

# Modifying Reports in Visual *CLIP*

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## Modifying your Reports, Statements and Invoices

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NOTE: This is an advanced function. If you are not comfortable with computers then you should not attempt the following steps. After you make changes to forms **CLIP** no longer will support that form if you get errors. Applying an update will reset all the forms back to factory settings.

In Visual **CLIP-Pro** you have the ability to modify almost all of the reports, invoices and statements. There are advantages and disadvantages to this so be careful and consider well before you modify these report files.

### Advantages:

The obvious is that you make the report, invoice or statement look exactly like you want. If you want to adjust the position of the name, the color or font of different sections or just re-adjust the whole statement or invoice to your liking.

### Disadvantages:

Once you modify the report file, it is unique to you. Sensible Software, Inc. will not support the new form. You could end up with errors or you could lose your changes for whatever reason. When you install updates from SSI the install program will install the standard reports over your modified ones, erasing your changes. We try to make the install check for modified dates and not overwrite your changes but we strongly advise you to protect yourself in this area.

Make sure that you make a copy of any report that you change. Copy it to another directory or area of your hard drive so that if you ever lose it, you can copy it back. Modified reports are "data" make sure you keep backups of your reports along with your data.

Once you have weighed the advantages and disadvantages, if you decide to go ahead and modify the report file, proceed with the instructions.

The steps to modifying a report file are as follows:

1. Understand a little about report files
2. Identify the report that you want to modify
3. Use the Dot Prompt to get into the report designer
4. Make the changes you desire
5. Save the report back to your hard drive
6. Test the report

### A little information about report files:

The report files in Foxpro are actually tables or data bases that contain all of the definitions. There are always two files for any report. One will have the extension "FRT" and the other will be an "FRX". For example, if a report is called "jobcost" it would have two files on the hard drive, "jobcost.frt" and "jobcost.frx". If you want to copy a report you need to copy both files or the report will be ruined.

There is an interface in Foxpro that allows you to change the reports "interactively" This allows you to move things around, change the fonts, colors, background, size, etc...

You access this interface by typing in "MODIFY REPORT reportname" where "reportname" is the name of the report you want to modify.

All of the modifiable reports are in the **CLIPv/REP** directory. Keep your modi-

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fied reports in this same directory and *CLIP* will use yours instead of the original ones.

Identifying the report you want to modify.

The easiest way to know what report goes to what function is to identify the function in *CLIP* that produces the report. The reports that are used to create the balance forward statements and invoices that are accessed from either

Billing Process or Mid-Month billing :

Plain paper statement or invoice = b0plain

Laser Statement 12256 or laser Invoice 12351

Offset determines which form is used:

0 offset = b12256I0

1 offset = b12256I1

2 offset = b12256I2

Small Statement 12328 or Small Invoice 12352

0 offset = b12328I0

1 offset = b12328I1

2 offset = b12328I2

Small Statement or Small Invoice

Pin Feed = b12354

Notice that CLIP determines which form to use based on the form chosen and the offset.

Route Sheet Invoices

Report files start with "pi"

Plain Paper = piplain

12345 - 0 offset = pi123450

12345 - 1 offset = pi123451

12345 - 2 offset = pi123452

Service Ticket = svr\_tick

Route Sheets :

Route Sheet = rtsheet

Route Sheet with bar code = rtsheetb

Abbreviated Route Sheet = rtshort

Expanded Route Sheet = rst\_exp

Summary Sheet = susheet

Project Report files:

Project Detail Landscape mode = pj\_dtl\_l

Project Detail Portrait mode = pj\_dtl\_p

Load List = pj\_load

Materials Required Landscape = pj\_matl

Materials Required Portrait = pj\_matp

Profit Loss analysis = pj\_pl

Project Proposal = PJ\_prop

Project Work Order = PJ\_wkord

Contract = PJ\_contr

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### Special Invoices:

```
Plain Paper          =  inv_plai
Plain paper statement =  inv_stmt
123511  0 offset    =  i1235110
123511  1 offset    =  i1235111
123511  2 offset    =  i1235112
123521  0 offset    =  i1235210
123521  1 offset    =  i1235211
123521  2 offset    =  i1235212
```

### Word Processor Reports

#### Accessed from Other Utilities/Word Processor

```
Header and Footer chosen  -wpheadft
Only Header chosen        -wpheadcu
Estimate Table Chosen     -wpheades
No header but footer      -wplainft
No header or Footer       -wplain
```

The tutorial that follows is based on making small changes to the b0plain form. This report is the plain paper statement or invoice from the Mid Month or End of Month billing screen.

Note: Make a backup of your entire CLIP program before changing any reports. You might have to restore a report if you make a mistake in your editing.

### Getting into the Report Designer

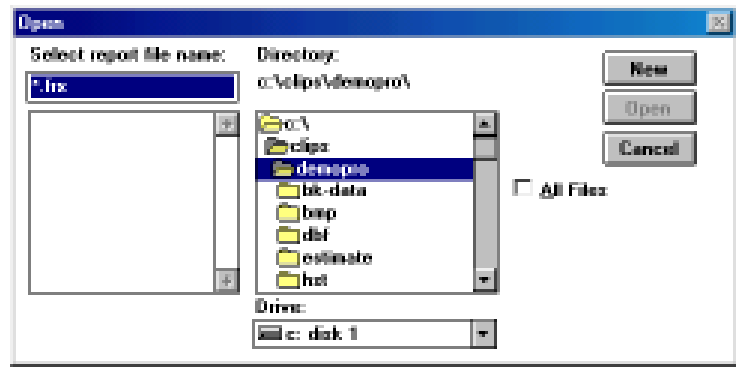
Once you know which report file you will be modifying, you can use the dot prompt to modify it. From the Files Menu, choose Other Options, then choose Dot Prompt.

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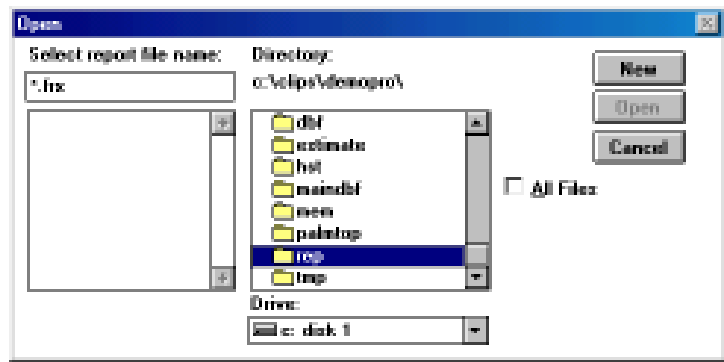
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At the dot prompt enter: "MODIFY REPORT " and then press enter. You will see a search box to locate the report you want to modify. All of the modifiable reports are in the REP directory.

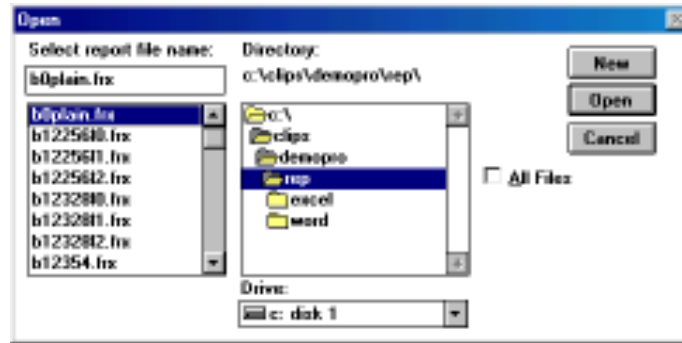


Choose the REP directory

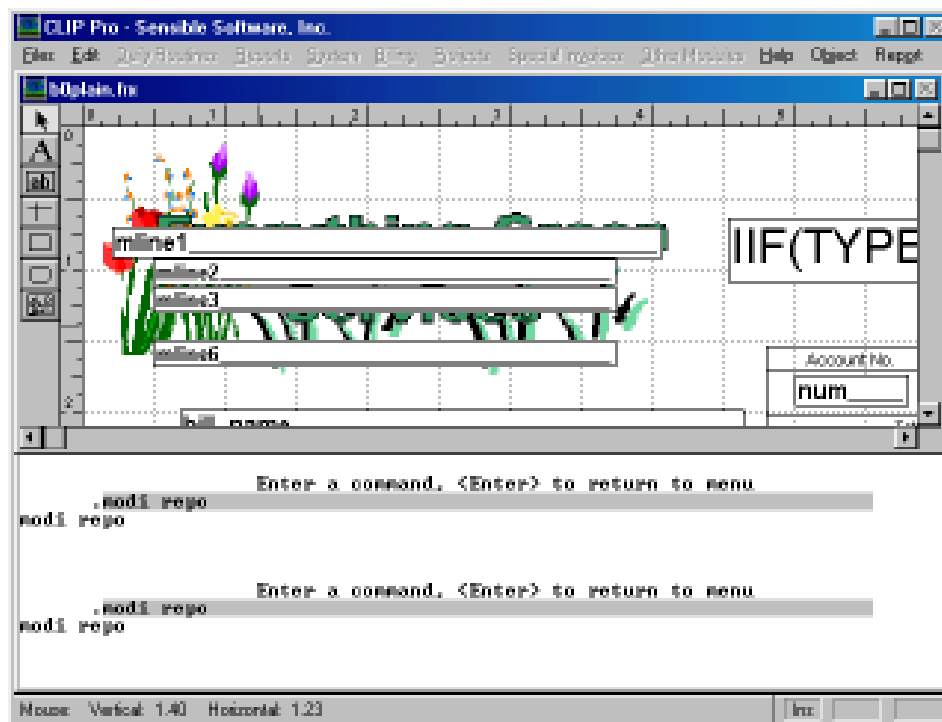


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Choose the "b0plain" report for the plain paper statement or invoice.



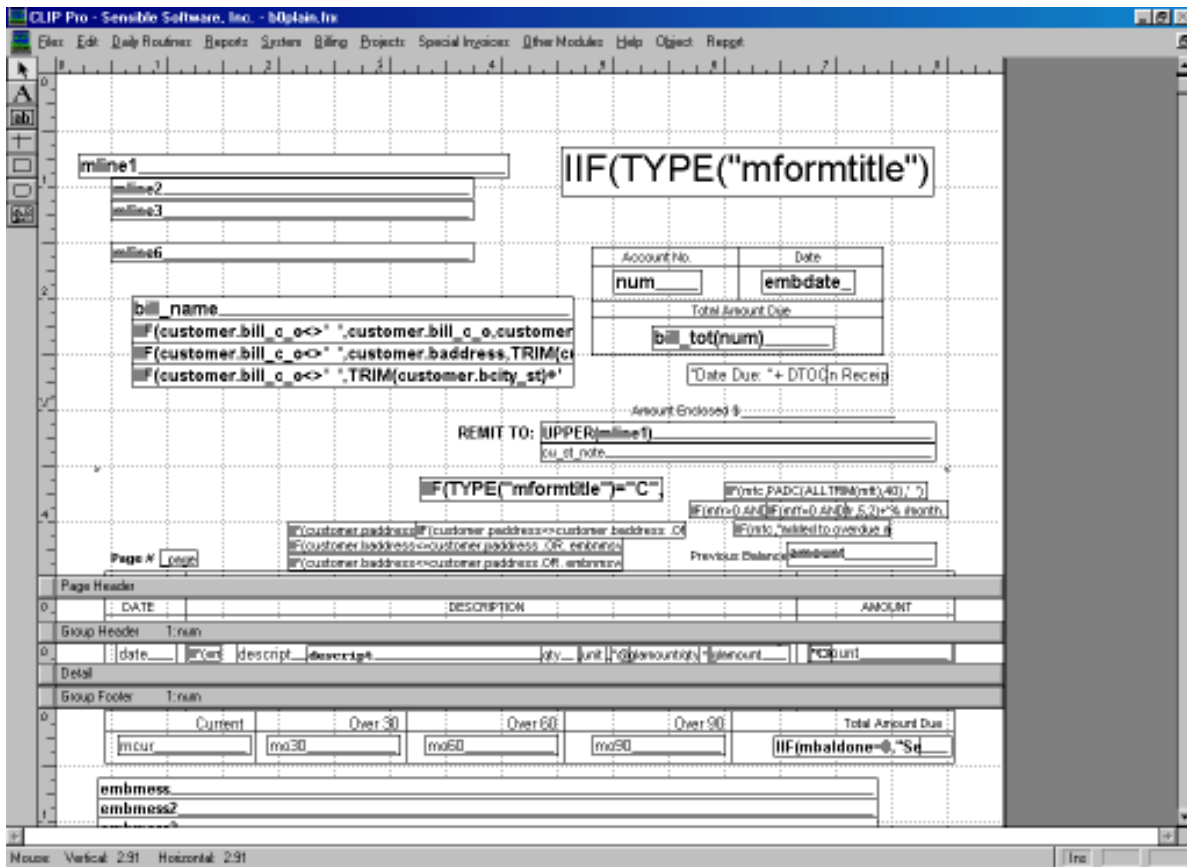
You will see a screen like this one:



Maximize both the Report screen and the *CLIP* screen to get the best view.

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Note: If your logo appears in the background, you will be able to modify your logo on the screen to adjust it as desired. To get your logo to print on the statements and invoices, you must save it as a BMP file, call it "cologo" and place it in the BMP directory of your *CLIP*.

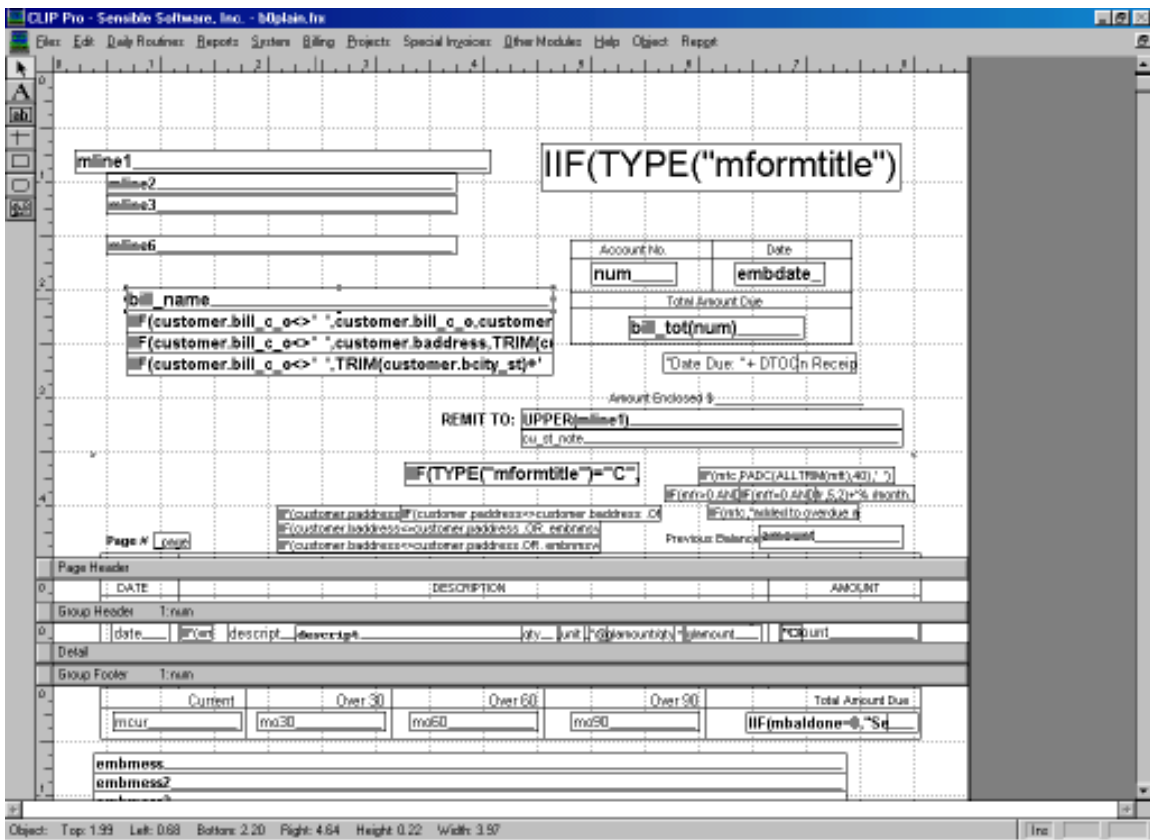
Changing the position of an object on a form.

Lets change the position of the billing name for our customer. We will want to move it over to the right a little bit.

In order to change the position we first need to select the "objects" that we want to move. We can do this one at a time by clicking on an object. When the object is selected, you will see handles around the object and the "object" menu at the top of the screen will be enabled.

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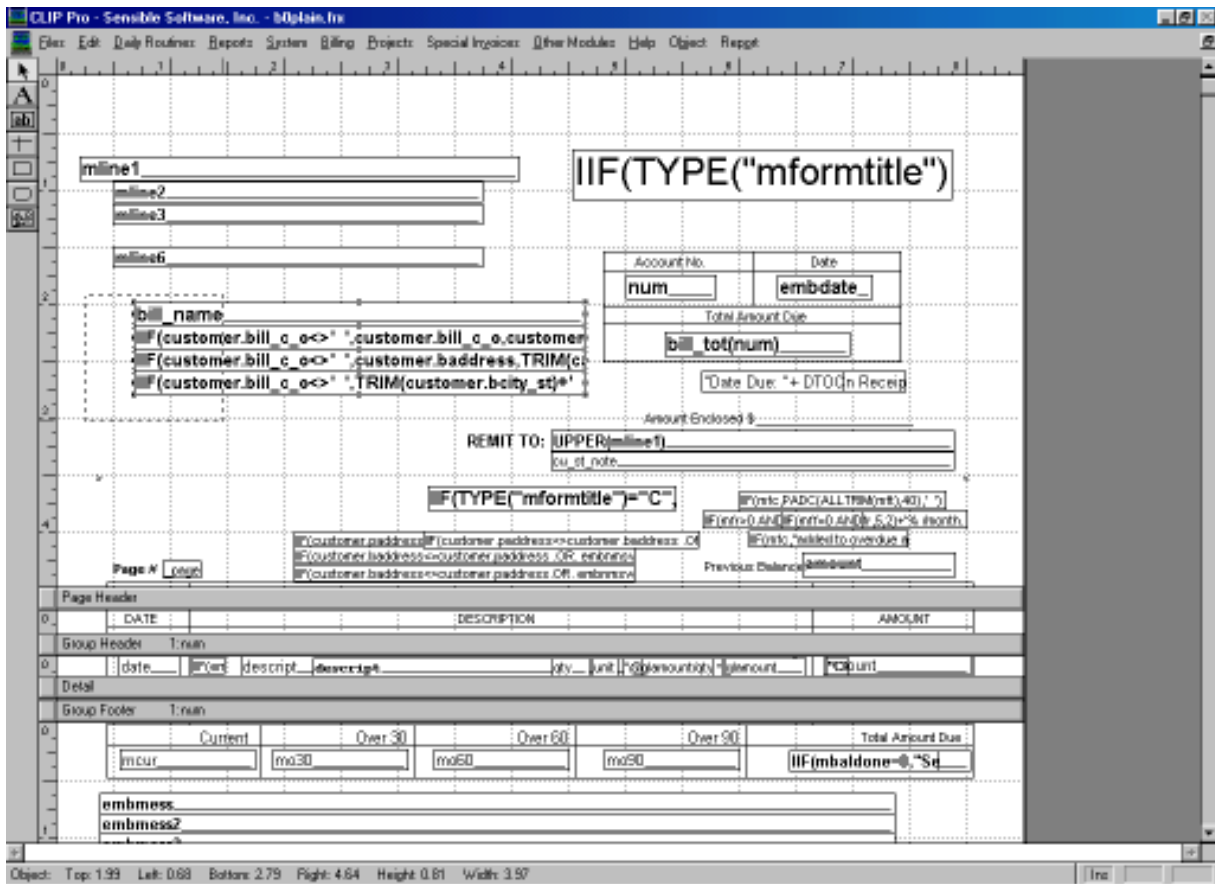
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To select more than one object at a time, you can hold the shift key down and click on each subsequent object. You can also start the mouse on the form where there is no object and drag a box around the objects you wish to select.

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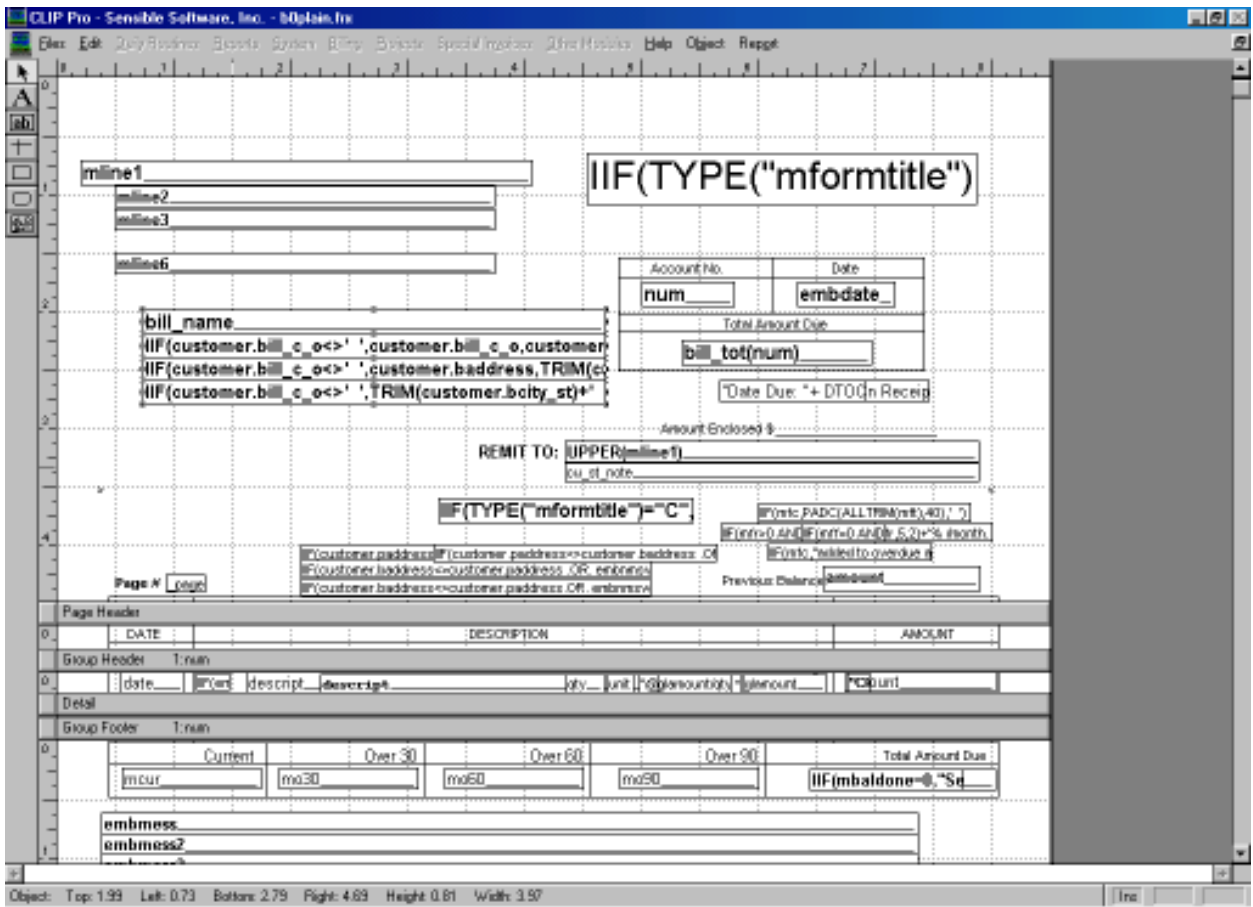
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Once the objects are selected, you can use the arrow buttons on your keyboard to change the position. Press the right arrow button 5 times to move the address over 5 pixels to the right.

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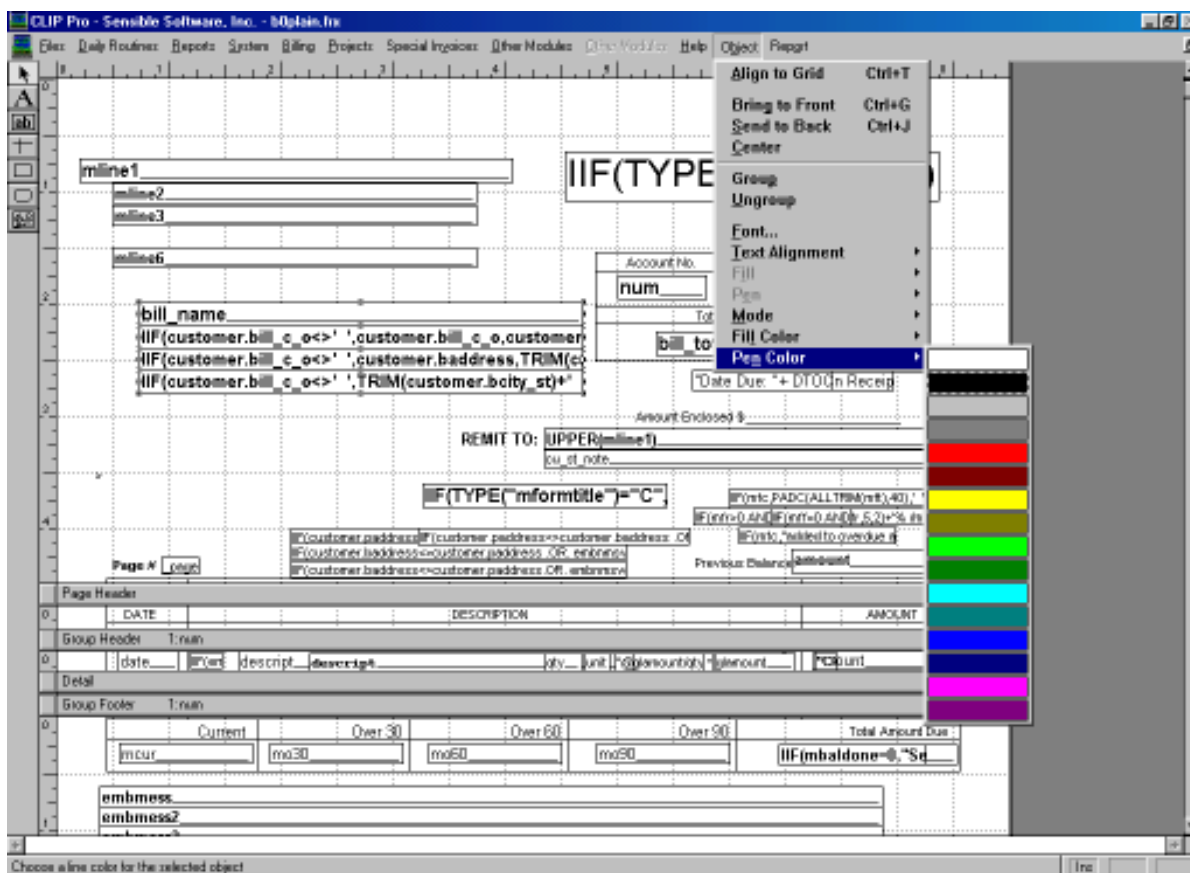


Changing the color of an object.

If you want your customer's name and address to print out in a different color, select the object and then pull down the object menu and press the "Pen Color" option and choose the color you desire.

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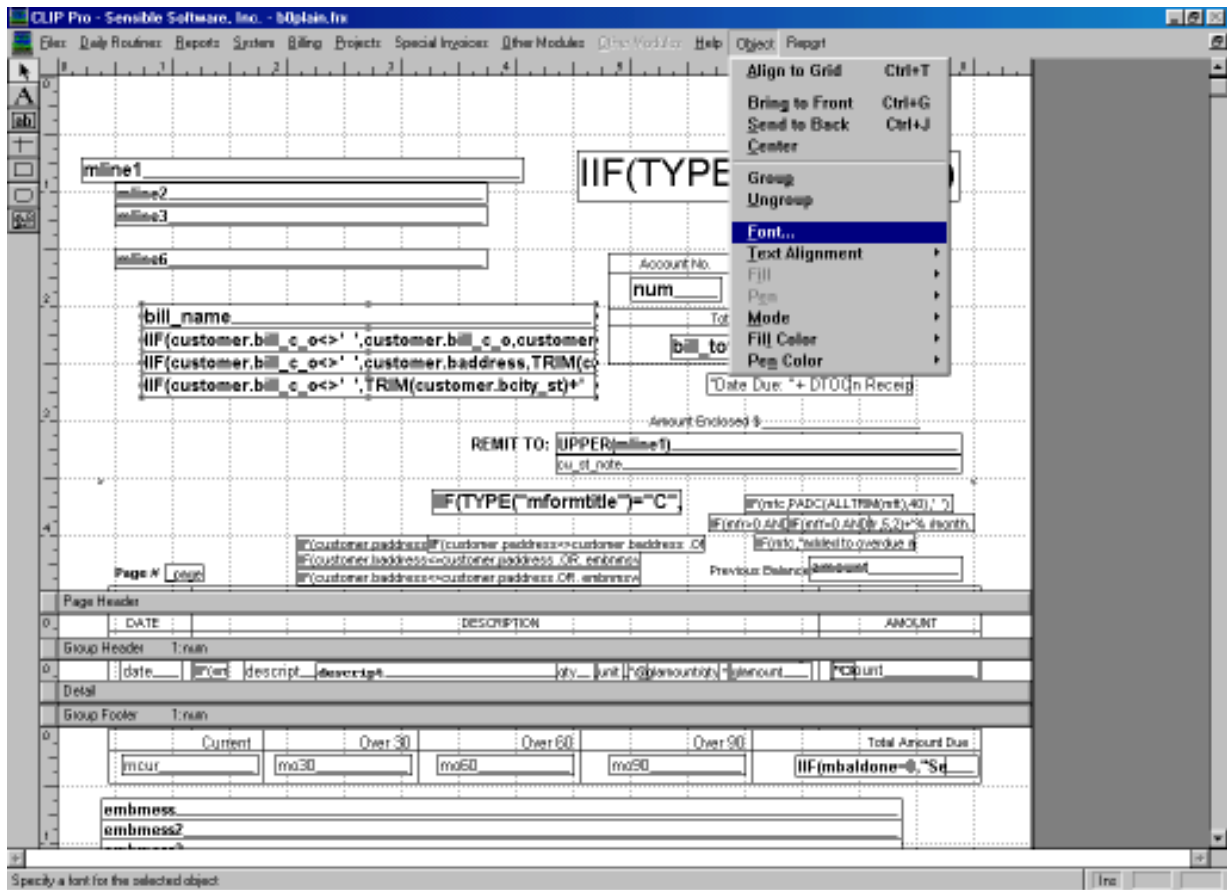


Changing the font of an object.

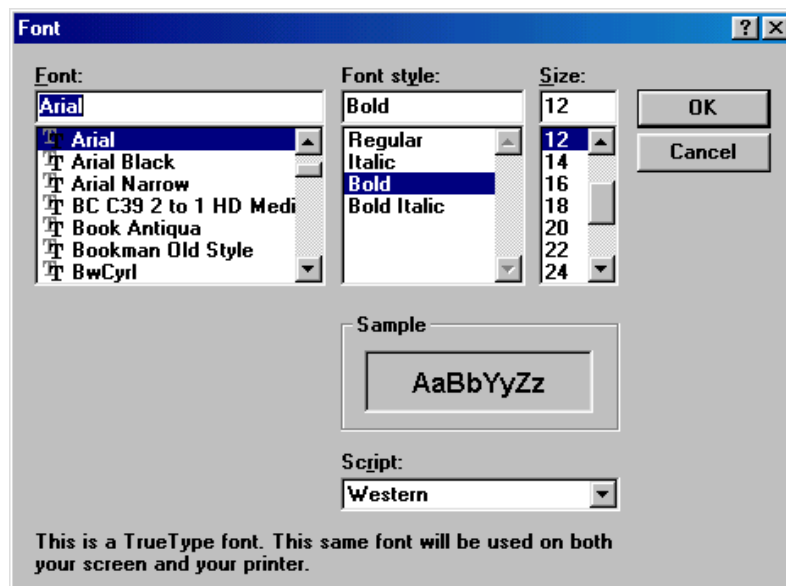
Select the object you want to change and then pull down the object menu and choose font.

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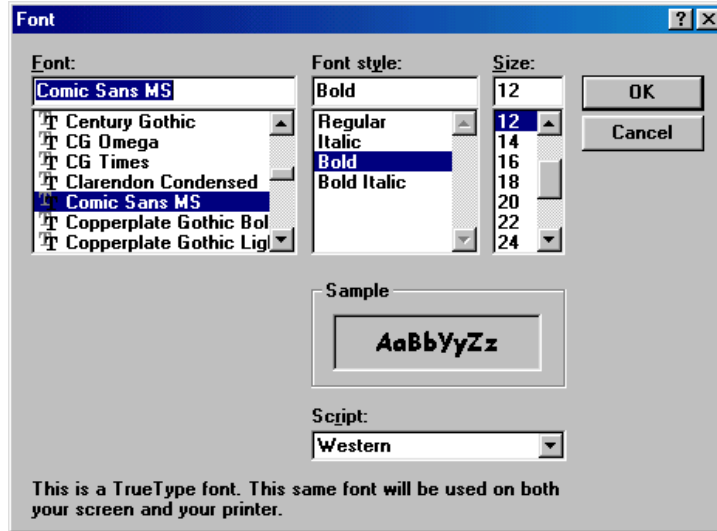


Select the font and size that you want.

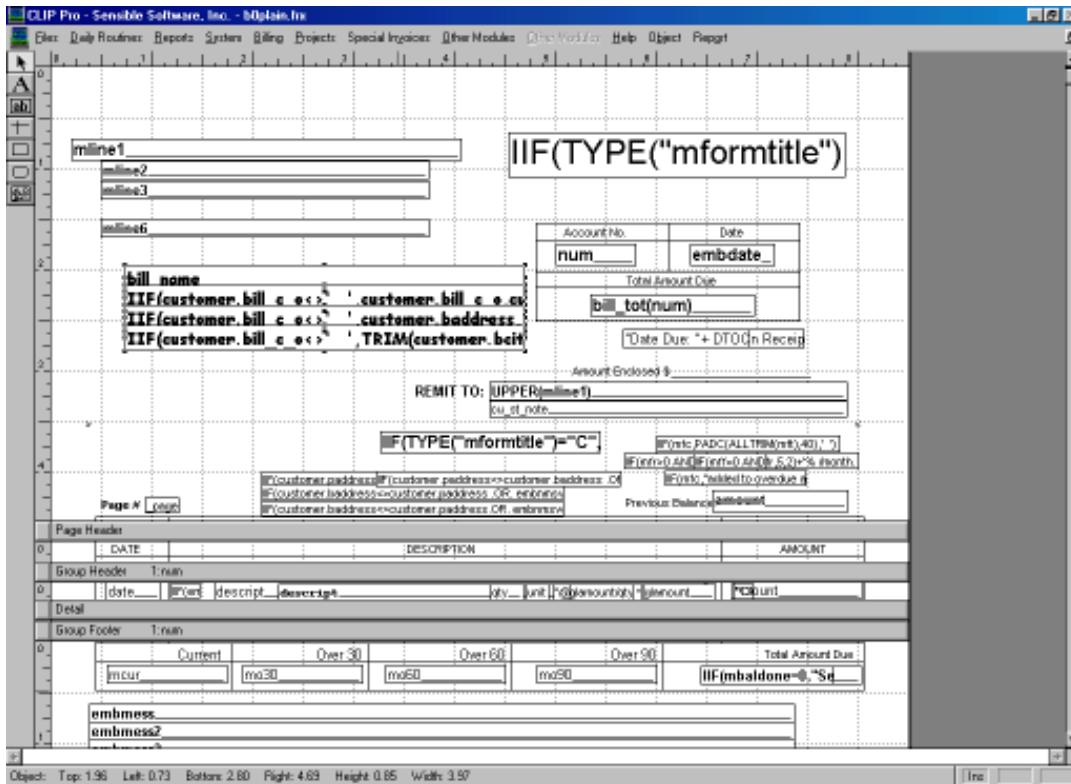


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Press Okay and you will return to the form designer.



Notice that if I enlarged the font, I would have to adjust the objects to fit or they would overlap each other.

Deleting an object from a report.

If you are sure that you do not want an object to be displayed on a report, you can delete it by simply selecting it and pressing your delete button.

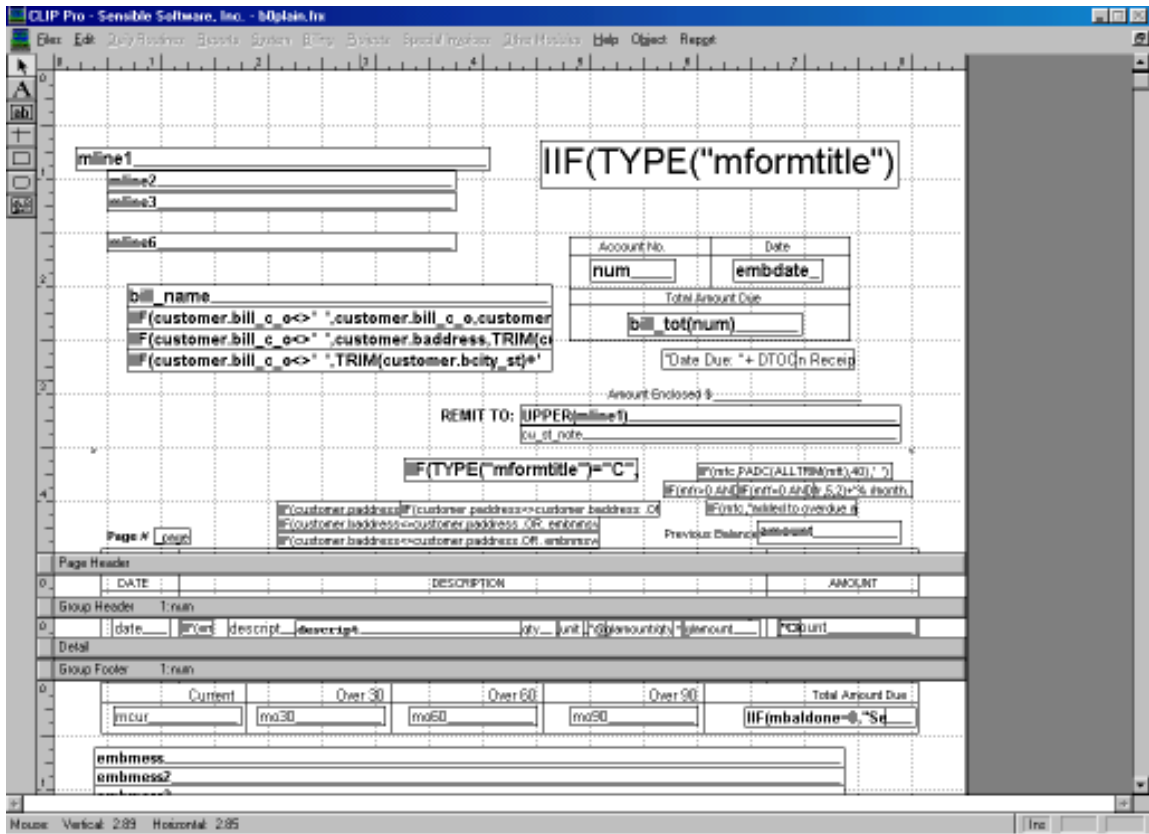
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## Copying an object

In most cases you can copy an object from one part of the report to another simply by selecting it and pressing “copy” from the edit menu and then “Paste” from the edit menu. You will see a copy of the object to the right and lower than the original object and it will be selected. “Grab” it with your mouse and move it down to the area you want.

## Understanding “Bands”



In the Plain Paper Statement/Invoice you can see 5 bands.

The first is the “Page Header”. This band is printed at the top of each page.

The second band is called “group header 1 num”. This is a group header which simply means that as **CLIP** is printing all the information between the header and the footer until the condition changes (a new customer number).

The third band is called the “detail” band. It prints the detail of the data and continues to print it until the group header changes or the page number changes. This is the band that contains the date, description, charge, etc.. for all the transactions for the customer.

The fourth band is the “Group Footer 1 num” and it signifies the end of the group. This band is empty because there is no information that we want to print when the customer number changes. In other reports, there will be sub-totals and such under this band.

The last band is the “Page Footer”. This is where we print the information we want on the bottom of the page.

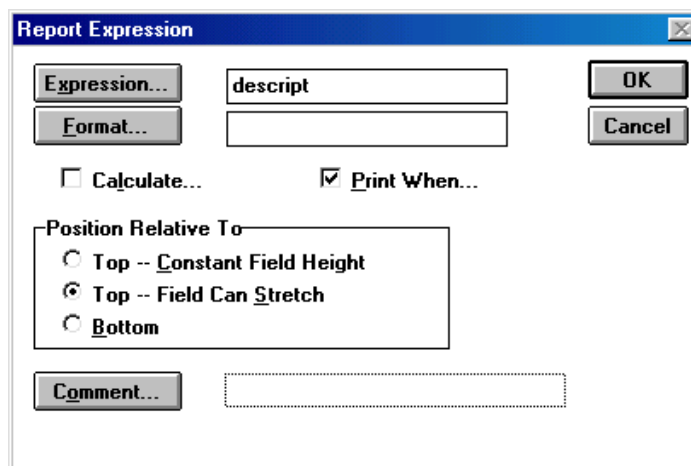
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You can adjust the bands by grabbing the square at the left of the footer and moving it up or down as needed. You cannot move the band higher than the lowest object in the band.

Understanding the programming behind objects.

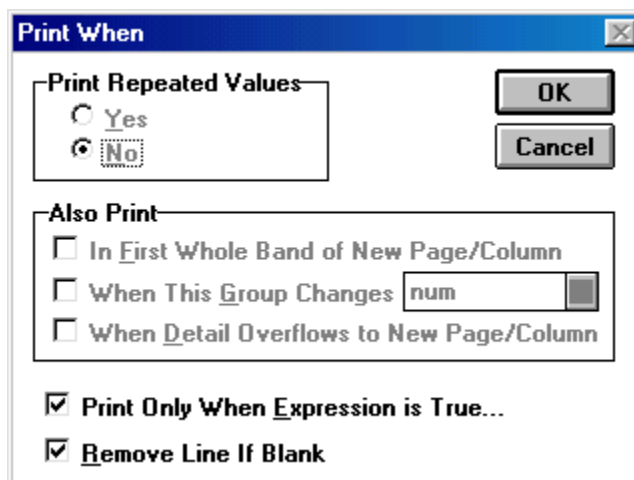
Objects have code that makes them appear or disappear as requested by the user from the menus and options. You can see this code by double clicking on the object.



If I double click on the descript field (description of the transaction) I see the dialog box above.

Notice that the "Print When" is checked off. This means that there is a condition that needs to be met in order for the decription to print.

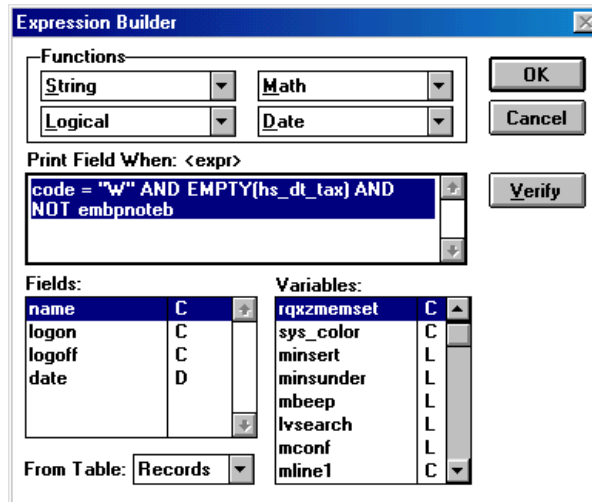
If you click on the Print When check box, you will then see the print when dialog box.



Notice the two options that are checked are the "Print only when expression is true" and the "Remove line if blank". The "Print only when expression is true" dialog can be accessed by clicking on it.

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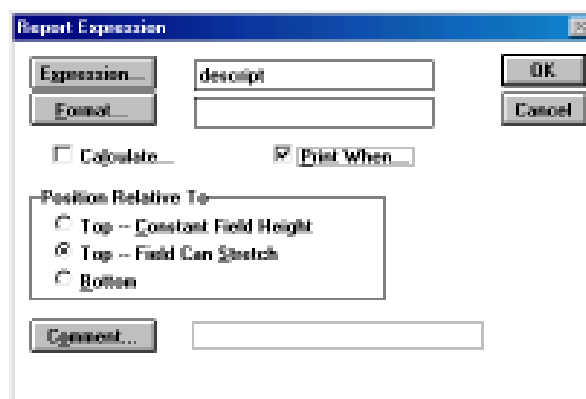
Notice that the expression is: `code = "W" AND EMPTY(hs_dt_tax) AND NOT embpnoteb`

The means that **CLIP** will first check to see if the code is a "W" or a note, then see if the project detail tax is empty (it is not a detail item on a project) and then see if the variable from end or month billing or mid-month billing is not set to Arial Font. If the detail currently printing matches all of these conditions, the line will print. You can see how these conditions can get rather complex.

Press escape to get out of this dialog.

The "Remove line if blank" does what it sounds like it does, if the line is blank, don't print anything, just skip it. That way, if all of the objects in a line are blank, there will be no line feed on the printer.

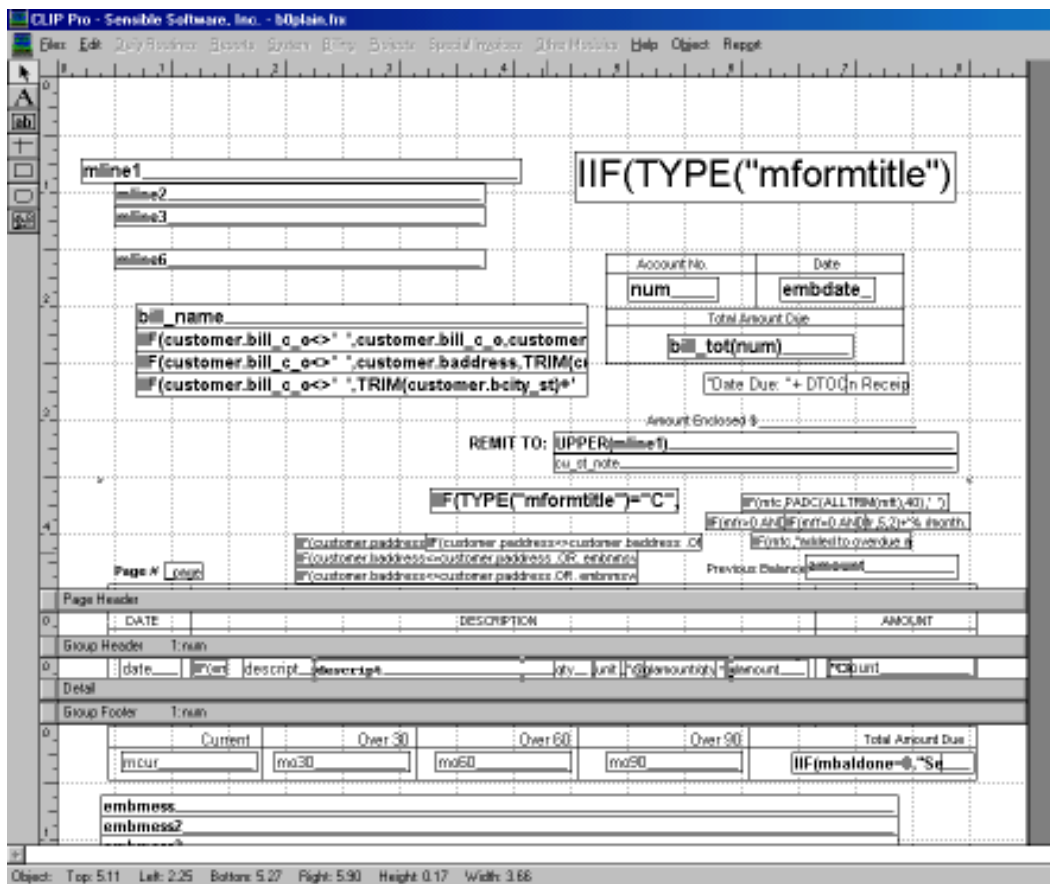
Press escape from this dialog box.



Now press escape again and you will be returned to the Report Designer.

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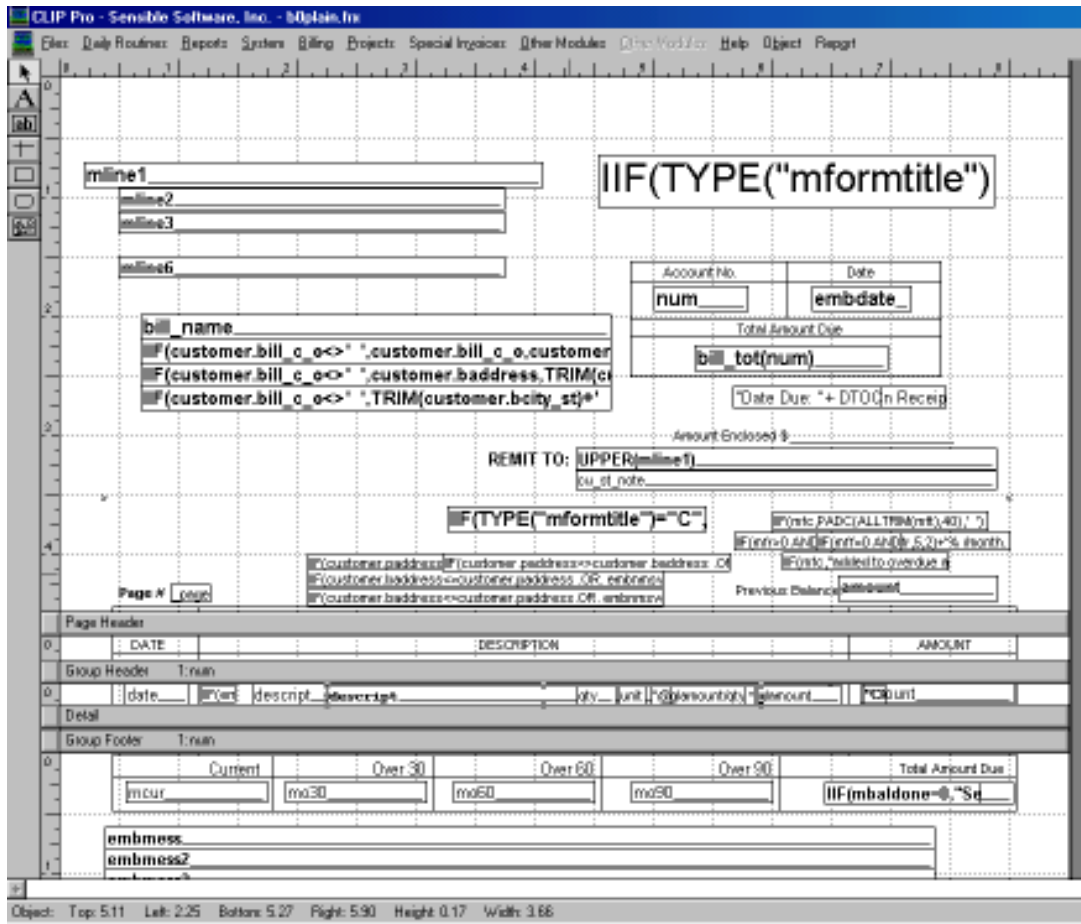
Notice that there is another “descript” object under the one that we just worked on. If you look at the code for that one, you will find that it has almost the same code with the exception of the variable for “embpnoteb”. This is how we fulfill the desires of the operator. If you choose, “Print notes in Arial Font” we use the descript underneath. If you “un-check” that option we use the standard one. So, eventhough it looks like we change the font depending on what you choose from the billing screen, what we are doing is printing one object or the other depending on your choice. Enough of this. Let’s get something more useful.

## Editing text on a Report

Lets change the text of the “Total Amount Due” to “Pay this amount”.

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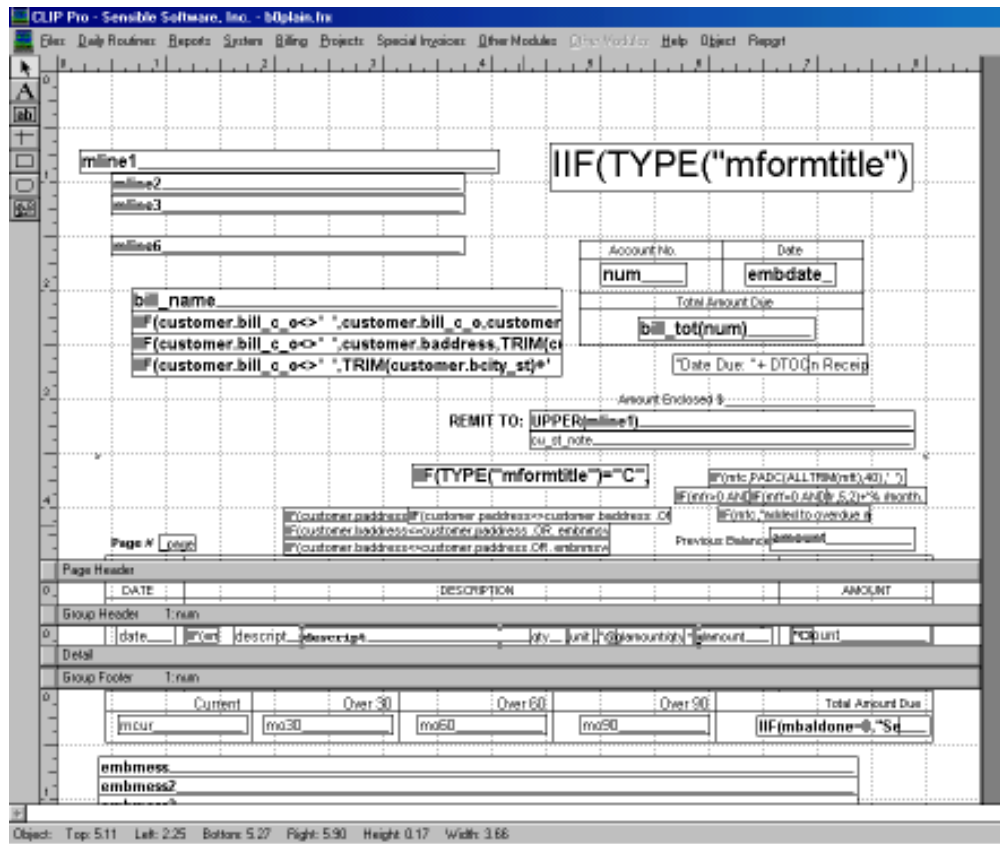
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Notice the text above the “bill\_tot(num)” field. Notice the “A” tool on the left hand side of the report designer.

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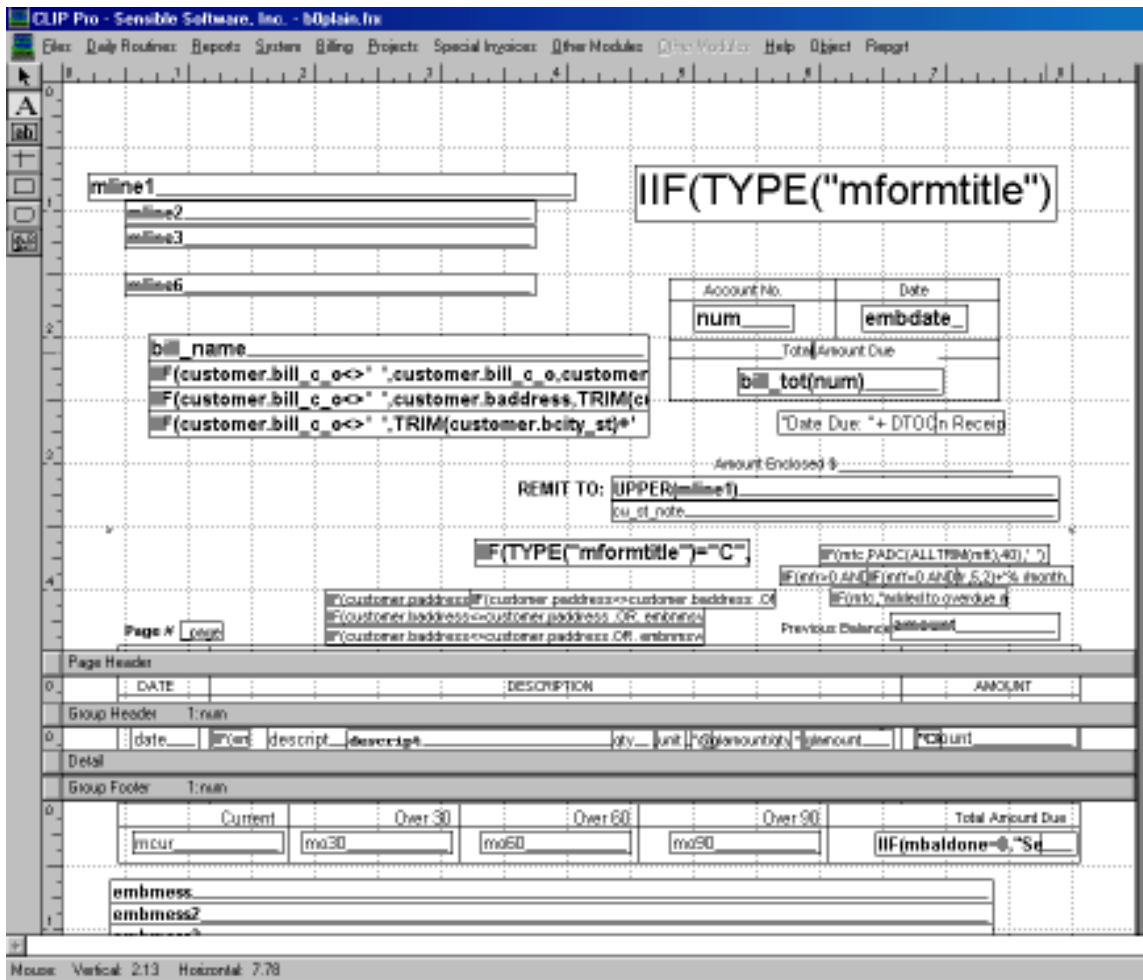
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Press this tool and then click in the center of the “Total Amount Due” text.

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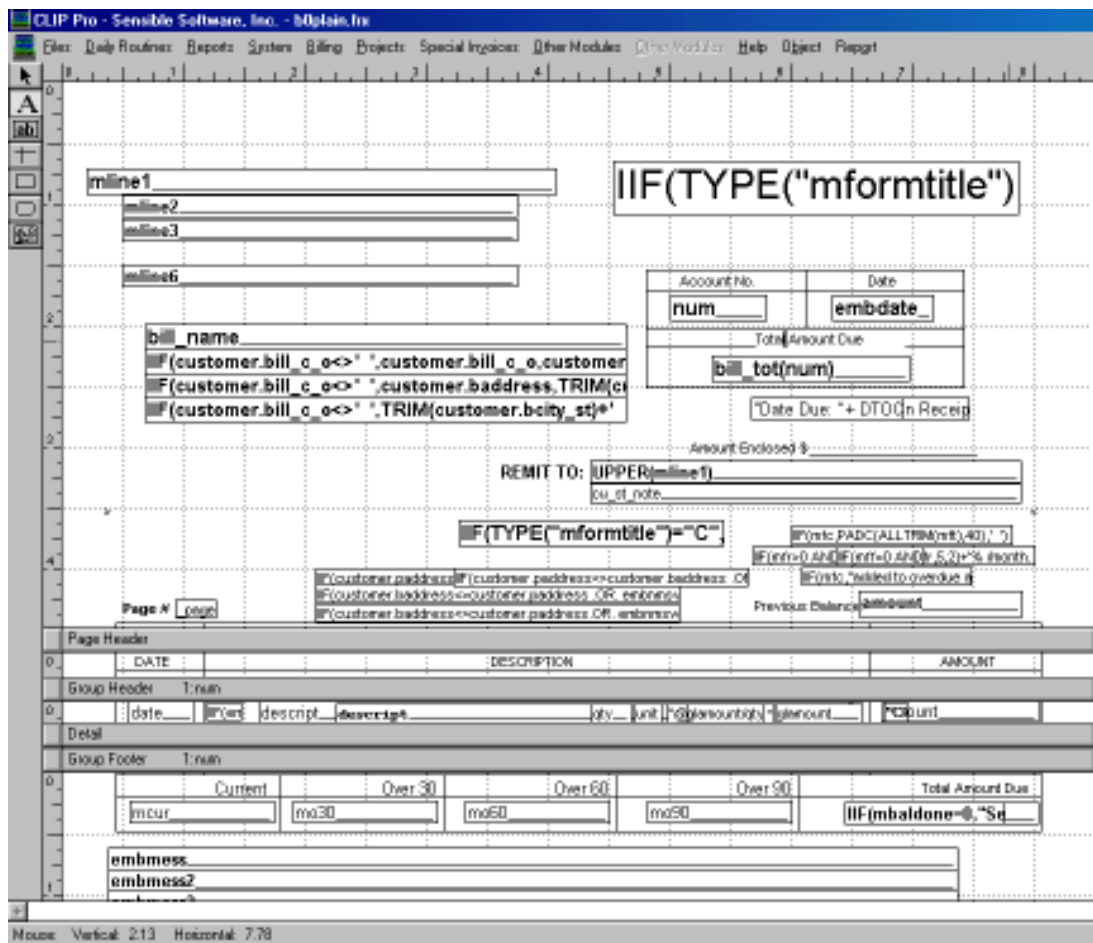
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The cursor should show up in the text of the object.

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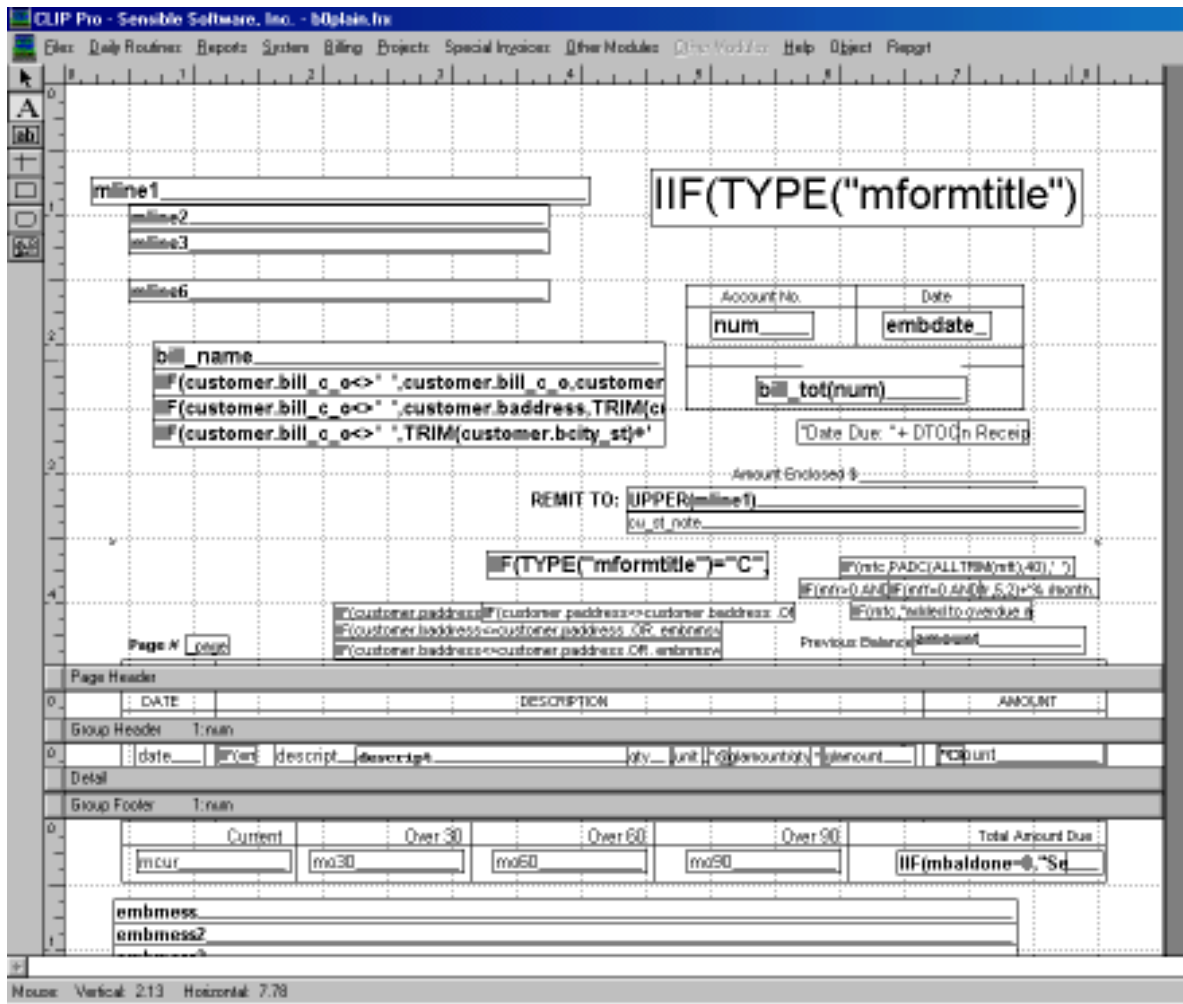
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Use the back space and the delete key to remove the text.

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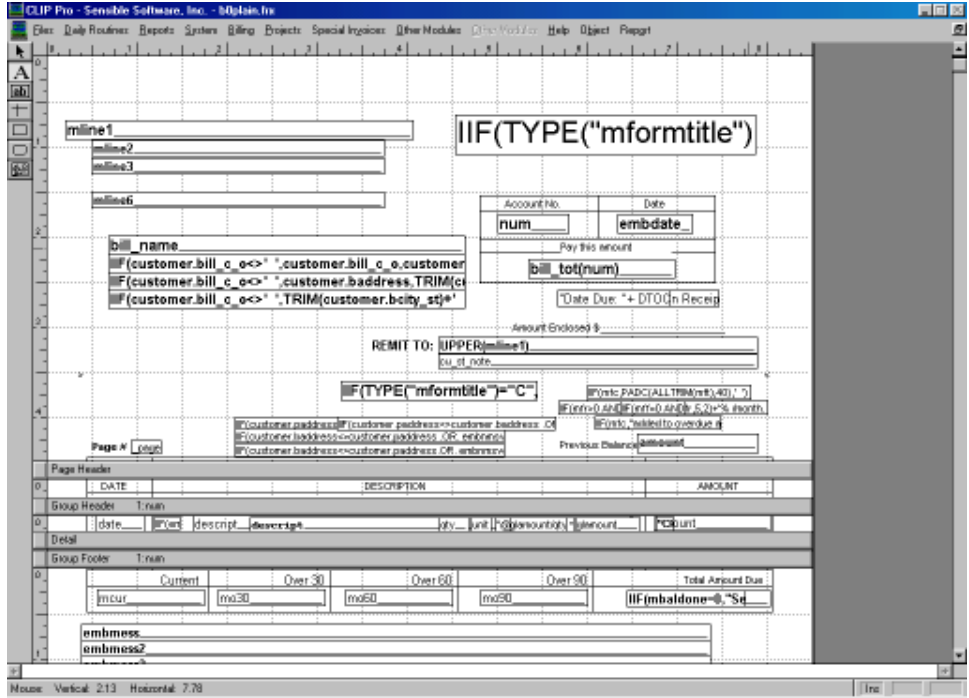
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Type in the new text "Pay this amount". When you are done typing in the text, click on the arrow tool on the upper left hand side of the report designer.

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You have just changed the text.

To create new text, just click on the “A” text tool and then click anywhere on the form and type out the text you want. After you type it out, you can change the font and size by using the same method outlined above.

Explanation of the tools on the report designer.

The tools for the report designer are on the upper left hand side of the screen. The first one is the arrow or pointing device. You use this tools to select object to move or modify.

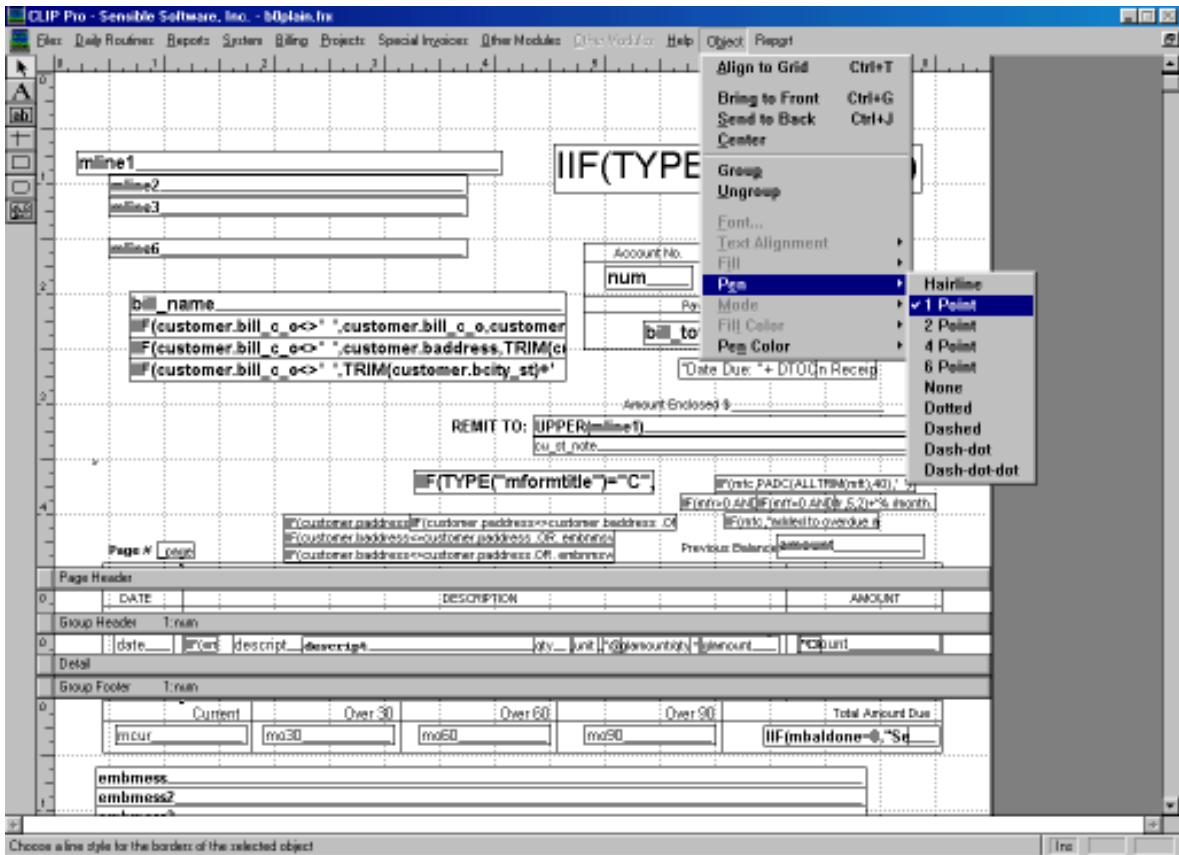
The “A” tool is for modifying or creating text.

The “ab” tool is for adding fields or variables to the report.

The line tool is for drawing lines on the form. You can change the thickness of the line by selecting the line and using the object menu, pen tool.

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The square and “oval” tools are for drawing boxes with either sharp corners or rounded corners.

The picture tool is for adding bitmaps to your form.

When you are finished modifying the form, hold down the CTRL key and press the “W” to save it to the report to disk.

To test your report, run it from the menu and see your changes. If you get an error, chances are you have mis-spelled something.

If you need to, you can restore from your backups and try to modify it again.

Have fun and be creative!

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