QXpress Template Designer Manual version 1.1

The ability to create your own reports, invoices and route lists offers you great power and flexibility. By using the template designer you can now create endless report, invoice and route list templates, allowing you to get the data you need, displayed in the way you like it. At a basic level you are able to quickly and easily download templates that other users have made. But it is also very easy to make small changes to existing templates to suit your preferences. As you grow more advanced, you'll start to create your own templates from scratch and take full advantage of the flexibility and power these features provide you.

NOTE: All versions of QXpress support templates for route lists and invoices. However, only QXpress Platinum supports templates for custom reports and estimates.

Template Designer: Reports (and Estimates)

This topic explains how the Template Designer can be used to download templates, show templates, create your own templates and share your templates with other users.

NOTE: Templates for custom reports and estimates are only available in QXpress Platinum.

Downloading Templates

To create, edit, or show a template, you must first download a similar template. Templates that you download not only give you a starting base for your own template, but they also provide you with "data sources". Downloading templates is easy, and only requires a connection to the Internet.

To Download A Template

1. Ensure that you are currently connected to the Internet.
2. Go to **Reports > Template Designer: Reports...**.
3. Click **Download Template...**.
4. Here you will see a list of all report templates shared by Alocet, and by other users. By clicking on a template you will see its description in the *Description of selected template* box.
5. Click on the template you would like to download.
6. Click **Download Selected Template**.

Showing A Report Template

Once you have downloaded a report template, you can show and print this report. Please note: to filter your results see *Filtering Report Results*.

To Show A Report Template

1. Go to **Reports > Template Designer: Reports...**.
2. From the *Report Category* dropdown list, select the Category you want to choose your report from.
3. Click on the report you want to show.
4. Click **Show Report**.

Showing An Estimate (or Proposal) Template

In QXpress Platinum, report templates can be used to print estimates and proposals.

To Show An Estimate Template

1. From *My Calendar*, or the from the *Customer* screen, double-click on the service you want to print an estimate for.
2. Click on the *Job Items* tab.
3. Click **Print Estimate / Report**.
4. From the *Template* dropdown list, select the template you want to use.
5. Click **OK**.

Showing An Estimate (or Proposal) Template for multiple services

In QXpress Platinum, you can also print estimates for multiple services, rather than for a single service.

To Show An Estimate Template for multiple services

1. From the *Customer* screen, under the *Schedule* tab, highlight the services you want to print an estimate for.
2. Click **Schedule > Print Estimate...**.
3. From the *Template* dropdown list, select the template you want to use.
4. Click **OK**.

Creating a new report template

When creating a new template, it is always best to copy an existing template, and then modify that copy. If you do not have a template that is similar to the one you want to create, you should click **Download Template** and download the closest match you can find.

To Create A New Template

1. Click **Reports > Template Designer: Reports ...**.
2. From the *Report Category* dropdown list, select the category you would like to place your new report in.
3. Click **New...**.
4. In the *Template Name* box, type a name for this template.
5. Select the *Copy and duplicate an existing template* option.
6. From the *Existing Template Name* dropdown list, choose a template that most closely matches the template you want to create.
7. Click **OK**.

Working With Report Categories

With the number of reports that you can download, you will find the need to categorize your reports. You may add categories such as “Accounting”, “Job Costing” and “Contacts”, and download reports directly into these categories. Please note: Categories are not available for route list templates and invoice templates.

To Create A New Category

1. To open the Template Designer, click **Reports > Template Designer:Reports...**.
2. Click the details button to the right of the *Report Category* dropdown list.
3. Click **Add**.
4. Under the *Additional Report Categories* column, type a new category name.
5. Click **Close**.

To Edit A Category Name

1. To open the Template Designer, click **Reports > Template Designer:Reports...**.
2. Click the details button to the right of the *Report Category* dropdown list.
3. Under the *Additional Report Categories* column, click on the Category Name you want to change.
4. Type a new name for the Category.
5. Click **Close**.

To Delete A Category

1. To open the Template Designer: Reports, click **Reports > Template Designer:Reports...**.
2. Click the details button to the right of the *Report Category* dropdown list.
3. Under the *Additional Report Categories* column, click on the Category Name you want to delete.
4. Click **Delete**.
5. Click **Close**.

To Move A Report Template To A Category

1. Click **Reports > Template Designer:Reports...**.
2. From the *Report Category* dropdown list, select the category your report template is currently in.
3. Click on the template you want to move.
4. Click **Move To Category...**.
5. From the *Report Category* dropdown list, select the category you want to move the template to.
6. Click **OK**.

Sharing Your Report Template

One of the best aspects of the Template Designer is the built-in ability to let you quickly and easily share templates with other users. If you have created a template that you feel could be of benefit to one or more other users - you should be proud and share it! Once you have shared it, it is up to other users to read the description you gave for your template, and then choose to download it.

NOTE: You are not sharing your company's data, you are only sharing a template.

To Share Your Report Template

1. Make sure you are currently connected to the Internet.
1. Click **Reports > Template Designer:Reports...**.
2. From the *Report Category* dropdown list, select the category your report is in.
3. Click on the report you want to share.
4. Click **Share Template...**.
5. In the *Template Name* box enter a name for your report template. Your name will have to be unique, so that no other shared report has this name. Also, you should try to create a name that is meaningful. For example, instead of calling the template ‘Payment List’, try calling it ‘Payments-Grouped by Type’.
6. In the *Display Name* box, enter your name. For example, enter “Joe Smith” or “Joe S”, or “The Service Company”. This display name will be seen by other users.
7. In the *Template Description* box, give a meaningful description of what your report template does. When other users look at a list of available report templates to download, they will read your description and use it to decide if your report template is something they will be able to use.
8. Click **Share Report**.
9. Congratulations - you have now shared your valuable efforts with other users!

Editing a template

Please see the *Layout Designer topic* to learn how to edit a template.

Template Designer: Route Lists

This topic is similar to the Template Designer: Reports and Template Designer: Invoices. It explains how the Template Designer: Route Lists can be used to download route list and work order templates, show route lists templates, create your own route list templates and share your route list templates with other users.

Downloading Route List Templates

To create, edit, or show a route list template, you must first download a similar template. Templates not only give you a starting base for your own template, but they also provide you with data sources that you can use to create your own route lists. Downloading route list templates is easy, and only requires a connection to the Internet.

To Download A Route List Template

1. Ensure that you are currently connected to the Internet.
2. In *My Calendar*, click Print > Print Work Orders / Route Lists.
3. Click **Customize**.
4. Click **Download Template...**.
5. Here you will see a list of all route list and work order templates uploaded by Alocet, and by other users. By clicking on a template you will see its description in the *Description of selected template* box.
6. Click on the template you would like to download.
7. Click **Download Selected Template**.

Showing A Route List

Once you have downloaded a route list template, you can show and print this route list or work order. Please note: to filter your results see *Filtering Report Results*.

To Show A Route List Template

1. In *My Calendar*, highlight the services you want to print route lists for.
2. Click **Schedule > Status To 'On Route'**.
3. Click **Print > Work Orders / Route Lists**.
4. From the *Template* dropdown list, select the template you want to show.
5. Click **OK**.

Creating a new route list template

When creating a new route list template, it is always best to copy an existing route list template, and then modify that copy. If you do not have a template that is similar to the one you want to create, you should click the Download Template button and download the closest match you can find.

To Create A Route List template

1. In *My Calendar*, click **Print > Print Work Orders / Route Lists**.
2. Click **Customize**.
3. Click **New...**.
4. In the *Template Name* box, type a name for this route list template.
5. Select the *Copy and duplicate an existing template* option.
6. From the *Existing Template Name* dropdown list, choose a route list template that most closely matches the template you want to create.
7. Click **OK**.

Sharing Your Route List Template

The Template Designer has the built-in ability to let you quickly and easily share route list templates, including work orders, with other users. If you have created a route list or work order that you feel could be of benefit to one or more other users, be proud and share it! Once you have shared it, it is up to other users to read the description you gave, and then choose to download it.

NOTE: You are not sharing your company's data, you are only sharing a template.

To Share Your Route List Template

1. Make sure you are currently connected to the Internet.
2. In *My Calendar*, click **Print > Print Work Orders / Route Lists**.
3. Click **Customize**.
4. Click on the route list template you want to share.
5. Click **Share Template...**.
6. In the *Template Name* box enter a name for your route list template. Your name will have to be unique, so that no other shared report template, route list template or invoice template have this name.
7. In the *Display Name* box, enter your name. For example, enter "Joe Smith" or "Joe S", or "The Service Company". This display name will be seen by other users.
8. In the *Template Description* box, give a meaningful description of what your template does. When other users look at a list of available route lists templates to download, they will read your description and use it to decide if your template is something they will be able to use.
9. Click **Share Template**.
   Congratulations - you have now shared your valuable efforts with other users!

Editing a template

Please see the *Layout Designer* topic to learn how to edit a template.

Template Designer: Invoices

This topic is similar to the Template Designer: Reports and Template Designer: Route Lists. It explains how the Template Designer: Invoices can be used to download invoice templates, show invoice templates, create your own invoice templates and share your invoice templates with other users.

Downloading Invoice Templates

To create, edit, or show an invoice template, you must first download a similar invoice template. Templates not only give you a starting base for your own invoice template, but they also provide you with the necessary data sources. Downloading templates is easy, and only requires a connection to the Internet.

To Download An Invoice Template

1. Ensure that you are currently connected to the Internet.
2. Go to **Invoices > Invoice List**.
3. Click **Customize**.
4. Click **Download Template...**.
5. Here you will see a list of all invoice templates uploaded by Alocet, and by other users. By clicking on a template you will see its description in the *Description of selected template* box.
6. Click on the template you would like to download.
7. Click **Download Selected Template**.

Showing An Invoice Template

Once you have downloaded an invoice template, you can show and print an invoice with it. Please note: to filter your results see *Filtering Report Results*.

To Show An Invoice Template

1. Click **Invoices > Invoice List**.
2. Select the invoices you want to print.
3. Choose the desired template from the *Template* dropdown.
4. Click **Print**.
5. Click **OK**.

Creating a new template

When creating a new template, it is always best to copy an existing template, and then modify that copy. If you do not have a template that is similar to the one you want to create, you should click the Download Template button and download the closest match you can find.

To Create An Invoice Template

1. Click **Invoices > Invoice List**.
2. Click **Customize**.
3. Click **New...**.
4. In the *Template Name* box, type a name for this invoice template.

5. Select the *Copy and duplicate an existing template* option.
6. From the *Existing Template Name* dropdown list, choose an invoice template that most closely matches the template you want to create.
7. Click **OK**.

Sharing Your Invoice Template

The Template Designer has the built-in ability to let you quickly and easily share invoice templates with other users. If you have created an invoice template that you feel could be of benefit to one or more other users, be proud and share it! Once you have shared it, it is up to other users to read the description you gave, and then choose to download it.

NOTE: You are not sharing your company's data, you are only sharing a template.

To Share Your Invoice Template

1. Make sure you are currently connected to the Internet.
2. Click **Invoices > Invoice List**.
3. Click **Customize**.
4. Click on the invoice template you want to share.
5. Click **Share Template...**.
6. In the *Template Name* box enter a name for your invoice template. Your name will have to be unique, so that no other shared report template, route list template or invoice template has this name.
7. In the *Display Name* box, enter your name. For example, enter "Joe Smith" or "Joe S", or "The Service Company". This display name will be seen by other users.
8. In the *Template Description* box, give a meaningful description of what your template does. When other users look at a list of available invoice templates to download, they will read your description and use it to decide if your template is something they will be able to use.
9. Click **Share Template**.
   Congratulations - you have now shared your valuable efforts with other users!

Editing a template

Please see the *Layout Designer* topic to learn how to edit a template.

Print Preview

In the Print Preview Screen you can print your report, invoice or route list; export your data to Microsoft Excel; filter results; or simply preview how your report, invoice or route list will look.

Filtering Report Results

By default, a new template will show all values ever produced for every client in your data source. Rarely will this be optimal - so you will want to filter the data to only show data between certain dates, and for only certain clients.

To Select Which Fields Will Be Filtered

1. If there is already a filter applied, you will see a *No Filter* button and a *Filter Field Select* button. If this is the case, click **Filter Field Select**. However, if there is no filter currently applied, click **Filter**.
2. On the left, select the fields you want to filter on. Please note that customer fields must be filtered through 'Customer-Memorized Filter Lists' or 'keyAid'. Also note that you cannot filter on more than 5 fields at a time. "Customer-Memorized Filter Lists" or 'keyAid' count as one field.
3. Click **Filter**.
4. You will now see the fields you want to filter on below the row of buttons at the top of the Print Preview screen.

To Filter On Customers

NOTE: Customers are typically filtered by *Customer-Memorized Filter Lists*. Sometimes, however, you may filter on *KeyAid*, which has the same affect.

1. In the Print Preview screen, click on the details button to the right of the "Customer-UserDefinedLists" filter field.
2. In the *Client Filter* screen, select your desired Memorized Filter List from the *Customer-Memorized Filter Lists* dropdown list. Memorized Filter Lists must first be created and saved from the *Customer* screen before being made available here.
3. To ensure that inactive customers are not included in your report, select the *Hide Customers That Are 'Hidden'* checkbox. Otherwise, clear the *Hide Customers That Are 'Hidden'* checkbox.
4. Click **Filter**.
5. For the report to change with the new filter criteria, click **Refresh**.

To Filter On Dates

1. In the Print Preview screen, click on the details button to the right of a filter field that is a *date type*. Examples of date types are: job dates, payment dates and invoice dates.
2. In the *Date Filter* screen, select the *From* and the *To* dates for the date range in your report. It is important to note that the date range is inclusive, meaning that any record that is equal to either the *From* or the *To* date <u>will</u> be included in your report.

3. Click **Filter**.
4. For the report to change with the new filter criteria, click **Refresh**.

To Filter On Text
1. In the Print Preview screen, click on the details button to the right of a filter field that is a *text type*. Examples of text types are: a payment memo, a job description, the status of a job, and client notes.
2. In the *Text Filter* screen, type the text you want to filter on.
3. Specify whether the report should keep records that *contain* the text you typed, or whether it should on keep records that *do not contain* the text you typed.
4. Click **Filter**.
5. For the report to change with the new filter criteria, click **Refresh**.

To Filter On Numbers
1. In the Print Preview screen, click on the details button to the right of a filter field that is a *number type*. Examples of number types are: an invoice amount, a tax rate, and the actual hours of a job.
2. In the *Number Filter* screen, select your criteria and enter your values accordingly.
3. Click **Filter**.
4. For the report to change with the new filter criteria, click **Refresh**.

Printing

This section will show you how to print your template, as well as change the printer if you have multiple printers. Please note that you must select your printer before you enter the *Print Preview* screen.

To Change Your Printer
1. In your Windows task bar, click **Start > Setting > Control Panel** (or **Start > Control Panel** in Windows XP).
2. Double-click on the *Printers* icon.
3. Right-click on the file you want to use as your printer, and choose *Set as Default Printer.*

NOTE: You must change your printer before you enter the print preview screen.

To Print Your Document
1. In the Template Designer, select the template you want to show.
2. Click **Show Report**.
3. Click **Print**.

Exporting To Excel

Sometimes you will want to get even more functionality out of your data by exporting it to Excel. With Excel you'll be able to make charts, and run more complex calculations. In addition, Excel allows you to save your data in a more universal format so that others, who don't use Alocet software, can analyze your data.

To Export Your Data To Excel

1. In the Template Designer, select the template you want to show.
2. Click **Show Report**.
3. Click **Excel**.
4. For *File Name*, give your export file a meaningful name.
5. Click **Save**. Microsoft Excel will appear with your reported data.

The Layout Designer

The layout designer is where you edit your template. Using the Layout Designer you can add new fields, lines, boxes, Sub Reports, groups, formulas, pictures and text. You can also use the Layout Designer to change the size or position of fields and objects, their fonts, color, alignment, and whether the template prints one record per page or many records per page. In short, the layout designer contains the power and flexibility you need to create a template you can be proud of.

There are four fundamentals of the Layout Designer. The first is that if you want to add a field or object to the report you need to right-click with your mouse where you want to place the field or object. Second, if you want to edit the properties of a field, object, or of the report itself, you need to double-click on it with your left mouse button. Third, if you want to move a field or object, all you need to do is left-click on it, and while holding down the mouse button, drag it to the location on the template you want it to be. Forth, if you want to change the size of a field or object, you need to left-click on it, release the mouse button, and use one of the 8 squares that appear to drag it to its new size.

Working With Data Sources

A *Data Source* is simply a list of your data, broken up into *fields*. For example, a Data Source might be 'Invoice List' that contains the fields 'Invoice Date', 'Job Site File Name', 'Invoice Total', and 'Invoice Number'. Alocet pre-formats all data sources to make the Layout Designer easier for you to use. You can gain access to a Data Source by downloading a template that uses that Data Source. Once you have downloaded a template with a certain Data Source it will become available for use on all your existing and new templates.

To work with Data Sources, you must be in the Layout Designer. To get to the Layout Designer, you should click on the template you want to edit, and then click **Edit...**.

To Set The Data Source For The Main Report

1. In the Layout Designer, double-click anywhere on the white grid.
2. Click the *Data Source* tab.
3. Click **Data Source Wizard**.
4. Select the Data Source you wish to use in your report.
5. Click **Done**.
6. In the *Root Report Properties*, click **OK**.
7. Right-click anywhere on the white grid, and choose *Insert Fields On Root Report*. You will now see all the available fields you can click on to insert on your template.

To Select A Data Source For A Sub Report

1. Assuming you have inserted a Sub Report onto your main template, double-click anywhere on the Sub Report.
2. Click the *Data Source* tab.
3. Click **Data Source Wizard**.
4. Select the Data Source you wish to use in your report.

5. Click **Done**.
6. In the *Sub Report Properties* screen, click **OK**.
7. Right-click anywhere on the Sub Report, and choose *Insert Fields On Sub Report*. You'll now see all the available fields you can insert on your Sub Report.

Working With Groups

Groups are a way of sectioning data in a report so that you can get a total for each section. For example, in a Invoice List report you could simply list all invoices from the first of the year to the end of the year. Or, you could group by customer File Name, so that it first listed a customer, then all their invoices, then the next customer, and all their invoices, and so on. Common uses of groups are grouping a landlord's jobsites on an invoice, or grouping a route list to show jobs for one crew, one date at a time.

To Add A Group
1. In the Layout Designer, double-click anywhere on the white grid.
2. Click the *Group Fields* tab.
3. Click **Add A Group**.
4. Select the field you want to group on.
5. Click **OK**.
6. You will be brought to the *Group Section Layout Designer*. Here you can select to edit a specialized header and / or footer for your group. Most commonly you will be inserting the grouped field in the group header, and a summary field in the group footer.
7. Click **OK** to return to the *Root Report Properties* screen.
8. Click **OK** to return to the *Layout Designer*.

To Edit A Group Header
1. In the Layout Designer, double-click anywhere on the white grid.
2. Click on the *Group Fields* tab.
3. Select the group you want to edit.
4. Click **Edit a group**.
5. Choose the *Group Header* option.
6. The *Group Section Layout Designer* follows the same rules for working with objects and fields as the Layout Designer. For more information on adding fields and objects, please review the appropriate section in this topic.

To Edit A Group Footer
1. In the Layout Designer, double-click anywhere on the white grid.
2. Click on the *Group Fields* tab.
3. Select the group you want to edit.
4. Click **Edit a group**.
5. Choose the *Group Footer* option.
6. The *Group Section Layout Designer* follows the same rules for working with objects and fields as the Layout Designer. For more information on adding fields and objects, please review the appropriate section in this topic.

To Remove A Group

1. In the Layout Designer, double-click anywhere on the white grid.
2. Click on the *Group Fields* tab.
3. Select the group you want to remove.
4. Click **Remove a Group**.

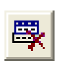
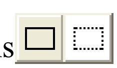
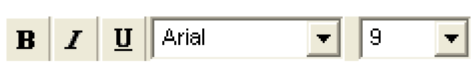
Working With Fields

When a report is shown it will fill in the *fields* of your template with the actual data from your database. For example, by inserting a field called 'Invoice Date' on your template you are ensuring that when the report is shown it will list the invoice date for each of your invoices in the area on the template where you placed the field.

To Add A Field

1. In the Layout Designer, right-click on the white grid where you want the field to show.
2. Click *Insert Fields On Root Report.*
   If this option does not show, you must not have selected a Data Source. You must select a Data Source before you can add fields.
3. Choose the field you want on your template from the list.

To Edit The Display Of A Field

1. In the Layout Designer, double-click on the field you want to edit.
2. If you want to change the way your field is labelled in the template, edit the *Label* box. This wording will not display on the final report.
3. If you want the field to be hidden in the situation where it contains no data, select the *Hide if empty* icon :  . This is especially useful for removing wasted space or gaps on a report, invoice or route list.
4. If you want change the alignment of the field data, select an option from the *Alignment* icons .
5. If you want to put a black border around the field, select an option from *Border Style* icons .
6. If this field will overlap other objects on your template, and you want to ensure that this field is in the foreground, select the *Bring To Front* icon . If you want to ensure the field is in the background, select the *Send To Back* icon .
7. Use the font icons: 

   if you want to change the font, font size or whether the fond is bold, italic or underlined click.
8. If you want to change the forecolor of the field data, click the forecolor icon:  .
9. If you want to change the backcolor of the field data, click the backcolor icon .

To Remove A Field

1. In the Layout Designer, left-click on the field you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Sub Report Objects

A Sub Report is a report inside a report, invoice or route list. The most common example of a Sub Report is a list of the line items on an invoice. Here, in a template header, you typically have your customer's address and invoice total, while in the detail of the template you have all the individual line items that make up the invoice. Another example of a Sub Report would be inserting a history of completed jobs on a customer Renewal Report template.

To Insert A Sub Report

1. In the Layout Designer, right-click on the white grid where you want the Sub Report to show.
2. Click *Insert Objects*.
3. Choose *Sub Report*.
4. Select the Data Source for the Sub Report.
5. Click **Done**.
6. Resize the Sub Report to the desired shape and size.

TIP: to download all available sub report datasources, download a template resembling 'SubReport_Datasources-'.

To Change The Height Of A Sub Report's Header, Detail and Footer

1. In the Layout Designer, move your mouse cursor to be over the <u>top</u> border of the *Detail Section* of the Sub Report until the cursor changes to be an Up and Down arrow.
2. Hold your left mouse button down.
3. If you want to make the *Detail Section* larger, and the *Header Section* smaller, drag the top border of the *Detail Section* <u>up</u>.
4. If you want to make the *Detail Section* smaller, and the *Header Section* larger, drag the top border of the *Detail Section* <u>down</u>.
5. Move your mouse cursor to be over the <u>bottom</u> border of the *Detail Section* of the Sub Report until the cursor changes to be an Up and Down arrow.
6. Hold your left mouse button down.
7. If you want to make the *Detail Section* larger, and the *Footer Section* smaller, drag the top border of the *Detail Section* <u>down</u>.
8. If you want to make the *Detail Section* smaller, and the *Footer Section* larger, drag the top border of the *Detail Section* <u>up</u>.

To Insert Fields On A Sub Report

1. In the Layout Designer, right-click on the Sub Report.
2. Click *Insert Fields On Sub Report*.
   If this option does not show, you must not have selected a Data Source for your Sub Report. You must select a Data Source before you can add fields.
3. Choose the field you want on your template from the list.

To Insert Objects On A Sub Report

1. In the Layout Designer, right-click on the Sub Report.
2. Click *Insert Objects*.
3. Choose the object you want on your subreport.

To Group Data On A Sub Report

1. In the Layout Designer, double-click on the Sub Report.
2. Click the *Group Fields* tab.
3. Click **Add A Group**.
4. Select the field you want to group on.
5. Click **Next**.
6. In the Group Section Designer, you can add a *Group Header* and *Group Footer* section, and Summary Fields. The most common field to add is a Summary Field in the *Group Footer* section that gives a sum of data within a group. Common examples are the total square feet of jobs for a crew on route list, or the subtotal of all charges on an invoice.

To Remove A Sub Report

1. In the Layout Designer, left-click on the Sub Report you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

To set whether a sub report 'Can Grow'

In some circumstances you will want a subreport to expand and show all records in subreport's datasource. For example, on an invoice template, the invoice line items are setup in a subreport. You will want to set this subreport to 'Can Grow' so that all invoice line items show, regardless of the original size of the subreport on the layout designer. Otherwise, the subreport may not show all the invoice line items, and the invoice total would seem to be inflated to your customer. By default all subreports are set to 'Can Grow'.

On the other hand, you may have another subreport on your invoice that shows a history of your last visits. In this case, you likely would want to set this subreport to 'No Grow'. This way no matter how many visits you have done in the past, the subreport will never expand past the original size you set in the layout designer.

1. In the Layout Designer, right-click on the Sub Report you want to set the 'Can Grow' property for.
2. Choose *Properties*.
3. If you would like your subreport to be able to expand, put a check in the 'Can Grow' checkbox. If you would like your report to not expand, and hold its original size, remove the check from the 'Can Grow' checkbox.

Working With Summary Field Objects

Summary fields allow you to get sums, averages or counts of a specific field. It is most common that a summary field be placed on a footer so that it totals all the records in a group or whole report.

To Insert A Summary Field

1. In the Layout Designer, right-click on the white grid where you want to insert the Summary Field.
2. Click *Insert Object*s.
3. Choose *Summary Field* from the list.

To Edit A Summary Field's Summary

1. In the Layout Designer, double-click on the Summary Field.
2. Click on the *Summary Field* tab.
3. For the *Choose the type of summary* dropdown list select whether you want to Sum, Average. or Count.
4. For the *Choose the field you want to summarize* dropdown list select the field you want to summarize. You will not have to choose a field if your summary type is "Count".

To Edit The Display Of A Summary Field

See *To Edit The Display Of A Field*.

To Remove A Summary Field

1. In the Layout Designer, left-click on the Summary Field you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Text Objects

Text objects are labels that you give column headings, group headings, field descriptions, or a title of your template.

To Add A Text Object

1. In the Layout Designer, right-click on the white grid where you want to insert the Text Object.
2. Click *Insert Objects*.
3. Choose *Text* from the list.

To Edit The Display Of A Text Object

See *To Edit The Display Of A Field*.

To Remove A Text Object

1. In the Layout Designer, left-click on the Text Object you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Box Objects

A Box Object is simply a box with an optional backcolor. Common uses of a box are the box around the details on an invoice or small squares as checkoff boxes.

To Add A Box Object

1. In the Layout Designer, right-click on the white grid where you want to insert the Box Object.
2. Click *Insert Objects*.
3. Choose *Box* from the list.

To Edit The Display Of A Box Object

1. In the Layout Designer, double-click on the Box Object.
2. If you want to change the backcolor, click **BackColor...**, and select the backcolor of your box.

To Remove A Box Object

1. In the Layout Designer, left-click on the Box Object you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Line Objects

A Line Object is simply a vertical or horizontal line. Common uses of a line are creating vertical columns for your report, sectioning jobs on a route list, and creating signature lines on an estimate / proposal.

To Add A Line Object

1. In the Layout Designer, right-click on the white grid where you want to insert the Line Object.
2. Click *Insert Objects*.
3. Choose *Line* from the list.

To Edit The Display Of A Line Object

1. In the Layout Designer, double-click on the line object.
2. If the line will run up and down on the template, select *Vertical*. If the line will run left and right on the template select *Horizontal*.
3. If you would like to change the width of the line to be thicker or thinner, change the value in the *Line Width* box.

To Remove A Line Object

1. In the Layout Designer, left-click on the Line Object you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Picture Objects

Like every object, you can add multiple pictures to your template. Pictures can be used to put your logo on invoices, route lists and reports. They can also be used for creating special objects like fancy bullets for documents, specialized lines, or faded backgrounds.

To Add A Picture Object

1. In the Layout Designer, right-click on the white grid where you want to insert the Picture Object.
2. Click *Insert Objects*.
3. Choose *Picture* from the list.

To Choose The Picture From Your Computer

1. In the Layout Designer, double-click on the Picture Object.

2. Below the caption *Image (Click image to select file)*, click on the image, or empty frame.
3. From your computer, find and double-click on your .bmp, .jpg, or .tif image.

To Remove A Picture Object
1. In the Layout Designer, left-click on the Picture Object you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Working With Formula Field Objects

Formula fields are advanced options that allow you add functionality to an already powerful layout designer. Formulas allow you perform mathematic functions on fields or combine text fields together.

To Insert A Formula Field
1. In the Layout Designer, right-click on the white grid where you want to insert the Formula Field.
2. Click *Insert Objects*.
3. Choose *Formula Field* from the list.

To Edit The Formula Of A Formula Field (Advanced)
1. In the Layout Designer, double-click on the Formula Field.
2. Click the *Formula Field* tab.
3. To use a field in your formula, double-click on it. Use the following examples of valid formulas to make your own formula:

Division - Number divided by 2:	{ado.Revenue} / 2
Multiplication - Number multiplied by 5:	{ado.Revenue} * 5
Addition - Number plus 100:	{ado.Revenue} + 100
Subtraction - Number minus 15:	{ado.Revenue} - 15
Addition of two number fields:	{ado.LaborCost} + {ado.MaterialCost}
Combining of two text fields:	{ado.City} & ", " & {ado.State}
Incorporating text with a text field:	“Sales Tax: “ & {ado.Tax}
The first 4 characters of a text field:	Left({ado.City},4)
Converting to upper case text:	UpperCase({ado.City})
Converting to lower case text:	LowerCase({ado.City})
Conditional for numbers fields:	if {ado.Tax} = 0 then "" else totext({ado.Tax})
Conditional for a fake checkBox:	if {ado.JobDescrip} = “Aeration” then "X" else ""
Printing today’s date	PrintDate()

Shared formulas (Highly Advanced)

An even more advanced formula is a ‘shared formula’. Shared formulas allow you to create variables that can be shared across root reports, subreports, group headers and group footers.

A great example of shared formulas can be found in the ‘Routelist_97_percent_esttime’ template. The purpose of the Routelist_97_percent_esttime template is to only display 97% of the true estimated time for the crews. The job items are listed in a subreport on a per service basis. A formula is created on the subreport that creates a shared variable called ‘shareFormula1’:

```
WhilePrintingRecords;
Shared NumberVar shareFormula1 :=  if {ado.JobItemType}='Service' then
(shareFormula1 + ({ado.JobEstHrs} *.97)) else shareFormula1
```

The above formula declares a number variable ‘shareFormula1’ (you may use a CurrencyVar for a currency field). It evaluates whether the item type is a service or material. If it is a service, it will add the previous total of estimated hours saved in ShareFormula1 to 97% of this job item’s estimated hours. So if there are 10 job items on a route list, all with 100 estimated hours, the total true estimated hours is 1000 hours. When the formula evaluates the 1st job item it will set the value 0 + (100 * .97) = 97 hours for shareFormula1. When the formula evaluates the 2nd job item, it will set 97 + (100 * .97) = 194 hours for shareFormula1......and when the formula evaluates the 10th job item it will set 873 + (100 * .97) = 970 hours for shareFormula1.

Finally, when it is time for the route list to print the contents of the group footer, it must print the total estimated hours accumulated so far. As of now shareFormula1 has accumulated 970 hours for a value. The following formula on the CrewDateGroup footer displays the value of shareFormula1:

```
WhilePrintingRecords;
Shared NumberVar shareFormula1;
(shareFormula1)
```

The problem, though, is that route lists are setup so that multiple crews and multiple days all can print at once. For each crew and day, the route list group header with the employee ‘start’, ‘out’ and ‘hours’ will print. On the route list group footer, it will print the total estimated hours for that day and that crew. This means that once the route list moves to print for a different crew and / or day, the formula will continue adding 97% of estimated hours to the existing shareFormula1 value of 970. To keep the total estimated hours accurate, we’ll need to reset shareFormula1 back to 0 for each CrewDateGroup header - this way the group footer only prints to the total estimated hours for that crew and date, and doesn’t accumulate total estimated hours from other crews and dates. So in the group header, the following formula is used to reset shareFormula1 back to zero:

```
WhilePrintingRecords;
Shared NumberVar shareFormula1 := 0
```

To Edit The Display Of A Formula Field

See *To Edit The Display Of A Field*.

To Remove A Formula Field

1. In the Layout Designer, left-click on the Formula Field you want to remove.
2. On your keyboard, click the *Delete* key or the *Del* key.

Sorting Reports

In version 1 of the template designer, there is no built-in way to sort the records in templates. The templates are sorted in the original order of the datasource designed by Alocet.

This is, however, a utility available on the Alocet website that allows you to have full control over the sorting of reports. This utility can be downloaded from http://www.alocet.net/utilities/qx_Report_Sort.exe.