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".

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

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...

😹 New Report Wizard					
	New Report Wizard				
	How do you want to create a new report?				
	Please select one of the options below and click 'Next' to start creating your new report				
		-			
New Report Bas	ed on Existing Report	- 1			
Select this option report. The report you will be able t	Select this option if you want to create a report that is based on a currently defined report. The report designer will start with the layout of the report that you select and you will be able to change the design on the new report.				
🚫 New Blank Repo	rt	- 1			
Select this option	if you want to create a blank report.	- 1			
		- 1			
		- 1			
	Previous Next Cancel	J			

Select New Report Based on Existing Report.

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

Ve Pies cited	ew Report Wizard will create a new report based on an exis as eseled a report below that you want to the to begin modifying the new report.	ing report. base this new r	eport on ar	ıd
leports available to base your r Benort Name	new report on	Category	Data	~
Project Hours Project Install Summary Detail Project Summary Detail	Estimated Hours for a Project. This in Installation price summary for a project Breakdown of labor price for a project	Manageme Client Repo Client Repo	DTool DTool DTool	
Project JavDetal Proposal Proposal Level 2 Items - Incu- Proposal Level 2 Items - Incu- Proposal Level 2 Items - Incu- Proposal Level 2 Items Proposal Level 2 Items Wrhtu- Proposal Level 2 Items Wrhtu- Proposal Level 3 Items Proposal Level 3 Items Wrhtu- Proposal Level 3 Items Wrhtu- Proposal Level 3 Items Wrhtu- Proposal Verbin Items Wrhtu- Proposal Verbin Items Wrthu- Proposal Verbin Items Pro- Prochase Order Request Purchase Orde	Summary of taxes for a project Proposal that allows showing of packa. Proposal that allows showing of packa, equipment items in a package or acce. equipment items in a package or acce. equipment items in a package or acce. Accessory items of equipment where L. Accessory items of equipment where L. Proposal that allows showing of packa. Punchase Under Request Document Punchase Under Request Document	Client Repo Client Repo Client Repo Client Repo Manageme Manageme Client Repo Client Repo	DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool DTool	A 1 A 1 A 1

- 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

	k 🖻 🛱 🗡 🔤 🖓 🛛 S. S. 🏧 🔽 💽
×	
- 1	
	🖂 GroupHeader1
-	Tax Description :
=	🖂 📋 Detail1
=	GroupFooter1

This report has two fields: Description and amount:

Pr	operties		Ţ	Pr	operties		ф,
	! 2↓				₽ ↓ ©		
	(Name)	txtT axD escription	^		(Name)	txtTaxAmount	^
	Alignment	Right			Alignment	Right	
	BackColor	Transparent			BackColor	Transparent	
	CanGrow	True			CanGrow	True	
	CanShrink	False			CanShrink	False	
	ClassName	Normal			ClassName	Normal	
	CountNulValues	False			CountNullValues	False	
	DataField	Description			DataField	Amount	
	DistinctField				DistinctField		
Ð	Font	Arial, 9pt, style=Bold		Ð	Font	Arial, 9pt, style=Bold	
	ForeColor	Black			ForeColor	Black	
	HyperLink				HyperLink		
Ð	Location	0.063, 0 in		Ð	Location	5.063, 0 in	
	MultiLine	True			MultiLine	True	
	OutputFormat				OutputFormat	C	
	RightToLeft	False			RightToLeft	False	
Ð	Size	4.938, 0.188 in		Ð	Size	1.25, 0.188 in	
	Style	text-align: right; font-weig			Style	text-align: right; font-wei	
	SummaryFunc	Sum			SummaryFunc	Sum	1
	SummaryGroup		-		SummaryGroup	GroupHeader1	
	SummaryRunning	None			SummaryRunning	None	
	SummaryType	None			SummaryType	SubTotal	
	Tag				Tag		
	Tevt	Tax Description	~		Tout	123 45	×

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 (<u>http://www.d-tools.us/showthread.php?t=1413</u>) 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:".

Pr	operties		#
•	! ⊉↓		
	(Name)	txtTaxDescription	^
	Alignment	Right	
	BackColor	Transparent	
	CanGrow	True	
	CanShrink	False	
	ClassName	Normal	
	CountNullValues	False	
	DataField		
	DistinctField		
Đ	Font	Arial, 9pt, style=Bold	
	ForeColor	Black Black	
	HyperLink		
Đ	Location	0.063, 0 in	-
	MultiLine	True	
	OutputFormat		
	RightToLeft	False	
Đ	Size	4.938, 0.188 in	
	Style	text-align: right; font-weig	
	SummaryFunc	Sum	
	SummaryGroup		
	SummaryRunning	None	
	SummaryType	None	
	Tag		
	Text	VAT	1
	VerticalAlignment	Тор	
	Vieible	Тлю	Y

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



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

This:



Becomes:



Click the Designer Tab at the bottom of the screen.

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

11. Click "No".

Publish	Successful
٩	Report successfully published. Do you want to close the Designer and return to the Reporting Center?
	Yes No

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

	E ReportHeader1
:	Project Summary
-	Equipment 123.45 Equipment Adjustment 123.45
- - 1	Misc Parts: 123.45
Ξ	🔄 GroupHeader2
=	🖃 GroupHeader1
=	📃 grpLaborDetail
-	PhaseName Labor: 123.45
=	🖂 🗊 Detail1
=	GroupFooter2
=	🔄 grpLaborSummary
-	Installation Labor: 123.45
=	GroupFooter1
:	Management Labor: 123.45
-	Design Labor: 123.45
:	
Ξ	ReportFooter1
1	123.45
1	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".

	Bind To D-Tools Report
	Insert >
Ж	Cut
Þ.	Сору
×	Delete
Ē.	Bring To Front
뮵	Send To Back
	Format Border
	Properties

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.



- 20. In the "grpSubTotal" section of the report, select the "subSumaryDetail" 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.

Reports List			
🖃 🗁 Report Categories	~		
🚊 🖶 🔚 Client Reports			
🛓 🗄 📲 🔄 Aggregate Proposal Items			
😟 🕀 🗓 Line Item Detail			
😟 🐨 📓 Line Item Detail - Installation Price			
🕮 📲 🚺 Line Item Detail - VAT Tax			
Project Contact Information			

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

	Line Item Detail		
Project Sum			
	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.