

The Project Summary on the Proposal and Line Item reports is a sub report (“Project Summary Detail”). The Tax Detail within the project summary is a sub report of the Project Summary (“Project Tax Detail”). Neither of these reports appears in the list of reports as they are flagged as “sub reports”.

Line Item Detail		
Project Summary		
	Equipment:	\$1,923.45
	Equipment Adjustment:	\$192.35
	Misc Parts:	\$192.35
	Installation Labor:	\$102.81
	Management Labor:	\$20.02
	Design Labor:	\$0.01
sub report:	Sales Tax:	\$115.41
	Misc. Costs:	\$80.00
	Grand Total:	\$2,626.40

To modify a line item report, at this level, three custom reports need to be created.

- Custom Tax Detail
- Custom Project Summary Detail
- Custom Line Item report.

Below, I will quickly run through the steps:

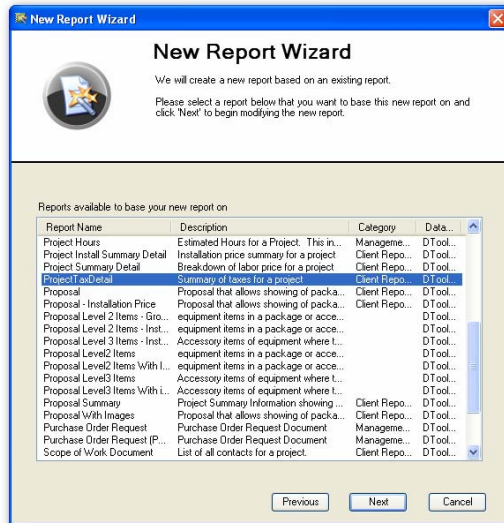
1. Open the reporting center and enter the Report Designer.

2. File > New...

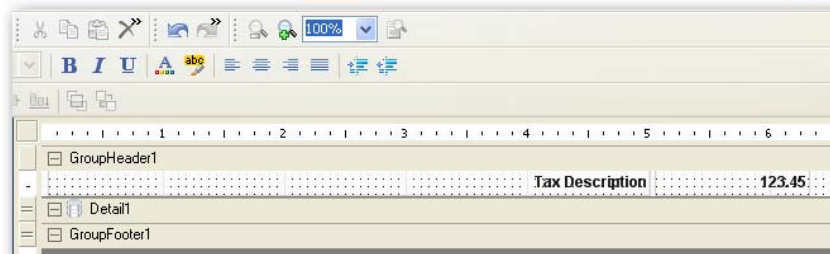


Select New Report Based on Existing Report.

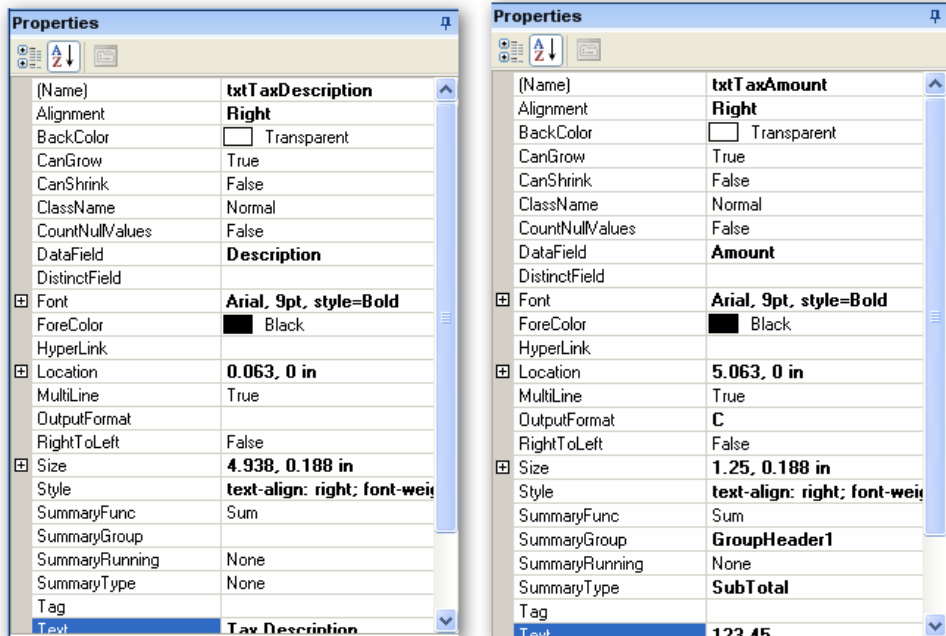
3. Click “Next”, select the “ProjectTaxDetail” report as your base.



4. Click “Next”, give it a name.
5. Continue clicking “Next” until you get through the wizard and then click finish.
6. The layout for the report will load



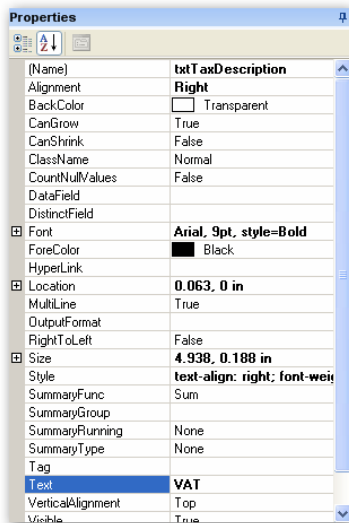
This report has two fields: Description and amount:



When this report runs, a helper function runs that generates the data the report iterates over. This data has two fields: Description and Amount. You can see above that the two controls in the report are bound to these two fields. This allows for US reports to show: "Sales Tax" and Canada Reports to show "GST" and "PST".

Assuming the guy who posted to the board (<http://www.d-tools.us/showthread.php?t=1413>) has his country code set to "Standard", he will get one record. If he is using Sales Tax as a VAT Tax then this is easy.

Select the "txtTaxDescription" textbox in the report, in the properties window, clear the DataField property and change the Text Property to "VAT:".



7. Click the "Script" tab at the bottom of the screen
8. Remove the following script block:

```
10
11 Sub GroupHeader1_Format
12
13     ' Add the : to the end of the text
14     ctype(rpt.Sections("GroupHeader1").Controls("txtTaxDescription"), TextBox).Value &= ":"
15
16 End Sub
```

This simply appends the : to the value (which will now be blank as this field is no longer bound to data).

This:

```
Object : ActiveReport Event :
1 Sub ActiveReport_ReportStart
2
3     ReportUtilities.SetupTaxSummaryDS(rpt)
4
5 End Sub
6 Sub ActiveReport_NoData
7     ' If the report has no data, then all sections will be made invisible
8     rpt.Cancel()
9 End Sub
10
11 Sub GroupHeader1_Format
12
13     ' Add the : to the end of the text
14     ctype(rpt.Sections("GroupHeader1").Controls("txtTaxDescription"), TextBox).Value &= ":"
15
16 End Sub
```

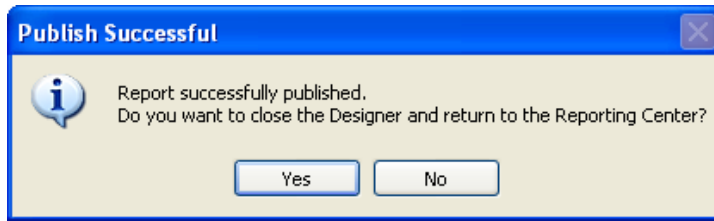
Becomes:

```
Object : ActiveReport Event :
1 Sub ActiveReport_ReportStart
2
3     ReportUtilities.SetupTaxSummaryDS(rpt)
4
5 End Sub
6 Sub ActiveReport_NoData
7     ' If the report has no data, then all sections will be made invisible
8     rpt.Cancel()
9 End Sub
10
11
```

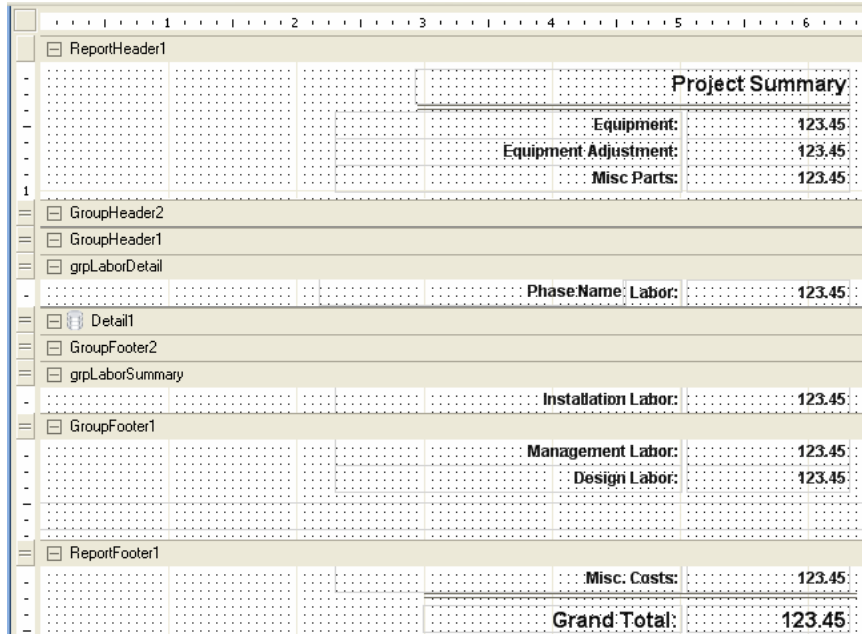
Click the Designer Tab at the bottom of the screen.

9. Click "Save". 
10. Click "Publish Report" 

11. Click “No”.



12. Repeat Steps 1 through 5. For Step 3, select the Project Summary Detail report as your base.



The image shows a report designer grid with a ruler at the top. The grid contains several report sections and controls. The 'Project Summary' section is highlighted. Below it, the 'Detail1' section is expanded, showing a table with columns for 'Phase Name' and 'Labor'. The 'GroupFooter1' section is also expanded, showing a table with columns for 'Misc. Costs' and 'Grand Total'.

Project Summary	
Equipment:	123.45
Equipment Adjustment:	123.45
Misc Parts:	123.45

Phase Name	Labor
	123.45

Installation Labor	
	123.45

Management Labor	
	123.45
Design Labor	
	123.45

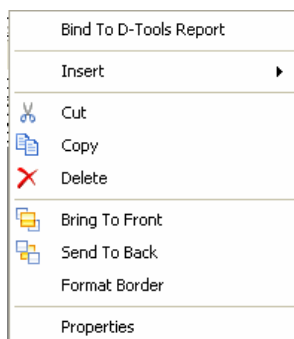
  

Misc. Costs	
	123.45
Grand Total	
	123.45

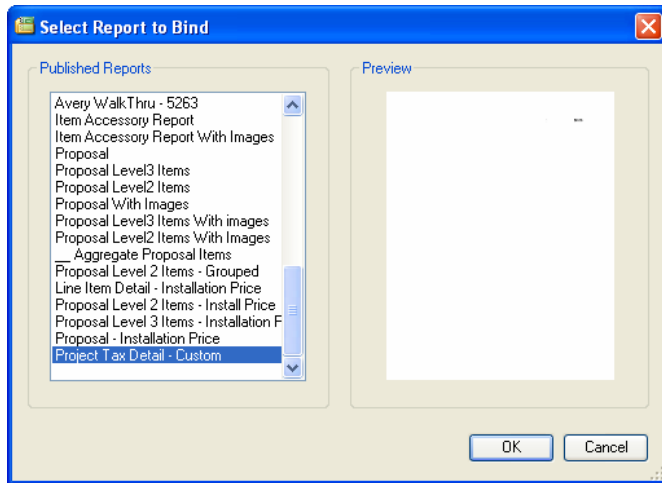
13. Repeat Steps 4, 5 and 6.

14. In the “GroupFooter1” section, select the “SubTaxDetails” sub report control.

15. Right Click on the control and select “Bind to D-Tools Report”.



16. Find you new custom Tax Report (probably at the end of the list), select it and click OK.



17. Make any other changes to this report (as desired).

18. Repeat Steps 9, 10, and 11.

19. Repeat Steps 1 through 5. For Step 3, select the “Line Item Detail” report as your base.

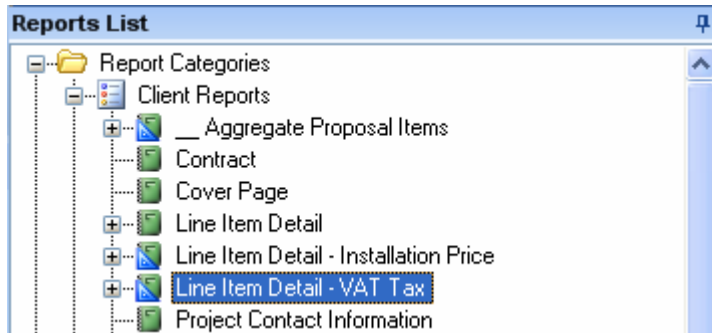
[illegible]

20. In the “grpSubTotal” section of the report, select the “subSummaryDetail” sub report control.

21. Repeat Steps 14 through 16. For step 16, select the newly created Project Summary Detail report.

22. Save the report by repeating Repeat Steps 9, 10, and 11.

23. When prompted to return to the Reporting Center, click “yes”. You should notice your new report in the list.



24. Run the new report, the Summary should look like:

Line Item Detail	
Project Summary	
Equipment:	\$1,923.45
Equipment Adjustment:	\$192.35
Misc Parts:	\$192.35
Installation Labor:	\$102.81
Management Labor:	\$20.02
Design Labor:	\$0.01
VAT:	\$115.41
Misc. Costs:	\$80.00
Grand Total:	\$2,626.40

25. To get this change in the Proposal, Repeat Steps 19 through the end, but make a custom report based on the Proposal.