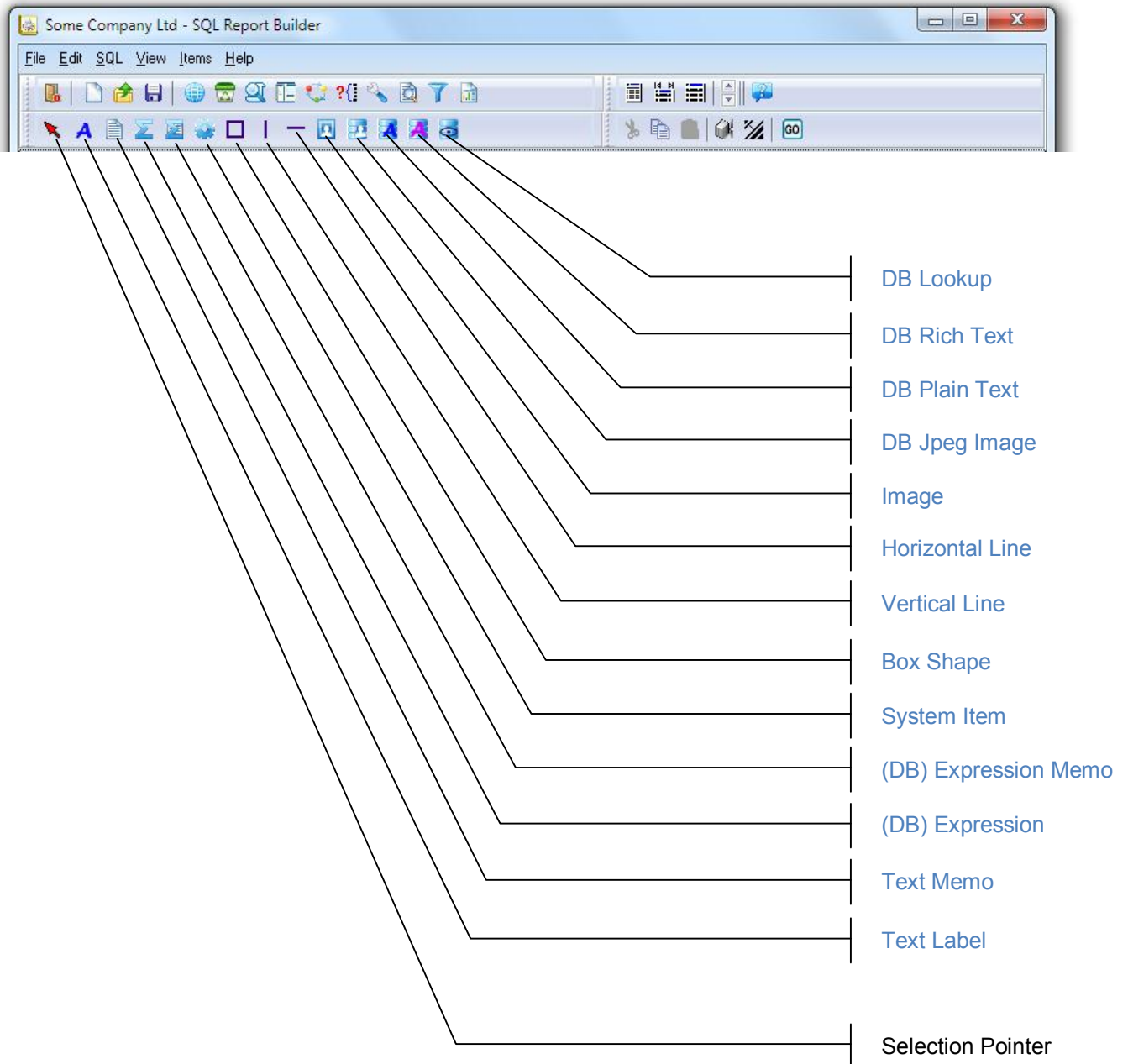
**Force Column** - If true, the band will always start a new column (this will be a new page in single column reports)

**New Page** - Forces the printer to start a new page before printing on this band.

**Has Child** - if set to true, a child band is placed automatically below its parent.



## Printable Components



There are 13 types of printable components that can be placed on a band, the Selection Pointer is simply there to set the cursor back to normal if you are in the middle of a drag operation and don't wish to continue with the drop.

1. Text Label
2. Text Memo
3. (DB) Expression
4. (DB) Expression Memo
5. System Item
6. Box Shape
7. Vertical Line
8. Horizontal line
9. Image
10. DB Jpeg Image
11. DB Plain Text
12. DB Rich Text
13. DB Lookup

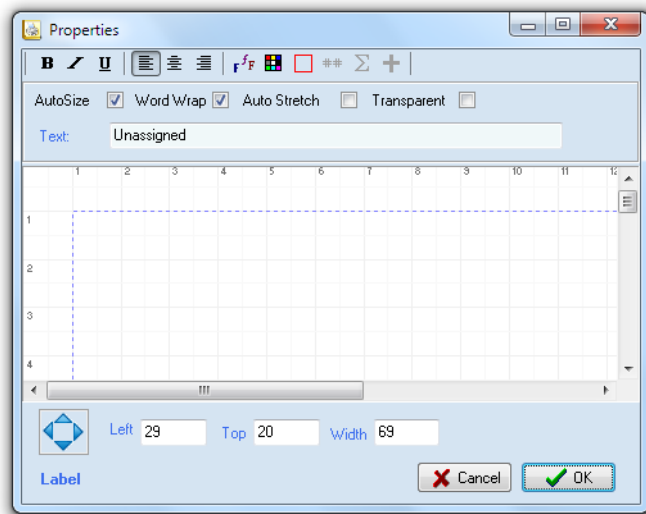
## 1. Text Label

Use a Text Label to put static text onto a page, for example a field identifier or document type such as “QUOTE”.

**Auto Size** – If true, the label will automatically extend its width to fit the included text characters.

**Word Wrap** - If true, the label will attempt to wrap any words that are outside the boundaries of the label area if auto size is not set.

**Auto Stretch** – If true, the label will stretch vertically to expose text that is outside of the label boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.



**Transparent** - if set to true, the label background assumes the colour of any object beneath.

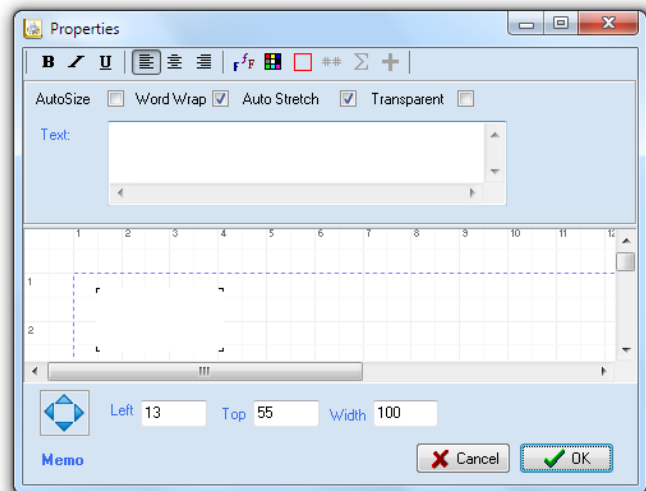
## 2. Text Memo

Use a Text Memo to put multiline static text onto a page, for example a statement of trading terms.

**Auto Size** – If true, the label will automatically extend its width to fit the included text characters.

**Word Wrap** - If true, the label will attempt to wrap any words that are outside the boundaries of the label area if auto size is not set.

**Auto Stretch** – If true, the label will stretch vertically to expose text that is outside of the label boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.



**Transparent** - if set to true, the label background assumes the colour of any object beneath.

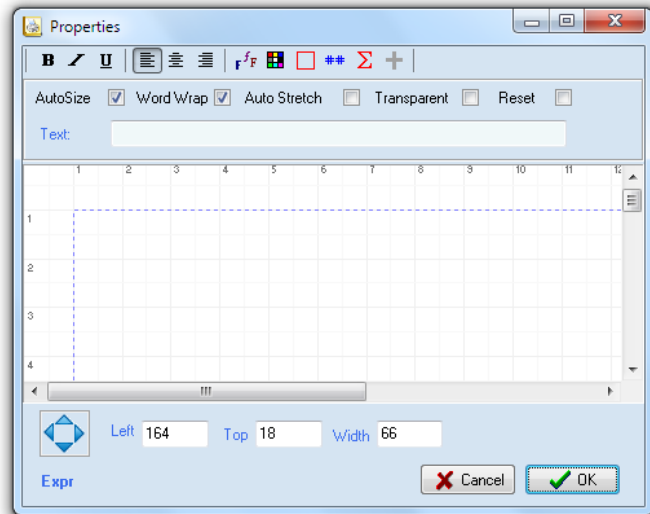
### 3. (DB) Expression

Use an Expression to put text onto a page that requires some kind of formula. The formula can include database fields and any of the functions provided in the Expression Editor which is invoked by clicking the E button.

**Auto Size** – If true, the expression will automatically extend its width to fit the expression result text characters.

**Word Wrap** - If true, the expression will attempt to wrap any words that are outside the boundaries of the expression area if auto size is not set.

**Auto Stretch** – If true, the expression will stretch vertically to expose text that is outside of the expression boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.



**Transparent** - if set to true, the expression background assumes the colour of any object beneath.

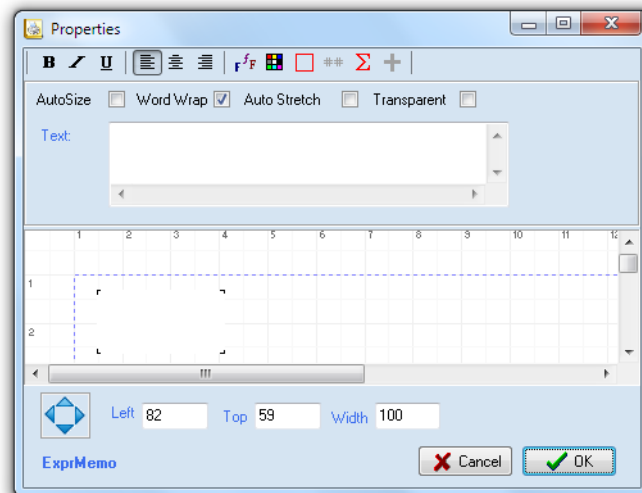
### 4. (DB) Expression Memo

Use an Expression Memo to put text onto a page that requires some kind of formula that produces multi-line results. The formula can include database memo fields and any of the functions provided in the Expression Editor which is invoked by clicking the E button.

**Auto Size** – If true, the expression memo will automatically extend its width to fit the included text characters.

**Word Wrap** - If true, the expression memo will attempt to wrap any words that are outside the boundaries of the expression memo area if auto size is not set.

**Auto Stretch** – If true, the expression memo will stretch vertically to expose text that is outside of the expression memo boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.



**Transparent** - if set to true, the expression memo background assumes the colour of any object beneath.

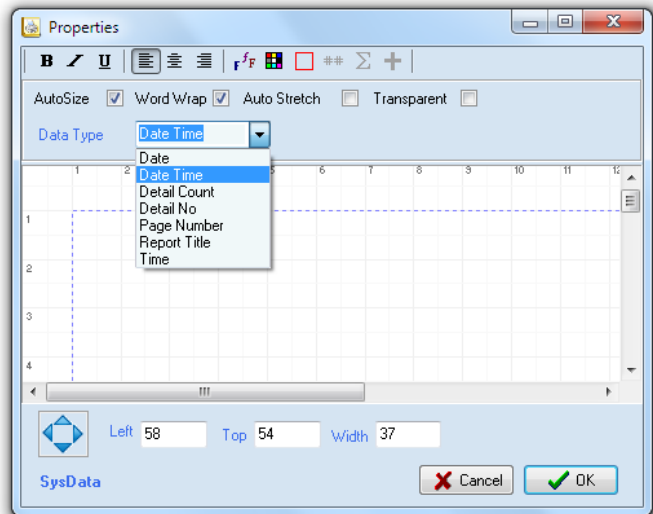
## 5. System Item

System items are predefined variables such as Date and Page Number that can be placed on the page wherever needed.

**Auto Size** – If true, the system item will automatically extend its width to fit the included text characters.

**Word Wrap** - If true, the system item will attempt to wrap any words that are outside the boundaries of the system item area if auto size is not set.

**Auto Stretch** – If true, the system item will stretch vertically to expose text that is outside of the system item boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.

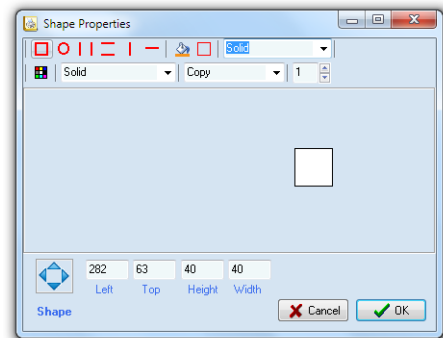


**Transparent** - if set to true, the system item background assumes the colour of any object beneath

## 6. Box Shape

A box shape provides a rectangle or circle that can be used to put borders or coloured areas round other objects. Care should be taken to make sure shapes are placed on the form before any objects that will be required to sit on top of them.

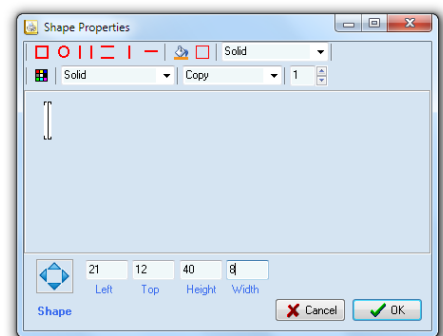
A toolbar provides buttons that are used to control borders, shading, fill and font colour.



## 7. Vertical Line

A vertical line shape provides a single line that can be used separate or delineate graphically, other objects on the page.

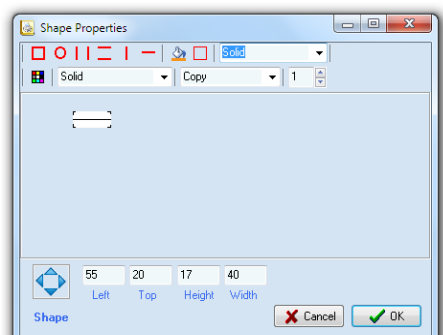
A toolbar provides buttons that are used to control borders, shading, fill and font colour.



## 8. Horizontal line

A horizontal line shape provides a single line that can be used separate or delineate graphically other objects on the page.

A toolbar provides buttons that are used to control borders, shading, fill and font colour.

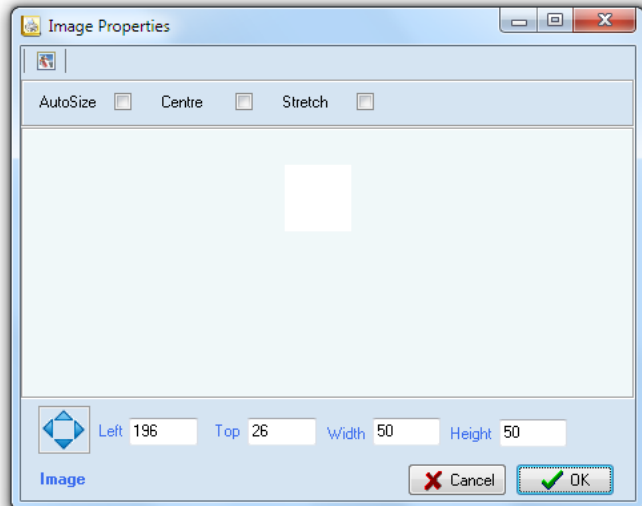


## 9. Image

This component lets you place a bitmap or other graphic on a report such as a logo. It has an Image editor which allows you to load a bitmap or other graphic into the space you have created for it.

Use the Autosize, Stretch and Center properties to display the graphic where you want.

Note that the image can only be moved by using the border positioning.

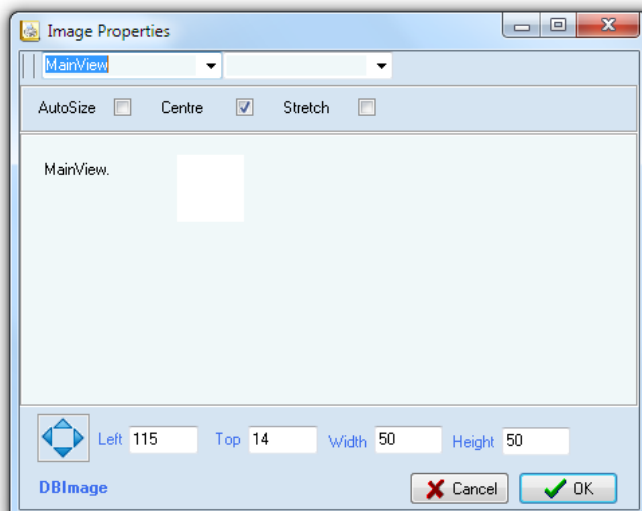


## 10. DB Jpeg Image

This component lets you place a Jpeg database graphic on a report. It has database dropdowns that allow you to choose a field to display in the space you have created for it.

Use the Autosize, Stretch and Center properties to display the graphic where you want.

Note that the image can only be moved by using the border positioning.



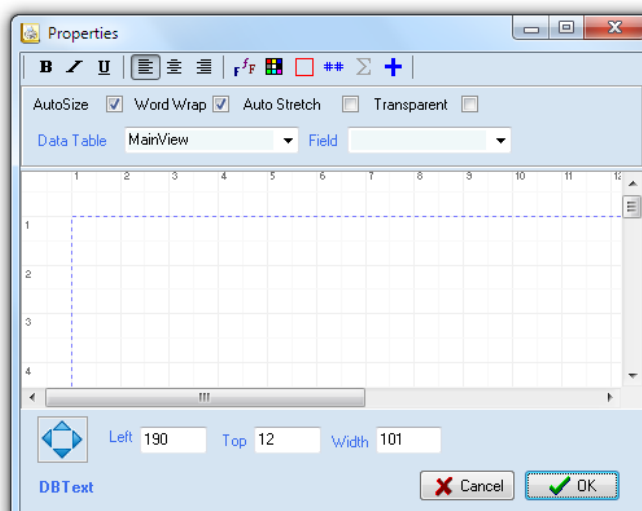
## 11. DB Plain Text

Use a DB Text object to display plain (non-rich) database text or numeric fields on the page.

**Auto Size** – If true, the system item will automatically extend its width to fit the included text characters.

**Word Wrap** - If true, the system item will attempt to wrap any words that are outside the boundaries of the system item area if auto size is not set.

**Auto Stretch** – If true, the system item will stretch vertically to expose text that is outside of the system item boundaries. This behavior will be influenced by the Auto Size and Word Wrap properties.



**Transparent** - if set to true, the system item background assumes the colour of any object beneath



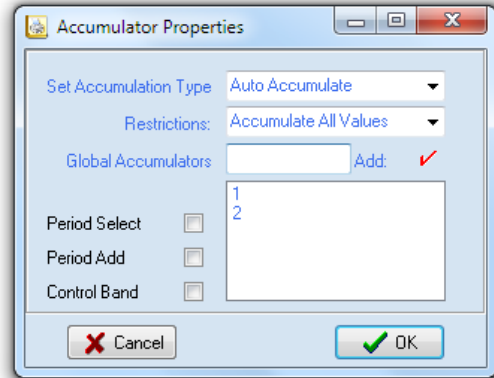
## Global Accumulators

The DB Text object has a special feature that provides Global Accumulators. Accumulators will allow numeric field data to accumulate to a pre-defined variable as the band iterates through the database records. There are 100 global accumulators pre-defined in Report Designer so all you need to do is use them.

These variables are referred to as “ACCUM( and a number)” and can be displayed anywhere on a page using an Expression object. Multiple DB Text objects can accumulate to the same ACCUM number.

Commonly these are used to sum columns of numeric data into sub-totals or grand totals. A Child band can clear an accumulator after printing; this is controlled in the band properties itself.

**Note:** The three check boxes are only for use in our Accounts application General Ledger and not applicable to Quotemaster.

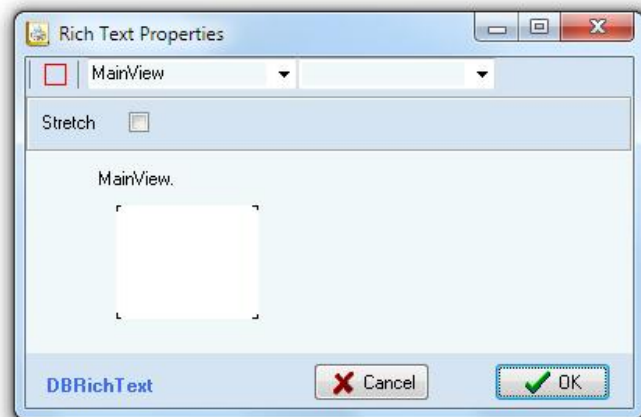


## 12. DB Rich Text

Use a DB Rich Text object to display database fields that have been stored in the database in rich text format such as having been pasted into a Quote Blurb from Microsoft Word.

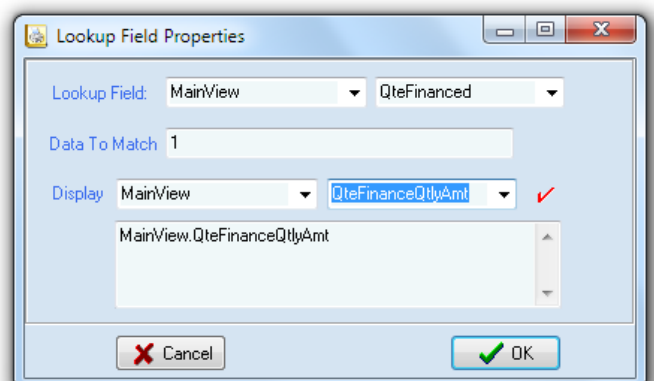
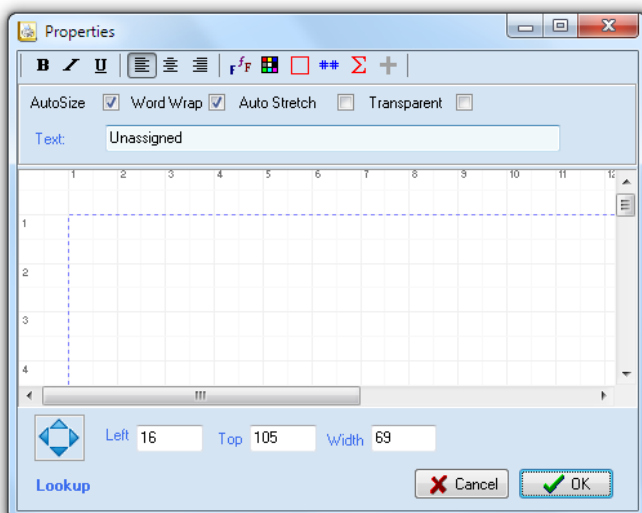
Generally these fields contain paragraphs of text and usually fill a large width portion of a band. By setting Stretch to on, the DB Rich Text object will automatically resize vertically to accommodate the contained text.

Note that the DB Rich Text object can only be moved by using the border positioning

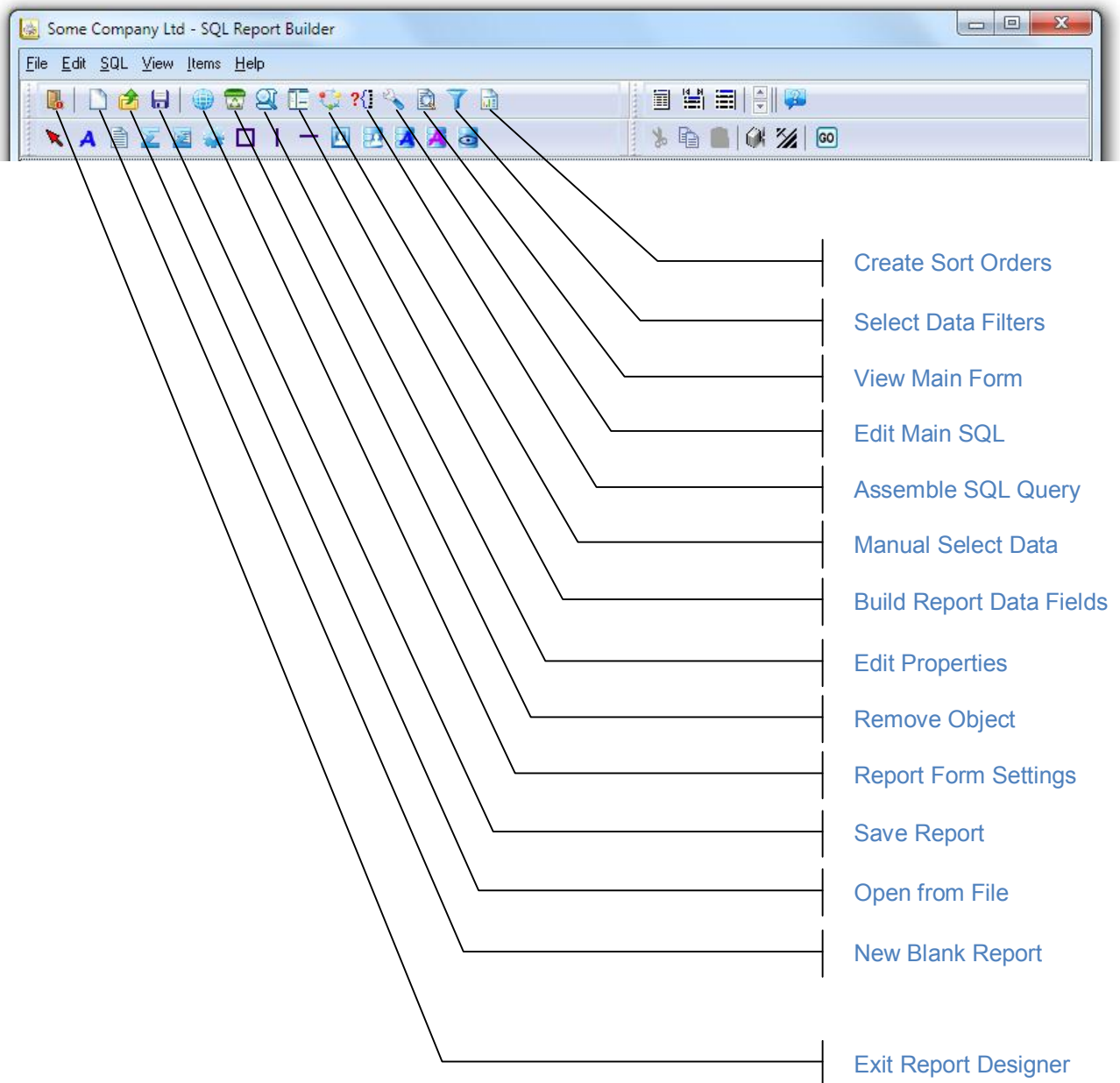


## 13. DB Lookup

A DB Lookup is really a DB Text object with a special facility to allow the display of one database field depending on the data contained in another database field.



## Report Designer Controls



### **New Blank Report**

Discards any current form and sets a new blank page.

### **Open from File**

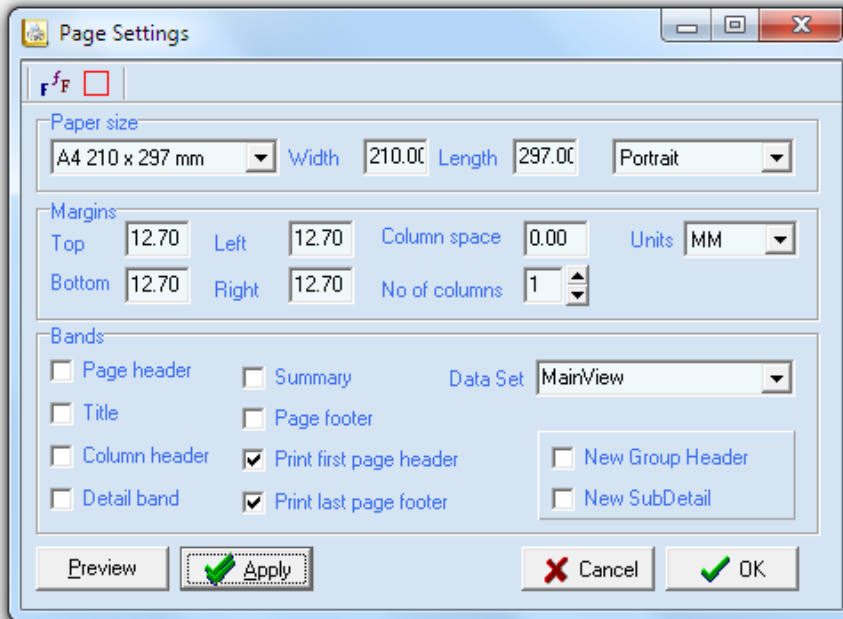
Load an existing saved report into the editor.

### **Save Report**

Save the current report to disk.

## Report Form Settings

Opens a window to configure the current report settings. Use this to create the initial format and other settings before starting to design the report body.



## Remove Object

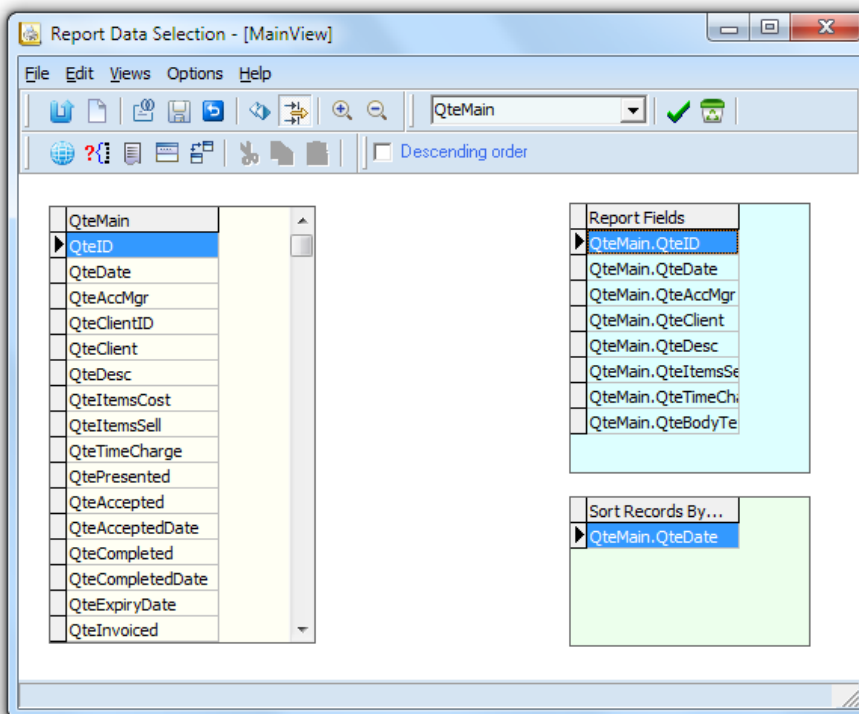
Removes the currently selected object from the page.

## Edit Properties

Invokes a property editor for the currently selected object.

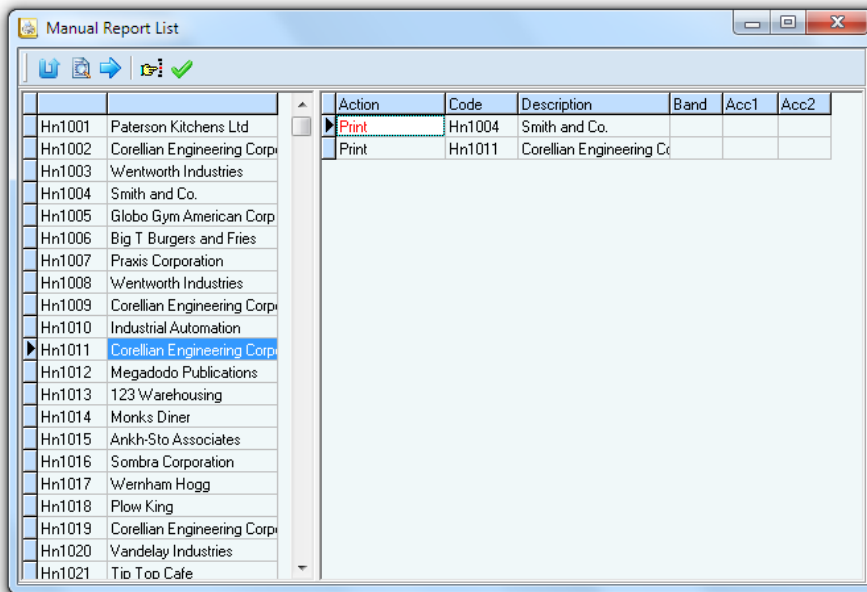
## Build Report Data Fields

Each band can operate from a view of the database tables and here is where you can define the views and fields that the report can display. Behind each view is an SQL query that produces the data selected for the report, all of which can be managed from this window.



## Manual Select Data

This feature allows specific records to be selected to print in the report. From the left hand grid you can drag the selection to the right hand grid. This feature is really intended for printing a chart of accounts in our General Ledger and probably not suited for use in Quotemaster.

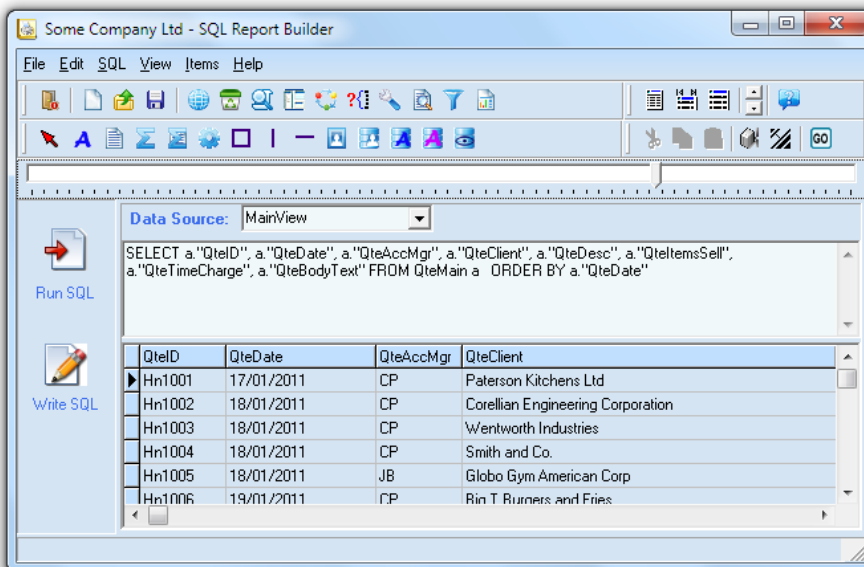


## Assemble SQL Query

Clicking this button assembles an SQL query based on the report data selection.

## Edit Main SQL

After assembling the query with the process above, this window allows you to review the results and if necessary, manually edit the query.



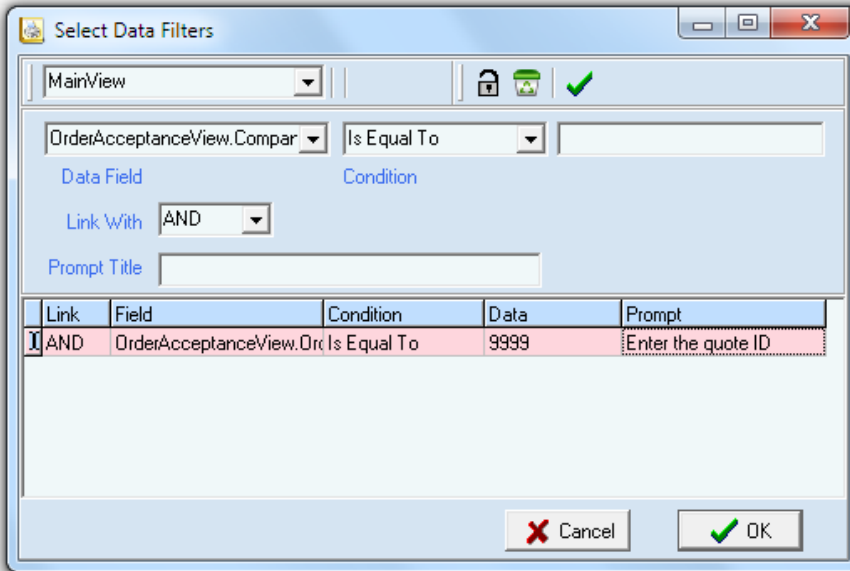
## View Main Form

Clicking this button simply shows the main design form.

## Select Data Filters

For each of the data view you define, you can create filters to control the data to be presented on the report. Multiple filters can be created for each view and a prompt can request user input at the time of executing the report.

Built in parameters are passed and made available as numeric variable names as in the example below where the QuoteID is sent as variable name “9999” and will be translated unless manual input overrides it.



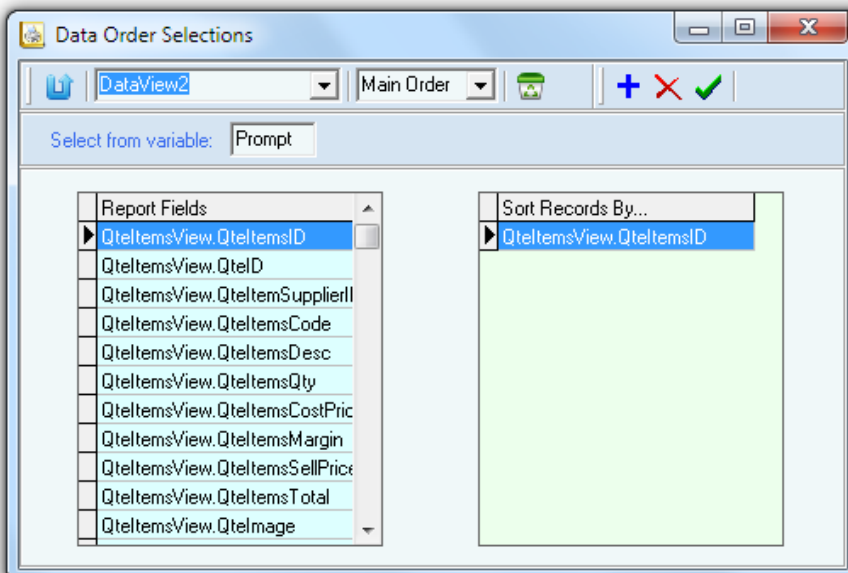
The built in variables sent from **Quotemaster** are...

- 9999 which is the currently selected **QuoteID**
- 9998 which is the **BranchID** of the quote Account Manager

These two allow a single quote to be printed along with the correct branch address.

## Create Sort Orders

This window allows manual manipulation of the sort order defined while creating the data views. It is not necessary to do this here if the views are created correctly to start with, also the views can be edited rather than do it here. Where it is necessary is when two or more views are linked together to produce a single union.



## Creating a report from scratch

Let's suppose we need a report containing all the orders that have a time charge with the following criteria....

1. Show the time items by Sales Order.
2. Total the time items for the Sales Order (Description, Hrs, Rate, Total).
3. Total the time items for the selected range ( Hrs, Total).

This would be a typical Master/Detail relationship with Summary.

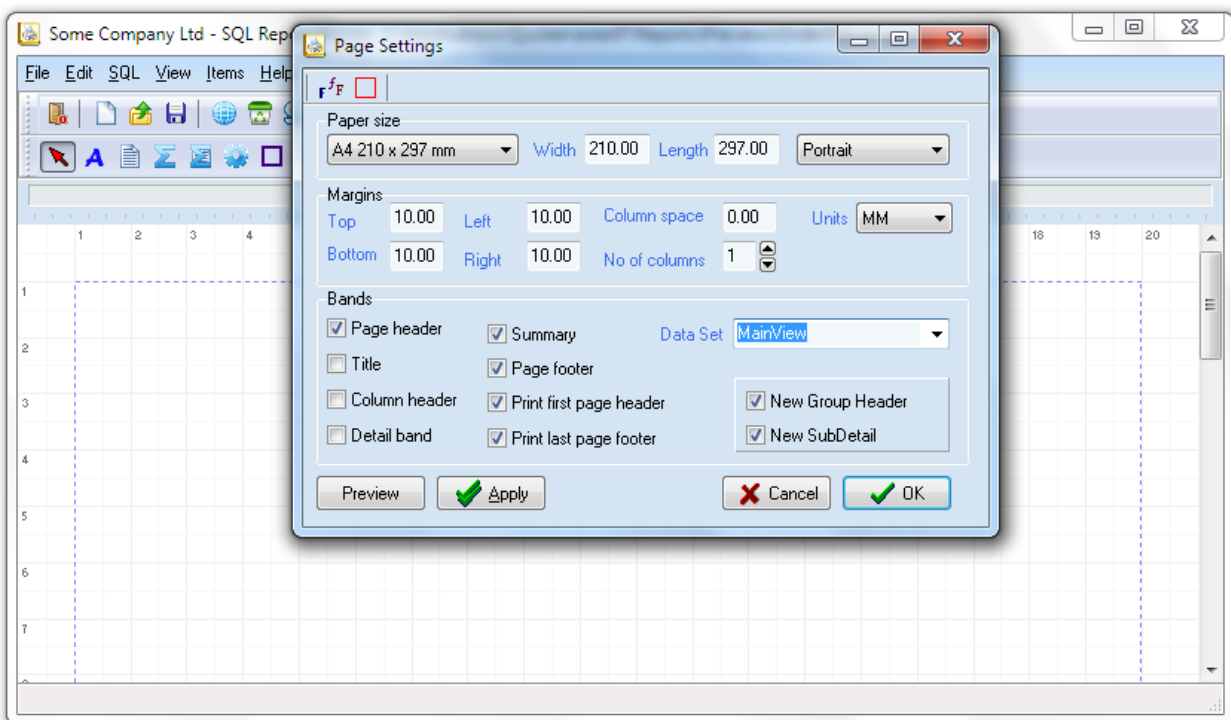
The bands that would be best the fit are...

1. Header
2. Group Header (for the order information)
3. Sub Detail (for the order items detail)
4. Summary (for grand totals)
5. Page Footer (for page number)

So let's go through the process step by step...

### Set the report global settings

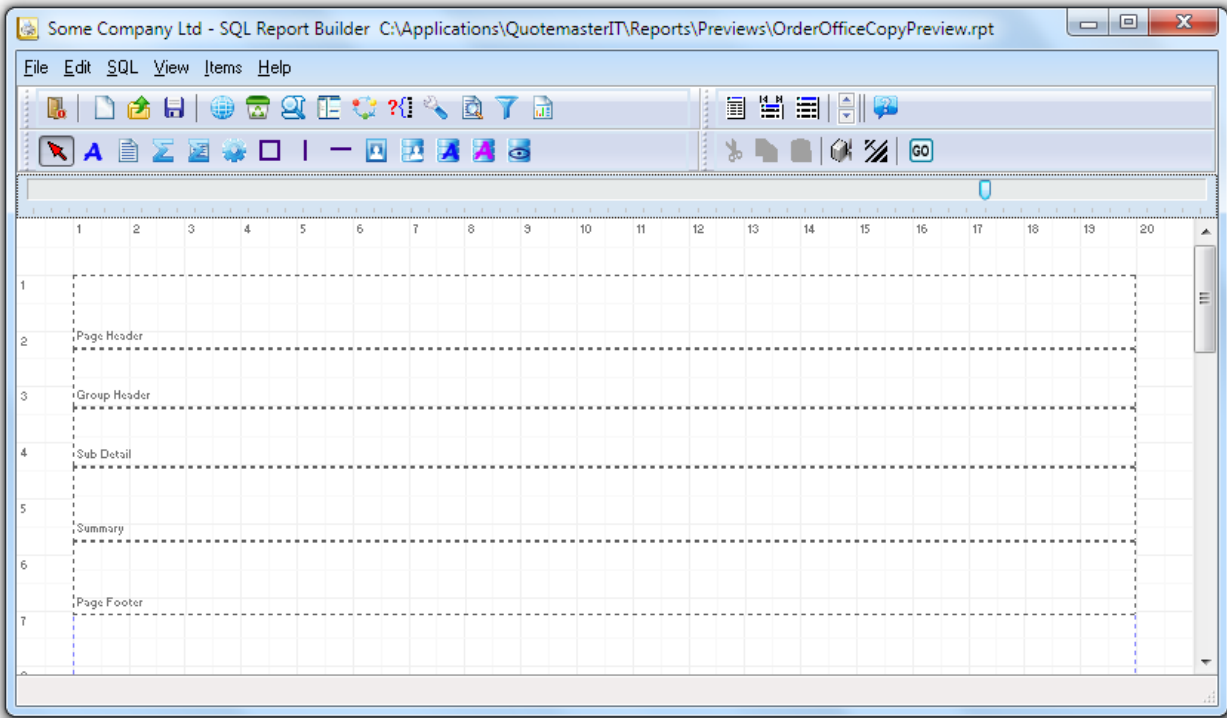
Use the Setup Report Form button to open the settings window and choose as per the screenshot below.



Don't forget to nominate the default Data Set which is yet to be created.

You may alter the margins if you wish although generally there is no need.

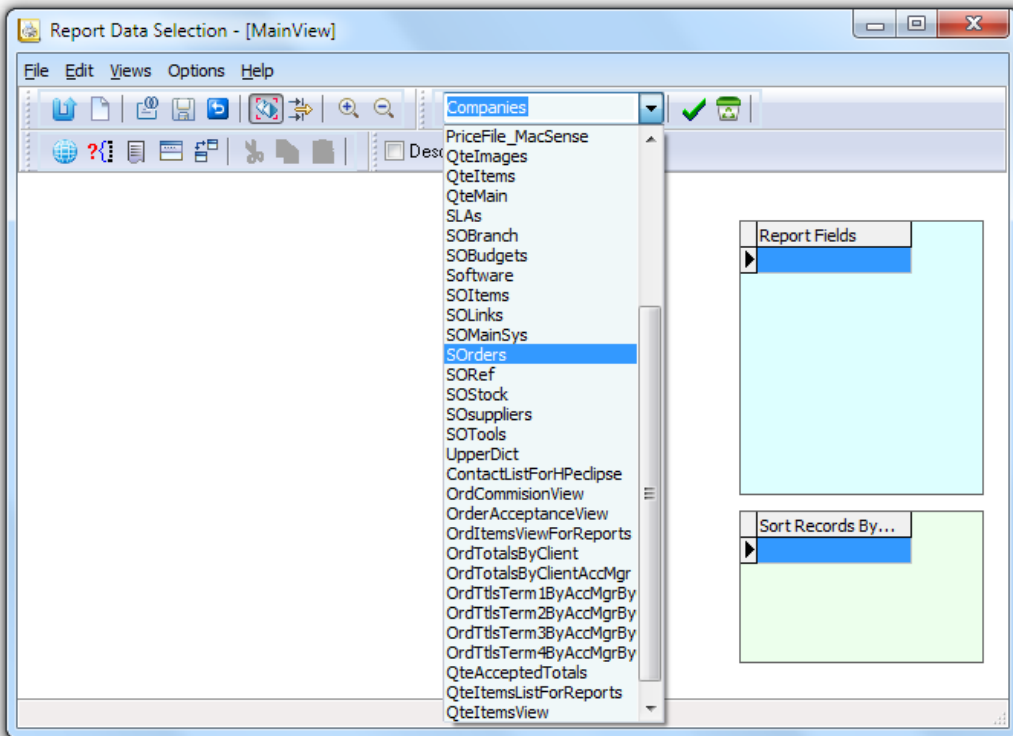
When you click the OK button you should end up with this...



Next we need to set up the data views of the tables that give us the information we need for the report. Some knowledge of the tables is needed and you can find this detail in the appendix of this document, however in this case we need to have access to the SOrders and SOItems tables.

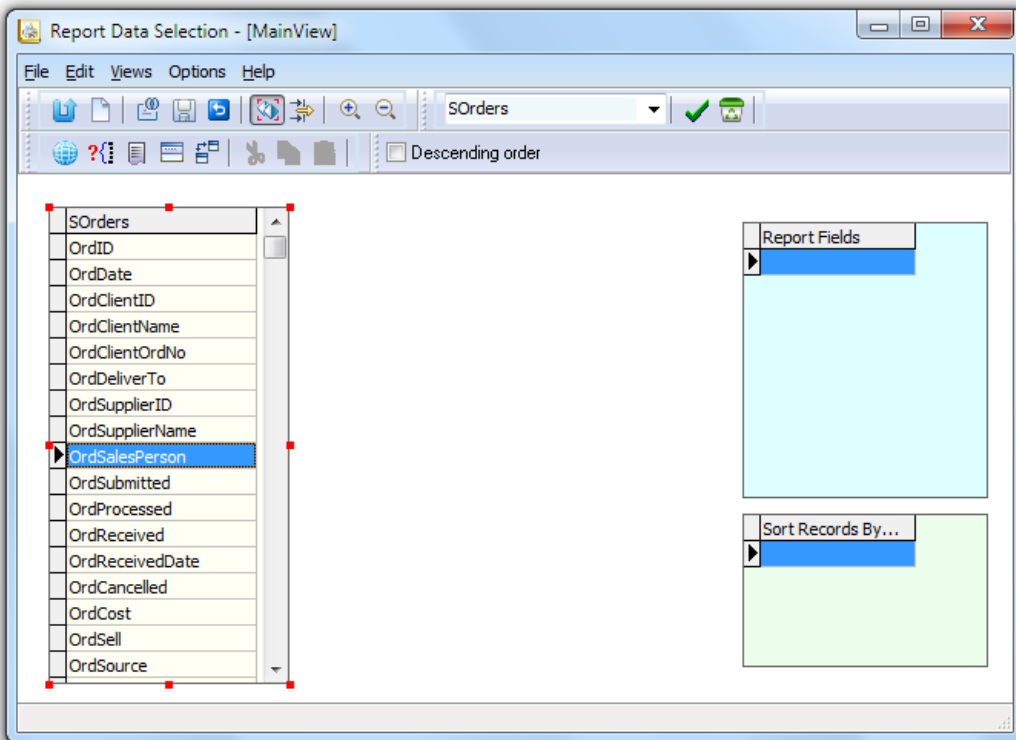
### **Create the Data views**

Click on the Build Report Data Query button to open up the visual table window.



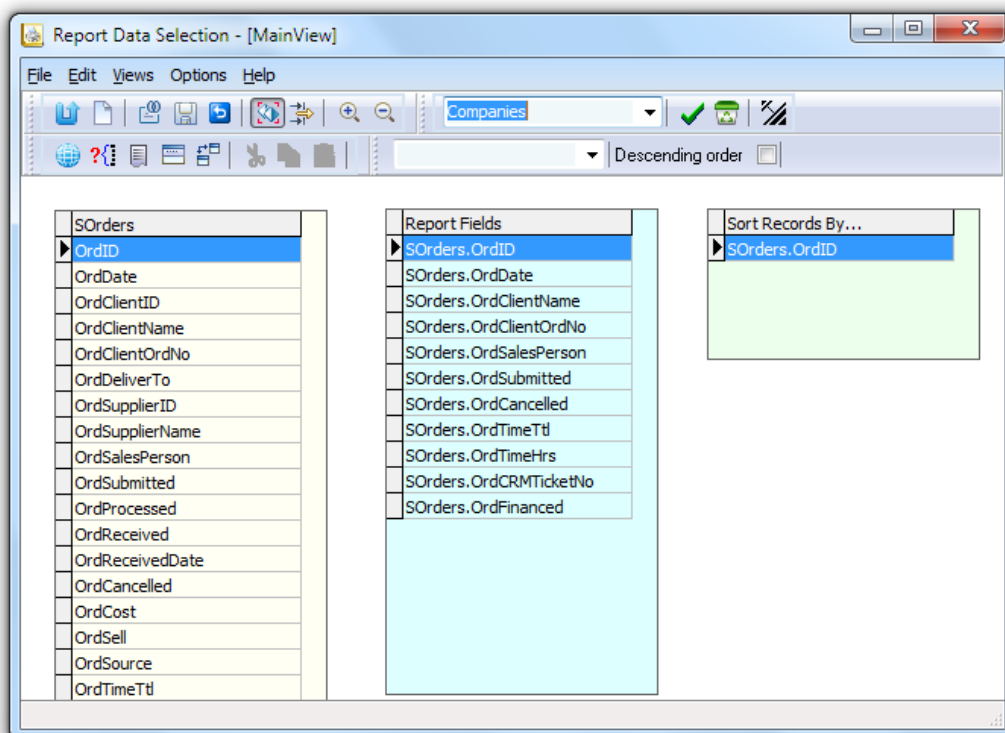
Use the tables drop-down to select SOrders then click the green tick button to insert the table into the form.

Once you have the table on the form you may resize the object for better viewing by dragging the corner handles.



From here, the general idea is to drag the fields you need in the report onto the Report Fields frame and the sort order fields onto the 'Sort Records By...' frame.

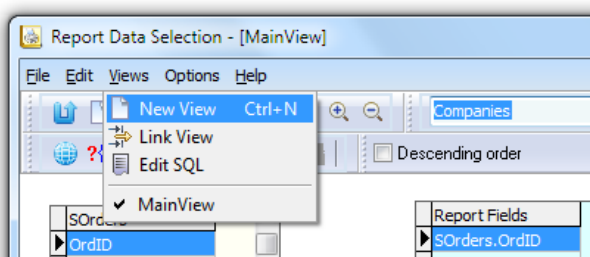
To do this you will first have to click the 'Drag Fields from one table to another' button to allow dragging to take place. You may simply drag every available field or by being more selective to will minimize the work that has to be done by SQL in producing the report.



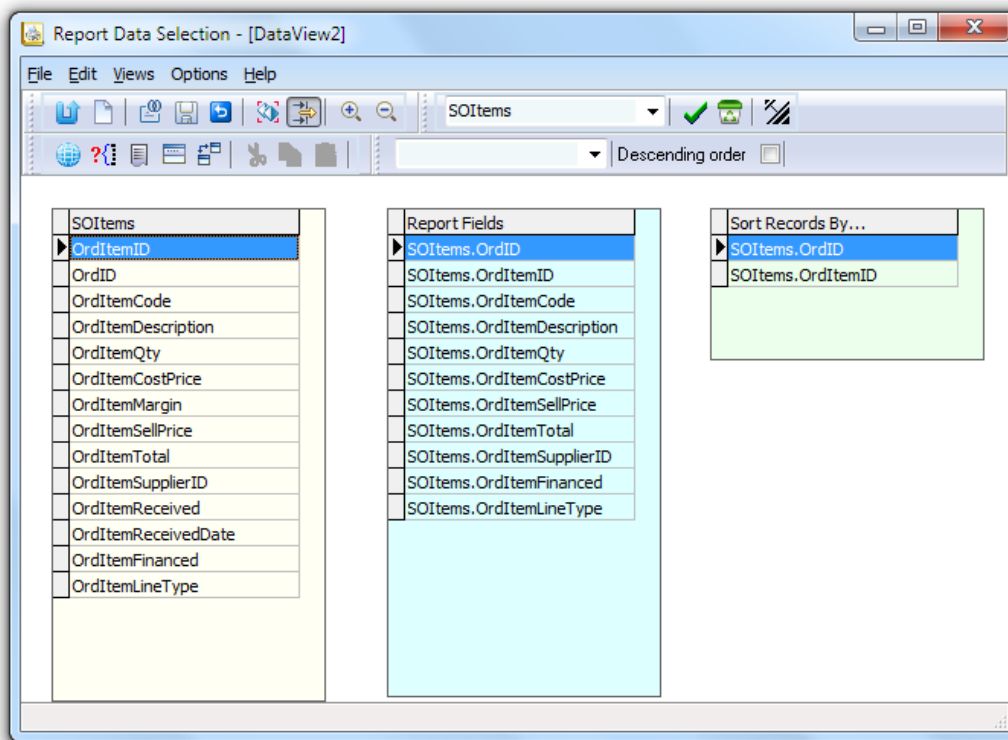
You may then close the window or in this case we need to create a second view, so continue...



Click on New View to create DataView2 with an empty form.



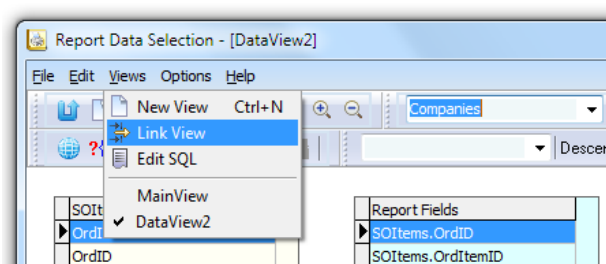
This time select the SOItems table and drag on the report fields as per the screenshot below...




... and then close the window to return to the main designer window.

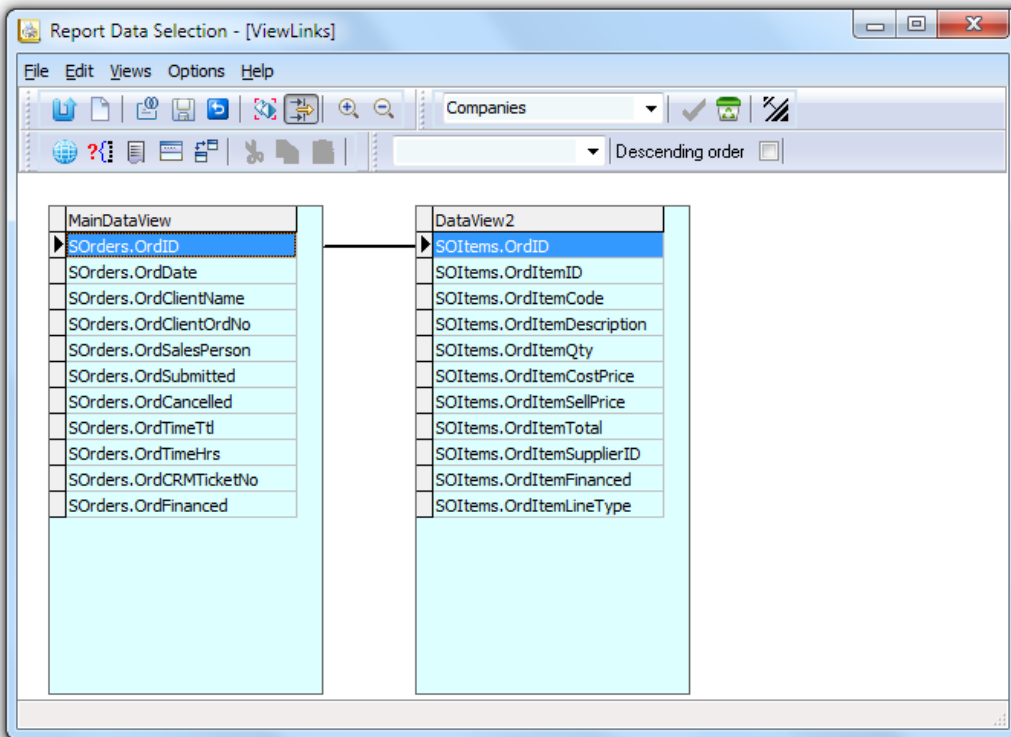
Now that we have the two data views, we need to link them together so that they print in the correct order as a Master/Detail.

Click on the **Build Report Data Query** button to open up the visual table window. This time click on the **Link View** in the Views drop down.



This will bring up both of the data views together in one window (see next page)

Click the ‘**Drag fields from one table to another**’  button to allow drag operation and drag the **SOrders.OrdID** field from the left hand table and drop it onto the right hand table’s **SOrders.OrdID** field. After a second a line will appear connecting the two.



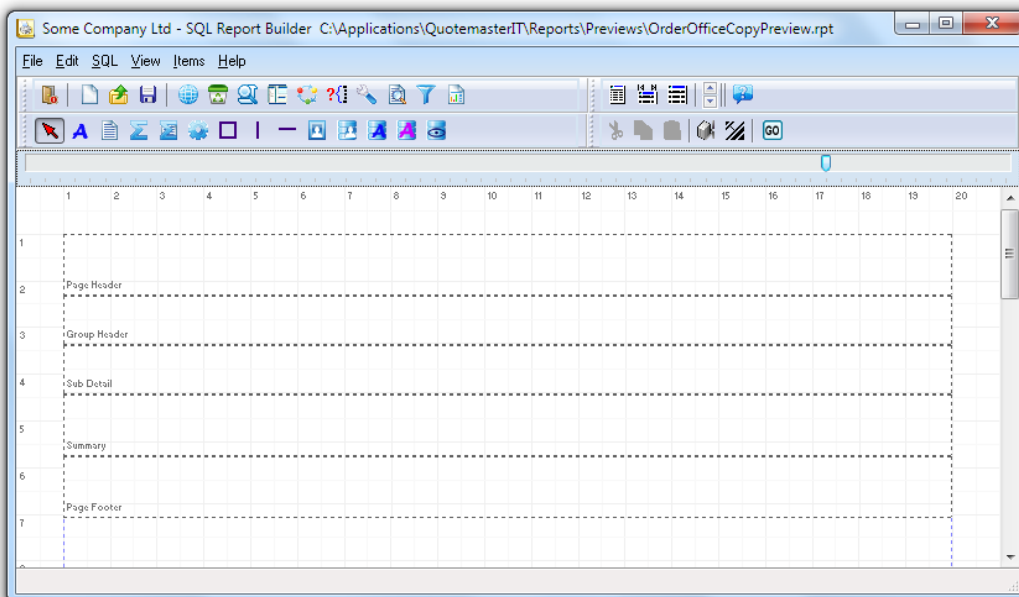
### Explanation of Links.

What we have just done is to create the connection between the master data view (MainDataView) and the detail data view (DataView2) using the OrdID field which is common to both.

For each iteration of the MainDataView, SQL will look up the matching data in DataView2 which has the same order number.

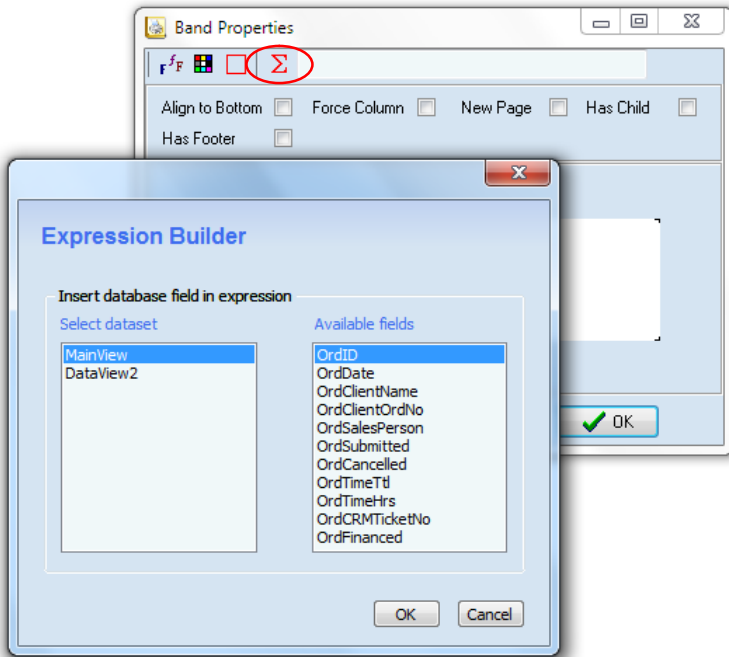
We will use this information in the band assignments to follow.

You may now close this window and return to the bands main window.



## Setting the band properties

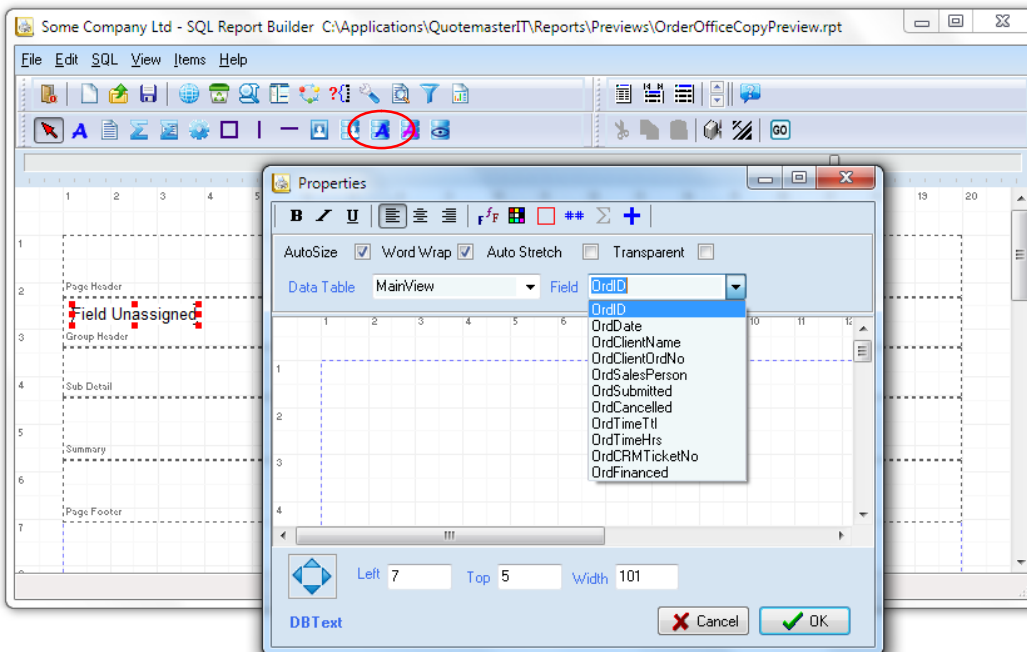
RightClick on the **Group Header band** and use the **Expression** button to nominate **OrdID** from the **Mainview** as the field to base the group on.



Next RightClick on the Sub Detail band and nominate Dataview2 as its provider. This is similar to the above but there is no Expression button for Sub Detail bands.

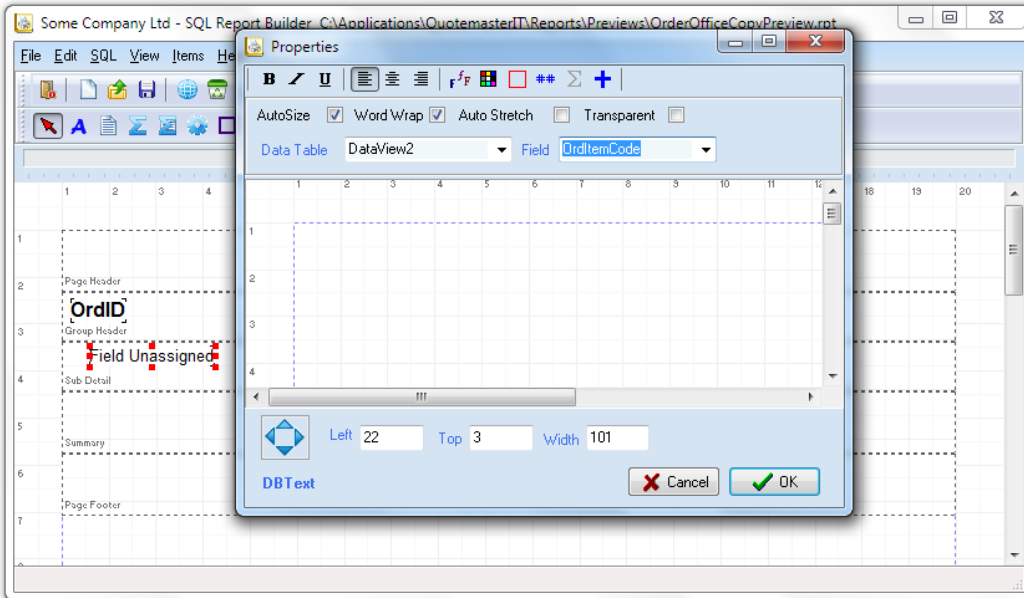
## Adding fields to the bands

Next click on the DB Text button then click in the Group Header band to drop a field on the band.



Then RightClick on the field to edit its properties. Select the OrdID field from Mainview and alter its font to make is size 12, black and bold.

Again click on the DB Text button then click in the Sub Detail band and choose Dataview2 to locate the OrdItemCode which is the Vendor Part Number.



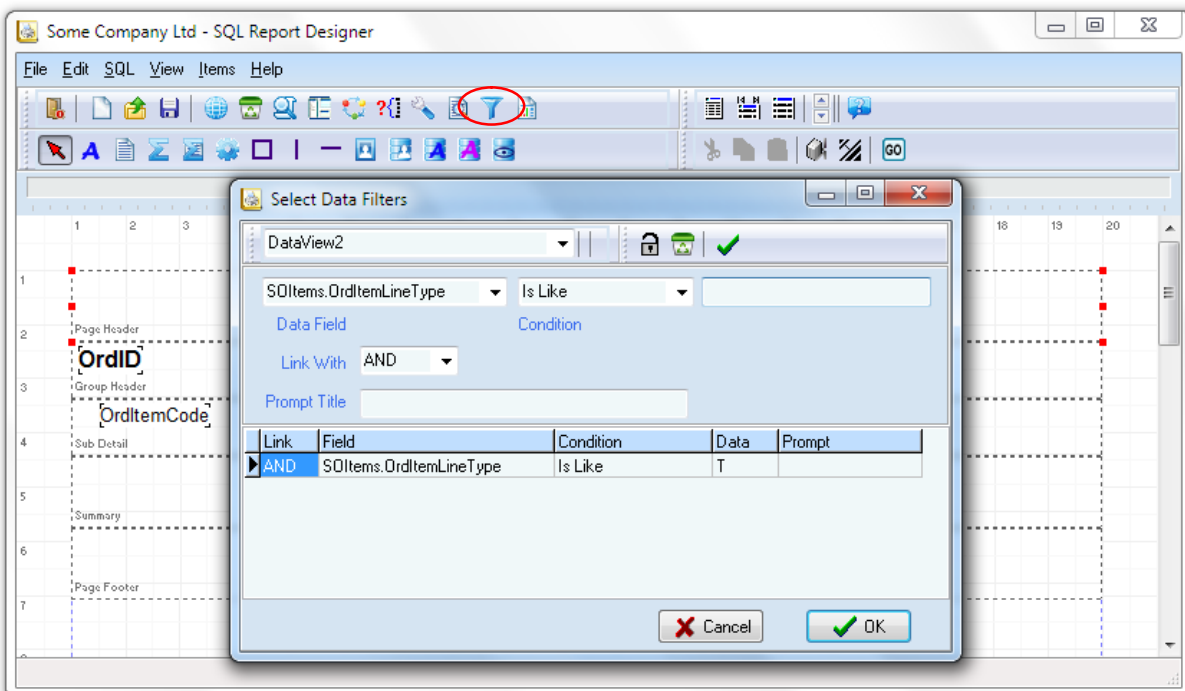
This gives us a couple of active fields to test the report, but before we do there is one more thing that needs our attention....

### Setting Report Filters

Make sure the padlock is off and click on the Select Data Filters button then nominate DataView2 as the provider, select SOItems.OrdItemCode from the fields drop-down and place a T in the data column.

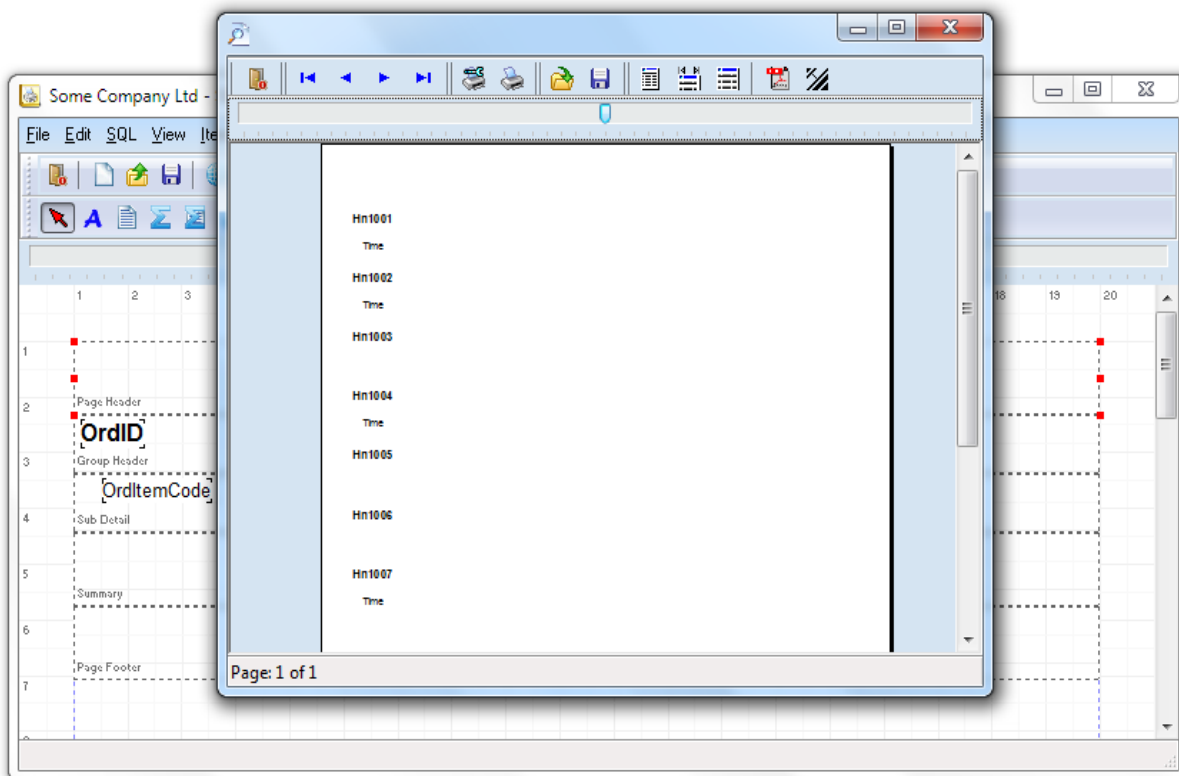
When you then click the green tick, the built up detail will be added to the grid at the bottom of the window. You could have typed in the information directly into the grid but it's much easier this way.

What we are doing here is to tell the Sub Detail band to filter all the items records to only those whose Line Type is T for Time.



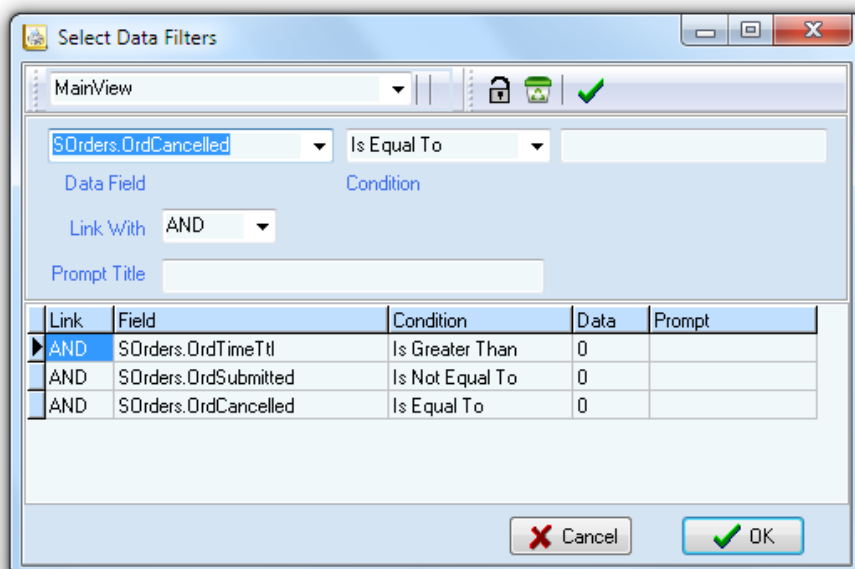
You will notice that we have used the *Is Like* operator, this is better for text based selection rather than *Is Equal To*. Keep in mind that Is Like will match any text that contains the search characters.

Now if you click the GO button you will see that our report has the basic results we require and only needs expanding on the content.



At this point you should save the report and place it in the *Other Reports* folder. Call it **Orders with Time**.

You will notice that the report data lists orders that have no time charges – we can use the filter to select MainView items that have a Time Total greater than zero...



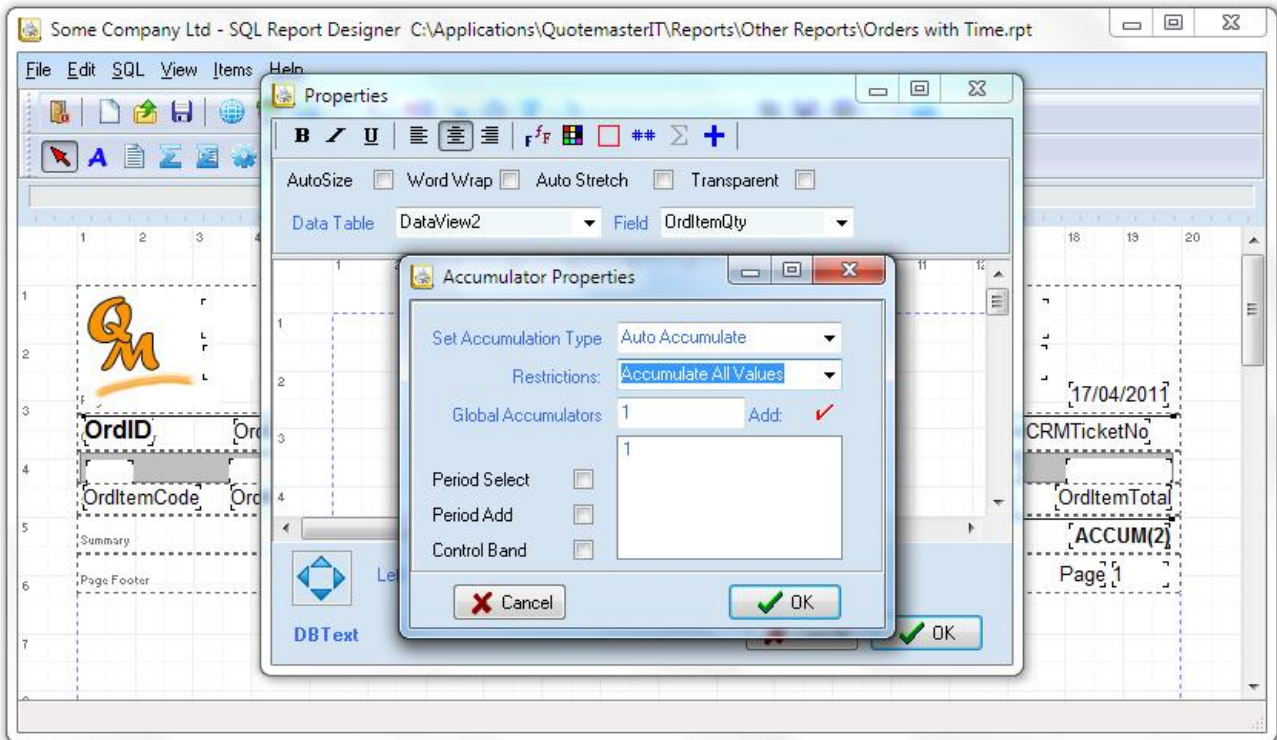
Add a couple more filters and we have the final result.

Now all that remains is to dress the report up with additional data and presentation material.

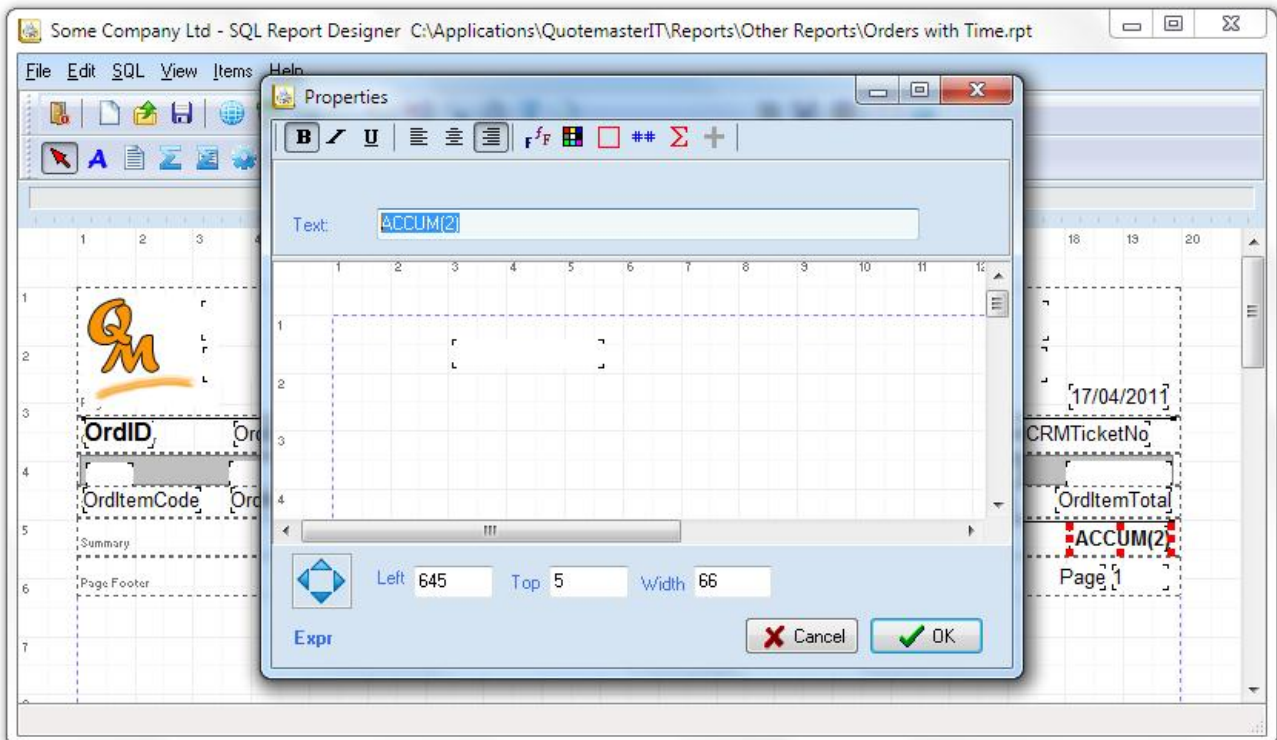
## Setting Global Accumulators for grand totals

We have added the window dressing by telling the Sub Detail band that it has a header and placing titles in as Labels, placed an image in the Header plus more labels and a system date, now there is one more critical thing to do in order to get column totals.

In the *OrdItemQty* field we need to tell the band to accumulate the contents of the field as it iterates through the report. This is done by nominating a Global Accumulator ACCUM() number and setting it to Auto Accumulate as per the screenshot below. The same was done with the *OrdItemTotal* field in which we nominated the Global Accumulator number 2



Place an Expression on the Summary band and simply set it's Text to ACCUM(and the number of the nominated Global Accumulator). Dress it up and that's all there is to using accumulators.



By clicking the GO button you should now see the report complete with summary totals.

**Some Company Ltd**  
**Quotes with Installation**  
19/04/2011

Code	Description	Qty	Cost	Sell	Line Total
<b>Hn1001</b>	21/01/2011 Wentworth Industries		CP	CRM 0123456	
Time	Installation and Deployment	7	\$120.00	\$120.00	\$840.00
<b>Hn1002</b>	23/01/2011 Industrial Automation		CP	CRM 0123556	
Time	Onsite support	2	\$95.00	\$95.00	\$237.50
<b>Hn1004</b>	23/01/2011 Industrial Automation		CP	CRM 012346	
Time	Installation and Deployment	3	\$95.00	\$95.00	\$285.00
		<b>12</b>			<b>\$1,362.50</b>

Page: 1 of 1

## Appendix – Key Tables

Companies			
The Companies table is the main company/client name that parents Locations and People tables.			
Field Name	Type	Length	Comment
CompanyId	WideString	41	Unique Identifier
CompanyName	WideString	101	
Self	Boolean	1	Not Used Yet
Client	Boolean	1	Not Used Yet
Supplier	Boolean	1	Not Used Yet
Warning	Boolean	1	Not Used Yet
CompanyTypeld	WideString	17	Not Used Yet
Flags	Integer	3	Not Used Yet
DefaultPriority	Integer	3	Not Used Yet
AccountManagerId	WideString	17	Assigned manager ID
Info1	WideString	511	Not Used Yet
Info2	WideString	511	Not Used Yet
Info3	WideString	511	Not Used Yet
Info4	WideString	511	Not Used Yet
Tag1	Boolean	1	User definable tag for reporting
Tag2	Boolean	1	User definable tag for reporting
Tag3	Boolean	1	User definable tag for reporting
Tag4	Boolean	1	User definable tag for reporting
Notes	WideString	8001	General notes
Deleted	Boolean	1	Not Used Yet
LastModified	DateTime	7	Not Used Yet
SupportPlanId	WideString	17	Not Used Yet
SupportStart	DateTime	7	Not Used Yet
SupportExpiry	DateTime	7	Not Used Yet
QuotaStartDay	Integer	3	Not Used Yet
QuotaStartMonth	Integer	3	Not Used Yet
RequestsThisPeriod	Integer	3	Not Used Yet
RequestsCounted	DateTime	7	Not Used Yet
TimeThisPeriod	Integer	3	Not Used Yet
TimeCounted	DateTime	7	Not Used Yet
WarningInfo	WideString	511	Alert text - not used yet
CostAccount	WideString	101	Not Used Yet
ChargeAccount	WideString	101	Not Used Yet
Created	DateTime	7	Not Used Yet
DefDocPath	WideString	511	Not Used Yet
TimeZoneld	Integer	3	Not Used Yet
Category1Id	Integer	3	Not Used Yet
Category2Id	Integer	3	Not Used Yet
Category3Id	Integer	3	Not Used Yet
Category4Id	Integer	3	Not Used Yet



Locations			
<b>The address and location info for Companies. Companies can have multiple locations; the default location is usually the head office.</b>			
Field Name	Type	Length	Comment
LocationId	String	8	Location Unique Identifier
CompanyId	String	20	Company link
PersonId	String	8	Not used yet
LocationTypeId	String	8	Not used yet
Address	Memo	-1	
Postcode	String	20	
Country	String	50	Not used yet
Telephone	String	50	
Fax	String	50	
BusinessHours	String	255	Not used yet
AccessLimitations	String	255	Not used yet
DefaultLocation	Boolean	1	Sets the main location
DefaultPriority	Integer	3	Not used yet
AccountManagerId	String	8	Not used yet
Notes	Memo	-1	General notes
Deleted	Boolean	1	Not used yet
LastModified	DateTime	7	Not used yet
SupportPlanId	String	8	Not used yet
SupportStart	DateTime	7	Not used yet
SupportExpiry	DateTime	7	Not used yet
QuotaStartDay	Integer	3	Not used yet
QuotaStartMonth	Integer	3	Not used yet
RequestsThisPeriod	Integer	3	Not used yet
RequestsCounted	DateTime	7	Not used yet
TimeThisPeriod	Integer	3	Not used yet
TimeCounted	DateTime	7	Not used yet
CostAccount	String	50	Not used yet
ChargeAccount	String	50	Not used yet
Info1	String	255	Not used yet
Info2	String	255	Not used yet
Info3	String	255	Not used yet
Info4	String	255	Not used yet
Created	DateTime	7	Not used yet
TimeZoneId	Integer	3	Not used yet
Warning	Boolean	1	Use Alert tag - Not used yet
WarningInfo	String	255	Alert text
Category1Id	Integer	3	Not used yet
Category2Id	Integer	3	Not used yet
Category3Id	Integer	3	Not used yet
Category4Id	Integer	3	Not used yet

People			
People are the employees of the Location that belong to the Company.			
Field Name	Type	Length	Comment
PersonId	String	8	Person Unique Identifier
CompanyId	String	20	Company Link ID
LocationId	String	8	Location link ID
BranchId	String	8	Branch ID for System Users
SupportGroupId	String	8	Not used yet
WorkPatternId	String	8	Not used yet
JobTitle	String	50	Not used yet
Title	String	20	Job Title
FirstName	String	50	
MiddleInitial	String	5	Not used yet
LastName	String	50	
Suffix	String	50	Not used yet
Telephone	String	50	
Mobile	String	50	
Fax	String	50	
Email	String	255	
Login	String	50	Not used yet
Administrator	Boolean	1	Not used yet
Manager	Boolean	1	Not used yet
SystemUser	Boolean	1	Shows person in dropdowns
CanBeAssignee	Boolean	1	Not used yet
CanBeRaiser	Boolean	1	Not used yet
Flags	Integer	3	Not used yet
DefaultPriority	Integer	3	Not used yet
AccountManager	String	8	Assigned account manager ID
Info1	String	255	Not used yet
Info2	String	255	Not used yet
Info3	String	255	Not used yet
Info4	String	255	Not used yet
Tag1	Boolean	1	User definable tag
Tag2	Boolean	1	User definable tag
Tag3	Boolean	1	User definable tag
Tag4	Boolean	1	User definable tag
Notes	Memo	-1	
Deleted	Boolean	1	Not used yet
LastModified	DateTime	7	Not used yet
WarningInfo	String	255	Alert text
CostAccount	String	50	Not used yet
ChargeAccount	String	50	Not used yet
Created	DateTime	7	Not used yet
UserGroupId	String	8	Not used yet
DepartmentId	String	8	Not used yet
Flags2	Integer	3	Not used yet
TimeZoneId	Integer	3	Not used yet
StatusSecurityLevel	Integer	3	Not used yet
KnownAs	String	50	Not used yet

Salutation	String	50	Salutation
Category1Id	Integer	3	Not used yet
Category2Id	Integer	3	Not used yet
Category3Id	Integer	3	Not used yet
Category4Id	Integer	3	Not used yet
LanguageId	String	8	Not used yet

Quotes			
Main Quote Table which parents Quote Items			
Field Name	Type	Length	Comment
QteID	String	10	Quote Unique Identifier
QteDate	DateTime	7	Date created
QteAccMgr	String	10	Account Manager ID
QteClientID	String	15	Client (Company) ID
QteClient	String	50	Client Name
QteDesc	String	60	Quote Title
QteItemsCost	Currency	7	Total Items Cost
QteItemsSell	Currency	7	Total Items Sell
QteTimeCharge	Currency	7	Total Time Items Sell
QtePresented	Boolean	1	Quote has been emailed
QteAccepted	Boolean	1	Quote has been converted
QteAcceptedDate	DateTime	7	Date accepted (converted)
QteCompleted	Boolean	1	Manual completed tag
QteCompletedDate	DateTime	7	Date of manual completion tag
QteExpiryDate	DateTime	7	Date due to expire
QteInvoiced	Boolean	1	Manual invoiced tag
QteFinanced	Boolean	1	Quote is financed
QteFinanceQtlyAmt	Currency	7	Finance Payment
QteFinanceableAmt	Currency	7	Financeable amount
QteFinanceType	String	10	Shows person in dropdowns
QteSourceURL	String	200	Quote was cloned from this ID
QteArchived	Boolean	1	Quote marked as Archived
QteHours	Float	7	Total time hours
QteCRMTicketNo	String	10	CRM Ticket Number
QteVendorQuote	String	20	Vendor special price quote No.
QteHitExpectation	String	3	Percent estimate of success
QteBodyText	Memo	-1	Quote blurb text
QteCreator	String	50	ID of Person who created quote
QteRegion	String	2	Branch ID as Region
QtePrivateNotes	Memo	-1	Private Notes
QteTagged	Boolean	1	Manual user tag
QteVendorQteRequested	Boolean	1	A request for price was emailed
QteLocationID	String	8	Location ID for addressing
QtePrintHours	Boolean	1	Print hours on quotes flag

QuoteItems			
Items of a quote			
Field Name	Type	Length	Comment
QteltemsID	String	10	Quote Item Unique Identifier
QtelD	String	10	Parent Quote ID
QteltemSupplierID	String	20	Item Supplier ID
QteltemsCode	String	25	Vendor part No
QteltemsDesc	Memo	-1	Item description text
QteltemsQty	Float	7	Quantity
QteltemsCostPrice	Currency	7	Cost Price
QteltemsMargin	Float	7	Points of Margin markup
QteltemsSellPrice	Currency	7	Item Sell Price
QteltemsTotal	Currency	7	Extended line total
QtelimageLink	String	20	Item Image ID
QteltemFinanced	Boolean	1	Item is financed
QteltemsLineType	String	1	Line Type N-T-P-S-H
QteltemsPrintFlag	Boolean	1	Included or not
QteltemTagged	Boolean	1	Manual user tag

<b>SOrders</b>			
<b>Sales Order main table which parents Order Items</b>			
<b>Field Name</b>	<b>Type</b>	<b>Length</b>	<b>Comment</b>
OrdID	String	10	Unique Identifier
OrdDate	DateTime	7	Order creation date
OrdClientID	String	20	Client Link ID
OrdClientName	String	50	Client Name
OrdClientOrdNo	String	10	Client's Purchase Order number
OrdDeliverTo	Memo	-1	Delivery Address
OrdSupplierID	String	20	Order Main Supplier ID
OrdSupplierName	String	50	Order Main Supplier Name
OrdSalesPerson	String	8	Account Manager ID
OrdSubmitted	Boolean	1	Is submitted for processing
OrdProcessed	Boolean	1	Processing to vendor is completed
OrdReceived	Boolean	1	Goods have been received
OrdReceivedDate	DateTime	7	Date all goods were received
OrdCancelled	Boolean	1	Order was cancelled
OrdCost	BCD	33	Order Cost Total
OrdSell	BCD	33	Order Sell Total
OrdSource	String	200	Converted Quote Number
OrdTimeTtl	BCD	33	Order Time Total
OrdTimeHrs	Float	7	Order Time Hours
OrdCRMTicketNo	String	10	CRM Ticket Number
OrdInvoiced	Boolean	1	Order has been invoiced
OrdFinanced	Boolean	1	Order is financed
OrdFinanceType	String	10	Finance period and type
OrdFinanceableAmt	BCD	33	Amount to be financed
OrdFinanceQtlyAmt	BCD	33	Finance payment
OrdCreator	String	50	ID of person who created order
OrdRegion	String	2	Branch ID of Account Manager
OrdPrivateNotes	Memo	-1	General internal notes
OrdTagged	Boolean	1	User definable tag

<b>SOItems</b>			
<b>Items of a Sales Order</b>			
<b>Field Name</b>	<b>Type</b>	<b>Length</b>	<b>Comment</b>
OrdItemID	ftString	10	Unique Identifier
OrdID	ftString	10	Main Order Link ID
OrdItemCode	ftString	25	Vendor Part Number
OrdItemDescription	ftString	70	Item description
OrdItemQty	ftSmallint	1	Item Quantity
OrdItemCostPrice	ftBCD	33	Item Cost Price
OrdItemMargin	ftFloat	7	Points of Margin
OrdItemSellPrice	ftBCD	33	Item Sell Price
OrdItemTotal	ftBCD	33	Item Line Total
OrdItemSupplierID	ftString	20	Item Supplier ID
OrdItemReceived	ftBoolean	1	Item was received
OrdItemReceivedDate	ftDateTime	7	Date all items were received
OrdItemFinanced	ftBoolean	1	Item is financed
OrdItemLineType	ftString	1	Line Type -N-T