

Applying conditional formatting to a variable

- Open the Sales Ledger Account Details report.
- Within the Details section, select the variable to which you want to apply conditional formatting to.
- For this example select *SLCustomerAccounts.AccountBalance*.
 AccountBalance
- From the Properties pane, select **Conditional Formatting** then click the finder button **...**.

The Conditional Formatting window appears displaying the Filter and Properties tabs.

Conditional Formatting	×
Conditional Formatting	
Change the display of an element depending on the data in the report	
Filter Properties	
The filter to determine whether the normal or conditional formatting for this element should be used.	
<u>E</u> dit	
<u> </u>	

The Filter tab allows us to apply the filter on which to base the condition. The Properties tab allows us to specify the effects of this condition.



• From the Filter tab, click **Edit**, then enter the filter as below.

Filter to pick items for conditional formatting		×
Modify Filter		
Choose the data you want to include		
Include rows where		
SLCustomerAccount	2000	-
(choose)		
Use Advanced Filter Clear Filter	<u> </u>	ancel

NB. You are able to use the Advanced Filter option to create your filter, if required.

• Select **Ok**, the filter appears in the Filter tab.

Condition	al Formatting			×
Cond	litional Forma	atting		
Chang	e the display of an e	element depending	g on the data i	n the report
Filter	Properties			
The fill should	er to determine whether be used.	the normal or condition	nal formatting for	this element
SLCu	stomerAccounts.Accoun	itBalance > 2000.0		
				<u>E</u> dit
			<u>0</u> K	Cancel



• Select the Properties tab, and set the properties as below.

Conditional Formatting		×
Conditional Formatting	ថ្ន	
Change the display of an element	it depending on the data in the report	
Filter Properties		_
Preview	Appearance	
AccountBalance	Style	
	Text Style (Arial, 8pt)	
	Font ab Arial	
	Size 8	
	Bold True	
	Italic True	
	Strikeout False	
	Color Red 💌	
	Alignment Right	
	Vertical Alie Top	
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		-

The preview pane indicates how the object appears when the condition is met.

We have told the *SLCustomerAccounts.AccountBalance* variable to show in **Bold**, *Italic* and **Red** text if the Account Balance is more than £2000.00.

• To save the conditional formatting, click **OK**.

You are returned to the Report Designer window. The Properties pane, for the *SLCustomerAccounts.AccountBalance*, displays the coding for your created condition.

• **Preview** the report

Account	Contact : Ann Jardin		Last Trans Dated : 1	6/01/2011	Order Priority :	C Current Balance :	0.00
KIT001	Phone: 44 029 2379 0111		Date A/C Last Amended : 1	8/04/2010		Credit Limit :	20000.00
Kitchen	Fax: 44 029 2378 0934		Account Type : Open Item			Turnover MTD :	0.00
Kitchen Refit Specialists Ltd	Terms: 30 Days From en	d of month					
234 Crwys Way	VAT Details :	GB	138 1265 95	Use as SOP	default : No	Discount % :	0.00
Rumney	Currency :	£	Pounds Sterling			Discount Days :	0
Cardiff	Default Nominal Account :	31100	Customer Discount Group	:		Line Discount % :	0.00
Glamorgan	Cost Centre :	SAL	Order Value Discount :	Order Value	Discount	Invoice Discount % :	0.00
CF3 5SC	Department :	COM	Price Band :	Standard			
	Trading Terms :					Account Opened :	
	Credit Reference :					Last Credit Review :	
	Credit Bureau :					Next Credit Review :	
	Credit Position :		Finance Charges :	%		Application Date :	
	Average Time To Pay: 0	Days	Terms Agreed : Yes			Date Received :	
Account	Contact : Jane Taylor		Last Trans Dated : 3	1/08/2011	Order Priority :	B Current Balance :	5939.63
KIT002	Phone: 44 0151 900 9000		Date A/C Last Amended : 2	0/07/2011		Credit Limit :	20000.00
Kitsch	Fax: 44 0151 900 6797		Account Type : Open Item			Turnover MTD :	0.00
Kitsch Kitchens	Terms: 0 Days From sta	art of month					
The Refit Centre	VAT Details :	GB	145 1353 43	Use as SOP	default : No	Discount % :	0.00
Aimort Dood	Currencer	c .	Doundo Ptorling			Discount Days :	0

NB. You cannot apply conditional formatting based on any variable which has its function set to Sum, for example group totals or report totals.



Advanced conditional formatting

Conditional formatting in the Sage 200 Report Designer can be either basic or advanced. The Advanced option allows multiple conditions with the use of the Else command. *For example you could say to make a variable Red if X or Green if Y.*

NB. By default only basic formatting is enabled

- If it isn't open from above, open the Sales Ledger Account Details report.
- Select Tools > Options.

The Options window appears.

Options	x
Options	
Change the options for the Report Designer	
Options Printer Offsets Email Setup Scheme	
Layout	
Measurement Inch	
Snap To Mode SnapToLines	
Grid Size 🗴 0.0833 🚔 in y 0.0833 🚔 in	
Show <u>G</u> rid (only for SnapToGrid mode)	
Options	
<u>Reset Settings</u> (occurs at next start-up) Use <u>Active Complete</u>	
✓ Use Element Tooltips ✓ Sort Column List	
Keep selected Toolbox Item active Image: Prompt to Change Styles	
Use Advanced Conditional Formatting 🔽 Use I abbed Drill Down	
Spell Check Language <use locale="" settings=""></use>	
	1
<u> </u>]

- From the Options tab, select 'Use Advanced Conditional Formatting'
- Click OK.
- Within the Details section, select the variable to which you want to apply the conditional formatting.
- For this example select *SLCustomerAccounts.AccountBalance*.



• From the Properties pane, select **Conditional Formatting** then click the finder button

Rather than the Conditional Formatting window the Expression Editor is opened.

(If the above Conditional Formatting was saved the window will display the expression for this, otherwise the screen will be blank)

Expression Editor	×
Expression Editor Modify an expression	
if SLCustomerAccounts.AccountBalance > 2000.0 then begin TextStyle>Bold := True; TextStyle>Color := NamedColor("Red"); end	Functions P Accounts Accounts Aubigned(value) Accounts Accounts Accounts Configurable Accounts ConfigurableTermManager DateTime DateTime Accounts Accounts Accounts Account Accounts Acco
Clear Save As Snippet Show Eield Values	<u> </u>

• Enter the following expression below:

xpression Editor	×
Expression Editor Modify an expression	
if SLCustomerAccount8.account8.alance >= 5000.0 then begin TextStyle>Bold := True; TextStyle>Color := NamedColor("Red"); end Else if (SLCustomerAccount8.account8.alance < 5000.0) And (SLCustomerAccount8.account8.alance > 2000.0) then begin TextStyle>Color := NamedColor("Blue"); end TextStyle>Color := NamedColor("Blue");	Functions P Accounts Image deviate Image deviation Image deviation Image deviatio
Clear Show Field Values	<u>QK</u> _Cancel



• Click **Ok** to save and return to the Report Designer Window.

We have told the *SLCustomerAccounts.AccountBalance* variable to show in **Bold**, *Italic* and Red text if the Account Balance is £5000.00 or more, show in Blue text if the Account Balance is between £2000.00 and £5000.00, otherwise show as normal.

• **Preview** the report

Sales Ledger Acc	ount Details Report				Date	21/05/2012
g					Time	14:21:39
Account	Contact : Andrew Lowe		Last Trans Dated : 20/	04/2012 Order Priority :	A Current Balance :	8746.64
ABB001	Phone: 44 0131 621 9900		Date A/C Last Amended : 20/	04/2012	Credit Limit :	200000.00
Abbey	Fax: 44 0131 621 9855		Account Type : Open Item		Turnover MTD :	0.00
Abbey Retail Ltd	Terms: 30 Days From do	cument date				
16 Church Lane	VAT Details :	GB	612 5749 32	Use as SOP default : No	Discount % :	0.50
Lochside	Currency :	£	Pounds Sterling		Discount Days :	15
Edinburgh	Default Nominal Account :	31100	Customer Discount Group :	CustDiscGrp ABB001	Line Discount % :	0.00
Midlothian	Cost Centre :	SAL	Order Value Discount :	Order Value Discount	Invoice Discount % :	0.00
EH12 1WE	Department :	BES	Price Band :	Standard		
Account	Contact : Brian Lynch		Last Trans Dated : 13/	11/2013 Order Priority :	A Current Balance :	3426.20
BET001	Phone: 44 01793 992345		Date A/C Last Amended : 03/	02/2014	Credit Limit :	500000.00
Better	Fax: 44 01793 992344		Account Type : Open Item		Turnover MTD :	0.00
Better Kitchens	Terms: 30 Days From do	cument date				
212 Westerfield Road	VAT Details :	GB	673 6324 74	Use as SOP default : No	Discount % :	0.00
Cheney Manor	Currency :	£	Pounds Sterling		Discount Days :	0
Swindon	Default Nominal Account :	31100	Customer Discount Group :	CustDiscGrp BET001	Line Discount % :	0.00
Wilts	Cost Centre :	SAL	Order Value Discount :	Order Value Discount	Invoice Discount % :	0.00
SN6 2DS	Department :	COM	Price Band :	Standard		
Account	Contact : Acounts		Last Trans Dated : 31/	08/2011 Order Priority :	Current Balance :	0.00
CASH01	Phone :		Date A/C Last Amended : 20/	07/2011	Credit Limit :	0.00
CASH SAL	Fax :		Account Type : Open Item		Turnover MTD :	0.00
CASH SALE ACCOUNT	Terms: 30 Days From do	cument date				
	VAT Details :	GB		Use as SOP default : No	Discount % :	2.50