



Acumatica

The Cloud **ERP**

S150 Report Designer

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Timing and Agenda

October 16, 2024 - 10:00-11:30 AM PT

Day 1

Lesson 7: Using Parameters and Filters

Lesson 8: Sorting and Grouping Data

October 16, 2024 - 10:00-11:30 AM PT

Day 2

Lesson 9: Modifying the Report Style

Lesson 10: Developing Tabular Reports

Lesson 11: Exporting Reports

Lesson 12: Localizing Reports



Day 1



Scott McLaughlin

Acumatica Sponsored Professional Race Car Driver

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- **SweetLife Head Office and Wholesale Center:** This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- **SweetLife Store:** This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- **SweetLife Service and Equipment Sales Center:** This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Operational Activity

The company has been operating starting in the 01-2023 financial period. In November 2023, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. The equipment center has begun its operations in 01-2024 in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- **SweetLife Head Office and Wholesale Center:** In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- **SweetLife Store:** In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- **SweetLife Service and Equipment Sales Center:** This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

Muffins & Cakes Company Sales and Services

The Muffins & Cakes branches have the following business processes:

- **Muffins Head Office & Wholesale Center:** In this branch, baked goods and products for baking are sold to wholesale customers, such as restaurants and cafes. The company also conducts baking classes at customer locations.
- **Muffins Store:** In the store, small retail customers purchase baked goods, or pick the goods ordered on the website.

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers and juicer parts from large juicer vendors and either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

The Muffins & Cakes company also purchases stationery (printing paper, pens, and pencils) and advertising services

Lesson 7: Using Parameters and Filters

Learning Objectives

In this lesson, you will learn how to do the following:

- Specify parameters in a report
- Set up filters in a report

Parameters and Filters: To Define a Parameter and a Filter

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company has requested a report that displays data about vendors. You have offered the predefined Vendor Summary (AP655000) report, but the sales manager has asked you to give users the ability to select a particular vendor class to view data about only the vendors of this class. If no vendor class is specified, the report should display the full list of vendors.

Figure: Class parameter on the Parameters tab

The screenshot shows the 'Schema Builder' dialog box with the 'Parameters' tab selected. On the left, a list of parameters includes 'SupressZeroBal', 'SupressInactiveVendors', and 'Class', with 'Class' selected. The main area contains the following fields and options:

- Name:** Class
- Data Type:** String
- View name:** =Report.GetFieldSchema("Vendor.VendorClassID")
- Prompt:** Vendor Class
- Default value:** Product
- Column span:** 2
- Allow Null:** ☒
- Visible:** ☒
- Required:** ☐



Below these fields is the 'Available values' section, which contains a table with two columns: 'Value' and 'Label'. The table has one row with an asterisk (*) in the 'Value' column. The rest of the table area is greyed out.


At the bottom of the dialog are 'Add', 'Remove', 'OK', 'Cancel', and 'Apply' buttons.

Figure: Adding the filter

Schema Builder

Tables Relationships Parameters **Filters** Sorting And Grouping Viewer Fields

Data Field Formula  

	Braces	Data Field	Condition	Value1	Value2	Braces	Operator
	(FeaturesSet.VisibilityRestri...	Equal	0			Or
		Vendor.VOrgBAccountID	Equal	@me)	And
	(Vendor.VendorClassID	Equal	@Class			Or
		@Class	IsNull			<input type="text" value=""/>	And
*							

OK Cancel Apply

Figure: The S150 Vendor Summary (AP6550C2) report for the Product vendor class

Vendor Summary		Suppress Zero Balances						Page: 1 of 1		
Company: U100		Suppress Inactive Vendors						Date: 4/4/2024 7:57 AM		
								User: Kimberly Gibbs		
Vendor	Vendor Name	Status	Class	Terms	Vendor Currency	Tax Zone	Phone	FAX	Current Balance	Balance Currency
HOMEDEP	Bellevue Home Depot	Active	PRODUCT	30D	USD		+1-212-555-0153		10,394,820.00	USD
JARCO	Jar Co.	Active	PRODUCT	30D	USD		+1-917-555-0121		11,643.00	USD
OFFICEUP	OfficeUp Original	Active	PRODUCT	30D	USD		+1-212-555-0197		4,591.00	USD
STATOFFICE	Spectra Stationery Office	Active	PRODUCT	30D	USD		+1-212-555-0139		619.00	USD

Lesson 8: Sorting and Grouping Data

Learning Objectives

In this lesson, you will learn how to do the following:

- Create data groups in a report
- Specify sorting criteria for the data in a report group and the data in a report

Data Sorting and Grouping: To Specify a Data Group in a Report

Story

Suppose that you are a technical specialist in your company who is working on customizations. A sales manager of your company has requested a report that displays data about vendors. You have offered the predefined Vendor Summary (AP655000) report, but the sales manager wants the data to be grouped by vendor class. The sales manager has also asked you to display the total balance for each group. You will create the requested report by using a copy of the Vendor Summary report.

Figure: Grouping and sorting settings for the AP6550C1 report

Schema Builder

Tables Relationships Parameters Filters **Sorting And Grouping** Viewer Fields

Enter sorting conditions here :

	Data Field	Sort Direction
▶	Vendor.AcctCD	Ascending
*		

Select group and Enter grouping conditions below :

NewGroup
group1

Grouping Field Formula

	Data Field	Sort Direction
▶	=[Vendor.VendorClassID]	Ascending
*		

OK Cancel Apply

Figure: The S150 Vendor Summary (AP6550C1) report, with data grouped by vendor class

Vendor Summary		Suppress Zero Balances						Page: 1 of 2	
Company: U100		Suppress Inactive Vendors						Date: 4/4/2024 8:15 AM	User: Kimberly Gibbs
Vendor	Vendor Name	Status	Terms	Vendor Currency	Tax Zone	Phone	FAX	Current Balance	Balance Currency
Class	DEFAULT								
ALLFRUITS	All Fruits Mall	Active	30D	USD		+1-212-555-0119		1,139.10	USD
ARCINS	Arc Insurance	Active	30D	USD		+1-212-555-0124		1,024,698.72	USD
BLUELINE	BlueLine Advertisement	Active	30D	USD		+1-212-555-0161		19,004.73	USD
COMPULINK	Compulink and Co	Active	30D	USD		+1-212-555-0112		12,253.00	USD
FRONTSRC	Frontsource Ltd.	Active	30D	USD	NYSTATE	+1-315-555-0128		7,318.00	USD
PRINTICO	Wingman Printing Company	Active	30D	USD		+1-212-555-0103		4,123.00	USD
SQUEEZO	Squeeze Inc.	Active	30D	USD		+1-212-555-0107		3,950.00	USD
TEACOMPANY	Tea Company Syndicate	Active	30D	USD		+1-914-555-0193		1,949.10	USD
								1,074,435.65	USD
Class	EMPHOURLY							0.00	USD
Class	INTLCA								
CARTRIDGE	Cartridge World Inc.	Active	30D	USD		+1-212-555-0182		5,771.73	USD
								5,771.73	USD
Class	PRODUCT								
HOMEDEP	Bellevue Home Depot	Active	30D	USD		+1-212-555-0153		10,394,820.00	USD
JARCO	Jar Co.	Active	30D	USD		+1-917-555-0121		11,643.00	USD
OFFICEUP	OfficeUp Original	Active	30D	USD		+1-212-555-0197		4,591.00	USD
STATOFFICE	Spectra Stationery Office	Active	30D	USD		+1-212-555-0139		619.00	USD
								10,411,673.00	USD
Class	SALARIED							0.00	USD
Class	SERVICE								
KADESIGN	Kam Design Inc.	Active	30D	USD		+1-212-555-0136		42,000.00	USD
								42,000.00	USD
Class	SUBCON								
GRITIN	Grit Industries	Active	30D	USD		+1-212-555-0201		843,120.00	USD
HARDCO	Standard Hardware Company	Active	30D	USD		+1-212-555-0155		15,477,000.00	USD
HARMINT	Harmon Installation	Active	30D	USD		+1-212-555-0166		11,578,160.00	USD
STONEC	Cornerstone Concrete	Active	30D	USD		+1-212-555-0149		45,000.00	USD
SUNDWY	Sundance Drywall Company	Active	30D	USD		+1-415-555-0171		5,555.00	USD
SUNTECH	Suntech Concrete	Active	30D	USD		+1-786-555-0121		100,962.00	USD
TECHLAB	TechLabs LLC	Active	30D	USD		+1-212-555-0177		14,547,371.35	USD

Data Sorting and Grouping: To Specify Sorting Conditions

Story

Suppose that you are a technical specialist in your company who is working on customizations. An accountant of your company has requested a report that displays the AP batch register. You have offered the predefined AP Batch Register Detailed (AP621000) report, but the sales manager has requested that the data be sorted by batch number in descending order and by debit amount in ascending order.

Figure: Sorting and grouping settings for the AP6210C1 report in the Schema Builder

Schema Builder

Tables Relationships Parameters Filters **Sorting And Grouping** Viewer Fields

Enter sorting conditions here :

	Data Field	Sort Direction
▶	GLTran.DebitAmt	Ascending
*		

Select group and Enter grouping conditions below :

group1

Grouping Field Formula

	Data Field	Sort Direction
▶	Batch.Module	Ascending
	Batch.BatchNbr	Descending
*		

OK Cancel Apply

Figure: Sample page of the S150 AP Batch Register Detailed (AP6210C1) report

AP Batch Register Detailed

Company/Branch: HEADOFFICE

Ledger: ACTUAL

From Period: 01-2024

To Period: 12-2024

Page: 7 of 12

Date: 4/4/2024 8:42 AM

User: Kimberly Gibbs

Include Unposted Transactions

Module	Batch Number	Period	Entered Date	Status	Description	Created By	Last Modified By	Control Total
AP	AP000031	01-2024	1/2/2024	Posted		admin	admin	122,950.00
Branch	Account	Subaccount	Ref. Number	Description	Debit	Credit		
HEADOFFICE	20000		000030		0.00	122,950.00		
SWEETEQUIP	20100		000030	Peel Ejector Kit	225.00	0.00		
SWEETEQUIP	20100		000030	Containers for Juice	250.00	0.00		
SWEETEQUIP	20100		000030	Juice Tray Kit	500.00	0.00		
SWEETEQUIP	20100		000030	Blade Holder V 1.2	800.00	0.00		
SWEETEQUIP	20100		000030	Lower Plastic Pressing Wheels V 1.0 (2 Units)	1,000.00	0.00		
SWEETEQUIP	20100		000030	Upper Plastic Pressing Wheels V 4.0 (2 Units)	1,200.00	0.00		
SWEETEQUIP	20100		000030	Lower Plastic Pressing Wheels V 1.3 (2 Units)	1,225.00	0.00		
SWEETEQUIP	20100		000030	Feeder Basket	1,250.00	0.00		
SWEETEQUIP	20100		000030	Front Cover with Outputs	1,300.00	0.00		
SWEETEQUIP	20100		000030	Upper Plastic Pressing Wheels V 4.3 (2 Units)	1,400.00	0.00		
SWEETEQUIP	20100		000030	Blade Holder V 2.0	1,800.00	0.00		
SWEETEQUIP	20100		000030	Pro series juicer with a production rate of 1 litre per minute	12,000.00	0.00		
SWEETEQUIP	20100		000030	Commercial juicer with a production rate of 1.5 litres per minute	40,000.00	0.00		
SWEETEQUIP	20100		000030	Commercial citrus juicer with a production rate of 2 litres per minute	60,000.00	0.00		
Batch Total:					122,950.00	122,950.00		
AP	AP000030	01-2024	1/23/2024	Posted		admin	admin	240.50
Branch	Account	Subaccount	Ref. Number	Description	Debit	Credit		
HEADOFFICE	20000		000029		0.00	240.50		
HEADOFFICE	20100		000029	Fresh oranges 1 lb	240.50	0.00		
Batch Total:					240.50	240.50		
AP	AP000029	01-2024	1/22/2024	Posted		admin	admin	114.50
Branch	Account	Subaccount	Ref. Number	Description	Debit	Credit		
HEADOFFICE	20000		000028		0.00	114.50		
HEADOFFICE	20100		000028	Fresh apples 1 lb	114.50	0.00		
Batch Total:					114.50	114.50		
AP	AP000028	01-2024	1/15/2024	Posted		admin	admin	525.00
Branch	Account	Subaccount	Ref. Number	Description	Debit	Credit		
HEADOFFICE	20000		000027		0.00	525.00		
HEADOFFICE	20100		000027	Fresh apples 1 lb	229.00	0.00		



Day 2



Jessica Korda

Acumatica Sponsored Professional Golfer

Lesson 9: Modifying the Report Style

Learning Objectives

In this lesson, you will learn how to do the following:

- Change the style of an element in a report
- Change the style of number of reports

Report Style: To Create and Apply a Style Template

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. An accountant has asked you to implement the following new company standards for the reports in the Payables workspace:

- Reports must have a light-blue background.
- For report titles, the following font must be used:
 - Type: Bold
 - Style: Times New Roman
 - Size: 12 px
 - Color: Blue
- For report parameters, the following font must be used:
 - Type: Italic
 - Style: Arial
 - Size: 10 px
 - Color: Black

You have decided to create a style template based on the new standards. Then you can apply this style template to the reports in the Payables workspace.

Figure: The list of styles specified in the StyleRule Collection Editor

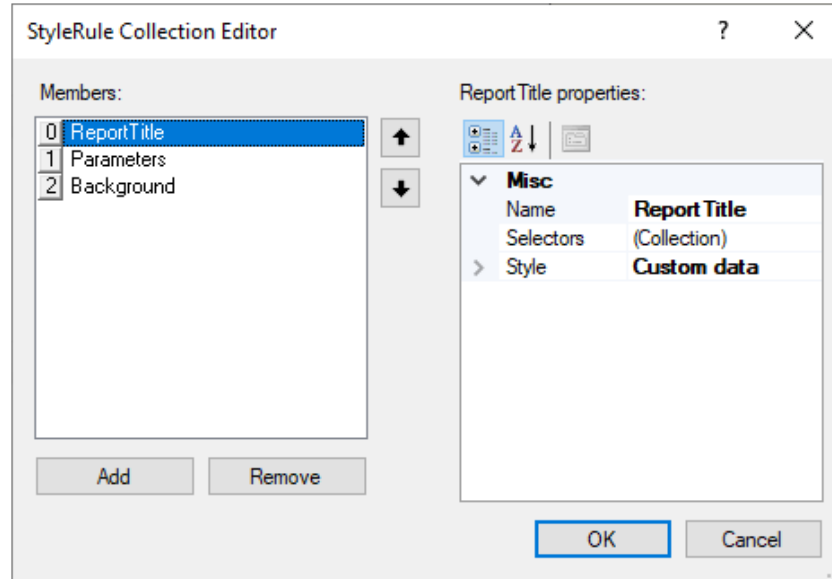


Figure: The AP Balance by Vendor (AP6325C1) report with the new style template applied

AP Balance by Vendor (Open Documents)

Company/Branch: HEADOFFICE

Financial

12-2023

Page: 1 of 5

Date: 4/4/2024 11:21

User: Kimberly Gibbs

Include Applications

Vendor

Vendor Name

ARCINS

Arc Insurance

Account

Subaccount

20000

Description

Accounts Payable

Ref.

Applied To

Doc. Type

Vendor Ref.

Doc. Date

Entered

Posted

Closed

Description

Amount

Balance

000000007

Bill

12/15/2021

12-2021

12-2021

Insurance policies

3,000.00

3,000.00

000000006

Bill

12/28/2021

12-2023

12-2023

Insurance Dec

1,255.00

1,255.00

Account Documents Total:

4,255.00

Account Unrealized

0.00

Vendor Documents Total:

4,255.00

Vendor Unrealized

0.00

BLUELINE

Blueline Advertisement

Account

Subaccount

20000

Description

Accounts Payable

Ref.

Applied To

Doc. Type

Vendor Ref.

Doc. Date

Entered

Posted

Closed

Description

Amount

Balance

000000006

Bill

2/10/2021

02-2021

02-2021

Advertisement

228.00

228.00

000000007

Bill

5/7/2021

05-2021

05-2021

Advertisement

3,700.00

3,700.00

000000007

Bill

8/26/2021

08-2021

08-2021

Advertisement

4,776.73

4,776.73

000000007

Bill

9/3/2021

09-2021

09-2021

Advertisement

2,000.00

2,000.00

000000054

Prepayment

11/9/2021

11-2021

11-2021

Prepayment

-1,420.00

-1,420.00

000000055

Prepayment

1/12/2022

01-2022

01-2022

Advertisement

-3,200.00

-3,200.00

000000008

Debit Adj.

5/18/2022

05-2022

05-2022

-1,500.00

-1,500.00

000000059

Prepayment

12/14/2021

12-2022

12-2022

Prepayment

-4,500.00

-4,500.00

Account Documents Total:

84.73

Account Unrealized

0.00

Vendor Documents Total:

84.73

Vendor Unrealized

0.00

CARTRIDGE

Cartridge World Inc.

Account

Subaccount

20000

Description

Accounts Payable

Ref.

Applied To

Doc. Type

Vendor Ref.

Doc. Date

Entered

Posted

Closed

Description

Amount

Balance

Lesson 10: Developing Tabular Reports

Learning Objectives

In this lesson, you will learn how to do the following:

- To create tabular reports in the Report Designer.

Tabular Reports: To Create a Tabular Report

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager has requested a report that shows the quantity of inventory items ordered by customers. You have looked through the reports in the Sales Orders workspace and suggested that the manager use the Sales Order Details by Customer (SO611000) report. The sales manager said that the requested report should give salespeople the ability to compare the quantities of inventory items for different customers—that is, to display the quantities of an inventory item for different customers in the same row, with a separate row for each inventory item.

Figure: The modified Sales Order Details by Customer report

Sales Order Details by Customer			
Company:	U100	Start Date:	12/1/2023
User:	Kimberly Gibbs	End Date:	12/31/2023
		Date:	4/4/2024 12:00 PM
		Page:	1 of 1
<u>Inventory Item</u>		GOODFOOD	
ORANGES		238.00	
APPLES		118.00	
Total:	356.00		
<u>Inventory Item</u>		HMBAKERY	
ORANGES		109.00	
APPLES		224.00	
Total:	333.00		

Figure: The tabular report in design mode

The image shows a design mode interface for a tabular report. It features a tree view on the left with expandable sections, and a preview area on the right showing the layout of these sections. The sections are:

- pageHeaderSection1**: Contains a title "Sales Order Details by Customer" and two fields: "Company" with value `[=Report.GetDefault('AccessInfo.Co...)]` and "User" with value `[=Report.GetDefault('RowAccessInfo...)]`.
- groupHeaderSection1 (Header of group1)**: Contains a table with two columns: "Inventory Item" and `[=[BAccount.AcctCD]]`.
- groupHeaderSection2 (Header of group2)**: Contains a table with two columns: `[=[SOLine.InventoryID]]` and `[=Sum(isnull([SOLine.Order...)]`.
- groupDetails**: The main body of the report.
- groupFooterSection2 (Footer of group2)**: A footer section.
- groupFooterSection3 (Footer of group2)**: Another footer section.
- groupFooterSection1 (Footer of group1)**: Contains a table with two columns: "Total:" and `[=Sum(isnull([SOLine.OrderQt...)]`.

Figure: The Sales Order Details by Customer (SO6110C1) tabular report

Sales Order Details by Customer					
Company: U100		Start Date: 11/1/2023		Date: 4/4/2024 4:10 PM	
User: Kimberly Gibbs		End Date: 1/28/2024		Page: 1 of 1	
Inventory Item	CAKEADO	COFFEESHOP	GOODFOOD	HMBAKERY	TOMYUM
APJAM08		77.00	86.00		
APJAM96		10.00		25.00	
APPLES		15.00	364.00	690.00	
BLACKTEA06		30.00			
FRUITTEA12		30.00			
GRAPEFRUIT	25.00				
GREENTEA06		30.00			
INSTALL		1.00	2.00	1.00	1.00
JUICER15			1.00	1.00	
JUICER20C		1.00	1.00		1.00
KIWIJAM32		20.00			
LEMJAM08		5.00			
LEMJAM32		15.00			
LEMJAM96		28.00	15.00		
ORANGES			833.00	482.00	
ORJAM08			40.00		
ORJAM32		93.00	45.00		
PLUMJAM32		5.00			
RASPJAM32		12.00			
STRAWJAM32		6.00			
Total:	25.00	378.00	1,387.00	1,199.00	2.00

Lesson 11: Exporting Reports

Learning Objectives

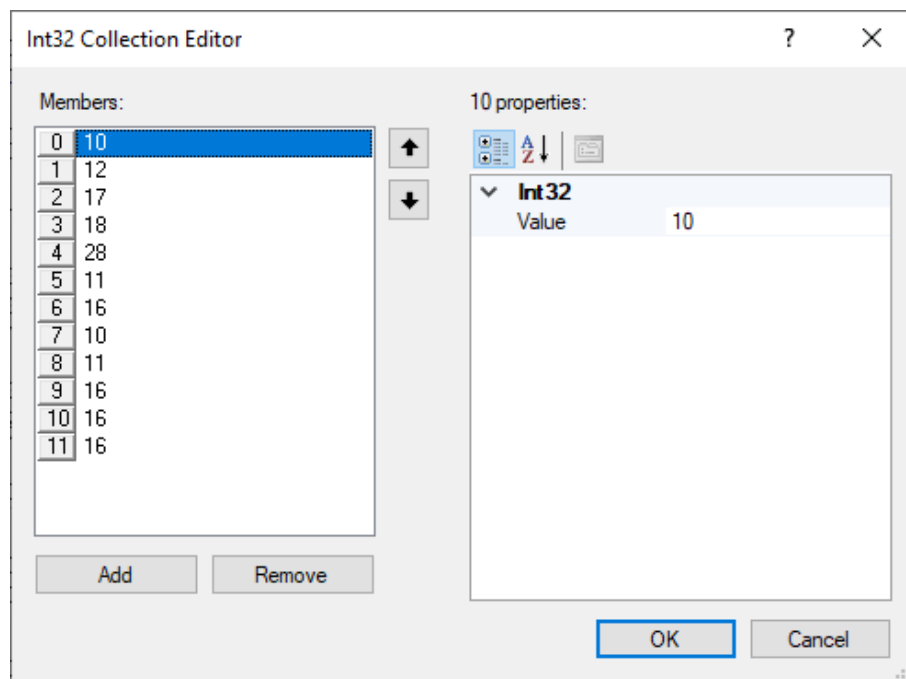
In this lesson, you will learn how to do the following:

- To export report results by using the Report Designer.

Figure: Display of the Excel column grid for the report

pageHeaderSection1	Sales Order Details by Customer: 1:1											
	Company/Brand: 2:1	[=OrgBAccountID] 2:2		Start D: 1:6	[=@DateFrom] 1:7			D: 2:11	[=N] 2:12			
	User: 3:1	[=Report.GetDefUIRowAcce] 3:2		End D: 2:6	[=@DateTo] 2:7			P: 1:11	[=Pag] 1:12			
pageHeaderSection2												
	Customer ID: 1:1	Customer Name: 1:3				Order C: 1:9	Open: 1:10	Line: 1:11	Open Am: 1:12			
groupHeaderSection1 (Header of group1)												
	[=BAccount.AcctCD] 1:1		[=BAccount.AcctName] 1:3		[=Sum(isn] 1:9		[=sum(is] 1:10	[=sum(isnull([S] 1:11	[=sum(isnull([S] 1:12			
groupHeaderSection3 (Header of group1)												
	Type: 1:1	Ref. Nbr.: 1:2	Curren: 1:3	Status: 1:4	Inventory: 1:5	Subitem: 1:6	Warehous: 1:7	UOM: 1:8	Order C: 1:9	Open: 1:10	Line: 1:11	Open Am: 1:12
groupHeaderSection2 (Header of group2)												
groupDetails												
	[=SOC] 1:1	[=SOOrder] 1:2	[=SOC] 1:3	[=SOC] 1:4	[=SOLine.InventoryID] 1:5	[=SOLine.Subite] 1:6	[=SOLine] 1:7	[=SOL] 1:8	[=SOLine] 1:9	[=SOLine] 1:10	[=SOLine.Cur] 1:11	[=SOLine.Cur] 1:12
groupFooterSection2 (Footer of group2)												
	[=Total '*{SOOrder.C] 1:7											[=Sum(isn] 1:9
groupFooterSection3 (Footer of group2)												
groupFooterSection1 (Footer of group1)												

Figure: The Int32 Collection Editor



Report Export: To Export a Report as an XLS file

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company has requested the Vendor Summary (AP655000) report in XLS format. The sales manager plans to process the data further in Excel. You plan to use a copy of the report; after checking its settings, you will run the report and export it.

Figure: The exported Vendor Summary (AP6550C4) report opened in Excel

Vendor Summary		Suppress Zero Balances							Date: 4/5/2024 7:21 AM	
Company:	U100	Suppress Inactive Vendors							User:	Kimberly Gibbs
Vendor	Vendor Name	Status	Class	Terms	Balance	Currency	Tax Zone	Phone	FAX	Current Balance
ALLFRUITS	All Fruits Mall	Active	DEFAULT	30D		USD		+1-212-555-0119		1,139.10
ARCINS	Arc Insurance	Active	DEFAULT	30D		USD		+1-212-555-0124		1,024,698.72
BLUELINE	Blueline Advertisement	Active	DEFAULT	30D		USD		+1-212-555-0161		19,004.73
CARTRIDGE	Cartridge World Inc.	Active	INTLCA	30D		USD		+1-212-555-0182		5,771.73
COMPULINK	Compulink and Co	Active	DEFAULT	30D		USD		+1-212-555-0112		12,253.00
FRONTSRC	Frontsource Ltd.	Active	DEFAULT	30D		USD	NYSTATE	+1-315-555-0128		7,318.00
GRITIN	Grit Industries	Active	SUBCON	30D		USD		+1-212-555-0201		843,120.00
HARDCO	Standard Hardware Company	Active	SUBCON	30D		USD		+1-212-555-0155		15,477,000.00
HARMINT	Harmon Installation	Active	SUBCON	30D		USD		+1-212-555-0166		11,578,160.00
HOMEDEP	Bellevue Home Depot	Active	PRODUCT	30D		USD		+1-212-555-0153		10,394,820.00
JARCO	Jar Co.	Active	PRODUCT	30D		USD		+1-917-555-0121		11,643.00
KADESIGN	Karn Design Inc.	Active	SERVICE	30D		USD		+1-212-555-0136		42,000.00
NYTAXDEP	NY State Department of Revenue	Active	TAXAGENCY	30D		USD		+1-212-555-0139		654.78
OFFICEUP	OfficeUp Original	Active	PRODUCT	30D		USD		+1-212-555-0197		4,591.00
PRINTICO	Wingman Printing Company	Active	DEFAULT	30D		USD		+1-212-555-0103		4,123.00
SQUEEZO	Squeezo Inc.	Active	DEFAULT	30D		USD		+1-212-555-0107		3,950.00
STATOFFICE	Spectra Stationery Office	Active	PRODUCT	30D		USD		+1-212-555-0139		619.00
STONEC	Cornerstone Concrete	Active	SUBCON	30D		USD		+1-212-555-0149		45,000.00
SUNDW	Sundance Drywall Company	Active	SUBCON	30D		USD		+1-415-555-0171		5,555.00
SUNTECH	Suntech Concrete	Active	SUBCON	30D		USD		+1-786-555-0121		100,962.00
TEACOMPANY	Tea Company Syndicate	Active	DEFAULT	30D		USD		+1-914-555-0193		1,949.10
TECHLAB	TechLabs LLC	Active	SUBCON	30D		USD		+1-212-555-0177		14,547,371.35

Lesson 12: Localizing Reports

Learning Objectives

In this lesson, you will learn how to do the following:

- To localize a report in the Report Designer.

Report Localization: To Localize a Report

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company has requested that you localize the predefined Vendor Summary (AP655000) report to the Italian language. You will localize a copy of the predefined report, starting with a test of the capability in which you localize the report header and table header.

Figure: The localized AP6550C5 report

\$\$Vendor Summary\$\$					Suppress Zero Balances		Page: 1 of 1			
Company: U100					Suppress Inactive Vendors		Date: 05/04/2024 09:20			
							User: Kimberly Gibbs			
\$\$Vendor\$\$	\$\$Vendor Name\$\$	\$\$Status\$	\$\$Class\$\$s	\$\$Terms\$\$	\$\$Vendor Currency\$	\$\$Tax Zone\$\$	Phone	\$\$FAX\$\$	\$\$Current Balance\$\$	\$\$Balance Currency\$
ALLFRUITS	All Fruits Mall	Active	DEFAULT	30D	USD		+1-212-555-0119		1,139.10	USD
ARCINS	Arc Insurance	Active	DEFAULT	30D	USD		+1-212-555-0124		1,024,698.72	USD
BLUELINE	BlueLine Advertisement	Active	DEFAULT	30D	USD		+1-212-555-0161		19,004.73	USD
CARTRIDGE	Cartridge World Inc.	Active	INTLCA	30D	USD		+1-212-555-0182		5,771.73	USD
COMPULINK	Compulink and Co	Active	DEFAULT	30D	USD		+1-212-555-0112		12,253.00	USD
FRONTSRC	Frontsource Ltd.	Active	DEFAULT	30D	USD	NYSTATE	+1-315-555-0128		7,318.00	USD
GRITIN	Grit Industries	Active	SUBCON	30D	USD		+1-212-555-0201		843,120.00	USD
HARDCO	Standard Hardware Company	Active	SUBCON	30D	USD		+1-212-555-0155		15,477,000.00	USD
HARMINT	Harmon Installation	Active	SUBCON	30D	USD		+1-212-555-0166		11,578,160.00	USD
HOMEDEP	Bellevue Home Depot	Active	PRODUCT	30D	USD		+1-212-555-0153		10,394,820.00	USD
JARCO	Jar Co.	Active	PRODUCT	30D	USD		+1-917-555-0121		11,643.00	USD
KADESIGN	Karn Design Inc.	Active	SERVICE	30D	USD		+1-212-555-0136		42,000.00	USD
NYTAXDEP	NY State Department of Revenue	Active	TAXAGENCY	30D	USD		+1-212-555-0139		654.78	USD
OFFICEUP	OfficeUp Original	Active	PRODUCT	30D	USD		+1-212-555-0197		4,591.00	USD
PRINTICO	Wingman Printing Company	Active	DEFAULT	30D	USD		+1-212-555-0103		4,123.00	USD
SQUEEZO	Squeeze Inc.	Active	DEFAULT	30D	USD		+1-212-555-0107		3,950.00	USD
STATOFFICE	Spectra Stationery Office	Active	PRODUCT	30D	USD		+1-212-555-0139		619.00	USD
STONEC	Cornerstone Concrete	Active	SUBCON	30D	USD		+1-212-555-0149		45,000.00	USD
SUNDW	Sundance Drywall Company	Active	SUBCON	30D	USD		+1-415-555-0171		5,555.00	USD
SUNTECH	Suntech Concrete	Active	SUBCON	30D	USD		+1-786-555-0121		100,962.00	USD
TEACOMPANY	Tea Company Syndicate	Active	DEFAULT	30D	USD		+1-914-555-0193		1,949.10	USD
TECHLAB	TechLabs LLC	Active	SUBCON	30D	USD		+1-212-555-0177		14,547,371.35	USD



Thank you!

Johans Saavedra