

SAP Crystal Solutions
SAP Crystal Reports and SAP Crystal Server

Step by Step guide: How to create an invoice With SAP Crystal Reports 2020





CREATE AN INVOICE WITH SAP CRYSTAL REPORTS 2020

One of the many benefits of a “pixel perfect” reporting tool, such as SAP Crystal Reports, is complete freedom to create a document to your exacting needs. Since it’s so critical to your organization’s bottom line, a custom invoice is the perfect use for Crystal Reports.

Using the Blank Report option is the best starting place for an invoice. This document outlines steps to create an invoice using the Ridin Round.xls sample data source. This, as well as the completed report design .rpt file, may be downloaded from <https://www.crystalreports.com/sampledata>.

Note: Steps to create an invoice with your own data source will vary significantly, as specific report design steps are largely based on the organization of the specific data source.

FINAL RESULT

Ridin' Round Outdoor Sports
 1725 North 54th Street
 Fort Collins, CO 80183
 (800) 555-1234
 Billing@RidinRoundOutdoor.com

CUSTOMER INVOICE
Making Tracks
 5511 Ocean Road
 Concord, MA 01767

Invoice Date: 3/18/2019
 Invoice #: 0058-20190318

Quantity	Product Name	Unit Price	Extended Price
Order #:1293 Order Date: 2/15/2019			
1	Descent	2,939.85	\$2,939.85
1	Endorphin	899.85	\$899.85
Order #:1307 Order Date: 2/18/2019			
1	Active Outdoors Crochet Glove	14.50	\$14.50
2	Active Outdoors Lycra Glove	16.50	\$33.00
2	SlickRock	764.85	\$1,529.70
Order #:1324 Order Date: 2/21/2019			
3	Xtreme Anatomic Mens Saddle	13.05	\$39.15
2	Mozzie	1,739.85	\$3,479.70
3	Roadster Jr BMX Saddle	11.40	\$34.20

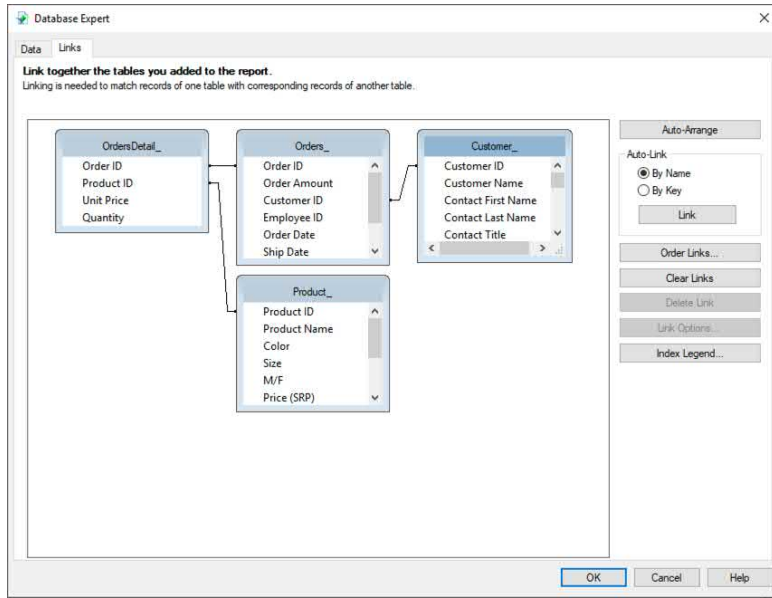
Invoice Total - Please Pay This Amount \$8,969.95



CONNECT TO THE DESIRED DATA SOURCE

Connect to the desired data source using steps outlined in the Connecting to a Data Source white paper found here: <https://www.crystalreports.com/sampledata>.

Using the Ridin Round.xls sample data source, tables are added and joined as follows (standard inner joins are used):



SELECT DESIRED REPORT RECORDS

For the Ridin' Round data source, a record selection formula is added to include only orders placed during the last full month (if the report is run anytime on or after the first day of the month, all orders from the previous month will be included).

1. Choose Report > Selection Formulas > Record from the drop-down menus.
2. Enter the following formula:

```
{Orders_.Order Date} In LastFullMonth
```



SPECIFY FIELDS FOR THE DETAILS SECTION

Fields from several Ridin Round.xls tables are included in the Details section. These fields refer to individual order line items within an order.

1. Drag the following fields into the Details section from the Field Explorer:

OrdersDetail_.Quantity
Product_.Product Name
OrdersDetail_.Unit Price



2. Create a formula to calculate the extended price. RIGHT-CLICK on the Formula Fields section in the Field Explorer and choose New from the context menu.

3. Name the formula Extended Price and type in the following formula text:

{OrdersDetail_.Quantity} * {OrdersDetail_.Unit Price}

4. Drag the Extended Price formula to the Details section to the right of Unit Price.

5. Format Details fields to be more readable:


- a. Select Quantity and reduce decimal places to zero by clicking  in the toolbar twice.
- b. Select Product Name and widen the field with the sizing handle to avoid truncation of long product names.
- c. Add a leading dollar sign to Extended Price by selecting it and clicking the  toolbar button.

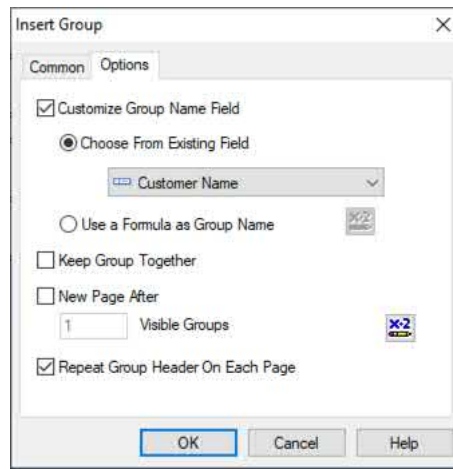
6. Save the report. Continue to save the updated report at regular intervals.






CREATE GROUPS

Create two report groups to organize order details into Customer > Order Number hierarchy.

1. Click the Insert Group  toolbar button. Choose Customer ID as the group field (choosing a unique numeric value, rather than customer name, will separate two customers that may have the same name into unique groups).
2. Specify the following options on the Insert Group dialog box Options tab to display the customer name instead of customer ID in the group header, and to repeat the customer group header on subsequent pages if a customer's orders exceed one page:




3. Click the Insert Group  toolbar button. Choose Order ID as the group field.
4. Click the Insert Group dialog box Options tab. Check Repeat Group Header On Each Page to repeat the order group header on subsequent pages if a single order exceeds one page.
5. Add a subtotal for Extended Price in Group Footer #1 by selecting Extended Price in the Details section and clicking the Insert Summary  toolbar button. Select Group #1 – Customer as the Summary Location.
6. Select the just-created subtotal. Add a dollar sign by clicking the  toolbar button.




FORMAT AND ADJUST REPORT SECTIONS

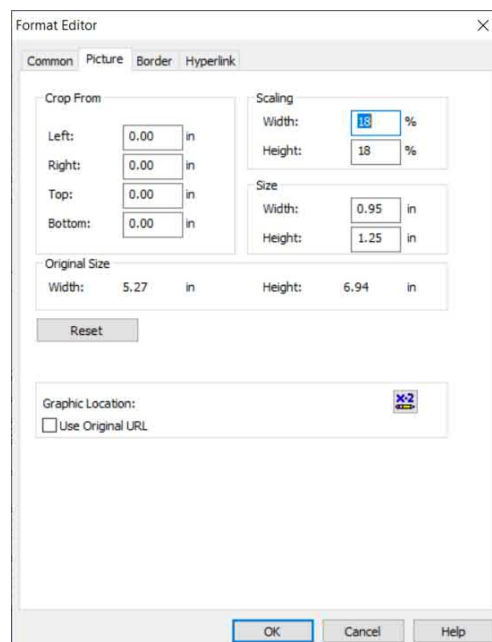
You will need to perform report section adjustments and formatting to present a standard invoice layout.


1. Click the Section Expert  toolbar button to display the Section Expert dialog box.
2. Set the following options in the Section Expert:
 - a. Report Header Common tab: Suppress (No Drill-Down)
 - b. Page Header Common tab: Suppress (No Drill-Down)
 - c. Group Footer #2 Common tab: Suppress (No Drill-Down)
 - d. Group Footer #1 Paging tab: New Page After
 - e. Page Footer Common tab: Suppress (No Drill-Down)
 - f. Report Footer Common tab: Suppress (No Drill-Down)
3. Make all visible sections, except Details, taller by dragging the line below the section (you will need to adjust section height as you continue to design the report).
4. Select the four field headings in the suppressed Page Header (you may CTRL-CLICK them or draw an elastic box around them) and drag them to the bottom of Group Header #1.

BUILD THE INVOICE HEADER

Since Group Header #1 will appear at the top of each invoice, additional fields, images, and text objects will need to be added. Adjust the section height, as necessary, to accommodate them. Format as needed.

1. Add a company logo. Click the Insert Picture  toolbar button. Locate and specify the desired image file in the file dialog box.
2. Drop the image outline in the upper left of Group Header #1. RIGHT-CLICK on the image and select Format Graphic from the context menu. On the Picture tab, size the image by specifying identical scaling width/height percentages.



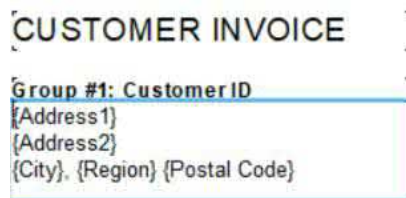
3. Click the Insert Text Object  toolbar button. Size a tall text object next to the logo, to permit multiple lines of text. Type in the company name, mailing address, phone number, and billing e-mail address. While still editing the text object, highlight the company name and use formatting options to make the company name larger and bold.



4. Add a CUSTOMER INVOICE text object to the upper right. Format in a larger font.

5. Drag the Group Name field underneath the CUSTOMER INVOICE text object. Widen it to display the full customer name.

6. Add a multi-line text object below the Group Name field. Drag Address #1, Address #2, City, Region, and Postal Code database fields into the text object, adding spaces, line breaks, and punctuation where necessary.

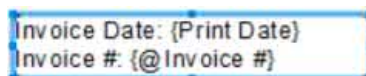


7. To prevent blank lines from appearing for customers that have no Address2 data, RIGHT-CLICK on the text object and select Format Text from the context menu. Check Suppress Embedded Field Blank Lines.

8. Create a formula to generate a unique invoice number, based on the customer ID and current date. Name the formula Invoice #, with the following text:

```
ToText ( {Customer_.Customer ID} , "0000" ) & "-" &  
ToText ( PrintDate , "yyyyMMdd" )
```

9. Add a text object that combines text, the PrintDate Special Field (you may drag this into the text object from the Special Fields portion of the Field Explorer), a line break, more text, and the Invoice # formula:




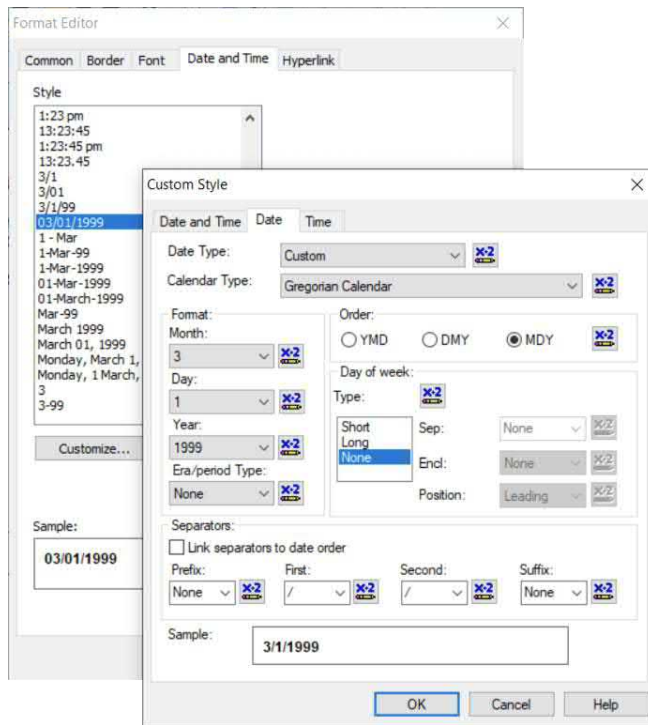
ADJUST THE ORDER HEADER

Group Header #2 prints at the beginning of each order within the Customer group. Format and adjust to display the order number and order date.

1. Select the Group Name Field in Group Header #2. RIGHT-CLICK and select Format Field from the context menu. In the Number tab, select the -1123 entry to eliminate decimal places and thousands separators.
2. Add text objects, the just-formatted Group Name field, and the Order Date database field:

Order #; Group #2: Ord Order Date; Order Date

3. Select Order Date. Click the  Format toolbar button. Select a date-only format. Customize to suppress leading zeroes on month and day, if you so desire.



FINISH THE INVOICE FOOTER


Group Footer #1 prints at the end of the customer group, indicating the end of the invoice. Add text and formatting appropriate for the end of the invoice.

1. Add a text object that denotes the invoice total amount:

Invoice Total - Please Pay This Amount

2. Format the subtotal with a larger font size.

3. Click the  Insert Box toolbar button. Draw a box around the text object and subtotal.

4. Select the just-drawn box. Click the  Format toolbar button. Check Color within the Fill section. Select a light gray color.




© 2020 SAP AG or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP AG or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG (or an SAP affiliate company) in Germany and other countries. Please see <https://www.sap.com/about/legal/trademark.html> for additional trademark information and notices. Some software products marketed by SAP AG and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials are provided by SAP AG or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP AG or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP AG or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP AG or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP AG's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP AG or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

