Reports

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Chapter 1

Reports Overview

In MYOB Accounting Plus, *reports* are documents that provide various types of reference about the information you've entered in the MYOB system.

Over 100 MYOB Accounting Plus reports provide you with comprehensive information about your business. Using reports, you can view detailed or summary lists of your information and examine related information that allows you to analyse your business activity. Typical reports include balance sheets, account lists and sales analysis reports.

Finding reports

The Index to Reports window provides a single location for you to work with your reports. Using the Index to Reports, you can:

- View lists of all the reports in the MYOB system
- View a short description of each report
- View an on-screen version of the selected report
- View a sample of the selected report. Information and tips about the report are included.
- Save the selected report as a file on your hard disk or other disk
- Begin the process of printing the selected report on your printer
- Choose the information you want to appear on the selected report
- Select the fields you want to print on the selected report
- Make changes to the appearance of the selected report
- Begin the process of exporting report information using OfficeLink

- Begin the process of emailing a report

See the following step-by-step procedure:

"To find a report" on page 991

Choosing preference settings for reports and forms

You've got a number of options within MYOB Accounting Plus with which you can personalise your printed documents, as well as the process by which you print reports and forms. Some options can be chosen that affect all reports and other options can be chosen that affect specific reports.

The topics listed below, discuss settings that affect all reports. See "Choosing settings for a specific report" on page 978 for overview information about choosing settings for specific reports. See "Choosing printer settings that affect all reports and forms" on page 1054 for more information about choosing printer settings. See "Customising forms" on page 1017 for overview information about choosing settings for specific forms.

Using Reports and Forms Preferences

Using the Reports & Forms view of the Preferences window, you can make a few settings that can make working with reports and forms easier.

- Specify the ageing periods that will be used for your sales and purchases transactions. You can use either daily or monthly ageing periods. See "Understanding user-defined ageing for sales and purchases" on page 977 for more information about the user-defined ageing feature.

- Mark the Include Currency Symbols option if you wish to display currency symbols next to the financial amounts on your reports.

- Mark the Include Currency Symbols in Forms option if you wish to display currency symbols next to financial amounts on statements, sales, cheques and other forms.

- Mark the Always Display the Report Customisation window Before Printing Reports option if you want the Report Customisation window to appear each time you click the Print or Display buttons in the Index to Reports window. This feature eliminates the need for clicking the Customise button to determine the information you want on your reports.

- Mark Include all Payroll Categories with YTD amount on Paycheque stubs if you wish to show a payroll category YTD amount, even if no amount for the category is included in the current paycheque.

If you wish to choose a different default font for all of your reports or forms, click the Reports button or the Forms button at the bottom of the window. Make your changes in the Change Default Forms Font window for forms or the Customise Reports window for reports, then click OK to redisplay the Reports & Forms view of the Preferences window.

See the following step-by-step procedures:

"To choose preferences for reports and forms" on page 991

"To choose a font for all reports" on page 994

Understanding user-defined ageing for sales and purchases

With Accounting Plus, you can choose to use daily ageing periods of any length you like; you also can use monthly ageing periods. The selections you make will affect the way information is displayed in the Analyse Debtors and Analyse Creditors windows, on plain-paper statements and on the summary and detail versions of the following reports: Aged Debtors, Aged Creditors, Debtors Reconciliation and Creditors Reconciliation.

If you choose to use daily ageing, you can use any number of days you like, up to 999 days. For example, if ageing periods of 7, 14 and 21 days are common in your industry, enter 7 for the first ageing period, 14 for the second ageing period, and so on.

If you choose to use monthly ageing, you can identify your ageing periods by either month name or month number. If you choose month names, reports and windows will include transactions in the months they came due. If you choose month numbers, reports and windows will categorise transactions by the number of months they are overdue.

If you don't select any ageing options using the Preferences window, your transactions will continue to be aged at 30-, 60- and 90-day intervals as they have been in previous versions of MYOB software.

See the following step-by-step procedures:

"To choose preferences for reports and forms" on page 991

Choosing settings for a specific report

You have a number of options within Accounting Plus with which you can personalise your printed documents, as well as the process by which you print reports. Some options can be chosen that affect all reports and other options can be chosen that affect specific reports.

The following settings affect specific reports. See "Choosing preference settings for reports and forms" on page 976 for overview information about choosing settings for all reports.

Accounting Plus gives you complete control of the content and appearance of your Accounting Plus reports. You can use Customise, Design and Format in any combination to customise your reports. If you want, you can customise a report, print it immediately, then revert the report back to its original settings. Or, if you wish to retain a report's modifications, you can customise the report and save the changed report. When you save a customised report, the report is known as a *custom report*.

See the following step-by-step procedures:

"To save a report as a custom report" on page 996

"To choose a font for a specific report" on page 993

"To design a report" on page 995

"To format a report" on page 995

"To change a report back to its original format" on page 996

Customising reports

Use the Report Customisation window to determine the amount of information you want to include on a report. Customising allows you to choose specific pieces or ranges of data that can be included on a single report. For example, if you want to print a Sales [Customer Detail} Report for customer Eileen Martin for the months of May through July, you can use customising to select those criteria only.

You can use the Customisation window for reports you print on your printer, as well as reports you display on your computer screen.

Click the Customise button to open the Report Customisation window. The window varies, depending upon the report you're customising.

- Typically, the top section allows you to choose the topics that will be included on the report.
- Typically, the middle section allows you to choose ranges of criteria, such as dates, that will be included on the report.

Wildcards are special characters that give you more flexibility in selecting various records, such as account numbers and invoice numbers, to print on reports that use that type of information.

You can use two wildcard characters, the asterisk (*) and the question mark (?), in the Report Customisation window.

The asterisk Using the asterisk in the Report Customisation window allows you to print a report for a specific group of records. For example, if you want to print an Account Transactions report for all accounts whose account numbers begin with 1, you can use the asterisk wildcard to do so. (Without the asterisk wildcard, you could print the report only for a single account or for all your accounts.)

To select only the accounts whose numbers begin with 1, enter 1* in the Selected field in the Report Customisation window for the Account Transactions report.

When you print the report, only the accounts whose numbers begin with 1 will be included on the report.

You can use the asterisk in other locations in an account, item or job number in the Selected field, as well. For example, if you have several item numbers whose numbers end in SVC (to indicate the items are service items), you can enter *SVC in the Selected field to print a report that includes only the items whose numbers end in SVC.

The question mark The question mark wildcard allows you to restrict a report even further than the asterisk. Using the question mark, you can limit your report to elements that contain only a specific number of characters.

For example, say you want to print a Job Transactions report for the Cadwell Corporation. All Cadwell job numbers are three characters long and begin with the letter C. However, you have other jobs that start with the letter C and you don't want those jobs to appear on the report. In the Selected field of the Job Transactions report's Report Customisation window, enter C?? to limit the report to three-character jobs that begin with C.

Like the asterisk wildcard, the question mark can be used in other locations in account, item, purchase, sale and card names, as well.

See the following step-by-step procedure:

"To customise a report" on page 994

Designing reports

Use the Report Design window to choose the type of information to include on a report.

Since Accounting Plus's reports are already set up to be comprehensive enough for most businesses, you may want to consider printing a report or displaying it on your computer screen before you design it, just to check to see whether the report already contains the information you want.

Click the Customise button to open the Report Customisation window; then click the Design button to open the Report Design window. This window lists all of the fields that are available for the report. You can simply choose the fields you want to print on specific reports. For example, if you want to print VAT amounts on a sales report, you can choose to do so by designing the report so it includes VAT amounts. You can also choose the order in which information is printed on your reports when you design them.

> **Note: If you receive a message that the report is too wide to print**
>
> A message may appear advising you that the report you have chosen is too wide to fit on the paper because of report customisations. You can choose to print the report with only the information that will fit on the paper, or you may want to recustomise the report. If you want to recustomise the report, try some of these suggestions, then try to reprint the report.
>
> - Hide some of the fields using the report design feature; include only the fields you need.
> - Change the order of the fields using the report design feature; the fields display and print in the order that they appear in the Field Name list in the Report Design window.
> - Change the page orientation from portrait to landscape using the Print Setup command on the File menu.
> - Reduce the size of the font chosen for the report by using the report format feature.

A message may appear advising you that the report you have chosen is too wide to fit on the paper because of report customisations. You can choose to print the report with only the information that will fit on the paper, or you may want to recustomise the report. If you want to recustomise the report, try some of these suggestions, then try to reprint the report.

- Hide some of the fields using the report design feature; include only the fields you need.
- Change the order of the fields using the report design feature; the fields display and print in the order that they appear in the Field Name list in the Report Design window.
- Change the page orientation from portrait to landscape using the Print Setup command on the File menu.
- Reduce the size of the font chosen for the report by using the report

format feature.

> **Note: Use caution in designing reports you plan to export to Excel**
>
> If you plan to use MYOB OfficeLink to export the report you're working with to Microsoft Excel, avoid moving or adding fields to your report since these changes can cause the information that appears in Excel to be wrong, or to be formatted inappropriately. If you wish to move the information in your report around, we suggest that you do so using Excel after the report has been exported.
>
> For more information about OfficeLink, refer to "OfficeLink Overview" on page 1072.

See the following step-by-step procedure:

"To design a report" on page 995

Formatting reports

Use the Report Format window to modify the look of individual reports by using different font styles, sizes, colours, alignments and effects, and by changing the reports' page margins. Click the Customise button to open the Report Customisation window; then click the Format button to open the Report Format window.

If you wish to use fonts other than the default font on individual reports, keep in mind that the new fonts may dramatically change the appearance of your reports.

When you choose a font in the Report Format window, Accounting Plus calculates the approximate number of columns that will fit on a printed page, using the fonts you've selected and your current print setup selections.

The widest Accounting Plus report is 106 columns. If your font and print setup selections cause a report's calculated number of columns to be greater than 106, it may not fit on a printed page. When this happens, you must either change your page settings using the Print Setup window to accommodate a wider page or choose another font that fits better. (Consider using the 8-point Arial font.)

If you've formatted a report and want to change it back to its original format, you can simply click the Default button located at the bottom of the Report Format window.

> **Note: Formatting changes won't appear in reports exported to Excel**
>
> Any formatting changes you make to your report in Accounting Plus will not appear in Excel, if you export the report to Excel using MYOB OfficeLink. If you plan to export your report, we suggest you make formatting changes in Excel after the report has been exported.
>
> For more information about OfficeLink, see "OfficeLink Overview" on page 1072.

See the following step-by-step procedures:

"To format a report" on page 995

"To change a report back to its original format" on page 996

Saving custom reports

If you plan to use a specific report's design and format many times in the future, you can customise the report once and save the changes so you can use the modified report whenever you want.

When you save a report's changes, you create a *custom report*. Custom reports appear in the Custom section of the Index to Reports window, and can be printed, displayed and saved as files, just like any other Accounting Plus reports.

Since the report name you provide will eventually appear in the Index to Reports window, so you may want to enter a name that's easy for you to recognise in the future. The report name can be a maximum length of 27 character.

You can perform the same tasks with custom reports as you do with any other Accounting Plus reports, including printing them, displaying them on your computer screen, saving them as files on a disk and emailing them.

See also:

“To display a report on your computer screen” on page 998

“To print a report” on page 998

“To save a report as a file on a disk” on page 999

See the following step-by-step procedure:

“To save a report as a custom report” on page 996

Choosing what you want to do with the report

Once you’ve chosen the report you want to print and have made the customisations you need, you’re ready to see the finished product. In Accounting Plus, there are many ways to work with a report:

Displaying reports on your computer screen

Like printing a report on paper, displaying a report on your computer screen is affected by your entries and selections in the Print Setup window. If necessary, use the scroll bars in the Screen Reports window to view the entire report.

You can display only one report on your computer screen at a time. If you attempt to display a report when another report already is displayed on the screen, the first report's Screen Reports window will close before the second report is displayed.

If you want to email, fax or save to disk (choosing among a variety of formats) the report that's displayed, you can use the Send To button; the Customise button allows you to determine how much information you want to print. Once you're in the Report Customisation window, the Design button allows you to choose the fields you want to print; and the Format button allows you to change a report's appearance.

If you chose to use Microsoft Excel with MYOB OfficeLink when you installed Accounting Plus, you can click the Send To button and select Excel from the list to automatically display your report in Excel. To learn more about using OfficeLink to display reports in Excel, see "To view Accounting Plus reports in Excel" on page 1077.

You can also view more detail about a particular report by "zooming" to the detail from the Screen Reports window. To do this, move your mouse pointer over a piece of information in the Screen Reports window about which you want to see more detail. The mouse pointer will change into a magnifying glass.

When you see this magnifying glass, click your mouse button; the window used to enter the information you clicked on will appear, displaying the report information in more detail. When you're finished viewing the detailed information, close the window to return to the Screen Reports window.

See the following step-by-step procedure:

"To display a report on your computer screen" on page 998

Printing reports

Once you've properly set up your MYOB system, your computer and your printer, and you've customised, designed and formatted the report you want to print, printing the Accounting Plus report is a simple task: click the Print button!

There are a number of Print buttons available in windows throughout Accounting Plus; only in the Index to Reports window, however, will you have the ability to print all the reports in the MYOB system.

If you're not sure whether a particular report is the report you want, we suggest that you display the report on your computer screen before you attempt to print the report. If you decide that you want to print the report when you're viewing it on the screen, you'll be able to print the report immediately. This feature allows you to preview a report and avoid wasting paper if decide you don't want the report.

See "To display a report on your computer screen" on page 998, to learn how to preview your report before you print it.

Regardless of the window in which you find a Print button, clicking Print will probably open the standard Print window for your computer and printer, unless you set up your computer to print documents immediately. (If, however, you marked the Always Display the Report Customisation Before Printing Reports selection in the Preferences window, the Report Customisation window for the report will appear before the standard Print window appears.) The Print window varies, depending upon the type of computer and printer you use; however, many Print windows allow you to choose a range of pages to print.

Note: If you can't make entries in your print selection window

If you're unable to make entries or selections in your print window, your printer driver software may not be up to date. See "Checking your Windows printer driver software" on page 1053 for more information about printer drivers.

When you're satisfied with the information in the Print window, click the OK button to begin printing the report.

See the following step-by-step procedure:

"To print a report" on page 998

"Printing Overview" on page 1052

Saving reports as files on a disk

If you don't want to print a report on your printer or display it on your computer screen, you can save it as a file on a disk. When you save a report as a file, you have the flexibility to do whatever you want with the report: you can further modify it using a word-processing programme, move it to another computer for printing or simply save it for your permanent records.

Reports can be saved in the following formats:

Tab-Delimited Text File When you save a report in tab-delimited format, the individual pieces of information in the report are separated by tab characters. For example, if the last name *Martin* and the address *300 Roundhill Drive* appear in a report of customer names, a tab character will appear between *Martin* and *300 Roundhill Drive* in the file.

Comma-Separated Text File When you save a report in comma-separated format, the individual pieces of information in the report are separated by commas. For example, if the last name *Martin* and the address *300 Roundhill Drive* appear in a report of customer names, a comma will appear between *Martin* and *300 Roundhill Drive* in the file. (Individual pieces of information that actually contain commas are surrounded by quotation marks.)

Simple Text When you save a report in text format, the individual pieces of information are separated by spaces so the appearance of the report is as similar as possible to a printed version of the report. (The amount of similarity between the file's appearance and the report's printed appearance depends upon the type of computer and fonts you're using in the report.)

HTML Formatted Text File When you save a report in HTML (Hypertext Markup Language) format, the report is saved in a format capable of being viewed in World Wide Web browsers such as Netscape Navigator and Microsoft Internet Explorer.

PDF (Portable Document Format) When you save information in a

PDF file format, the information can be viewed using Adobe Acrobat Reader, a free application distributed by Adobe Systems -- www.adobe.com.

See the following step-by-step procedure:

"To save a report as a file on a disk" on page 999

Viewing MYOB Accounting Plus reports in Microsoft Excel using OfficeLink

While Accounting Plus provides a wide range of reports, there may be times when you'll find it more convenient to use Microsoft Excel to create what-if scenarios, budgets and the like. With OfficeLink, you can transfer reports to Excel as easily as you can print them. For more information, see "OfficeLink Overview" on page 1072.

See the following step-by-step procedure:

"To view Accounting Plus reports in Excel" on page 1077

Using report batches

Report batches are groups of reports you set up that allow you to print several reports at a time. You can set up report batches to serve a number of purposes. For example, you may wish to create a report batch that contains all your regular monthly financial statements; with a few clicks of the mouse, you can start the printing process so the reports print while you work on other important tasks. Report batches are created and maintained in the Report Batches and New/Edit Batch windows.

Please note that this task requires single-user access. See “Single-user file locking” on page 763 for more information.

Printing a report batch is slightly different than printing an individual report. Instead of making entries and selections in a Report Customisation window before you print, you’ll use the Report Batches window to choose the reporting period for the batches you want to print.

In the Period list field in the Report Batches window, you can choose any of the months or quarters in the current financial year, or you can choose to print information for the entire year to date.

Your selection in the Period list affects different types of reports in different ways. As an example, say you chose January from the Period list.

- **Activity reports**, such as the Job Activity Report, show job activity information from January 1 through January 31
- **Balance sheet reports** show information as of January 31.
- **Sales and purchases reports** show information about your sales and purchase balances as of January 31.

> **Note: Some reports can’t be put in batches**
> Some reports, such as the Reconciliation Report, can’t be added to report batches because you need to specify information to be printed each time you want to print the report. If you attempt to add a report that can’t be included in a batch, an alert message will appear.

See the following step-by-step procedures:

“To create a report batch” on page 999

"To print a report batch" on page 1000

Chapter 2

Finding reports

Finding reports

To find a report

If you haven’t already read the Reports Overview, see “Finding reports” on page 975 for more information.

The Index to Reports window should be displayed.

1. At the top of the window, click the tab with the name of the command centre that applies to the report you’re looking for.

2. A header/detail format is employed in each tab view to organise the reports by category. Highlight the name of the report.

See also

“Choosing preference settings for reports and forms” on page 976

“Choosing settings for a specific report” on page 978

“Choosing what you want to do with the report” on page 984

Choosing preferences for reports and forms

To choose preferences for reports and forms

If you haven’t already read the Reports Overview, see “Using Reports and Forms Preferences” on page 976 for more information.

1. From the Setup menu, choose Preferences.

2. Click the Reports & Forms tab.

3. When you’ve made the selections you want, click OK to record the changes you made.

Chapter 3

Choosing settings for a specific report

Choosing settings for a specific report

To choose a font for a specific report

If you haven't already read the Reports Overview, see "Choosing settings for a specific report" on page 978 for more information.

> **Note: Formatting changes won't appear in reports exported to Excel**
> Any formatting changes you make to your report in MYOB Accounting Plus will not appear in Excel, if you export the report to Excel using MYOB OfficeLink. If you plan to export your report, we suggest you make formatting changes in Excel after the report has been exported.
>
> For more information about OfficeLink, see "OfficeLink Overview" on page 1072.

The Index to Reports window should be displayed.

1. Highlight the report whose fonts you want to change. Click the Customise button to open the Report Customisation window; then click the Format button.

2. The left side of the Report Format window contains a representation of the sections that will be printed on your report.

   To make changes to a section of a report, click the section in the left side of the window to highlight the section, then make selections from the lists and boxes in the top half of the right side of the window.

See also

"To choose a font for all reports" on page 994

"To format a report" on page 995

To choose a font for all reports

If you haven't already read the Reports Overview, see "Choosing preference settings for reports and forms" on page 976 for more information.

1. Choose Default Fonts from the File menu.
2. Click the Reports button.
3. Choose the font and size you wish and then click OK.

To customise a report

If you haven't already read the Reports Overview, see "Customising reports" on page 978 for more information.

The Index to Reports window should be displayed.

1. When you find the report you want to use, highlight it, then click the Customise button at the bottom of the window.
2. Make entries and selections in the Report Customisation window, then click OK. You can now print or display the report with the Customisation you selected.

Warning: Customisation selections aren't saved!

Customisation selections you set up for an individual report are used only if you print or display the report immediately after you set up the customisation selections. If you don't print or display a report after you set up its selections and then change a different report's customisation selections, the first report's selections won't be saved. You'll need to set up them again before you attempt to print the report.

To design a report

If you haven’t already read the Reports Overview, see “Designing reports” on page 980 for more information.

The Index to Reports window should be displayed.

1. Highlight the report you want to design, then click the Design button at the bottom of the window.

2. Mark the Display column next to the fields that you want to display on the report.

3. Click a field name and drag the field in the window to indicate the order in which you want the fields to be printed on the report. The fields at the top of the Report Design window will appear at the leftmost end of the report.

4. Click OK to close the window.

To format a report

If you haven’t already read the Reports Overview, see “Formatting reports” on page 982 for more information.

Note: Formatting changes won't appear in reports exported to Excel

Any formatting changes you make to your report in MYOB Accounting Plus will not appear in Excel, if you export the report to Excel using MYOB OfficeLink. If you plan to export your report, we suggest you make formatting changes in Excel after the report has been exported.

For more information about OfficeLink, see the “OfficeLink Overview” on page 1072.

The Index to Reports window should be displayed.

1. Highlight the report you want to format. Click the Customise button to open the Report Customisation window; then click the Format button.

2. The left side of the Report Format window contains a representation of the sections that will be printed on your report.

To make changes to a section of a report, click the section in the left side of the window to highlight the section, then make selections from the lists and boxes in the top half of the right side of the window.

3. Mark the Company Name and the Report Date selections if you want to include the name of your company and the current date on the report.

4. If you wish to change the printed area of your report, make changes to the Left Margin and Top Margin fields in the bottom right corner of the Report Format window. You'll need to close the Report Format window and choose Print Setup from the File menu to make additional page settings changes.

5. Click OK.

See also

"Choosing preference settings for reports and forms" on page 976

To change a report back to its original format

If you haven't already read the Reports Overview, see "Formatting reports" on page 982 for more information.

The Index to Reports window should be displayed.

1. Highlight the report you want to reformat. Click the Customise button to open the Report Customisation window; then click the Format button.

2. Click the Default button.

3. A message appears asking you to confirm your selection. Click OK.

To save a report as a custom report

If you haven't already read the Reports Overview, see "Saving custom reports" on page 983 for more information.

1. Display to the screen the report you wish to save as a custom report and click the Save As button.

2. Enter a name and a brief description of the custom report. Click OK.

3. The Screen Reports window appears again. Click Close.

4. To view your custom reports, click the Custom tab at the top of the Index to Reports window.

Chapter 4

Choosing what you want to do with the report

Displaying reports on your computer screen

To display a report on your computer screen

If you haven't already read the Reports Overview, see "Displaying reports on your computer screen" on page 985 for more information.

The Index to Reports window should be displayed.

1. Highlight the report you want to display, then click the Display button.
2. Use the scroll bars in the Screen Reports window to view the entire report, if necessary.

See also

"To customise a report" on page 994

"To design a report" on page 995

"To format a report" on page 995

Printing reports on your printer

To print a report

If you haven't already read the Reports Overview, see "Printing reports" on page 986 for more information.

The Index to Reports window should be displayed.

1. Highlight the report you want to print.

2. Click the Print button. Clicking Print will probably open the standard Print window for your computer and printer, unless you set up your computer to print documents immediately.

   (If, however, you marked the Always Display the Customisation window Before Printing Reports selection in the Preferences window, the Report Customisation window for the report will appear before the standard Print window appears.)

3. When you're satisfied with the information in the Print window, click the OK button to begin printing the report.

Saving reports as files on a disk

▸ To save a report as a file on a disk

If you haven't already read the Reports Overview, see "Saving reports as files on a disk" on page 987 for more information.

The Index to Reports window should be displayed.

1. Highlight the report you want to display, then click the Send To button.

2. A drop-down menu appears that includes five formats in which you can save the file. Choose the format you wish to use, then click Save.

3. In the Save As window, enter a name for the file you're creating and specify a location for the file.

4. When you're finished using the Save As window, click OK to save the report as a file.

Using report batches

▸ To create a report batch

If you haven't already read the Reports Overview, see "Using report batches" on page 989 for more information.

Please note that this task requires single-user access. See "Single-user file locking" on page 763 for more information.

The Index to Reports window should be displayed.

1. To begin creating a new batch, click the New button.

2. Enter a name for the batch in the Batch Name field.

3. Choose the reports that belong to the batch by clicking the name of each report. A mark will appear next to each selected report, indicating that it's included in the new batch.

   To remove a report from the batch, click the name a second time.

4. Click OK. The Report Batches window will appear again, displaying the name of the new batch in its scrolling list.

To print a report batch

If you haven't already read the Reports Overview, see "Using report batches" on page 989 for more information.

The Index to Reports window should be displayed.

1. Highlight the report batch you want to print.

2. From the Period list, choose the reporting period you wish to include on the reports in the batch.

3. Click the Print button to display the Print window for your computer, make the selections you want, and click OK. The information you enter in the Print window, such as number of copies and page orientation, will be applied to each report in the batch.

To change a report batch

If you haven't already read the Reports Overview, see "Using report batches" on page 989 for more information.

Please note that this task requires single-user access. See "Single-user file locking" on page 763 for more information.

The Index to Reports window should be displayed.

1. Highlight the name of the batch you want to change and click the Edit button.

2. In the New/Edit Batch window, you can change the batch's name and the reports contained in the batch.

3. Click OK to save your changes.

To remove a report batch

If you haven't already read the Reports Overview, see "Using report batches" on page 989 for more information.

Please note that this task requires single-user access. See "Single-user file locking" on page 763 for more information.

The Index to Reports window should be displayed.

1. Highlight the name of the batch you want to remove

2. Click Delete Batch from the Edit menu.

Chapter 5

Graphs Overview

Staying in touch with your company's financial activity must be one of your most important tasks. Using the full-featured graphs in the Analyse Balance Sheet, Analyse Profit & Loss and Analyse Sales windows, you can gain a quick and accurate picture of your company's financial health.

You can customise, display, print and modify the look of your MYOB Accounting Plus graphs.

Displaying graphs

Displaying a graph in Accounting Plus is as easy as opening any other type of Accounting Plus window. When you display a graph, you can also specify a number of criteria to show the data you want by clicking the graph buttons.

Graphs can be displayed in the following windows:

- **Analyse Sales graph** In any command centre, choose Analyse Sales from the Analysis list. The Analyse Sales window will appear.
- **Analyse Profit & Loss graph** In any command centre, choose Profit & Loss from the Analysis list. The Analyse Profit & Loss window will appear.
- **Analyse Balance Sheet graph** In any command centre, choose Balance Sheet from the Analysis list. The Analyse Balance Sheet window will appear.

> **Note: If a pie graph doesn't show every item or account**
> Accounting Plus pie graphs can be divided into 13 sections only. The 12 largest amounts are shown individually. Everything else is represented by a 13th section.

See the following step-by-step procedure:

"To display a graph" on page 1005

Using advanced graph tools

Your graph capabilities are strongly enhanced by a series of specialised tools that allow you to view your graph information more closely, change the appearance of your graphs on your computer screen and print your graphs.

> **Warning: Be mindful of the colours in your graph**
> If you plan to print a graph, keep in mind that some colors don't print well on white paper. Lighter colors, such as yellow, may not show up well at all, regardless of whether you're printing with a black-and-white printer or a color printer. .

You can also change the appearance of a graph and work with the information in a graph using the graph toolbar at the top of the graph window.

See the following step-by-step procedure:

"To view details in a graph" on page 1006

"To make details stand out in a pie graph" on page 1006

"To use the graph toolbar" on page 1006

"To adjust the 3D characteristics of a graph that is part of Windows" on page 1010

Chapter 6

Displaying graphs

To display a graph

If you haven't already read the Graphs Overview, see "Displaying graphs" on page 1003 for more information.

1. Open one of the three windows in which a graph can be displayed. (To learn which windows display a graph, see "Displaying graphs" on page 1003.)

2. Use the Customise button to select a range of dates, as well as other criteria, to group the data.

> **Note: If a pie graph doesn't show every item or account**
> MYOB Accounting Plus pie graphs can be divided into 13 sections only. The 12 largest amounts are shown individually. Everything else is represented by a 13th section.

Chapter 7

Using advanced graph tools

Viewing details in a graph

To view details in a graph

If you haven't already read the Graphs Overview, see "Using advanced graph tools" on page 1004 for more information.

1. Display the graph you want to view.

2. Double-click the element in the graph you want to view and additional information about that element of the graph will be displayed.

To make details stand out in a pie graph

If you haven't already read the Graphs Overview, see "Using advanced graph tools" on page 1004 for more information.

You can highlight important parts of a pie graph by separating slices of the pie graph from the rest of the graph.

1. Position the mouse pointer over the slice of the pie graph you want to separate from the rest of the graph.

2. Hold down the mouse button, then drag the slice of the graph away from the rest of the graph.

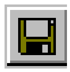
Using the graph toolbar

To use the graph toolbar

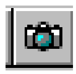
If you haven't already read the Graphs Overview, see "Using advanced graph tools" on page 1004 for more information.

Click a button to perform one the tasks in the following list. You can also learn the purpose of each button in the graph toolbar by pressing the right mouse button when the mouse pointer is over a button on the toolbar.

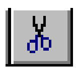
Export Chart Create an export file of the data in the graph you're viewing.



Copy as Bitmap Copy the graph you're viewing as a bitmap graphic onto the Clipboard.

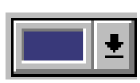


Copy as Data Copy the data represented by the graph you're viewing onto the Clipboard.

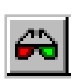


Print Print the graph you're viewing. If you're viewing a graph and its legend, you'll print the legend and the graph.

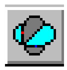
Change Colour Change the colour of a portion of the graph you're viewing. Select a colour from the palette that appears; then drag the colour from the Change Colour box to the portion of the graph you want to change. You can change the colour of any part of the graph you're viewing, including the graph's background and the legend's background.



3D-2D Toggle between a two-dimensional and three dimensional view of the graph

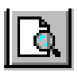


Rotate Open the 3D View Properties window, where you can choose your perspective of a three-dimensional graph. You can also add depth and shadow to a three-dimensional graph using this window. See “To adjust the 3D characteristics of a graph that is part of Windows” on page 1010 for more information about these features.

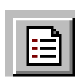


Z-Clustered Series Add a Z axis to a three-dimensional bar graph.

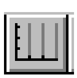
Zoom Hold down the button to drag a rectangle around the section of the graph you want to view in greater detail. Click the Zoom button again to return to normal view.



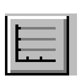
Show/Hide Legend Show or hide the graph’s legend box.



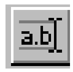
Vertical Grid Display a bar graph with a vertical grid.



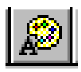
Horizontal Grid Display a bar graph with a horizontal grid.



Edit Titles Open the Titles window, where you can enter, edit or delete titles for the graph you're viewing. Click the Apply button in the Titles window to apply your changes to the graph titles. Click OK in the Titles window to apply your changes to the graph titles and close the Titles window.



Change Text Fonts Change the font characteristics of text in the graph window. Choose the text you want to change from the menu that appears, then change the font characteristics in the Font dialogue box and click OK.



Tools By choosing commands from the Tools menu, you can show or hide the legend box, the Palette Bar, the Pattern Bar or the Data Editor.

- The **legend box** is a key that identifies the sections of the graph according to colour and pattern.

  To show the legend box, click the Tools button and choose Legend from the Tools menu. You can also show and hide the legend box clicking the Show/Hide Legend button on the graph toolbar.

- The **Palette Bar** allows you to change the colour of a portion of the graph you're viewing.

  To show the Palette Bar, click the Tools button and choose Palette Bar from the Tools menu. Drag the colour from the Palette Bar to the portion of the graph you want to change. You can change the colour of any part of the graph you're viewing, including the graph's background and the legend's background. Use the arrows at the left of the Palette Bar to scroll through the available colours You can double-click a colour on the Palette Bar to open the Colour window, where you can define custom colour.

- The **Pattern Bar** allows you to add a pattern to the graph you're viewing.

To show the Pattern Bar, click the Tools button and choose Pattern Bar from the Tools menu. Drag the pattern from the Pattern Bar to the portion of the graph you want to change. To edit a pattern, double-click the pattern in the Pattern Bar. Click a pixel in the Pattern Bitmap section of the window to activate or deactivate it. When you're finished, click OK.

- The **Data Editor** allows you to change the information represented by the graph you're viewing so you can plot projected goals, predicted sales, and so on.

  To show the Data Editor, click the Tools button and choose Data Editor. You can change amounts represented in the graph and the legend names. When you're satisfied with your changes, click the Tools button and choose Data Editor to return to graph view. Any changes you make to the graph using the Data Editor won't affect your company file.

To adjust the 3D characteristics of a graph that is part of Windows

If you haven't already read the Graphs Overview, see "Using advanced graph tools" on page 1004 for more information.

Click the Rotate button, shown to the left, on the graph toolbar to open the 3D View Properties window. A few of the features of the window are:

- Remove the mark in the 3D field to change the view to a two-dimensional view.
- Mark the Full 3D View box if you want to set your own perspective of the three dimensional graph. When you mark this selection the X Angle and the Y Angle fields become active.
- You can adjust perspective by dragging the red and blue markers in the box on the left. (Mark the full 3D View box to make this area active.)
- Enter the angles of the perspective relative to the axis in the X Angle and Y Angle fields.
- Preview the graph in the box on the right.
- Increase the depth of the graph by dragging the slider under the preview window on the right.

To apply the changes, click Apply. To apply the changes and close the 3D View Properties window, click OK.