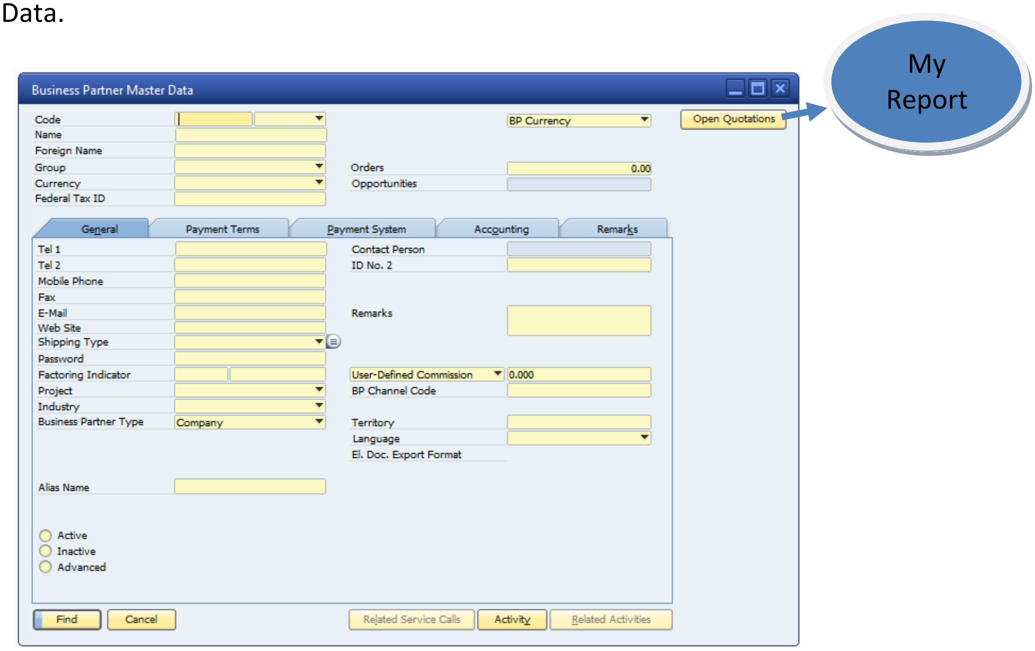
Create a button that launches a custom SQL-Report

Summary	
Module	Function Buttons + Universal Functions
Level	Medium
Requirements	B1UP 2.7.3.0 or higher

Scenario

The customer wish to be able to quickly see the open sales quotations of the customer and have them grouped by Posting Data.



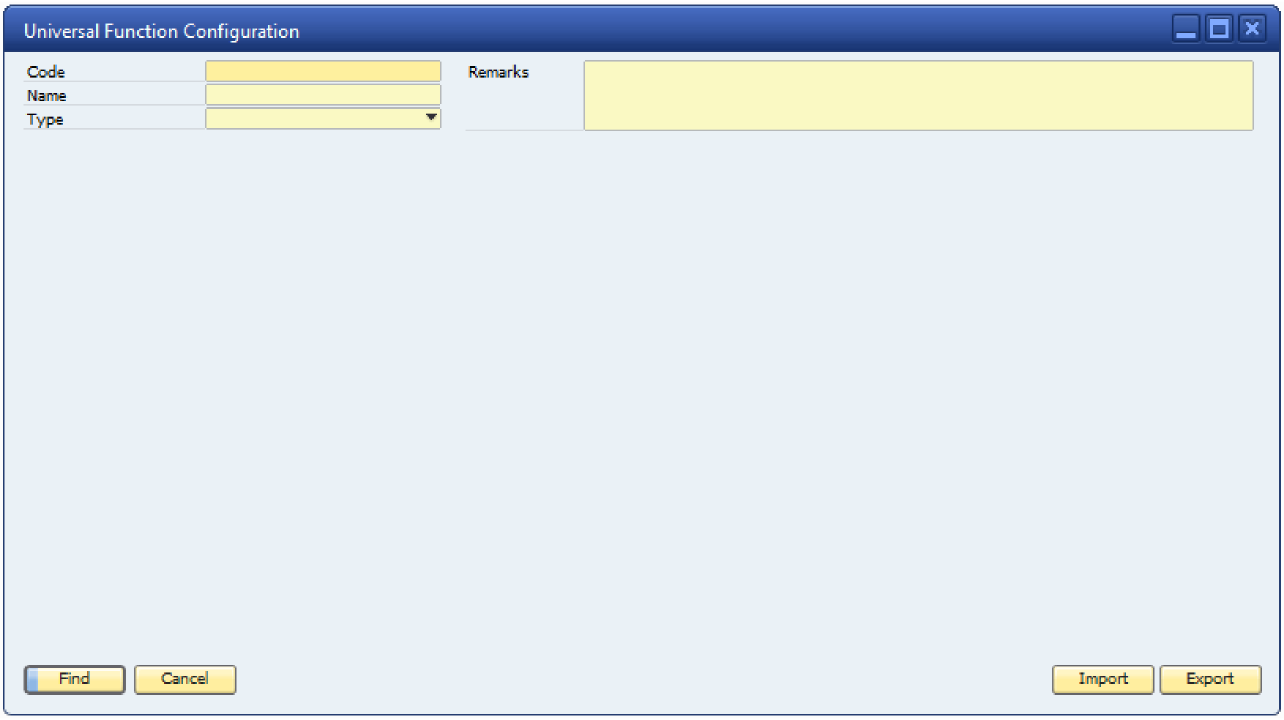
Needed configuration

You will need two things to do this:

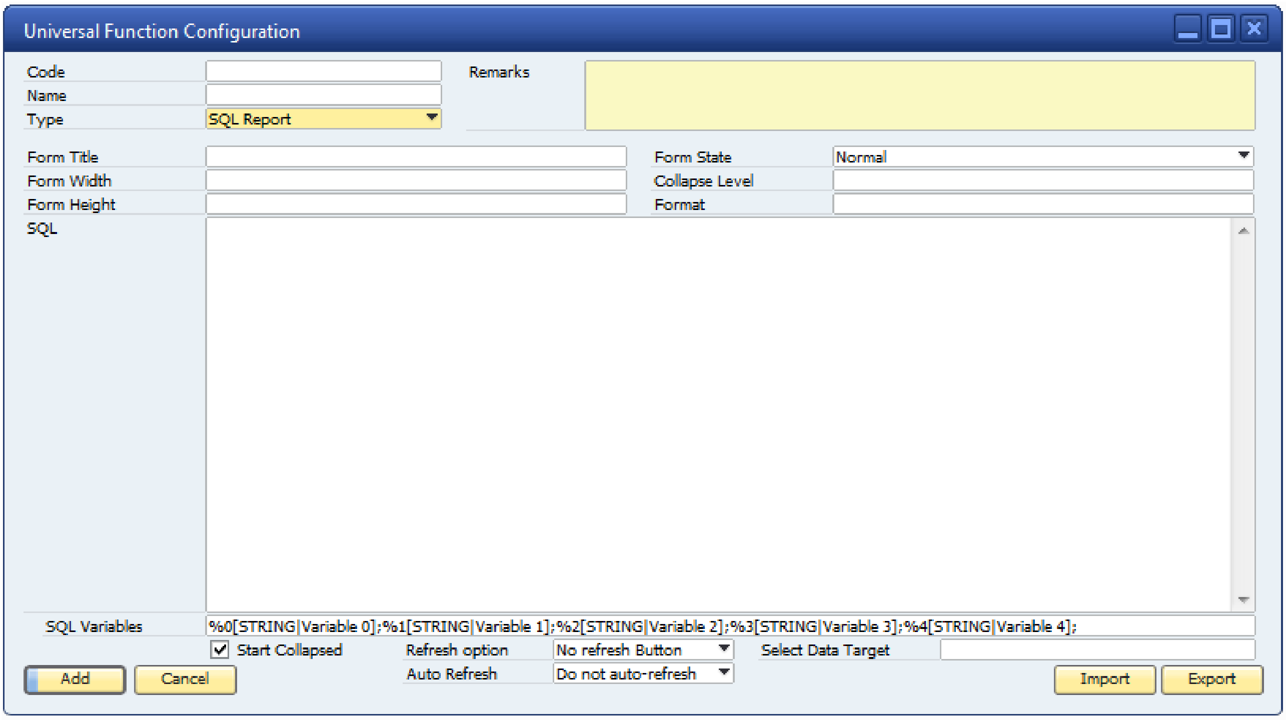
1. The universal function that will provide the report functionality
2. A function button configuration that set a button and link it to the universal function.

Step 1. Universal Function

To create universal functions please navigate to Administration > Add-Ons > B1 Usability Package > Module configuration > Universal Function configuration



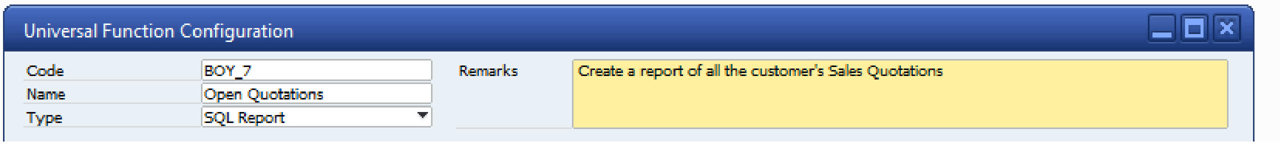
Start by switching to add-mode and choose the Universal Function type called SQL Report



First thing we need to do is to provide a code and a name for your configuration and optional some remarks to keep track of what the function does.

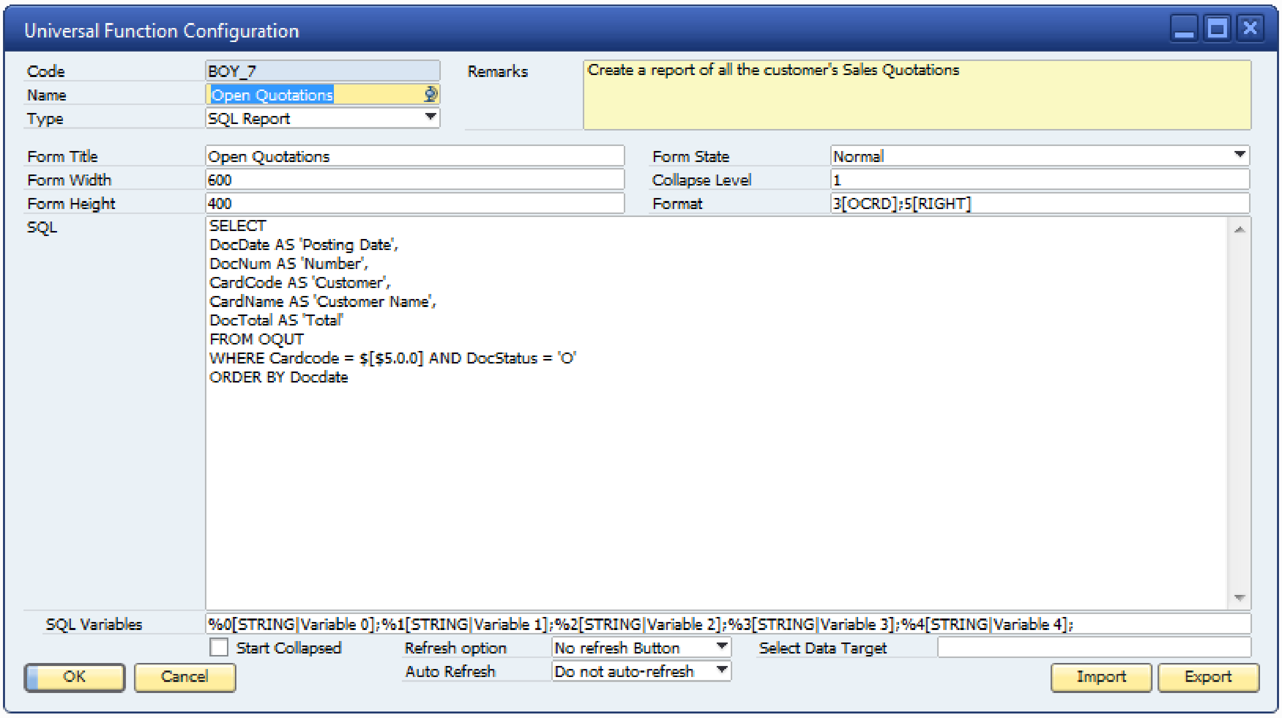
It is you that decide the code, name it just have to be unique and the code can max. be up to 8 characters long.

In this sample set the Code to BOY_7 and the name to and add the remarks



Next we need to provide the data needed to generate the report

1. We need to give the window that show the report an name. Her we give it name “Open Quotations”
2. We also need to provide how wide and high the report window should be. We set the width to 600 pixels and the height to 400 pixels
3. We set the form state as normal (we could alternative set it to minimized or maximized)
4. We set the collapse level to 1. This will make the report group its data by the first column which will be the posting date
5. In the format field we enter the value: 3[OCRD];5[RIGHT] (This will be explained later on what this means during the Use of functionality section)
6. Finally we add you SQL



The SQL (for copy/paste):

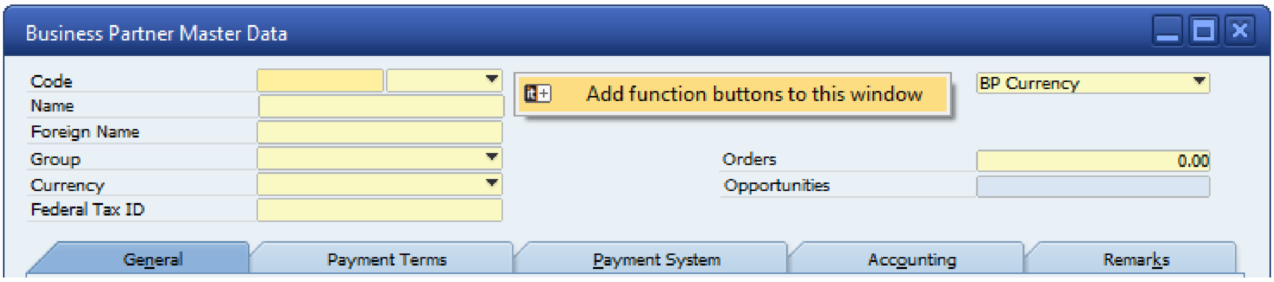
```
SELECT
DocDate AS 'Posting Date',
DocNum AS 'Number',
CardCode AS 'Customer',
CardName AS 'Customer Name',
DocTotal AS 'Total'
```

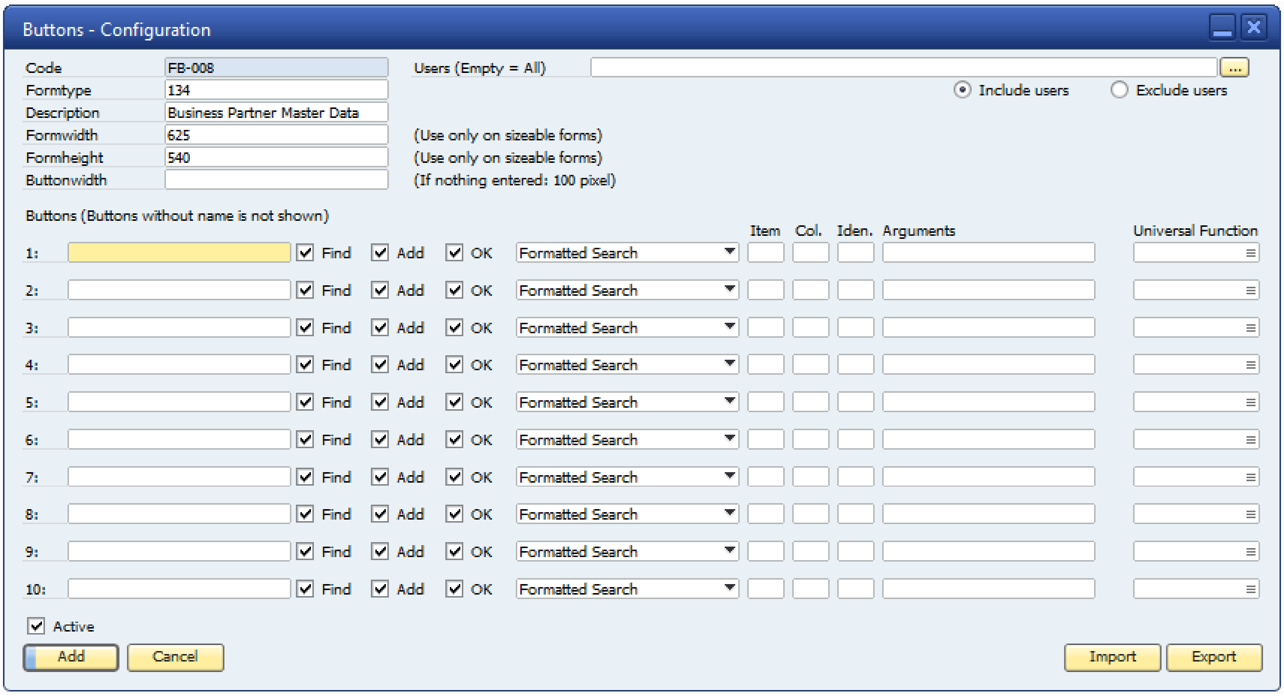
```
FROM OQUT
WHERE Cardcode = $[$5.0.0] AND DocStatus = 'O'
ORDER BY Docdate
```

We are now ready to add the configuration and tie it the Function buttons

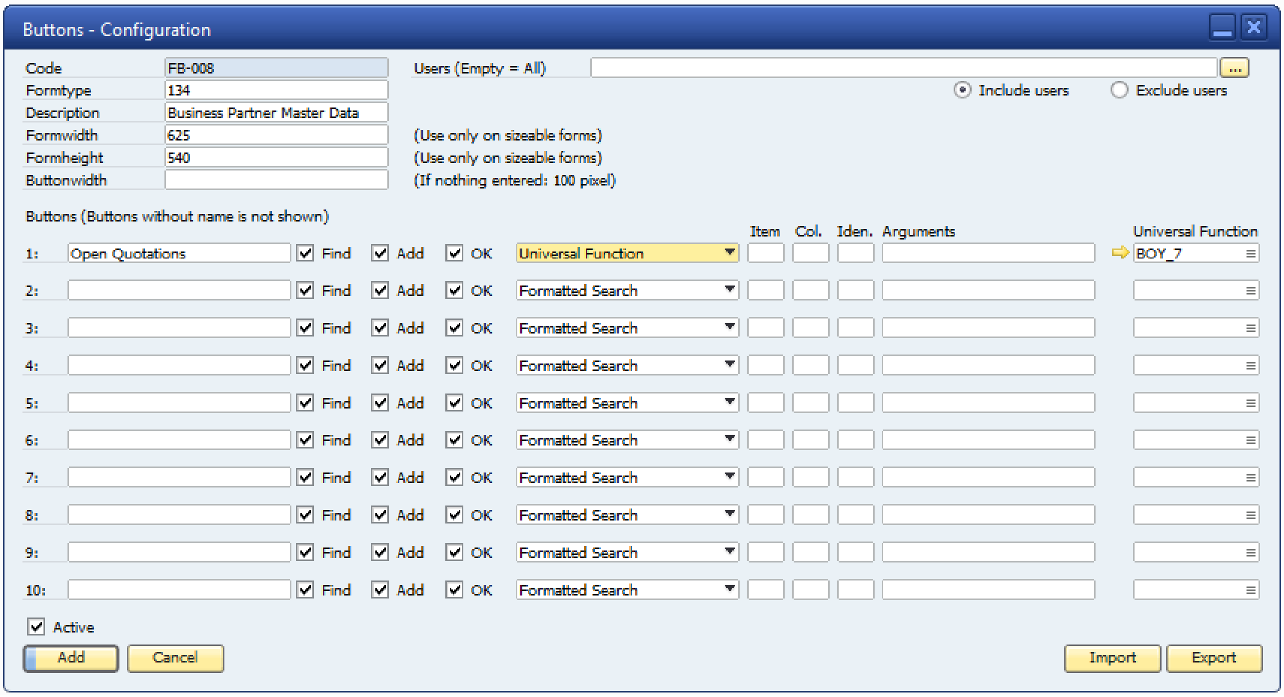
Step 2. Function Button Configuration

The function button we are planning for this should be located on the business Partner Master, so the first thing we need to do is open it, right-click and choose “Add function Buttons to this window”





Now we need to define the buttons we would like on the business partner window. This is done by simply adding the wanted name of the button and set the type to Universal Function.

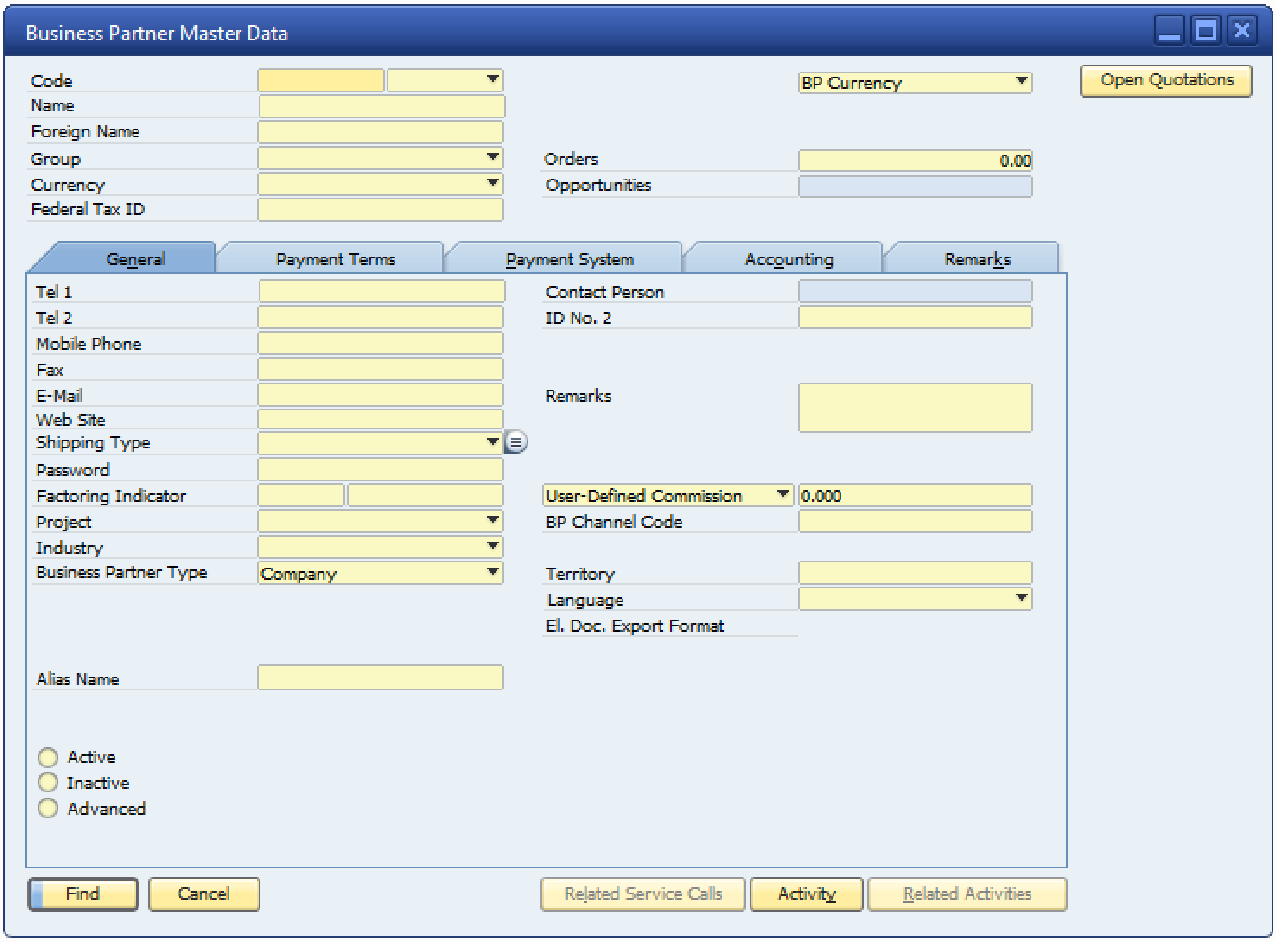


For the button go to the Universal function field, press tab and choose the BOY_7 universal function.

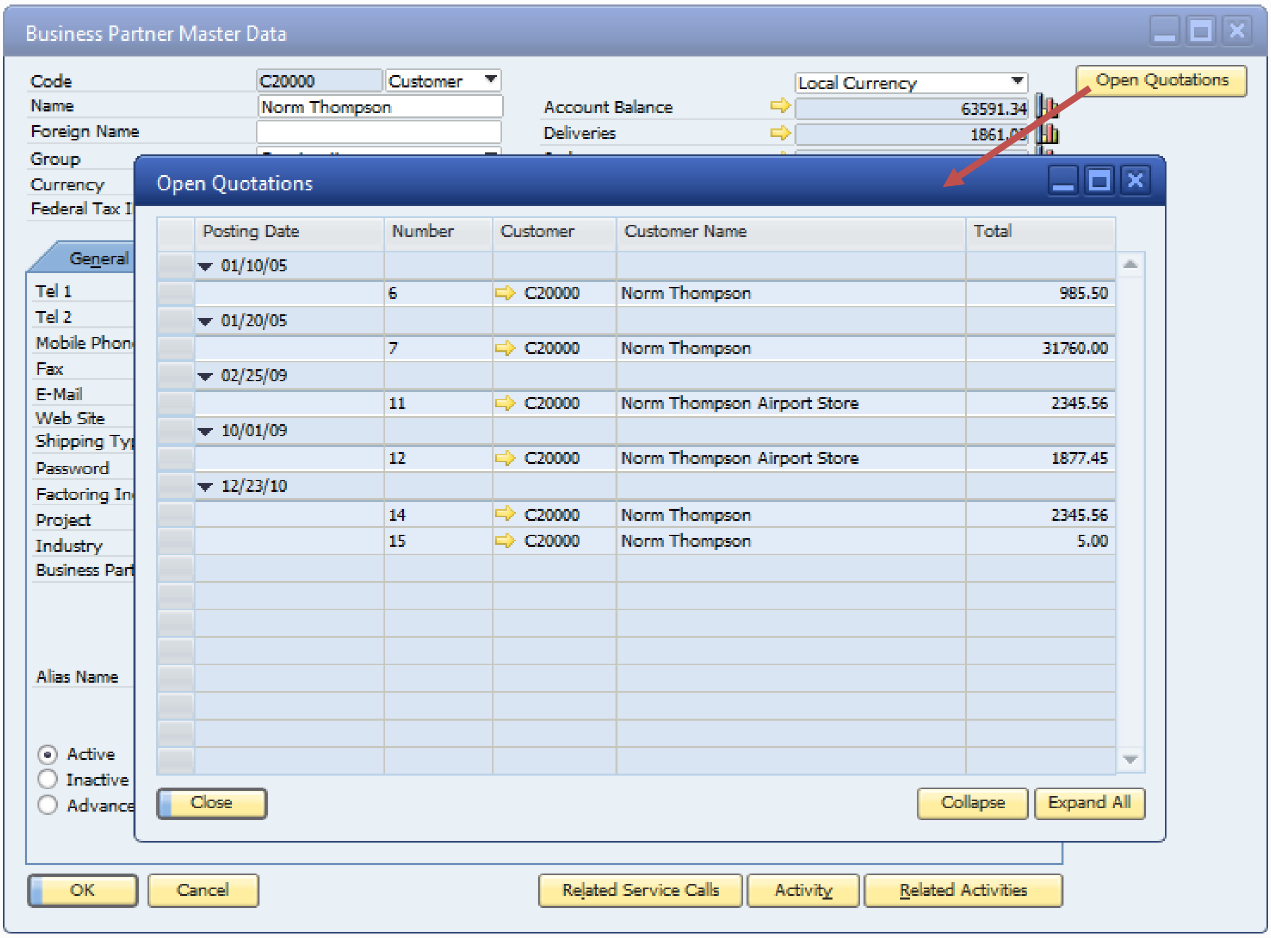
For this sample we do not need more configurations so simply press add to save the configuration.

Use of functionality

Now when we open a Business Partner window we already see the button.



If we navigate to a customer and press our button, we will see the report.



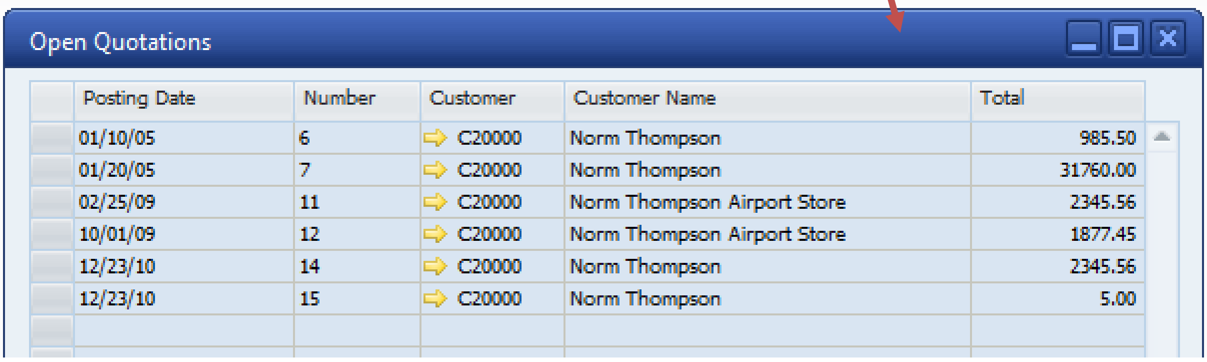
Please not that we entered a format called **3[OCRD];5[RIGHT]**. Seeing the report we can now see the this has something to do with adding Linked Buttons (the orange arrows) 3[OCRD] tell the report that column 3 contains business partners (Since OCRD is the table that holds customers).

In the same manner 5[RIGHT] forces the data in column 5 to be right-justified.

The ';' between the two format are just there to separate the two.

Also notice the grouping by posting date. This was the Collapse Level that was set to 1…

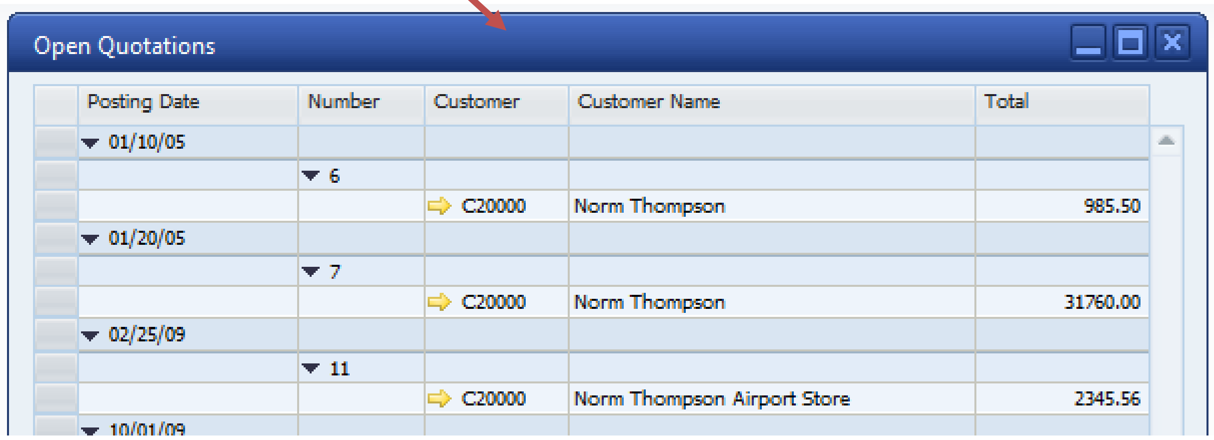
Just for the sample this was what it would look like if collapse level was 0



Open Quotations

Posting Date	Number	Customer	Customer Name	Total
01/10/05	6	C20000	Norm Thompson	985.50
01/20/05	7	C20000	Norm Thompson	31760.00
02/25/09	11	C20000	Norm Thompson Airport Store	2345.56
10/01/09	12	C20000	Norm Thompson Airport Store	1877.45
12/23/10	14	C20000	Norm Thompson	2345.56
12/23/10	15	C20000	Norm Thompson	5.00

And similarly if collapse level was 2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Posting Date	Number	Customer	Customer Name	Total
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	7			
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