How to edit a Crystal Report in SAP Business One

This guide shows you how to edit a Crystal Report in SAP Business One. You open an existing layout from Report and Layout Manager, change a field in Crystal Reports, and preview the result with live data. You then save the file, import it back into SAP Business One, and set it as the default layout. The example edits the **New Sales Order** layout and corrects a text field.

Prerequisites

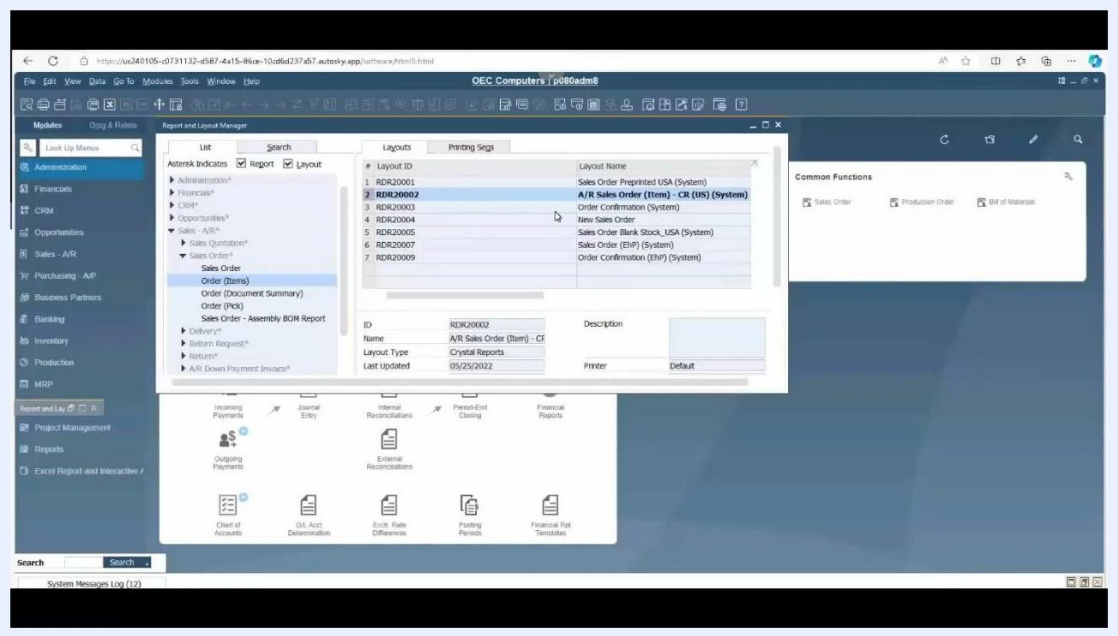
Before you start, make sure you have the following:

- Access to SAP Business One and its **Report and Layout Manager**.
- Crystal Reports, which opens from Report and Layout Manager when you edit a layout.
- The database connection details Crystal Reports may ask for: server, user ID, and password.
- The parameter values for the preview. A Sales Order report uses a DocEntry and an ObjectId. This example uses DocEntry 1585 and ObjectId 17.
- A test database with real sales order data, so you can check your changes.

Open the layout and edit the Crystal Report

Step 1: Open the SAP Business One main dashboard

Launch SAP Business One and wait for the main dashboard to load. The dashboard shows the modules and financial process shortcuts.



SAP Business One main dashboard with modules and financial process shortcuts

Step 2: Open Report and Layout Manager

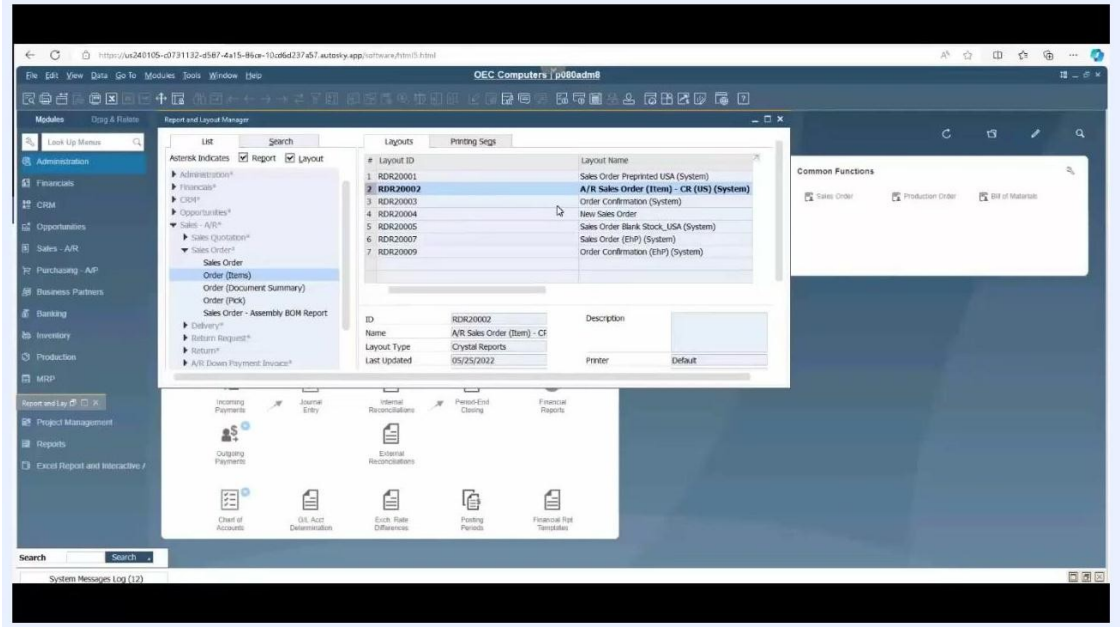
In the menu search bar, type Report and Layout Manager. Select **Report and Layout Manager** from the search results to open it.

Step 3: Select the layout to edit

In the Report and Layout Manager window, expand **Sales - A/R** > **Sales Order** > **Order (Items)**. In the list of layouts, select the layout you want to edit. In this example, select the layout with these values:

- **Layout Name:** New Sales Order

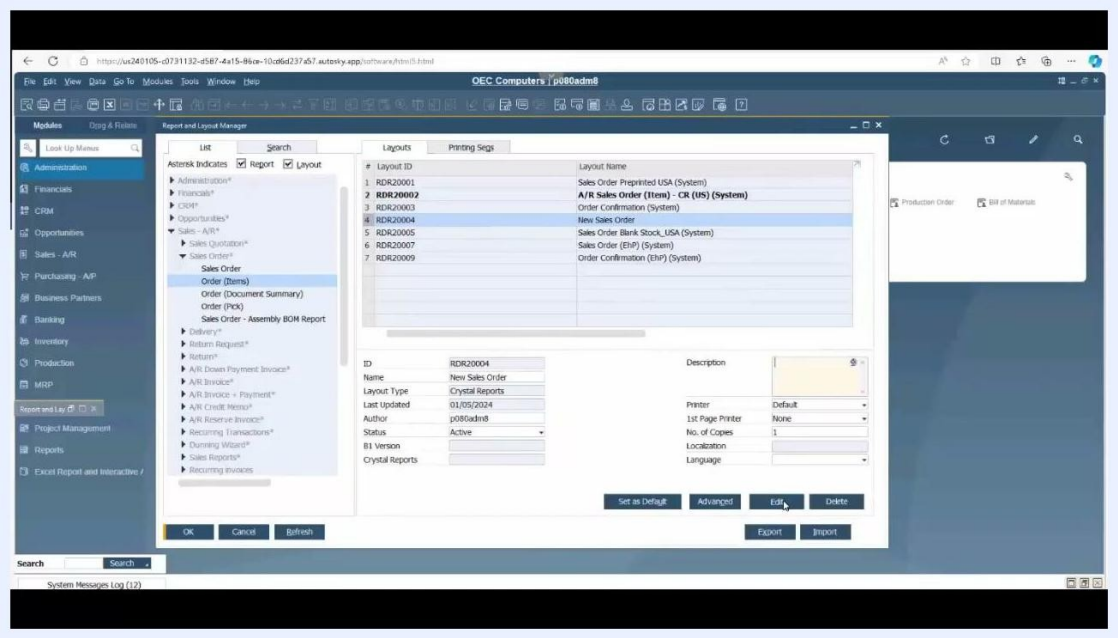
- **Layout ID:** RDR20004



Report and Layout Manager window with the New Sales Order layout selected

Step 4: Open the layout in Crystal Reports

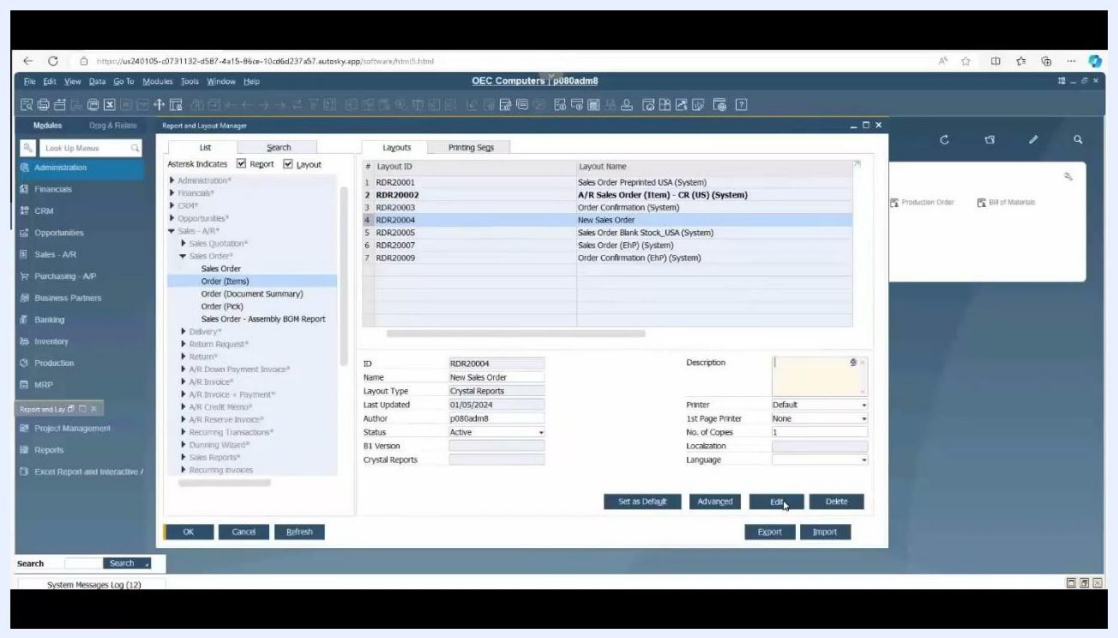
With the layout highlighted, click **Edit** at the bottom of the window. SAP Business One launches Crystal Reports and loads the selected layout for editing.



Report and Layout Manager with the Edit button highlighted for the New Sales Order layout

Step 5: Review the layout

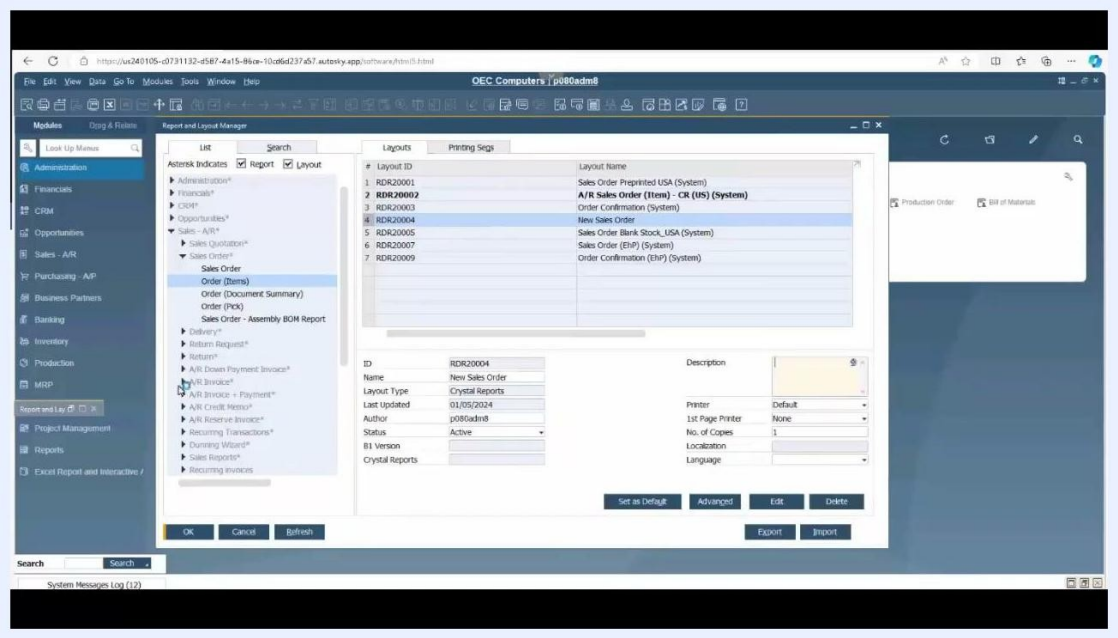
When Crystal Reports opens, review the layout. The top section is typically the header, and the fields shown depend on the report. In this example, locate the text field labeled INCORRECT TEXT HERE.



Crystal Reports editor showing the INCORRECT TEXT HERE field in the layout

Step 6: Edit the field

Click the text object you want to change, in this example INCORRECT TEXT HERE. Type the correct label, for example CORRECT TEXT HERE. You can also delete the field or move it to a different section.



Crystal Reports editor with the text object selected for editing

Step 7: Decide on further edits

Highlight any other text object or field you want to change or remove. Then use one of these options:

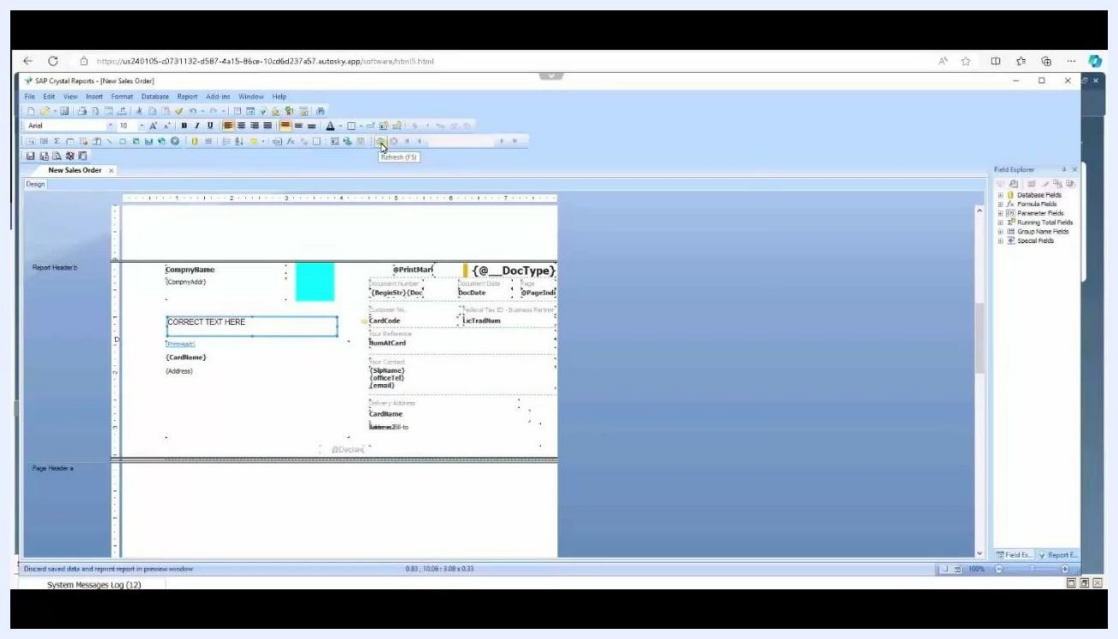
- To delete a field, select it and press the **Delete** key.
- To move a field, click and drag it to a different section of the layout.

In this example, keep the edited field as CORRECT TEXT HERE.

Preview the edited Crystal Report layout

Step 8: Refresh the report

Find the **Refresh** button, which has a circular arrow icon, in the Crystal Reports toolbar. Click it to load the report with live data. You can also use the **Preview** option to see a preview of the report.



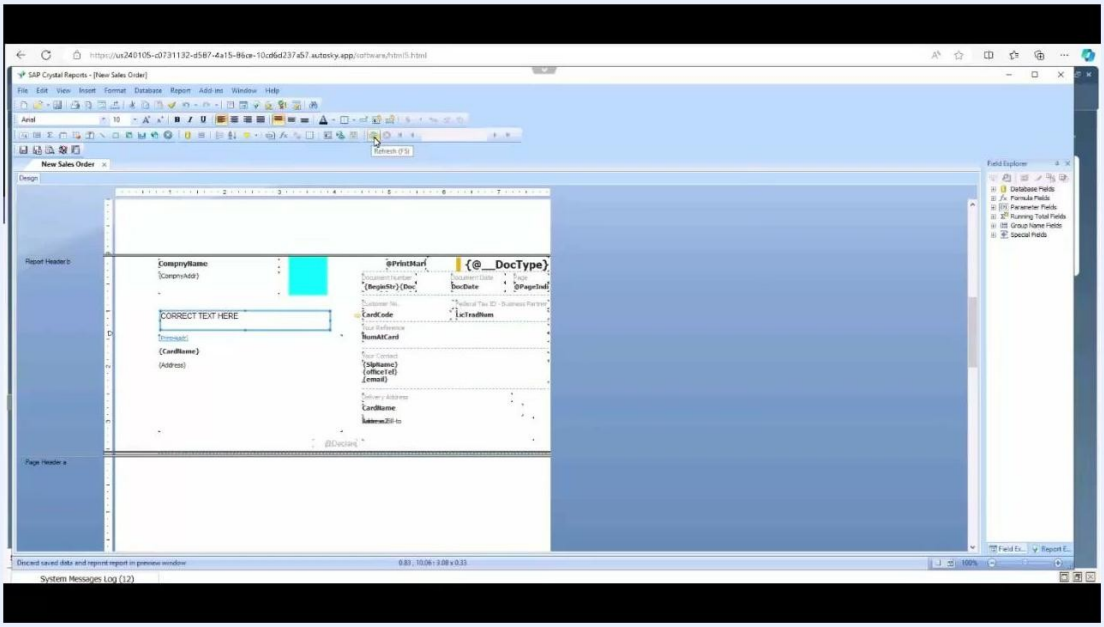
Crystal Reports editor with the Refresh button highlighted above the edited layout

Step 9: Enter the report parameters

When prompted, enter the parameters for the report. For a Sales Order report, enter:

- **DocEntry:** 1585
- **ObjectId:** 17

Click **OK** to proceed.



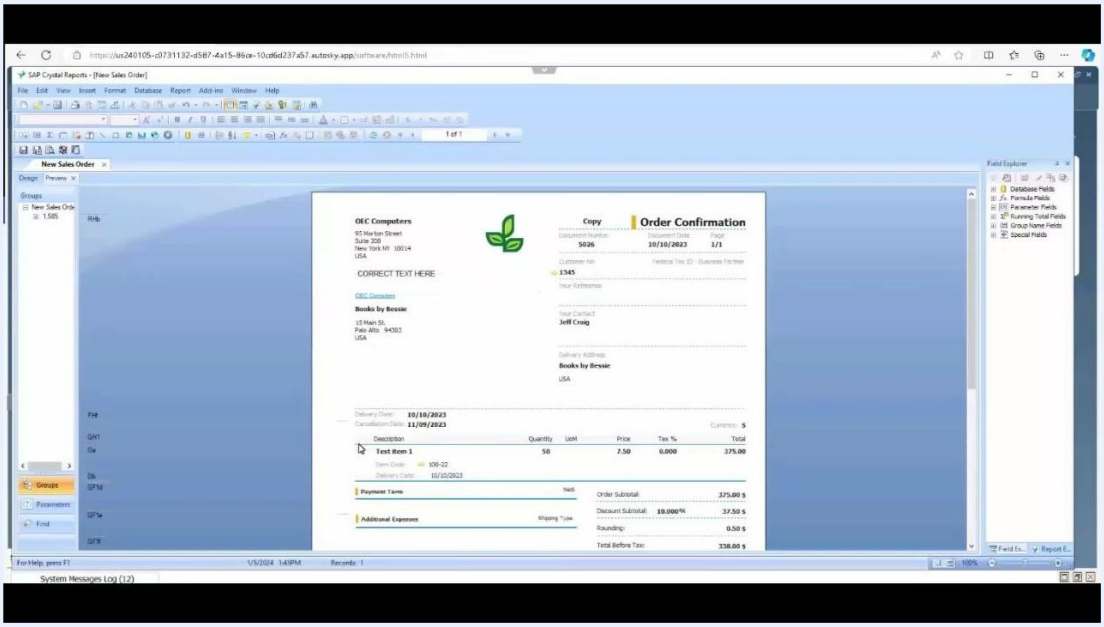
Parameter entry dialog in Crystal Reports with fields for DocEntry and ObjectId

Step 10: Enter the database connection details

If prompted, enter your database connection details:

- **Server:** saphasupportone:30015
- **User ID:** SYSTEM
- **Password:** your password

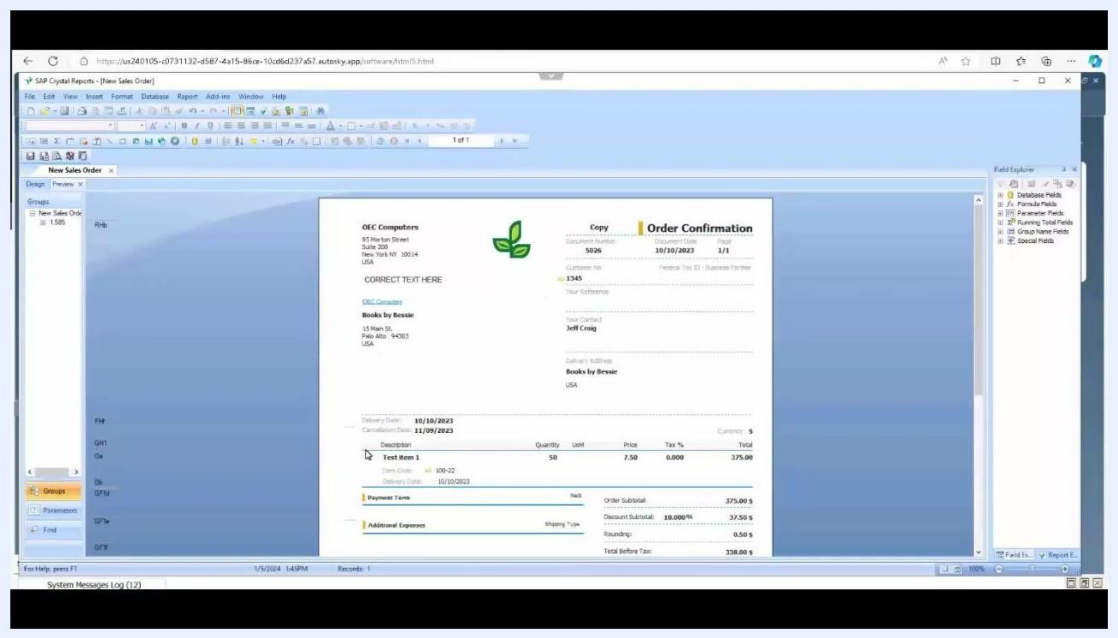
Click **OK** or **Finish** to connect.



ODBC connection dialog with server, user ID, and password fields

Step 11: View the report with live data

After the connection succeeds, the report refreshes and shows real data based on the parameters you entered. Verify that your change, such as the corrected text field, appears as expected.



Crystal Reports preview showing the updated layout with CORRECT TEXT HERE and live sales order data

Step 12: Check the preview

Confirm that the preview shows your changes and real sales order data from your test database. Use the preview to check the alignment, positioning, and overall appearance of your edits.

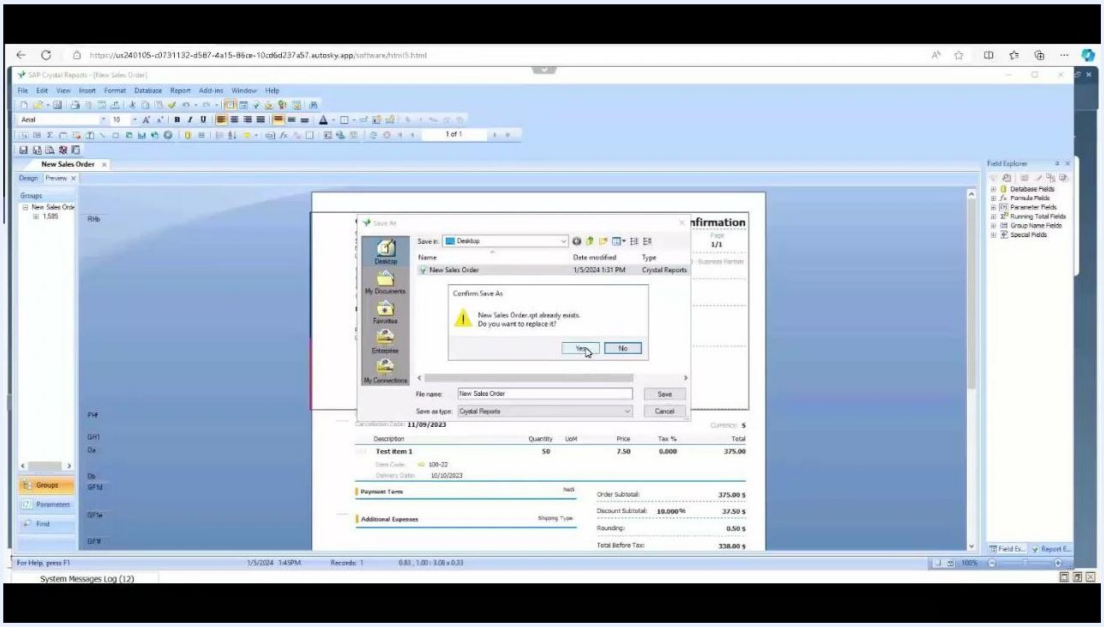
Save the edited Crystal Report and import it

Step 13: Save the edited layout

Save the layout as a file you can find easily:

1. In the menu bar, click **File**.
2. Select **Save As...**.
3. In the Save As dialog, choose an easy-to-find location, such as your Desktop.
4. Enter a file name, such as New Sales Order.

5. If you are told the file already exists, click **Yes** to replace it.



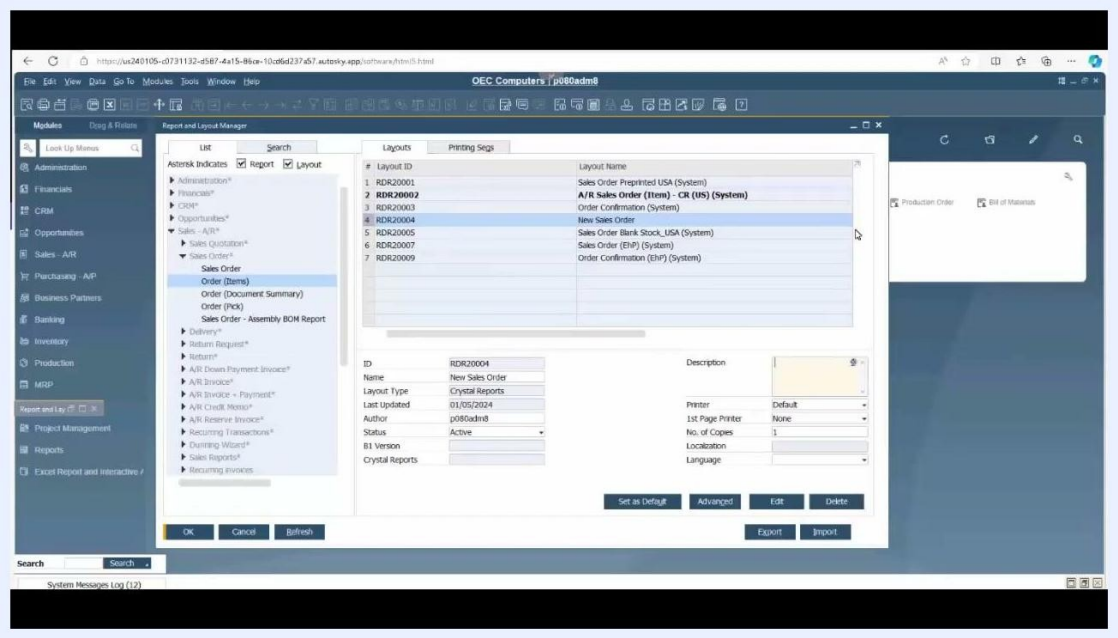
Crystal Reports Save As dialog saving New Sales Order.rpt to the Desktop and confirming the overwrite

Step 14: Close the Crystal Report file

After saving, close the file in Crystal Reports. Make sure it is not open, because leaving it open can cause errors when you import it into SAP Business One.

Step 15: Return to Report and Layout Manager

Go to the SAP Business One main window. In the **Modules** panel, select **Report and Layout Manager**. Locate the relevant layout, for example New Sales Order.



SAP Business One Report and Layout Manager with the New Sales Order layout selected

Step 16: Start the import

Click **Import** at the bottom of the Report and Layout Manager window. The Import Wizard launches and prompts you to select the file location.

Step 17: Select the layout file

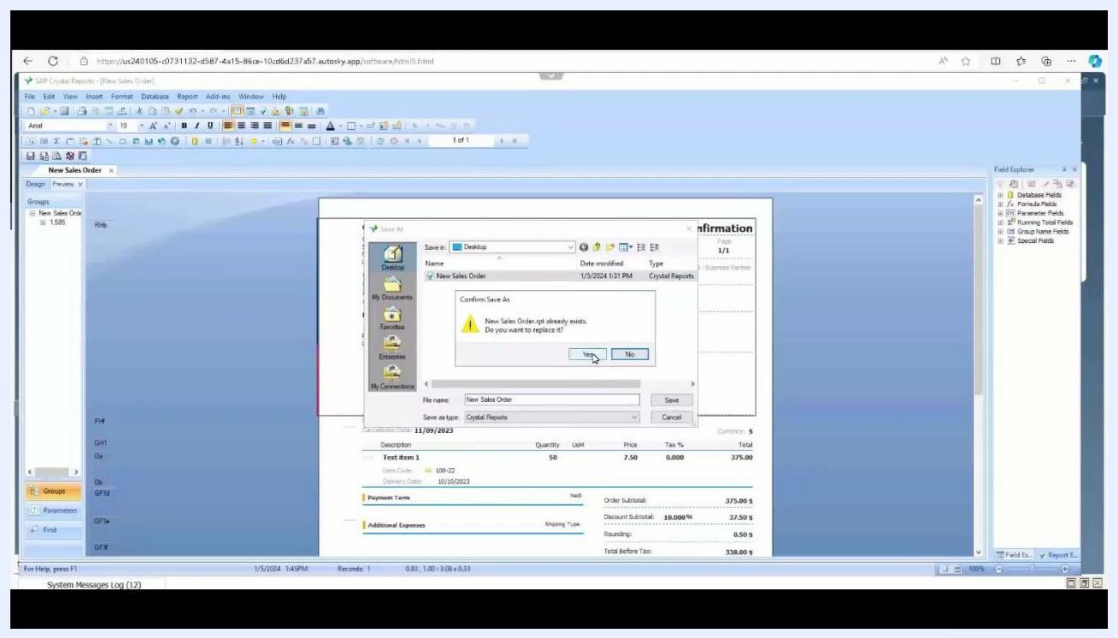
In the Import Wizard, browse to the location where you saved the file, for example the Desktop. Select the file, such as New Sales Order.rpt, and click **Open**.

Step 18: Choose the content type

When prompted, select **Layout** as the content type. If you were importing a report instead, you would select **Report** and be prompted to assign it to a specific menu location in SAP Business One.

Step 19: Specify the document type

In the File Selection step, a dialog appears for you to select the document type. For a sales order layout, select the matching type, for example **Sales Order**. Click **Choose** to confirm.



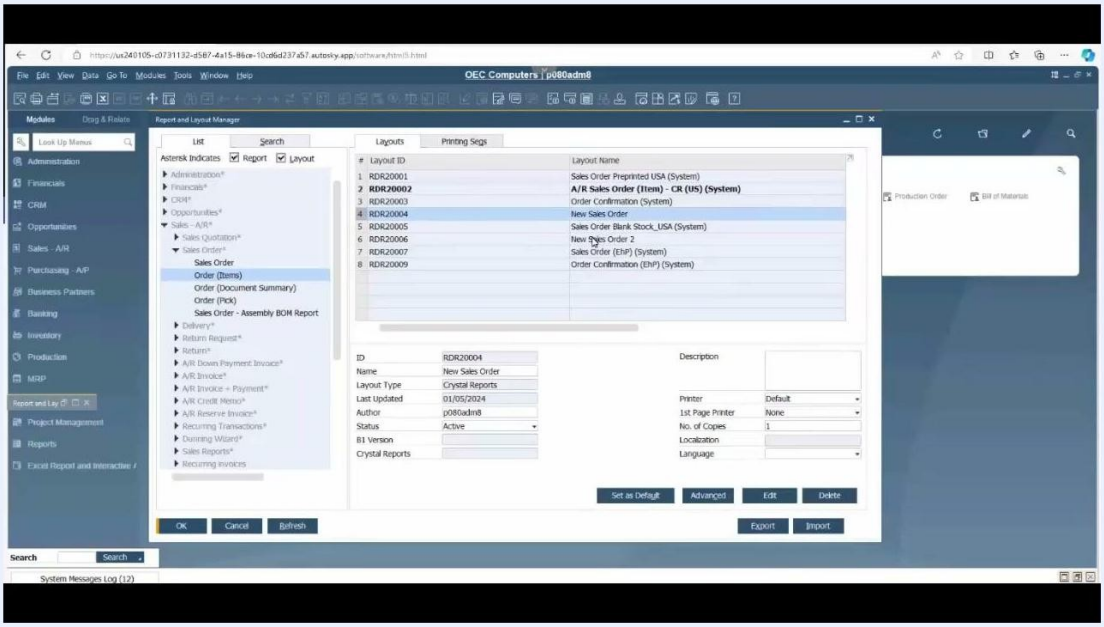
SAP Business One Import Wizard showing the File Selection step and the list of document types

Step 20: Handle a duplicate file name

If a file with the same name already exists, the RPT File dialog appears. In that dialog:

1. Choose **Rename**.
2. Enter the new name New Sales Order 2.

3. Click **OK** to proceed.



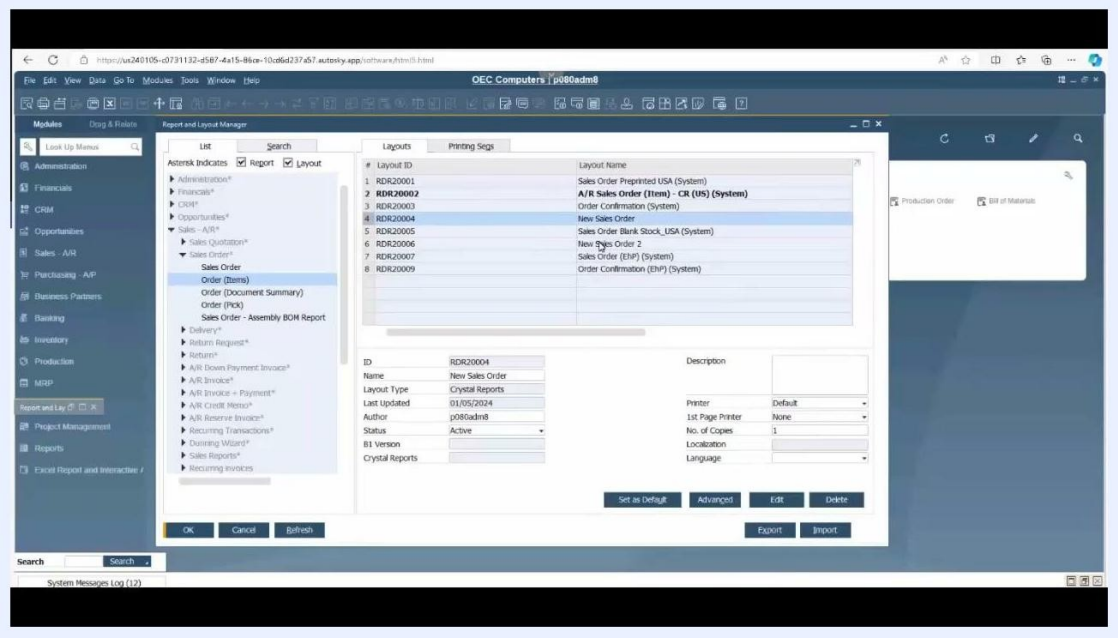
File Selection window with the duplicate file prompt, showing the Overwrite and Rename options and the new name New Sales Order 2 entered

Manage the imported layouts

Step 21: Review the imported layouts

In Report and Layout Manager, the list shows both the old and new versions. In this example, **New Sales Order** (ID: RDR20004) and **New Sales Order 2** (ID: RDR20006) are both visible.

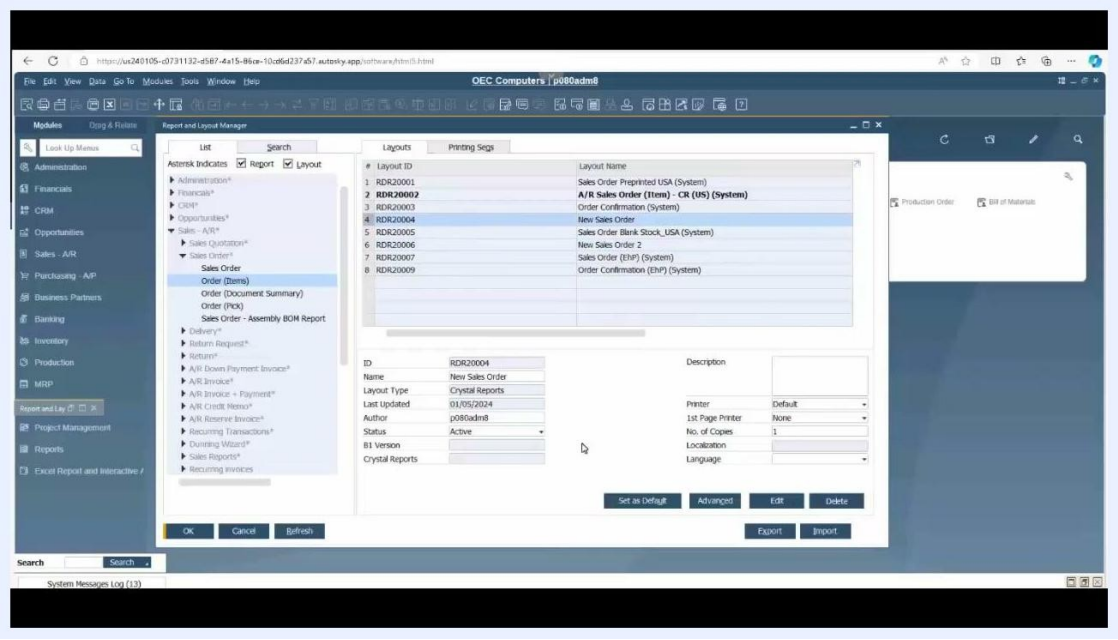
Below the list, you see details for the selected layout. These include ID, Name, Layout Type, Last Updated, Author, Status, Printer, and Number of Copies. Click the layout you want, for example **New Sales Order 2**, and check that it is the correct version.



Report and Layout Manager showing the old and new sales order layouts, with details for the selected layout

Step 22: Delete an old layout

To remove an old or unwanted layout, select it, for example **New Sales Order**. Then click **Delete**.



Report and Layout Manager with the option to delete a selected layout

Step 23: Refresh the layout list

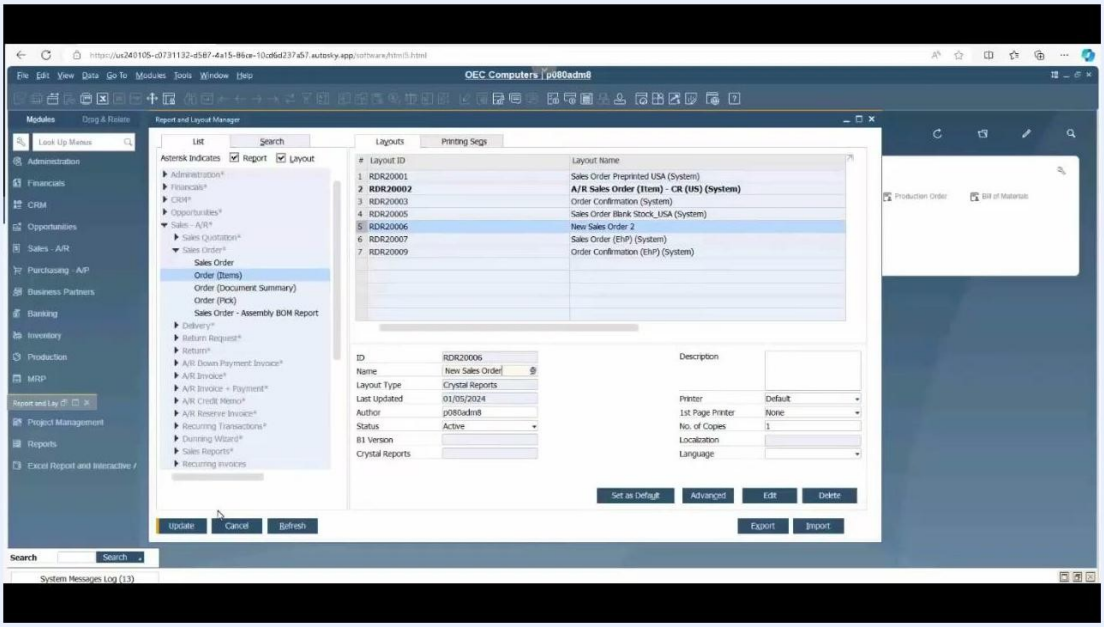
Click **Refresh** to make sure the deleted layout no longer appears in the list.

Step 24: Rename the new layout

To replace the old layout with the new version under the original name, rename the new one:

1. Select **New Sales Order 2** (ID: RDR20006).
2. Change the **Name** field to New Sales Order.

3. Click **Update** to save the change.

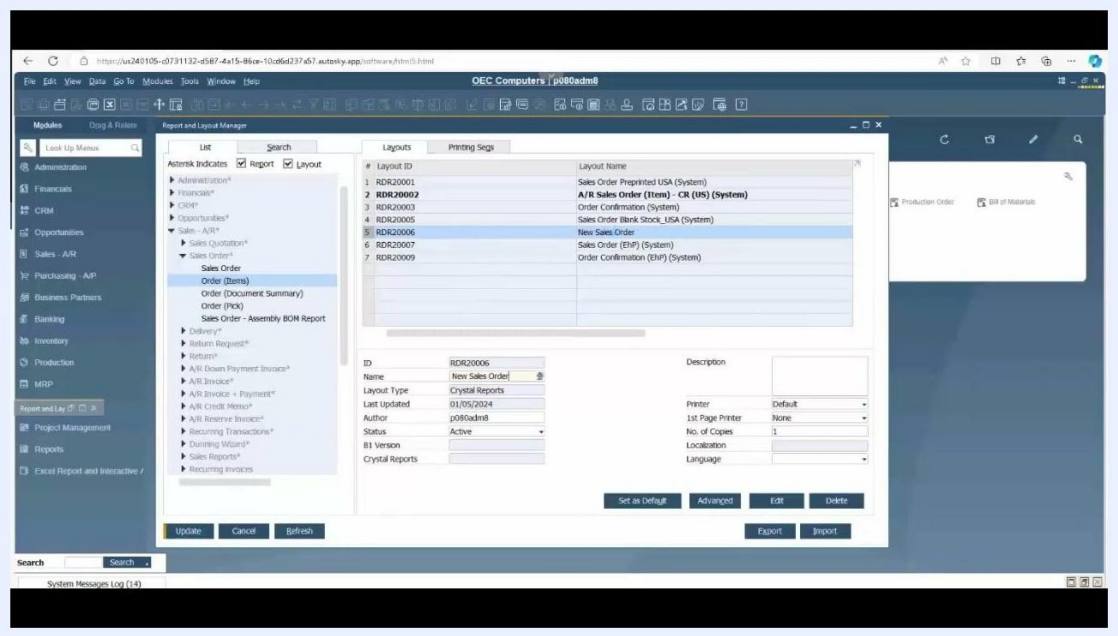


Report and Layout Manager with the Update button highlighted after renaming a layout

Test and set the layout

Step 25: Open a sales order to test the layout (optional)

Open any sales order in the system. Go to the **File** menu, then select **Preview** and **Layouts** to test the new layout with a real sales order.

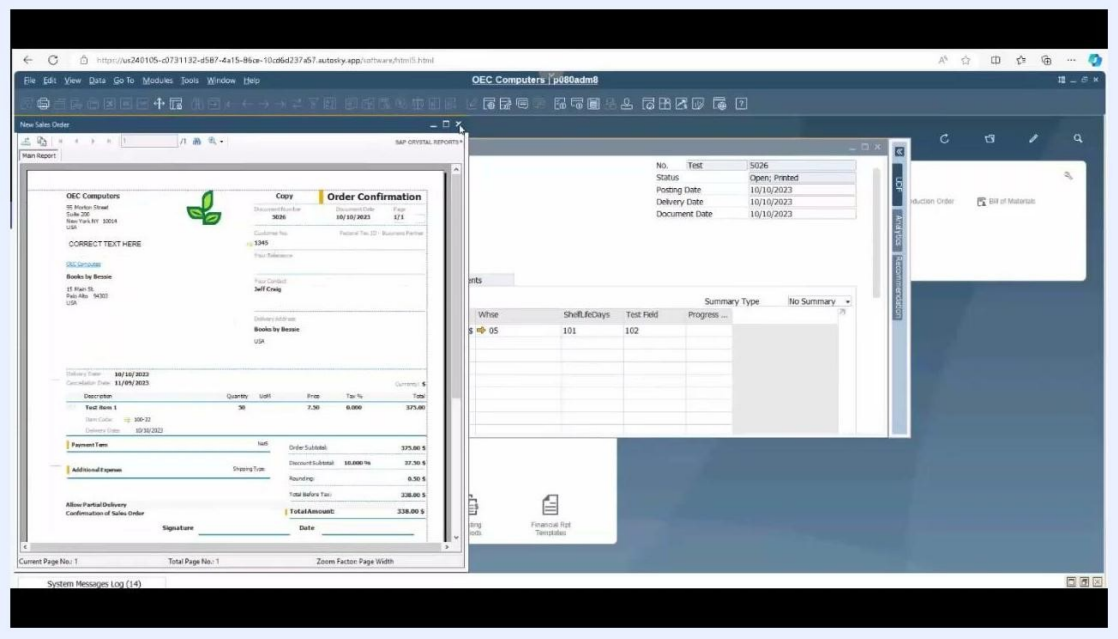


Sales Order screen open and ready for layout testing, showing customer and item details

Step 26: Choose the new layout

In the Sales Order window, open the **Choose Layout** dialog. Select **New Sales Order** from the list of available layouts and click **OK**.

In this example, the sales order is for customer "Books by Bessie" (Customer No. 1345). It contains item 100-22, quantity 50, unit price $7.50, and a total of $375.00.

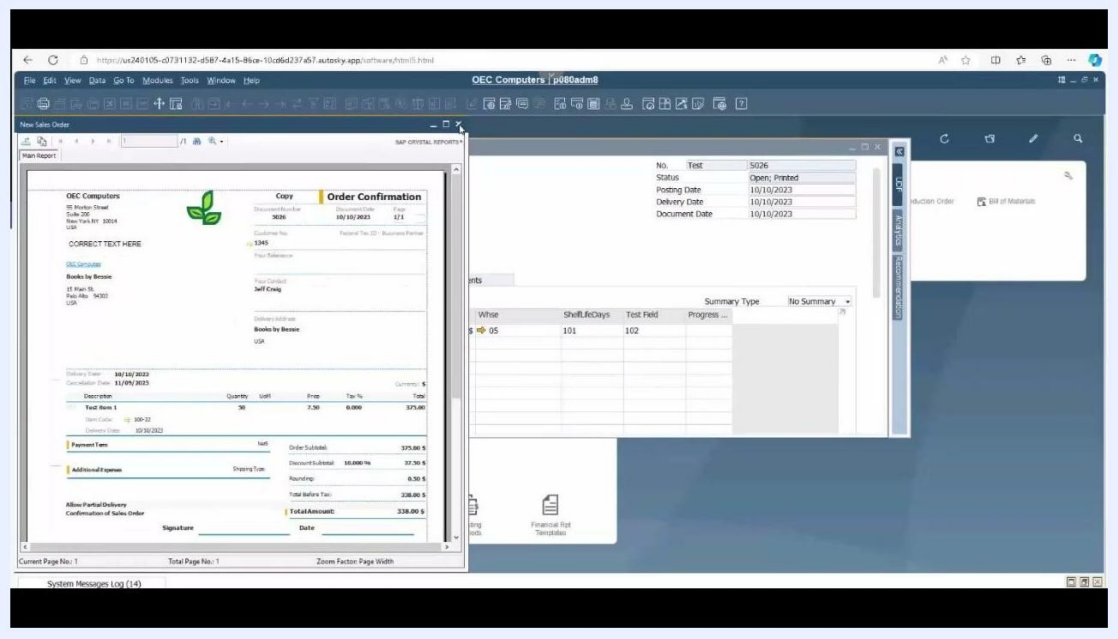


Sales Order screen with the Choose Layout dialog open, New Sales Order selected, and the cursor on OK

Step 27: Preview the sales order with the layout

After you apply the layout, a SAP Crystal Reports preview window opens. It shows the formatted sales order as an **Order Confirmation**.

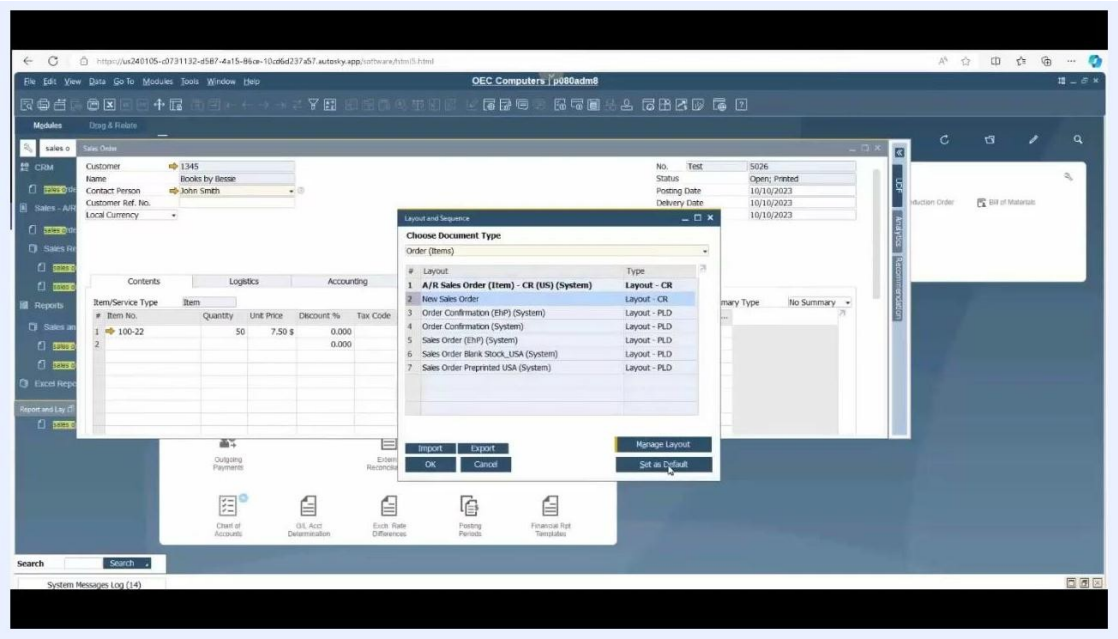
Review the company information, customer details, item description, quantity, price, and totals. Make sure the layout shows all required fields and formatting.



SAP Crystal Reports preview of the sales order, showing a formatted order confirmation with company, customer, and item details

Step 28: Set the layout as the default

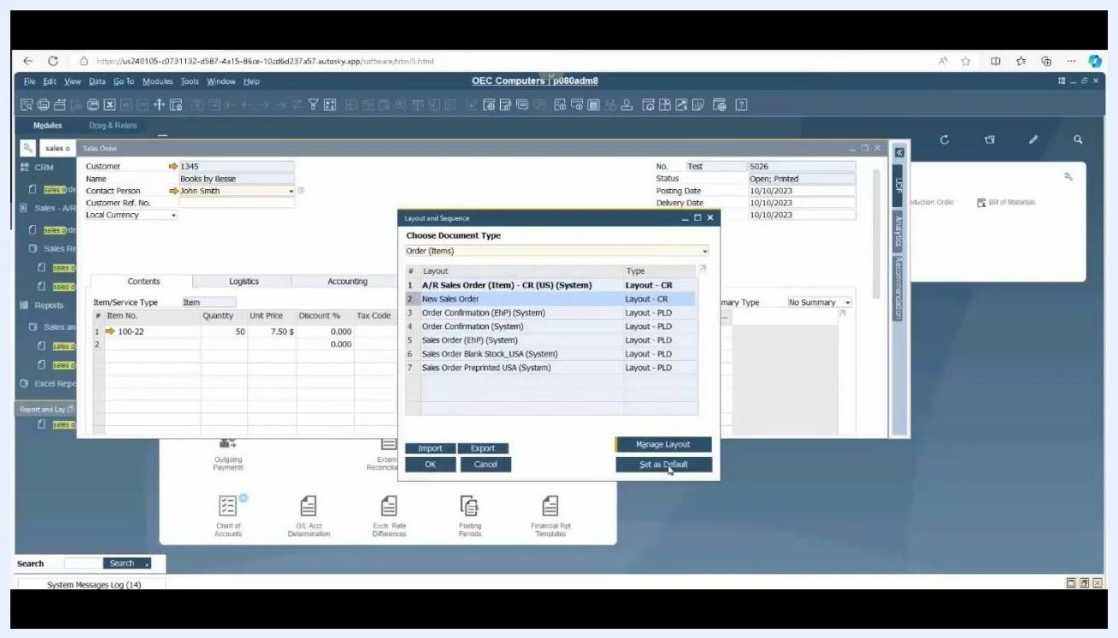
To use the layout for future documents, select it in the **Choose Document Type** dialog, for example **New Sales Order**. Click **Set as Default** to make it the default for the selected document type. You can also click **Manage Layout** to edit or organize layouts further.



Choose Document Type dialog with New Sales Order selected and the Set as Default button highlighted

Step 29: Close the layout dialog

When you finish managing layouts, close the **Choose Document Type** dialog. You return to the main sales order screen, which stays open and shows the current order details and available actions.



Sales Order screen after closing the layout dialogs, showing order details and available actions

Summary

You now know how to edit a Crystal Report in SAP Business One. You opened a layout from Report and Layout Manager, changed a field in Crystal Reports, and previewed it with live data. You then saved it, imported it, renamed it, tested it on a sales order, and set it as the default layout.