Custom Report Designer Help Guide

The custom report designer allows you to create your own report templates for an Event. You have control over the fields to display, fonts, colors, images, and much more. The creative possibilities are endless!

1. From the main toolbar, click the '**Reports'** button. *If prompted*, select an Event from the grid and click the '**OK'** button.
2. Click the '**Event Custom Rpt'** button.
3. By default, a blank template is loaded on the '**Template'** tab. Here you will build the "outline" of your report.
4. Locate the box labeled '**Database Fields'**. This is the tree view display. Each node of the tree view can be expanded to sub-levels by clicking the + sign to the left of the node label. For example, by clicking the + sign to the left of 'My Business Data' the node expands to show the fields business name, owners, address, etc. Some sub-nodes can further expanded to lower levels.
5. Take some time to review the nodes and sub-nodes of the tree view. Each node is broken down into logical groupings such as Event client data, Event venue data, Event financial and so on.
6. Locate a field in the tree view that you want to display on the template. *Be sure your cursor is somewhere on the template.* To add a field to the template click the '**Add Field** >>' button. As a shortcut simply double-click the field. The field name will be listed in brackets []. When the report gets formatted the field in brackets will get replaced with the data from the database. Ex: [Clnt Fname] may simply resolve to Joe.
7. Add any free flow text around the database fields. For example, type the label for the client name field: **Client Name:** [Clnt Lname] [Clnt Fname]. *Note: If your cursor seems to get "stuck" around a field, use the right arrow key on the keyboard!*
8. Click the **'Preview/Print'** tab to see the formatted result. Once in Preview mode, anything can be re-formatted. Note however that changes made in the preview tab are **not** saved to the template.
9. Be sure to save your template after designing to re-use again in the future! See the section below on saving and loading templates.

Helpful Hint: In conjunction with building your first template, we suggest reviewing one of the sample templates included with the installation. See the section 'Loading/Saving Templates' below for instructions on loading one of the sample templates. The default installation directory is '**c:\program files\total party planner\custom report templates*.trt'**. The sample templates emulate a couple different views of the Total Party Planner proposal and invoice.

Deleting a Database Field from the Template

Click the [] field on the template. The entire field will grey out.

Click the **'<< Delete Field'** button.

Special Tree View Nodes (listed in red on the tree view)

There are currently 6 special nodes on the tree. They are listed in red and can be found under the 'Event Data' node; sub-level 'Event Selection Detail'. The special field names are: Menu Description, Menu Dtl/Price, Beverage Dtl/Price, Rental Dtl/Price, Misc Dtl/Price, and Staff Dtl/Price. Because multiple records may be formatted (menu choices, beverage choices, staff, etc), special consideration must be considered for these fields.

Add one of the above fields to the main template. The field is now listed on the template.

Click on the corresponding tab to the field name just added. So, if you just added the 'Menu Description' field, then click on the 'Menu Description' tab.

Each special field tab has it's own tree view field selection. Add fields to the special field template as you did in the main template. When the report is previewed, the special field template will be merged into the main template, at the position you put the special field on the main template.

Helpful Hint: These tabs spin through all items related to the current event. Any text inserted in any of these tabs will display multiple times on the Print/Preview page – or one for each record. We suggest keeping plain text labels or headers on the '**Template'** tab only.

Tables

The use of tables makes final report alignment much more precise. It is recommended that a table be used for reports that require multiple columns. For Example:

Client Name:	Joe Sample	**Client Phone**:	(804) 123-4567
Event Date:	09/01/2005	**Guest Count:**	100

Inserting a Table/Columns

Click the **'Table'** button.

Click '**Insert > Table…**' option.

Place the cursor into a table cell.

Type directly into the cell or add a field from the tree view.

After inserting the table, you can optionally add or delete columns as required. These options are also listed by clicking the '**Table'** button.

Borders and Colors

Each cell of the table must be formatted with a border or color. Use the appropriate option after clicking the 'table' button. Note: Use the 'Do Last Command' to quickly perform the previous task to a newly selected cell.

Text Color

Highlight the desired text and/or database field(s) on the template.

Click the '**Text Color'** button.

Choose your color and click the '**OK**' button.

Page Break

Place the cursor in the desired page break location.

Click the '**Page Break'** button. A new page will be inserted to the template.

Scroll down to begin editing the template on the new page.

Headers and Footers

Use the header and/or footer functionality to create data that will print repeatedly on every page. The most common usage would be to print page numbers or the print date. *Note: template fields cannot be inserted into the header or footer. Use free text typing, tables, images, or the pre-defined header and footer options.*

Click the '**Header and Footer**' button.

Click the '**Create and Footer'** option. The header and footer MUST be created as the first step. By default you will be in edit mode for the header. To switch back and forth between the header and footer, click either the '**Edit Header'** or '**Edit Footer'** options displayed after clicking the header/footer button.

Type in desired text, insert images, or use the redefined fields such as page number and print date.

Images

Images, such as a logo, can be inserted directly on the template. *Note: Images cannot be resized once place on the template. Prior to importing, the image should be sized appropriately using an external graphics editor.*

Place your cursor on the template where the image should be inserted. Using a table will help with alignment.

Click the 'Insert Image' button.

From the '**Look in'** drop-down list, select the directory where the image was saved.

Select the desired image file and click the '**Open'** button.

Saving/Loading a Template

Saving

Click the **'Save Template'** button.

From the **'Save in'** drop-down list, select the desired directory to save to

Name the template in the '**File name'** box.

Click the **'Save'** button.

Loading

Click the **'Load Template'** button.

From the **'Look in'** drop-down list, select the directory where the template was saved.

Select the desired template name and click the '**Open'** button.

The pre-defined template should now be loaded in Total Party Planner.

Frequently Asked Questions/Issues

Question	Solution
I cannot insert text after a Field.	Press the **right** arrow key on the keyboard. This should remove the highlighting from the database field. You can then insert your text.
I am having trouble using tabs for text alignment.	Using tables instead of tabs works better for alignment.
I cannot insert Fields into the header or footer.	Only three fields are available for the header and footer. They can by found by clicking the 'Header and Footer' button. Any other information needed for the header or footer must be typed. You can. However, still use tables and images in the header/footer.
Can I merge table two or more table cells into one?	There is currently no way to merge cells. Instead, create a table within a table to create the same effect.
I cannot resize my image after inserting it on the template.	Images must be resized with a graphics editor (such as Microsoft Paint) prior to importing to the report template