



## Sage Timberline Office

### How do I save, add, and print a report design?

**Article ID:** KB20873, KB21339, KB21478

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#### Solution

Follow the steps below to [save](#), [add](#), and [print](#) a report design. This solution includes information on how to add a custom report to the menu.

#### Save a Report Design

For an attached report in the knowledgebase:

1. Click on the report link to download the report design.
2. Click [**Save**].
3. In the **Save in** box, browse to your Report folder. For example, X:\Timberline\Report or X:\Documents and Settings\All Users\Application Data\Sage\Timberline Office\9.5\Accounting\Report folder.
4. Verify that the **File name** and **Save as type** are correct.
5. Click [**Save**].
6. After the download is complete, click [**Close**].

For an attached report in an email:

1. Right-click the file attachment and select **Save As**.
2. For the **Save in** box, browse to X:\Timberline\Report folder (X:\Timberline represents the drive and folder location where the Sage Timberline Office Accounting and Management Products were installed on the network server).
3. Verify that the **File name** and **Save as type** are correct.
4. Click [**Save**].  
**Note:** Some Internet Service Providers (ISP) do not allow direct access to an attachment. Download it to a set location, such as C:\AOL\downloads. After you complete the procedures your email program requires, use Windows Explorer to copy the report design from the download location to your X:\Timberline\Report folder.

#### Add a Report Design to the Reports Menu

Steps for adding reports to Purchasing and Inventory are detailed in the following article: [How do I add a custom report to my Purchasing or Inventory Reports menu?](#) For other applications, follow the steps below.

1. Start the application where you want to add the report to the **Reports** menu.
2. From the **Reports** menu, select **Reports Manager**.
3. Click [**New**].
4. Type the report name in the **Report name** box as you want it to appear on the **Reports** menu.
5. To assign this report to a menu group, type the appropriate menu group name in the **Menu group** box.

**Note:** You can also click [**List**] to select an existing menu group. Leave the box blank to add the report to the main **Reports** menu.

6. In the **Source** section, select the appropriate option depending on whether this is a Crystal report or a standard Sage Timberline Office report.

7. Place your cursor in the **File name** box, click [**List**], and browse to the report design that you want to add to the **Reports** menu.
8. Select the report design and click [**Open**].
9. Click [**OK**], and then click [**Close**].

**Note:** The report may not appear on the **Reports** menu if Sage Timberline Office security is set up on your system. In this case, modify Sage Timberline Office security so that the appropriate operators have access to the report. Refer to [A report was added using Report Manager, but the report does not appear in the Reports menu](#) for more information.

### Print a Report

1. In Report Designer, from the **File** menu, select **Open Design**.
2. In the **Look In** box, select the drive and folder where the report design is located, such as X:\Program Files\Timberline Office\Accounting\Report for CD versions 9.4.x and earlier, or X:\Documents and Settings\All Users\Application Data\Sage\Timberline Office\9.5\Accounting\Report for versions 9.5.x and later.
3. Select the report and click [**Open**].
4. From the **File** menu, select **Print**. Make file selections, as needed.
5. Click [**Print Preview**] to view the report on screen or [**Start**] to print the report to your default printer.

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### Does this article apply to my products?

Products: Sage Timberline Office

Applications: All applications, Accounts Payable, Accounts Receivable, Cash Management, General Ledger, Job Cost, Payroll, Report Designer, AP, AR, CM, GL, JC, PR, RD

Version Applicable: All versions

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