



15-Minute Tip Talk – January 18, 2017

Drag & Relate AdHoc Reports

Available on all Softengine supported versions

Background

If you have worked with SAP Business One for a while, you may have noticed that the system reports may not cover all your reporting needs. To bridge this gap, you can create your own reports using tools such as queries and Crystal Reports. However, if you prefer not to use these tools and prefer a more visual way of generating reports, you may enjoy SAP Business One's Drag and Relate feature.

Drag & Relate

The Drag & Relate tab can be found in the Main Menu panel, next to Modules and My Cockpit.

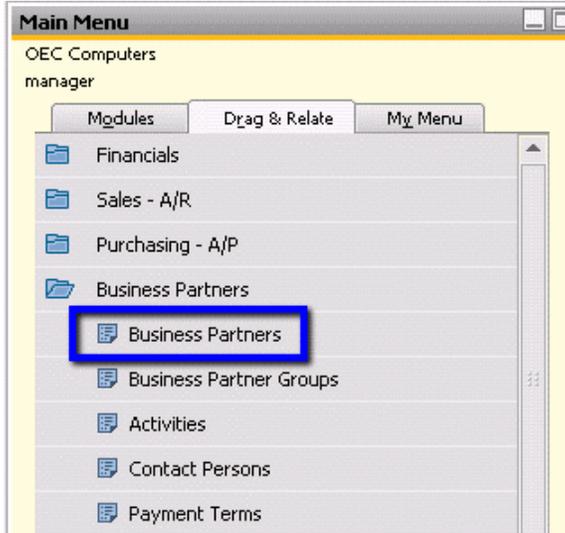


Similar to the Query Generator, you can use Drag & Relate to create instantaneous relations between record sets. First, we recommend that you develop a result scenario you would like to achieve.

Historical Revenue for a Customer

Let us take, for example, that you want to see the historical revenue for Microchips. This means you want to see the sum of invoices both open and closed. You would create this report in the following way:

1. Open the Business Partners folder and double click on Business Partner menu.

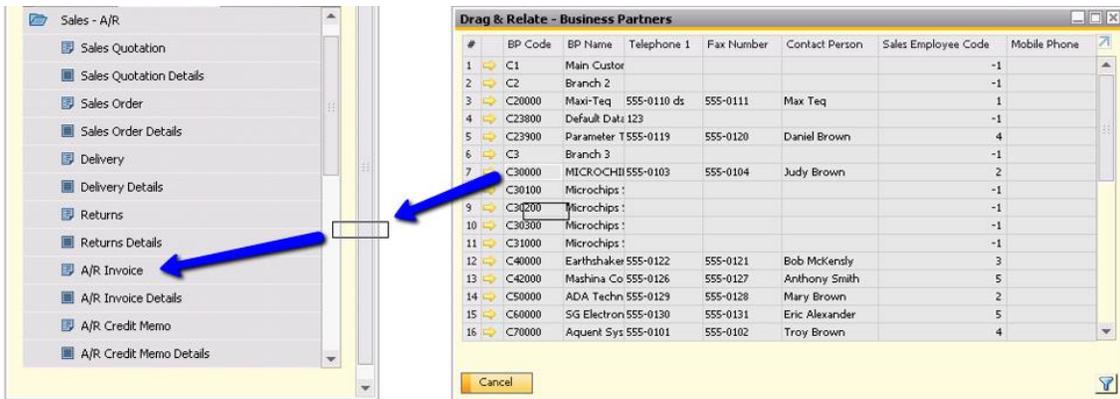


The Drag & Relate – Business Partners window appears and shows a list of all business partners.

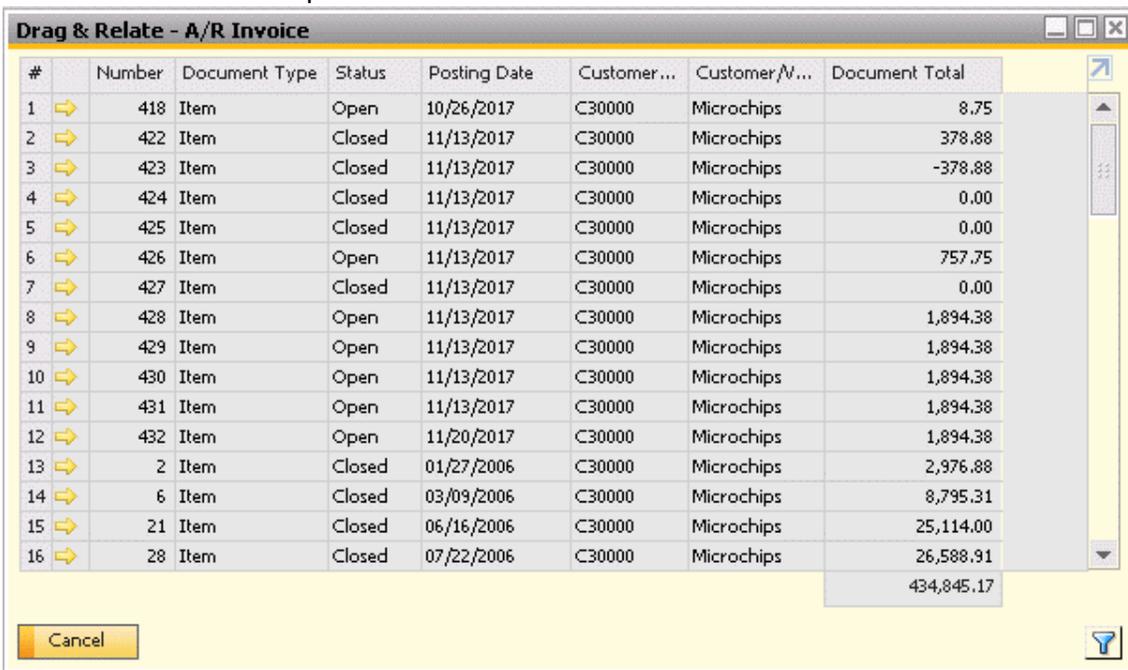
The screenshot shows a window titled "Drag & Relate - Business Partners" with a yellow header. It contains a table with the following columns: "#", "BP Code", "BP Name", "Telephone 1", "Fax Number", "Contact Person", "Sales Employee Code", and "Mobile Phone". The table lists 16 business partners, including "Main Custor", "Branch 2", "Maxi-Teq", "Default Data 123", "Parameter T 555-0119", "Branch 3", "MICROCHII", "Microchips", "Earthshaker", "Mashina Co", "ADA Techn", "SG Electron", and "Aquent Sys".

#	BP Code	BP Name	Telephone 1	Fax Number	Contact Person	Sales Employee Code	Mobile Phone
1	C1	Main Custor				-1	
2	C2	Branch 2				-1	
3	C20000	Maxi-Teq	555-0110 ds	555-0111	Max Teq	1	
4	C23800	Default Data 123				-1	
5	C23900	Parameter T 555-0119	555-0119	555-0120	Daniel Brown	4	
6	C3	Branch 3				-1	
7	C30000	MICROCHII	555-0103	555-0104	Judy Brown	2	
8	C30100	Microchips :				-1	
9	C30200	Microchips :				-1	
10	C30300	Microchips :				-1	
11	C31000	Microchips :				-1	
12	C40000	Earthshaker	555-0122	555-0121	Bob McKensly	3	
13	C42000	Mashina Co	555-0126	555-0127	Anthony Smith	5	
14	C50000	ADA Techn	555-0129	555-0128	Mary Brown	2	
15	C60000	SG Electron	555-0130	555-0131	Eric Alexander	5	
16	C70000	Aquent Sys	555-0101	555-0102	Troy Brown	4	

2. Click the Sales folder icon so that A/R Invoice is visible.
3. Place the mouse cursor on the BP Code field for the Microchips (C30000), hold the left mouse button until a black rectangle appears, drag this to A/R Invoice and release the mouse button.



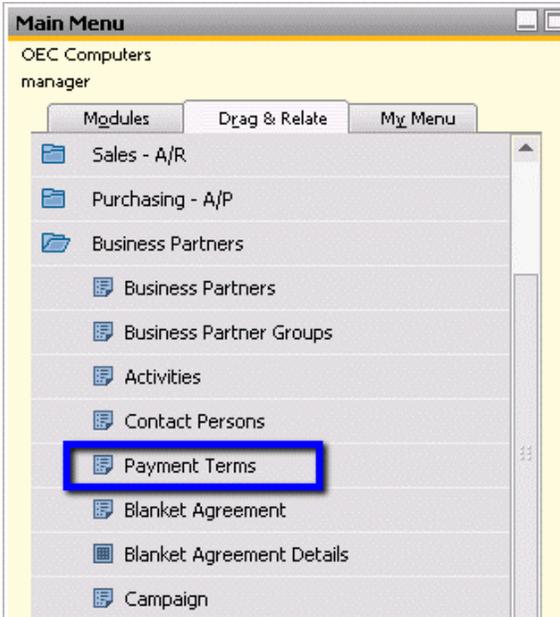
- Once the mouse button is released, the Drag & Relate window will populate with the list of invoices for Microchips.



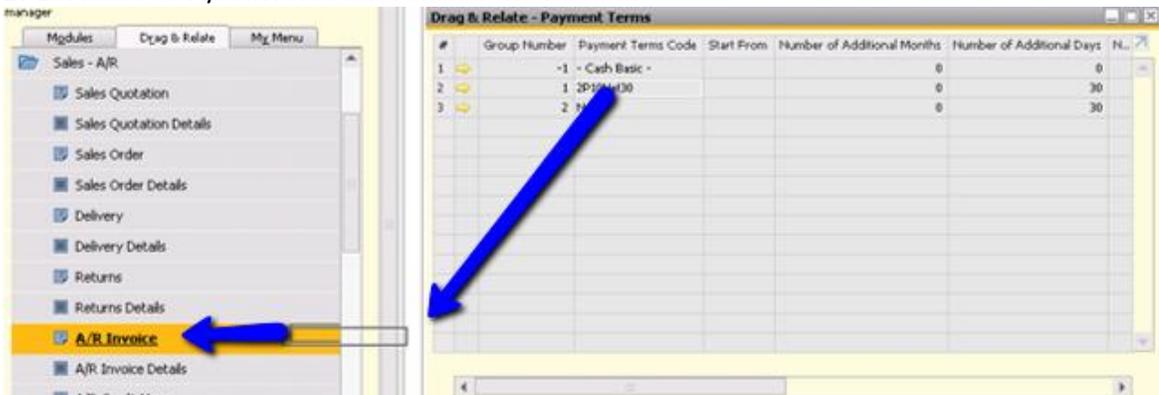
Finding Invoices For A Specific Payment Term

In this second example, we will find invoices for a specific payment term, namely 2P10Net30. The steps are as follows:

- Open the Business Partners folder and double click on the Payment Terms menu.



2. Click the Sales folder icon so that A/R Invoice is visible.
3. Press the left-mouse button to select 2P10Net30 in the Payment Terms Code field. Drag 2P10Net30 to A/R Invoice and release the button.



4. Once the mouse button is released, the Drag & Relate window will populate with the list of invoices with 2P10Net30 payment terms. You may use the filter function to add additional conditions.

Drag & Relate - A/R Invoice							
	Number	Document Type	Status	Posting Date	Customer/Vendor Code	Customer/Vendor Name	Document T...
1	412	Item	Open	10/20/2017	C30100	Microchips Store #100	1
2	413	Item	Open	10/20/2017	C30100	Microchips Store #100	7,42
3	414	Item	Open	10/25/2017	C30100	Microchips Store #100	70
4	415	Item	Open	10/26/2017	C30100	Microchips Store #100	
5	416	Item	Open	10/26/2017	C30100	Microchips Store #100	70
6	417	Item	Open	10/26/2017	C30100	Microchips Store #100	
7	418	Item	Open	10/26/2017	C30000	Microchips	
8	419	Item	Open	10/30/2017	C30200	Microchips Store #200	70
9	420	Item	Closed	10/30/2017	C2	Branch 2	70
10	421	Item	Open	10/30/2017	C3	Branch 3	17
11	422	Item	Closed	11/13/2017	C30000	Microchips	37
12	423	Item	Closed	11/13/2017	C30000	Microchips	-37
13	424	Item	Closed	11/13/2017	C30000	Microchips	
14	425	Item	Closed	11/13/2017	C30000	Microchips	
15	426	Item	Open	11/13/2017	C30000	Microchips	75
							3,708,243.03

Notes

- The Drag & Relate function works best for simple conditions. When more complex conditions arise, queries, views, and stored procedures are more flexible.
- You can use the filter button in the Drag & Relate result button to narrow down your criteria further.

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