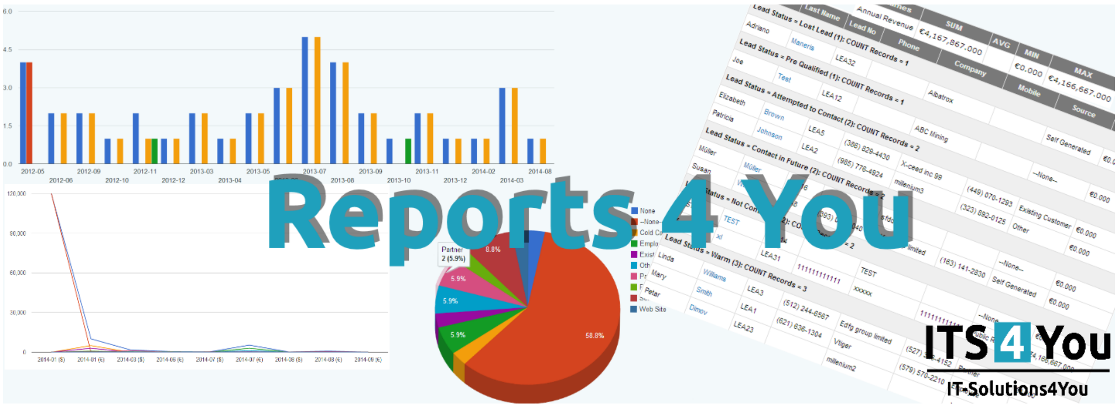
ITS 4 You

IT-Solutions4You

REPORTS 4 YOU for VTIGER CRM 5.x

Introduction



Reports 4 You is the most powerful runtime and design environment for your custom reports integrated into vtiger CRM Open Source.

Main Features:

- Easy installation via module manager
- You can create unlimited reports for all vtiger CRM modules (incl. custom modules created with vtiger standards)
- Allows you to use all fields from primary module and its related modules
- Supports unlimited count of uitype 10 fields related to same module
- 4 Report types (Tabular, Summaries, Summaries with Columns and details)
- Custom Labels definition
- Enhanced conditions functionality
- Support of Workflow/Scheduler
- Graphs
- PDF Export, print

Content

License agreement

- The Reports 4 You will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of Reports 4 You.
- This license gives the holder right to install Reports 4 You on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the Reports 4 You sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with Reports 4 You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Reports 4 You License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of Reports 4 You.

It is strongly required to deactivate the license before moving installation to another server (different url) in order to avoid any license conflicts.
After movement and repeated installation you can reactivate your license.

Terms and conditions

We accept all major credit cards, PayPal and Bank transfer. Our deliveries:

Credit Card: delivered immediately

PayPal: delivered immediately

Bank transfer: delivered in 2 - 5 days

After payment you will obtain email with info for download and your license key as well.

Private policy

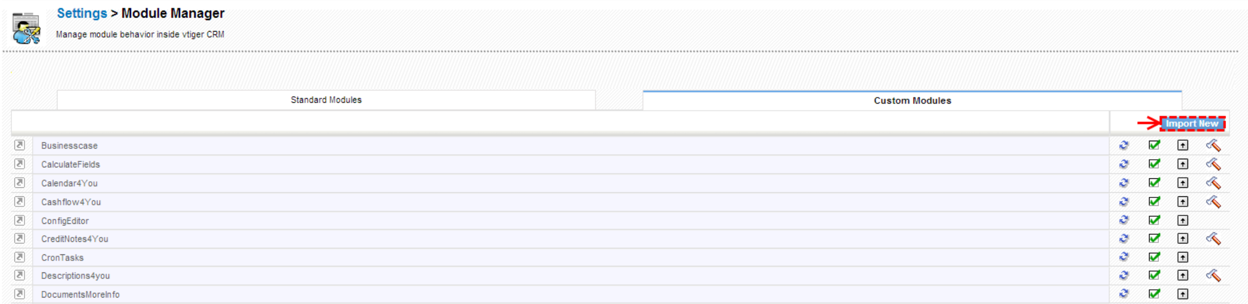
During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.x)
- Reports 4 You version (e.g. 1.xx)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

1 How to install Reports 4 You

Please provide following steps in order to install Reports 4 You:

1. Install the .zip (package) file of the Reports 4 You module via **CRM Settings -> Module Manager** tab and click on the Import New button.

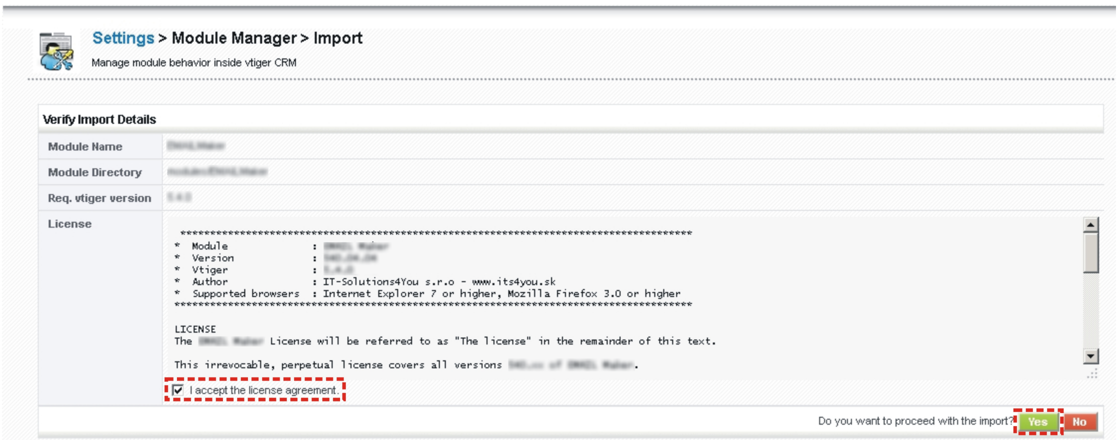


Picture 1.1: Installation of Reports 4 You – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Click on the Import button.

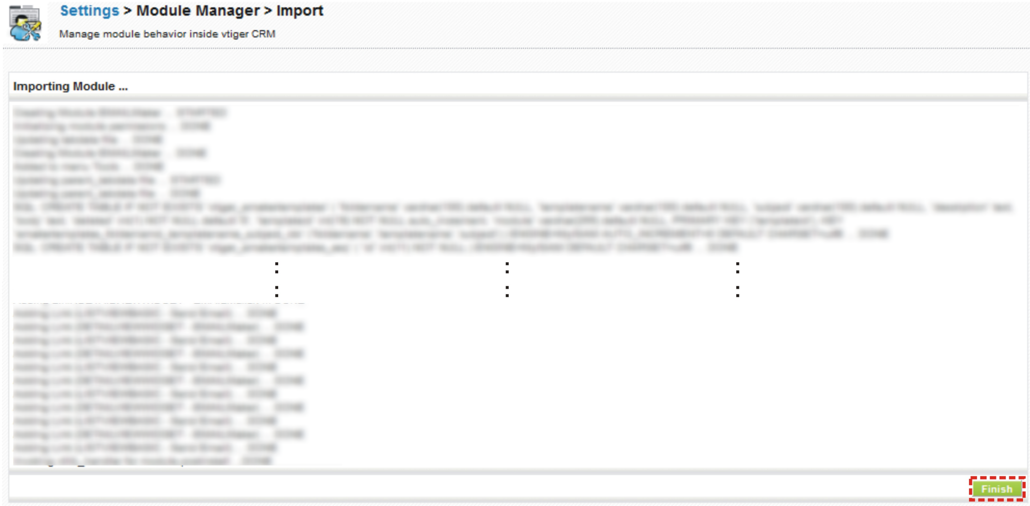
Picture 1.2: Installation of Reports 4 You – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click Yes to proceed or to No cancel.



Picture 1.3: Installation of Reports 4 You – Step 3

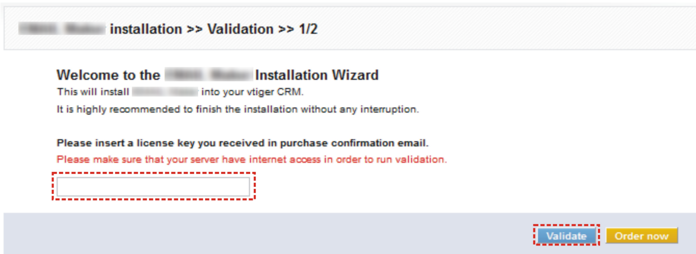
4. Click on **Finish** button to complete the module import.



Picture 1.4: Installation of Reports 4 You – Step 4

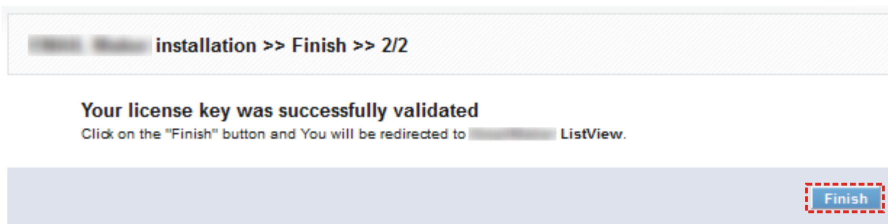
In order to finish installation, please provide following validation steps.

1. Reports 4 You Validation Step. Please insert a license key and make sure that your server has internet access. Click on **Validate** button.



Picture 1.5: Validation of Reports 4 You – Step 1

2. Click on **Finish** to complete Validation.



Picture 1.6: Validation of Reports 4 You – Step 2

Now, you have also option to import some our predefined reports or only skip to listview and create your own ones.

For Upgrade please check 5.3 Upgrade.

2 How to create Reports 4 You

Types of Reports

There are 3 types of Reports you are able to create.

1. **Tabular Report –** records displayed in standard tabular structure (mostly Activity report), skip this step and go to "Select Columns" step.

Lead No	Salutation	Last Name	Company	Lead Source	Phone	Assigned To
LEA1	-	Smith	Vtiger	Public Relations	(691) 225-3562	Administrator
LEA2	-	Johnson	T3m invest a/s	Public Relations	(014) 125-7627	Administrator

Picture 2.1: Tabular Report

Columns: Subject, Sales Order, Invoice No, Contact Name, Invoice Date, Status, Assigned To, Phone

Summaries Columns: None

Filters: (Status not equal to Paid)

Total: 20 Records

Report owner: Demo User

Sharing: public

Limit: 20 Records

Module: Invoice

Group By: None

Schedule: None

Chart Info: *(No Charts available for this report!)*

Subject	Sales Order	Invoice No	Contact Name	Invoice Date	Status	Assigned To	Phone
vt100usrpk_inv113	SO_vt100usrpk	INV4	Mary Smith	18-2013-02	Credit Invoice	Demo User	(774) 736-2805
vendtl_inv214	SO_vtiger	INV5	Maria Miller	31-2012-05	Created	Administrator	(622) 193-1075
Test2	-	INV11	Patricia Johnson	19-2012-06	Created	Sales Man	(043) 772-4083
Brandtest	-	INV12	Testvorname Testnachname a	29-2012-06	Created	Demo User	(774) 736-2805
wgwrgwrgwrgwrgwr	-	INV16	-	06-2012-07	Sent	Maciej Wasilewski	-
test	-	INV17	Elizabeth Brown	20-2012-07	Sent	Demo User	(439) 698-3144
test	-	INV19	Elizabeth Brown	20-2012-07	AutoCreated	Demo User	(439) 698-3144
test 2	-	INV21	-	18-2012-08	AutoCreated	Demo User	-
TEST	-	INV23	-	28-2012-08	AutoCreated	Demo User	0948222111
Chinese	-	INV24	-	14-2012-09	Credit Invoice	Demo User	-
sdsds	-	INV26	-	27-2013-01	Sent	Demo User	-
Prod_Quote Nguyễn Cao Khánh	-	INV28	-	08-2012-10	AutoCreated	Demo User	(043) 772-4083
Test100	-	INV29	Elizabeth Brown	18-2012-10	AutoCreated	Demo User	-
testa	-	INV30	D Testa	18-2012-10	AutoCreated	Demo User	-
LD_Prod_Quote Nguyễn Cao Khánh	-	INV31	-	18-2012-10	AutoCreated	Demo User	(043) 772-4083
YT20-ottnov12	YT20	INV32	-	27-2012-10	AutoCreated	Demo User	+421-51-7732370
testest	-	INV33	-	05-2012-11	AutoCreated	Demo User	-
25-15-33	2013-05-21 SIOI	INV34	-	09-2012-11	AutoCreated	Demo User	(439) 698-3144
pfitischigogerl	pfitischigogerl	INV35	-	09-2012-11	AutoCreated	Demo User	-
sirtec	-	INV36	-	14-2012-11	AutoCreated	Demo User	-

Picture 2.2: Tabular Report

2. **Summaries Report –** In this Report type it's necessary to define "Summaries Fields" which you want to report. Based on Rows or Columns structure you can get this two types of tables:

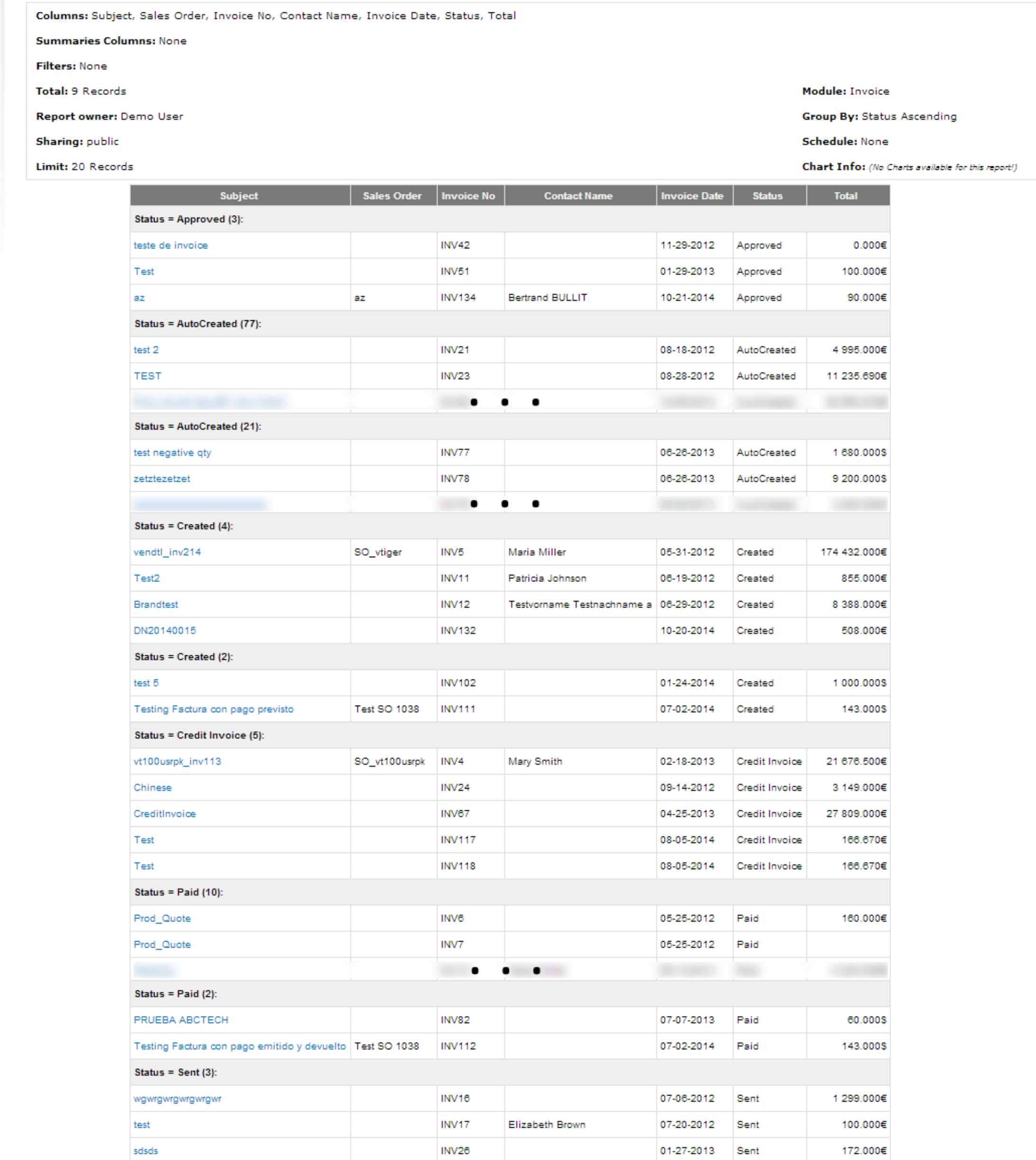
   a) **Summaries report –** Group data choosing rows values by one row or combination (rows-rows), (rows-rows-rows).

Lead Status, Company	COUNT Records	SUM Revenue	AVG Revenue	MIN Revenue	MAX Revenue
Contact in Future	2	€6,000.000	€3,000.000	€2,000.000	€4,000.000
Edfg group limited	1	€2,000.000	€2,000.000	€2,000.000	€2,000.000
Vtigercrm inc	1	€4,000.000	€4,000.000	€4,000.000	€4,000.000

Picture 2.3: Summaries report

Examples:

Report grouped by one row (Invoice status). Selected columns are Subject, Sales Order, Inovice No., Contact Name, Invoice Date, Status and Total. Filter is not set.



Columns: Subject, Sales Order, Invoice No, Contact Name, Invoice Date, Status, Total

Summaries Columns: None

Filters: None

Total: 9 Records

Report owner: Demo User

Sharing: public

Limit: 20 Records

Module: Invoice

Group By: Status Ascending

Schedule: None

Chart Info: *(No Charts available for this report!)*

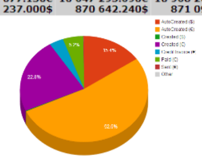
Subject	Sales Order	Invoice No	Contact Name	Invoice Date	Status	Total
Status = Approved (3):						
teste de invoice		INV42		11-29-2012	Approved	0.000€
Test		INV51		01-29-2013	Approved	100.000€
az	az	INV134	Bertrand BULLIT	10-21-2014	Approved	90.000€
Status = AutoCreated (77):						
test 2		INV21		08-18-2012	AutoCreated	4 995.000€
TEST		INV23		08-28-2012	AutoCreated	11 235.690€
		• • •				
Status = AutoCreated (21):						
test negative qty		INV77		06-26-2013	AutoCreated	1 680.000$
zetztezetzet		INV78		06-26-2013	AutoCreated	9 200.000$
		• • •				
Status = Created (4):						
vendtl_inv214	SO_vtiger	INV5	Maria Miller	05-31-2012	Created	174 432.000€
Test2		INV11	Patricia Johnson	06-19-2012	Created	855.000€
Brandtest		INV12	Testvorname Testnachname a	06-29-2012	Created	8 388.000€
DN20140015		INV132		10-20-2014	Created	508.000€
Status = Created (2):						
test 5		INV102		01-24-2014	Created	1 000.000$
Testing Factura con pago previsto	Test SO 1038	INV111		07-02-2014	Created	143.000$
Status = Credit Invoice (5):						
vt100usrpk_inv113	SO_vt100usrpk	INV4	Mary Smith	02-18-2013	Credit Invoice	21 676.500€
Chinese		INV24		09-14-2012	Credit Invoice	3 149.000€
CreditInvoice		INV67		04-25-2013	Credit Invoice	27 809.000€
Test		INV117		08-05-2014	Credit Invoice	166.670€
Test		INV118		08-05-2014	Credit Invoice	166.670€
Status = Paid (10):						
Prod_Quote		INV6		05-25-2012	Paid	160.000€
Prod_Quote		INV7		05-25-2012	Paid	
		• • •				
Status = Paid (2):						
PRUEBA ABCTECH		INV82		07-07-2013	Paid	60.000$
Testing Factura con pago emitido y devuelto	Test SO 1038	INV112		07-02-2014	Paid	143.000$
Status = Sent (3):						
wgwrgwrgwrgwrgwr		INV16		07-06-2012	Sent	1 299.000€
test		INV17	Elizabeth Brown	07-20-2012	Sent	100.000€
sdsds		INV26		01-27-2013	Sent	172.000€

Picture 2.4: Summaries Report grouped by one row

Report grouped by two rows: Status and Organization Name. In this report are Chosen Columns ignored. Shown are only Summaries Columns and Group by Columns. In this way we recommend to use Summaries report with columns for better view. Compare it with **this** report.

Columns: Subject, Sales Order, Customer No, Invoice No, Contact Name, Invoice Date, Status
Summaries Columns: SUM Paid Amount, SUM Open Amount, SUM Sub Total, AVG Sub Total
Filters: None
Total: 9 Records
Report owner: Demo User
Sharing: public
Limit: Summaries 50 Records, Details 2 Records
Module: Invoice
Group By: Status Ascending, Organization Name Ascending
Schedule: None
Chart Info: Pie 3D Chart (Status, AVG Sub Total)

Status, Organization Name	SUM Paid Amount	SUM Open Amount	SUM Sub Total	AVG Sub Total
Approved	0.000€	100.000€	100.000€	50.000€
5&7L	0.000€	0.000€	0.000€	0.000€
6?N	0.000€	100.000€	100.000€	100.000€
AutoCreated	0.000$	869 499.240$	869 753.240$	41 416.821$
1 prova	0.000$	33 136.000$	33 390.000$	8 347.500$
5&7L	0.000$	721 665.640$	721 665.640$	72 166.564$
AutoCreated	0.000€	10 605 921.690€	10 623 455.750€	141 646.077€
2 Muse s.r.o.	0.000€	2 104 511.690€	2 102 123.000€	420 424.600€
4 provaaaaa	0.000€	2 070 662.000€	2 073 724.000€	172 810.333€
Created	175 432.000€	9 243.000€	183 770.000€	61 256.667€
demovtiger	0.000€	855.000€	855.000€	855.000€
samplevtiger	175 432.000€	0.000€	174 527.000€	174 527.000€
Credit Invoice	1 155 024.500€	30 958.000€	48 341.340€	9 668.268€
JUt0	0.000€	3 149.000€	3 149.000€	3 149.000€
5&7L	0.000€	27 809.000€	27 809.000€	27 809.000€
Paid	237.000$	0.000$	203.000$	101.500$
ABC Corp	177.000$	0.000$	143.000$	143.000$
ARNAUD PASQUIER	60.000$	0.000$	60.000$	60.000$
Paid	111 522.630€	0.000€	111 022.630€	13 877.829€
demovtiger	103 437.000€	0.000€	103 387.000€	34 462.333€
DP&L	2 000.000€	0.000€	2 000.000€	2 000.000€
Sent	98.000€	1 473.000€	1 571.000€	523.667€
ABCIT	0.000€	172.000€	172.000€	172.000€
EDFG Group Limited	98.000€	2.000€	100.000€	100.000€
Totals	**1 442 077.130€ 237.000$**	**10 647 295.690€ 870 642.240$**	**10 968 260.720€ 871 099.240$**	**37 837.085€ 14 029.940$**

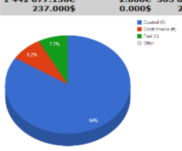


Picture 2.5: Report grouped by row-row

Reported grouped by three rows: Status, Organization Name and Invoice Date by Quarters. Filter is: Paid Amount is greather than 0. 3D Pie Chart.

Columns: Subject, Sales Order, Customer No, Invoice No, Contact Name, Invoice Date, Status
Summaries Columns: SUM Paid Amount, SUM Open Amount, SUM Sub Total, AVG Sub Total
Filters: (Paid Amount greater than 0)
Total: 5 Records
Report owner: Demo User
Sharing: public
Limit: All records
Module: Invoice
Group By: Status Ascending, Organization Name Ascending, Invoice Date Ascending by Quarters
Schedule: None
Chart Info: Pie 3D Chart (Status, AVG Sub Total)

Status, Organization Name, Invoice Date	SUM Paid Amount	SUM Open Amount	SUM Sub Total	AVG Sub Total
Created	175 432.000€	0.000€	174 527.000€	174 527.000€
samplevtiger	175 432.000€	0.000€	174 527.000€	174 527.000€
2012-2Q	175 432.000€	0.000€	174 527.000€	174 527.000€
Credit Invoice	1 155 024.500€	0.000€	17 050.000€	17 050.000€
t3M Invest A/S	1 155 024.500€	0.000€	17 050.000€	17 050.000€
2013-1Q	1 155 024.500€	0.000€	17 050.000€	17 050.000€
Paid	237.000$	0.000$	203.000$	101.500$
ABC Corp	177.000$	0.000$	143.000$	143.000$
2014-3Q	177.000$	0.000$	143.000$	143.000$
ARNAUD PASQUIER	60.000$	0.000$	60.000$	60.000$
2013-3Q	60.000$	0.000$	60.000$	60.000$
Paid	111 522.630€	0.000€	111 422.630€	15 917.519€
demovtiger	103 437.000€	0.000€	103 387.000€	34 462.333€
2012-2Q	8 383.000€	0.000€	8 333.000€	4 166.500€
2012-3Q	95 054.000€	0.000€	95 054.000€	95 054.000€
DP&L	2 000.000€	0.000€	2 000.000€	2 000.000€
2013-1Q	2 000.000€	0.000€	2 000.000€	2 000.000€
EDFG Group Limited	2 667.630€	0.000€	2 617.630€	1 308.815€
2012-3Q	2 667.630€	0.000€	2 617.630€	1 308.815€
IT-Solutions 4 You	3 418.000€	0.000€	3 418.000€	3 418.000€
2013-4Q	3 418.000€	0.000€	3 418.000€	3 418.000€
Sent	98.000€	2.000€	100.000€	100.000€
EDFG Group Limited	98.000€	2.000€	100.000€	100.000€
2012-3Q	98.000€	2.000€	100.000€	100.000€
Totals	**1 442 077.130€ 237.000$**	**2.000€ 0.000$**	**303 099.630€ 203.000$**	**51 898.630€ 101.500$**



Picture 2.6: Summaries Report grouped by row-row-row

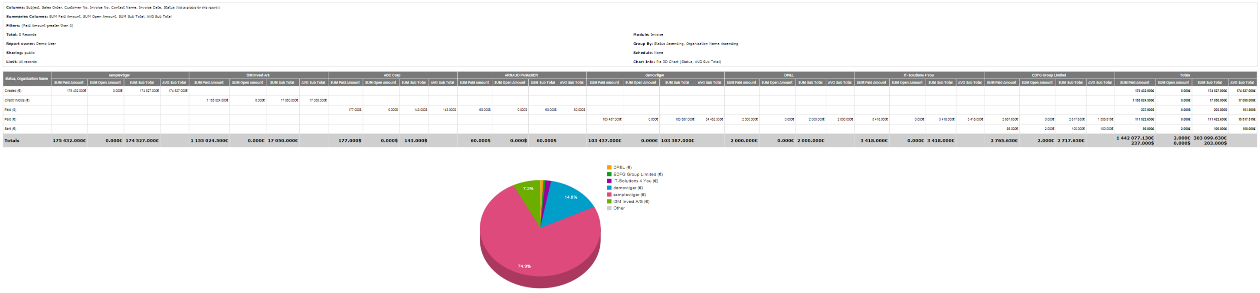
b) **Summaries report with columns –** In second selectbox choose columns as value and you will get rows-columns structure.

Lead Source, Assigned To	Administrator		Totals	
	COUNT Records	SUM Revenue	COUNT Records	SUM Revenue
Cold Call	1	€4,000.000	**1**	**€4,000.000**
Conference	2	€4,350.000	**2**	**€4,350.000**

Picture 2.7: Summaries report with columns

Example:

Report is grouped by row: Status and column: Organization Name. With filter: Paid Amount is greather than 0.



Picture 2.8: Report grouped by row-column

3. **Summaries Report with details –** Define ONE group by field, additionally you can select "summaries fields".

Status	Salutation	Last Name	Lead No	Phone	Company	Mobile
Lead Source = Conference (2):						
Contact in Future		Brown	LEA5	(743) 356-0951	X-ceed inc 99	(580) 478-1816
Not Contacted		Jones	LEA4	(864) 668-7332	Vtigercrm inc	(359) 595-3729

Picture 2.9: Summaries Report with details

Example:

There is Report with detail from Inovice module that is group by: Organization Name. Summaries Column is SUM Total. With Columns: Subject, Invoice No, Contact Name, Invoice Date, Sales Commission, Status, Total, Assigned To, Organization Name, Organization No.. Also Chart is included.

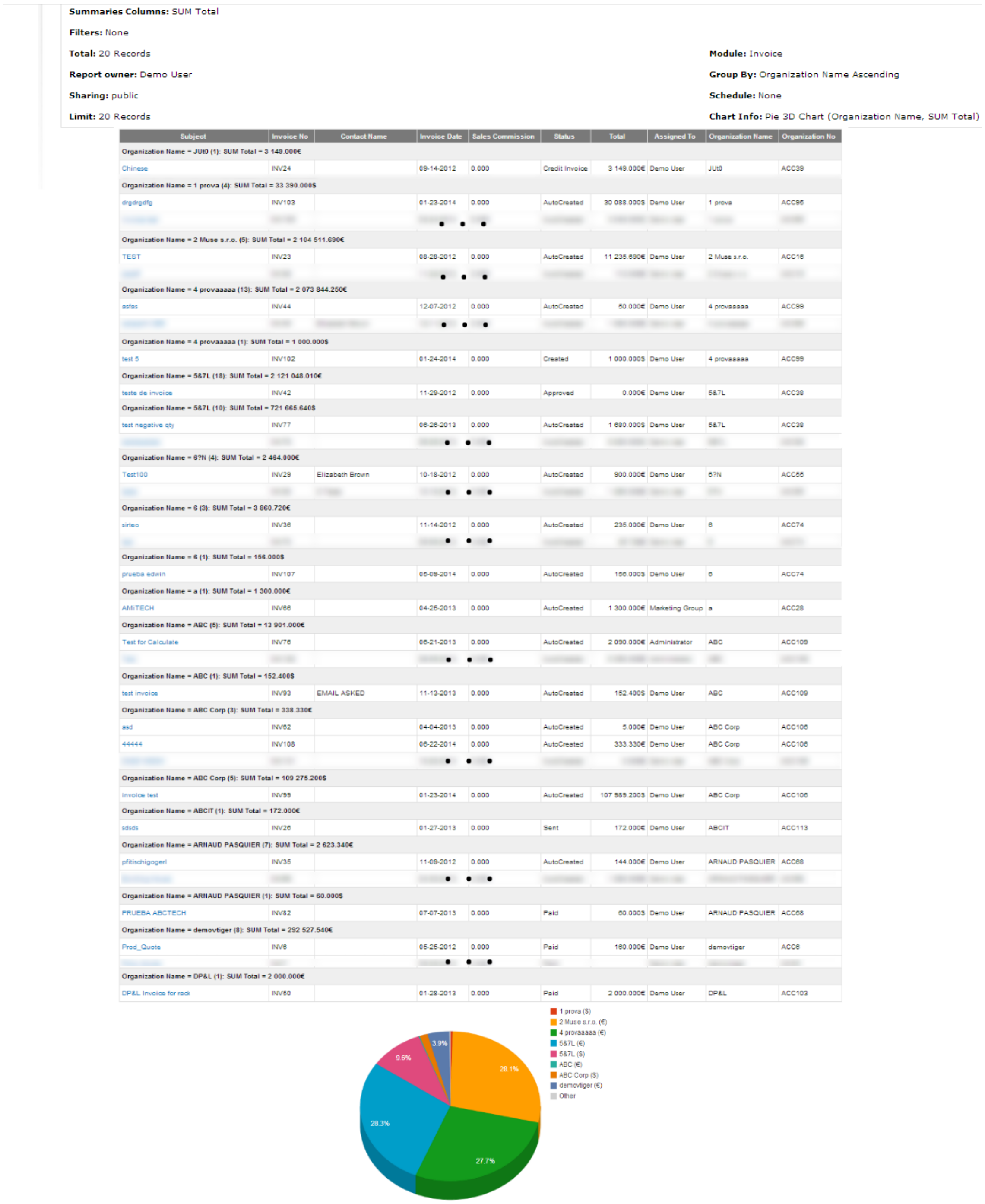
Group by "Organization Name"

Summaries Columns "SUM Total"

Invoices grouped by "Organization Name"

Subject	Invoice No	Contact Name	Invoice Date	Sales Commission	Status	Total	Assigned To	Organization Name	Organization No
Organization Name = JUt0 (1): SUM Total = 3 149.000€									
Chinese	INV24								
Organization Name = 1 prova (4): SUM Total = 33 390.000$									
drgdrgdfg	INV103		01-23-2014	0.000	AutoCreated	30 088.000$	Demo User	1 prova	ACC95
invoice test	INV105		03-24-2014	0.000	AutoCreated	3 048.000$	Demo User	1 prova	ACC95
a1	INV122		08-07-2014	0.000	AutoCreated	127.000$	Administrator	1 prova	ACC95
a1	INV123		08-07-2014	0.000	AutoCreated	127.000$	Administrator	1 prova	ACC95

Picture 2.10: Summaries Report with details



Picture 2.11: Summaries Report with details

2.1 Creating Report

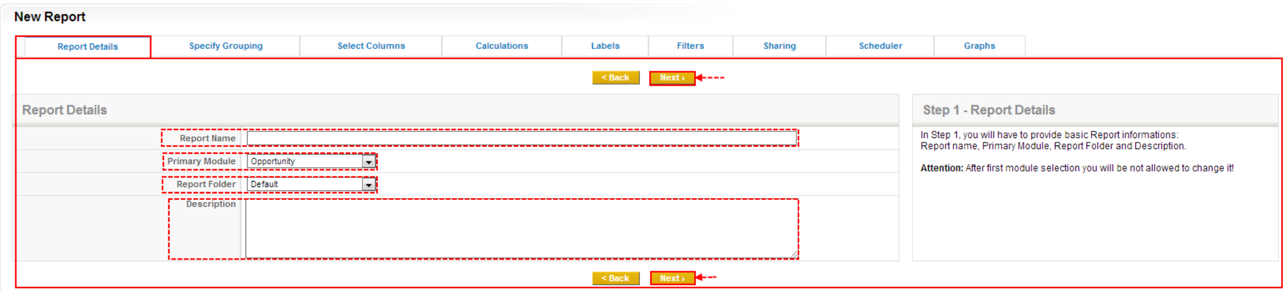
Creating a Report conists of 9 steps:

- Report Details
- Specify Grouping
- Select Columns
- Calculations
- Lables
- Filters
- Sharing
- Scheduler
- Graphs

In the following parts you can see how to create the Report.

Reports Details

In step 1, you will have to provide basic Report informations and then click on Next › button.



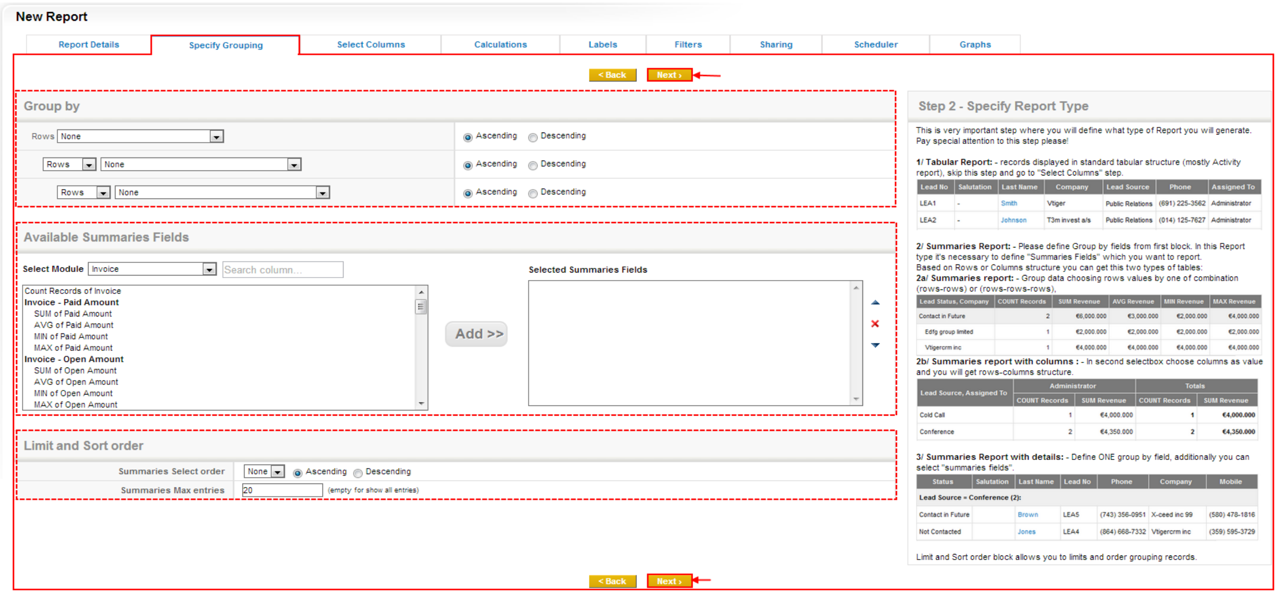
Picture 2.12: Report Details – step 1

Name	Description
Report Name	Name of your Report
Primary Module	Module from which you want to create Report (After first module selection you will be not allowed to change it)
Report Folder	Folder which will contain Report
Description	Description of Report

Table 1: Report Details

Specify Grouping

This step provide in case you want to Summaries Report. If you want to Tabular report please skip this step.

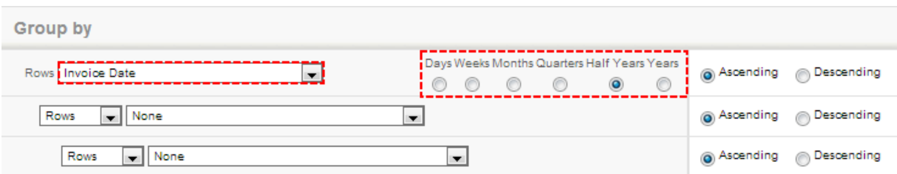


Picture 2.13: Specify Grouping

- **Group by –** here you can define by which fields will be your Report grouped. You are able to choose other fields to group by. There are two option (Rows or Columns). If you want Summaris report with columns in the second selectbox choose columns as value and you will gett rows-columns structure. You can also define how should be your Report ordered (Ascending/Descending).

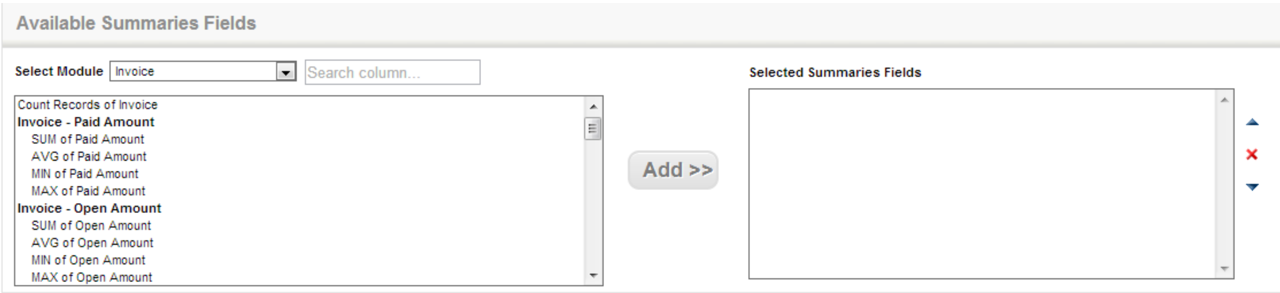
Picture 2.14: Group by

Here is also good option to choose date and group by date based on days, weeks, months, quarters, half years and years.



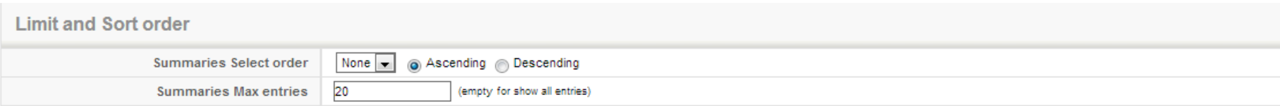
Picture 2.15: Group by date intervals

- **Available Summaries Fields –** allows to create Summaries Report with details



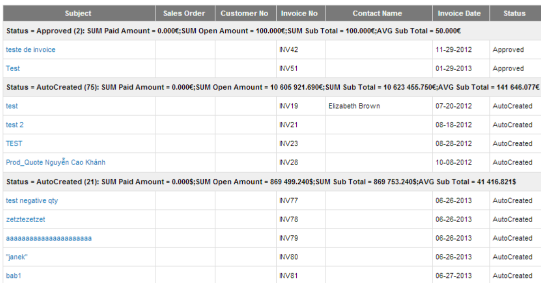
Picture 2.16: Available Summaries Fields

- **Limit and Sort order –** allows you to limits and order grouping records



Picture 2.17: Limit and Sort order

Here you can see how to looks like if you have Limit set on e.g. 3. If you want to limit number of record set limit also in Select Columns part.



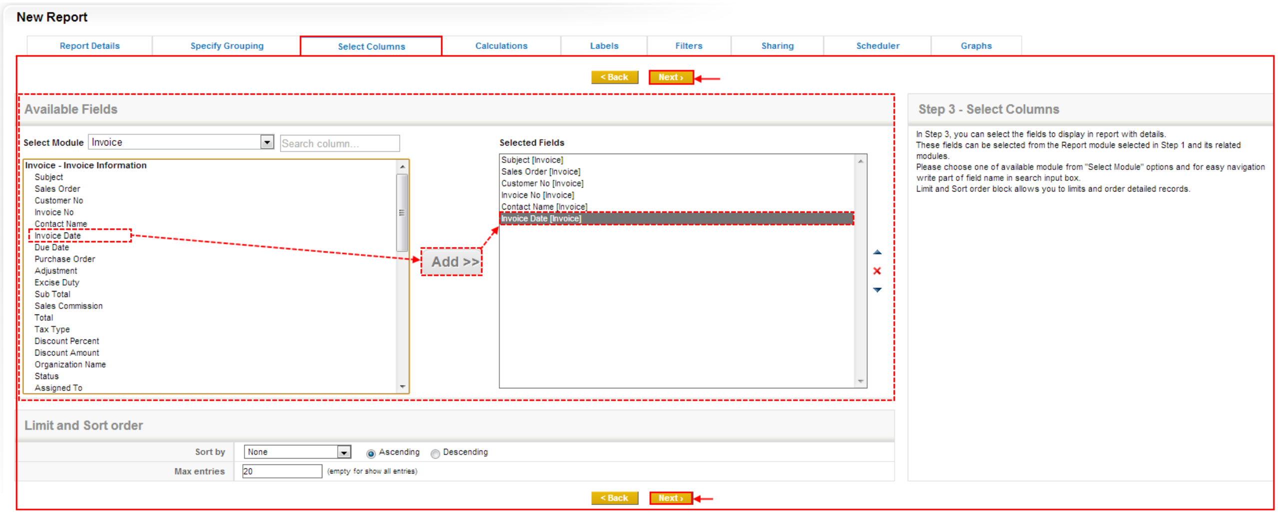
Subject	Sales Order	Customer No	Invoice No	Contact Name	Invoice Date	Status
Status = Approved (2): SUM Paid Amount = 0.000€;SUM Open Amount = 100.000€;SUM Sub Total = 100.000€;AVG Sub Total = 50.000€						
teste de invoice			INV42		11-29-2012	Approved
Test			INV51		01-29-2013	Approved
Status = AutoCreated (75): SUM Paid Amount = 0.000€;SUM Open Amount = 10 605 921.690€;SUM Sub Total = 10 623 455.750€;AVG Sub Total = 141 646.077€						
test			INV19	Elizabeth Brown	07-20-2012	AutoCreated
test 2			INV21		08-18-2012	AutoCreated
TEST			INV23		08-28-2012	AutoCreated
Prod_Quote Nguyễn Cao Khánh			INV28		10-08-2012	AutoCreated
Status = AutoCreated (21): SUM Paid Amount = 0.000$;SUM Open Amount = 869 499.240$;SUM Sub Total = 869 753.240$;AVG Sub Total = 41 416.821$						
test negative qty			INV77		06-26-2013	AutoCreated
zetztezetzet			INV78		06-26-2013	AutoCreated
aaaaaaaaaaaaaaaaaaaaa			INV79		06-26-2013	AutoCreated
"janek"			INV80		06-26-2013	AutoCreated
bab1			INV81		06-27-2013	AutoCreated

Picture 2.18: Limits in Grouping

Select Columns

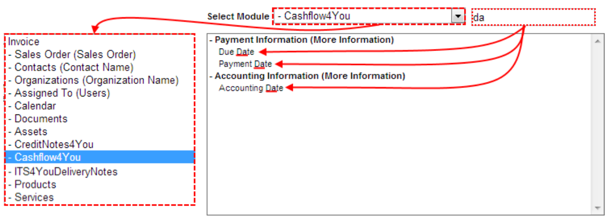
In Step 3, you can select the fields to display in report with details. These fields can be selected from the Report module selected in Step 1 and its related modules. Please choose one of available module from "Select Module" options and for easy navigation write part of field name in search input box. Limit and Sort order block allows you to limits and order detailed records.

You can use it in Tabular report and Summaries Report with details or Summaries report group by one row.



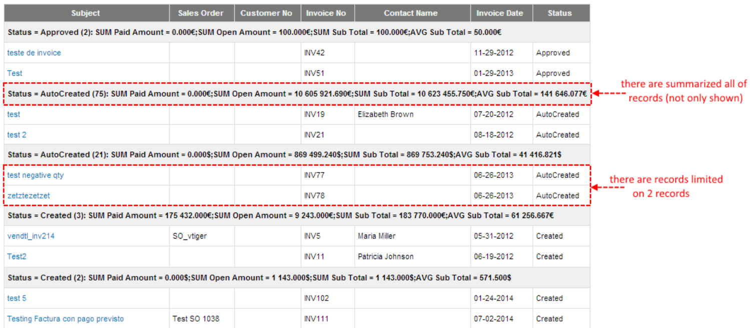
Picture 2.19: Select Columns

There is also useful option to search fields from chosen and related modules, choosing module and typing name of field (Picture 2.19).



Picture 2.20: Searching fields

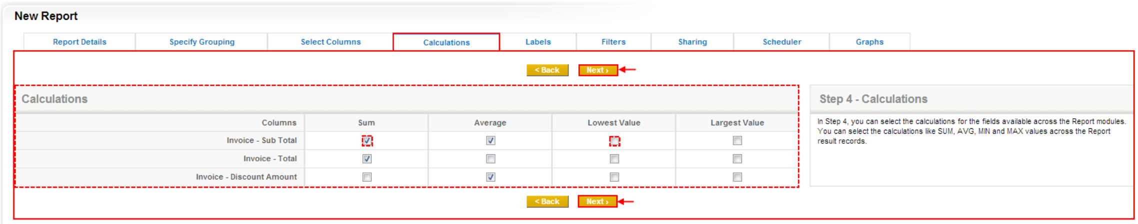
Here, in this Limit and Sort order you can set how many records are shown. For example, limit is set on 2 (Picture 2.20).



Picture 2.21: Limit in Select Columns

Calculations

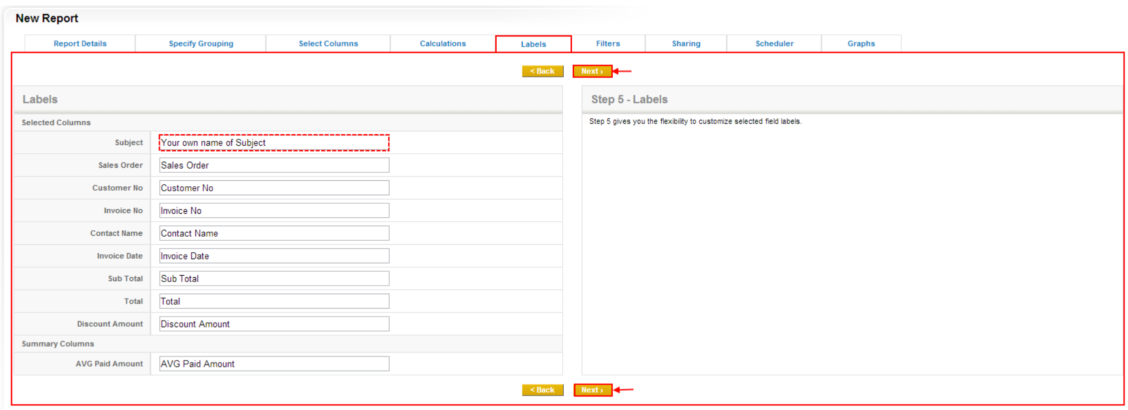
In Step 4, you can select the calculations for the fields available across the Report modules. You can select the calculations like SUM, AVG, MIN and MAX values (Numeric Columns: Sub Total, Total, ...) across the Report result records.



Picture 2.22: Calculations

Labels

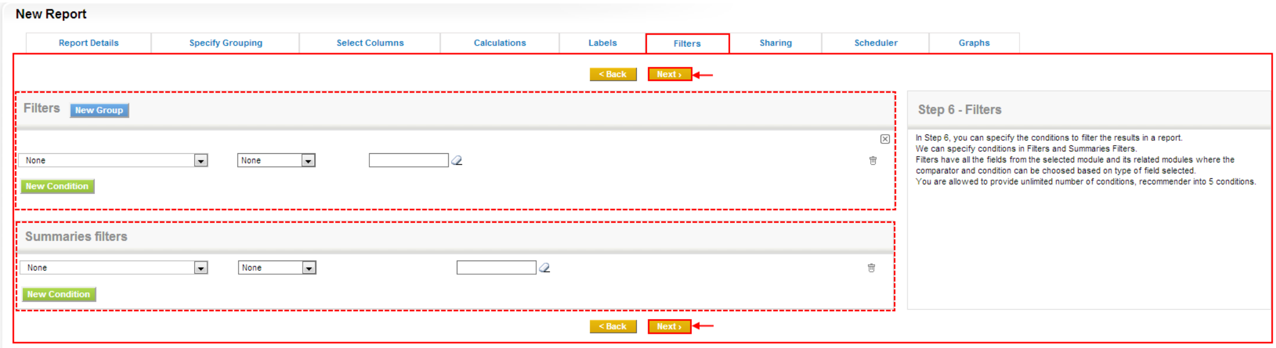
Step 5 gives you the flexibility to customize selected field labels. You can rename Selected Columns how you want.



Picture 2.23: Labels

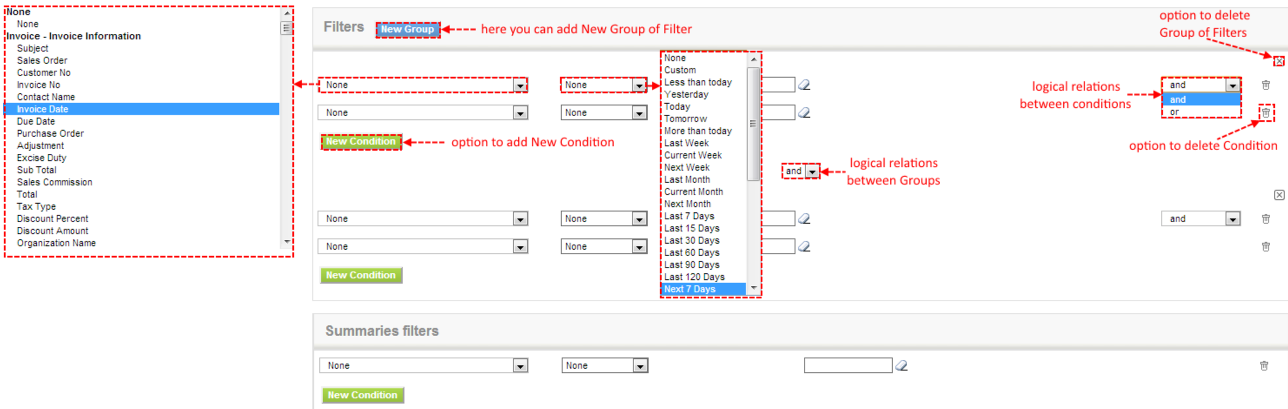
Filters

In Step 6, you can specify the conditions to filter the results in a report. You are able to specify conditions in Filters and Summaries Filters. Filters have all the fields from the selected module and its related modules where the comparator and condition can be chosed based on type of field selected. You are allowed to provide unlimited number of conditions, recommender into 5 conditions.



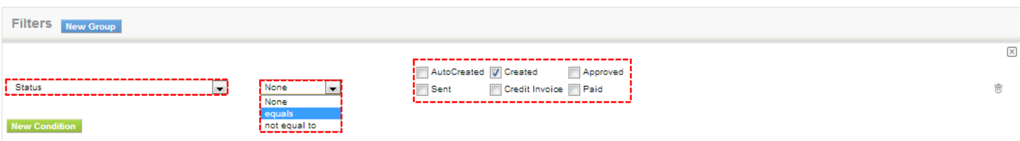
Picture 2.24: Filters

- **Filters –** here you are able to create Filter, add new Condition to Filter or add New Group of Filters. Course, there are options to Delete Condition(s) or Group(s). It is good to note our better comparators for time Columns (e.g. Less then today, More then today, Older than … day, …) and repair some standard comparators (e.g. Last/Next Days, …). (For example you can use it to Report Invoices that are not paid more then 7,… days).



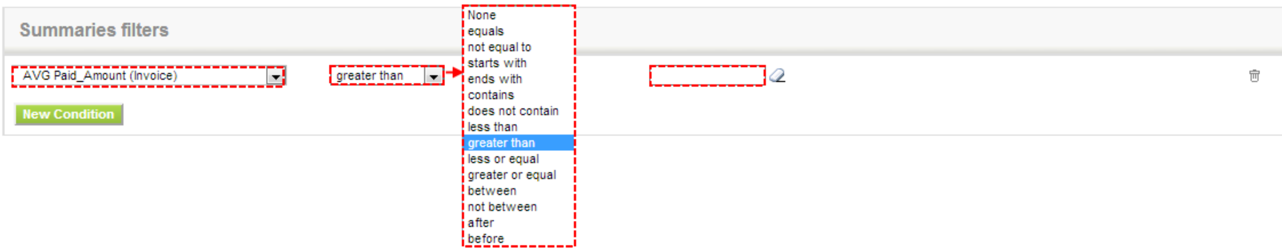
Picture 2.25: Filters

You can create filters by using fields according to checkboxes.



Picture 2.26: Filters by checboxes

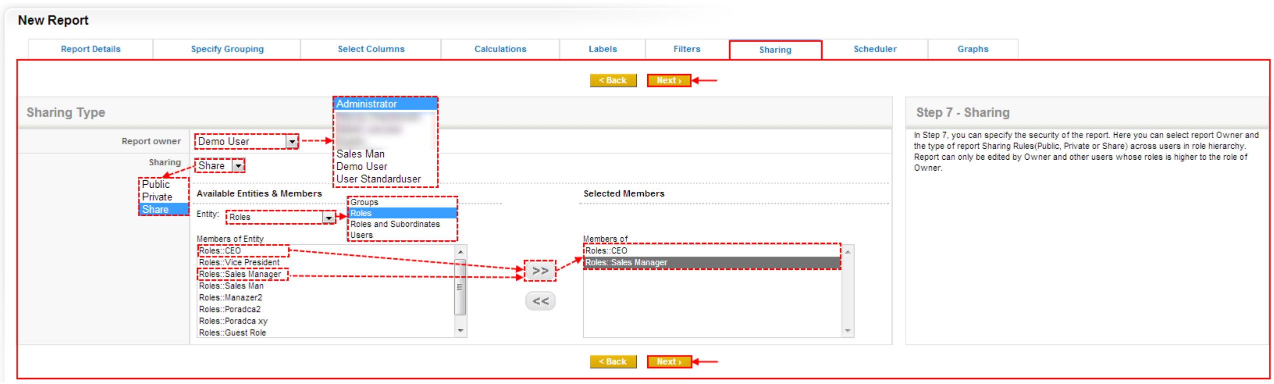
- **Summaries filters –** powerful option to create Filters from Summaries fields



Picture 2.27: Summaries filters

Sharing

In Step 7, you can specify the security of the report. Here you can select report Owner and the type of report Sharing Rules(Public, Private or Share) across users in role hierarchy. Report can only be edited by Owner and other users whose roles is higher to the role of Owner.

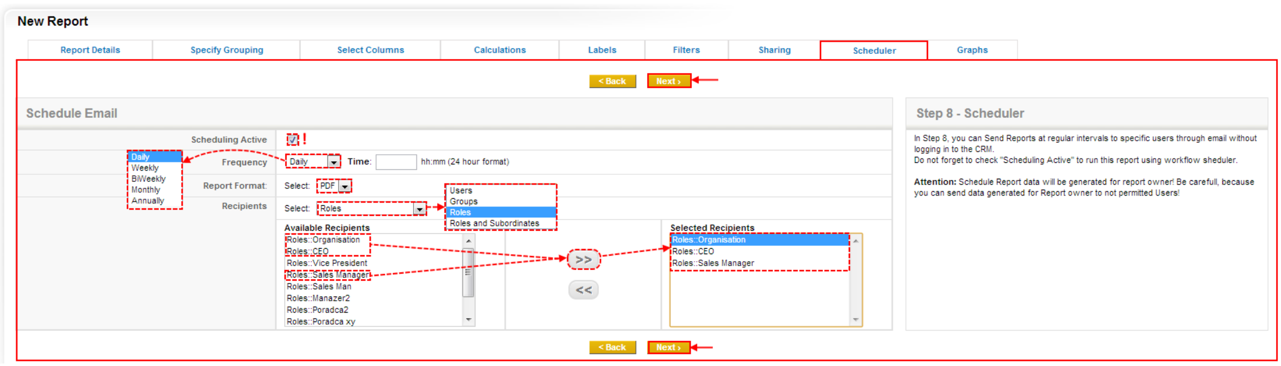


Picture 2.28: Sharing

Scheduler

In Step 8, you can Send Reports at regular intervals to specific users through email without logging in to the CRM. Do not forget to check "Scheduling Active" to run this report using workflow sheduler.

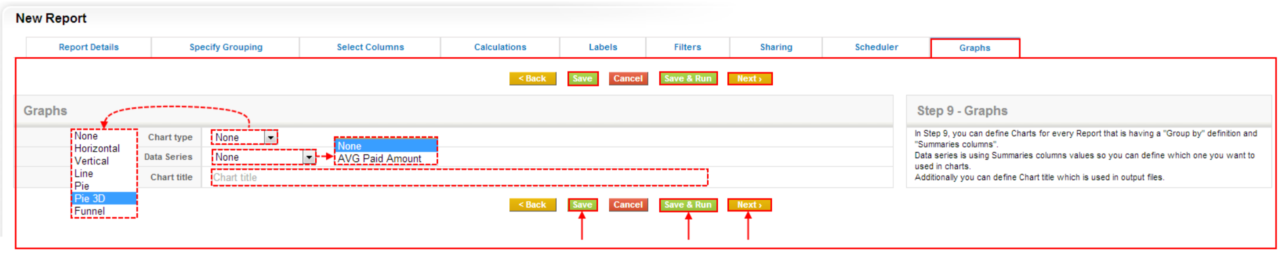
Attention: Schedule Report data will be generated for report owner! Be carefull, because you can send data generated for Report owner to not permitted Users!



Picture 2.29: Scheduler

Graphs

In Step 9, you can define Charts for every Report that is having a "Group by" definition and "Summaries columns". Data series is using Summaries columns values so you can define which one you want to used in charts. Additionally you can define Chart title which is used in output files. Here you can choose Chart type, Data Serties and Chart title.



Picture 2.30: Graphs

To finish your Report please click on Save , Save & Run or Next › button.

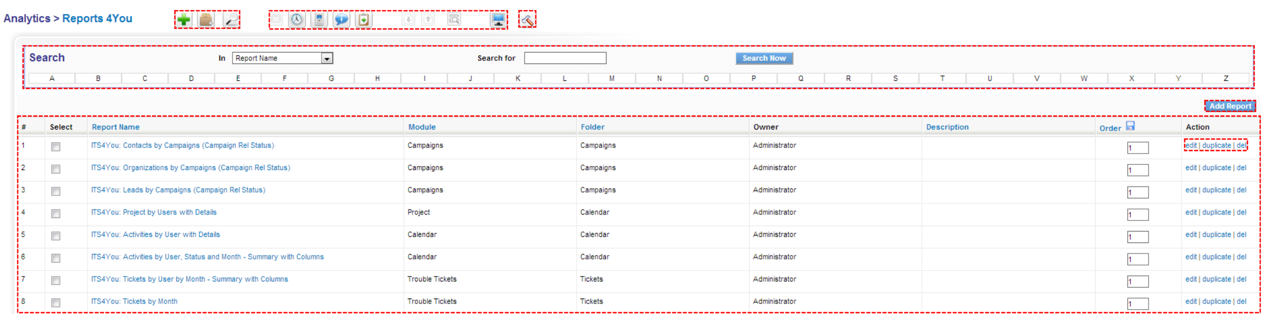
3 Work area

Work area of Reports 4 You consits of:

1. ListView – used for common tasks like add new, edit, duplicate and delete Reports, and access to others tools
2. DetailView – shows already created Reports in details
3. EditView – allows the preparation of the new report or editing existing reports

3.1 ListView

The common tasks like add/delete Reports or start editing have to be initiated via Reports 4 You ListView. Go to **More → Analytics → Reports 4 You** and Reports 4 You ListView will appear on your screen.



Picture 3.1: Work area of Reports 4 You

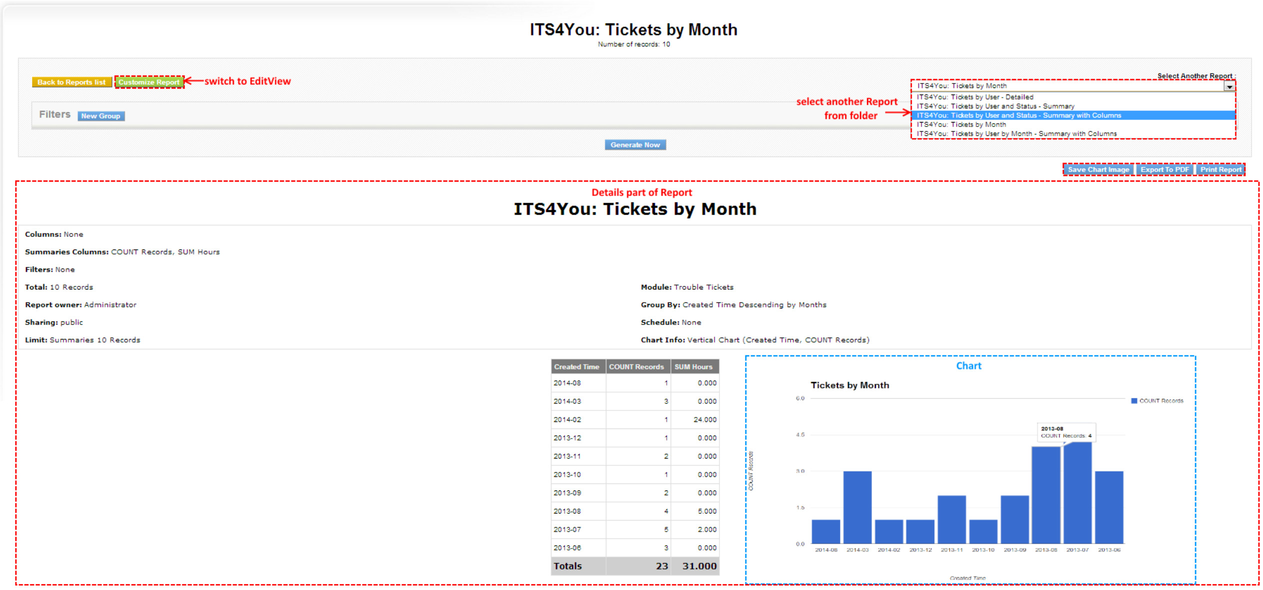
The main part of the Reports 4 You ListView consists of list of the Reports, which gives you information about a Report name, a reference to a module, folder, owner, description. As shown in the picture, above the list of the reports you can find following:

1. Action area – contains actions for edit, duplicate or delete reports
2. , Add Report – buttons for adding new report
3. – add new folder
4. – settings area contains option for upgrade and license settings
5. – Standard vtiger buttons
6. List of created Reports
7. – Search area allows you to find reports

3.2 DetailView

From ListView you can dircetly open any Report in DetailView. The DetailView consists of:

- Report details part
- Group of action buttons
    - Customize Report – switch to EditView and start editing
    - Save Chart Image – option to save your chart as image
    - Export To PDF – allows you to export your Report to PDF
    - Print Report – option to print your Report
- Select Another Report – choose another Report from same folder



Picture 3.2: DetailView of Report

3.3 EditView

The EditView shown in the picture below allows the preparation of the new Report as was mentioned in the chapter (How to create Reports 4 You) ListView or editing existing Reports. The main utilization of the EditView is in the additional correction of the Report. The EditView is divided into four parts:

- Tabs of Report – here you can select which part of Report you want to edit
- Buttons parts – there are buttons: Cancel, Save, Save & Run, Back/Next tab
- Box of tab´s option – here you can edit your Report
- Info box – there are a few info about Report´s tab

Picture 3.3: EditView of Report

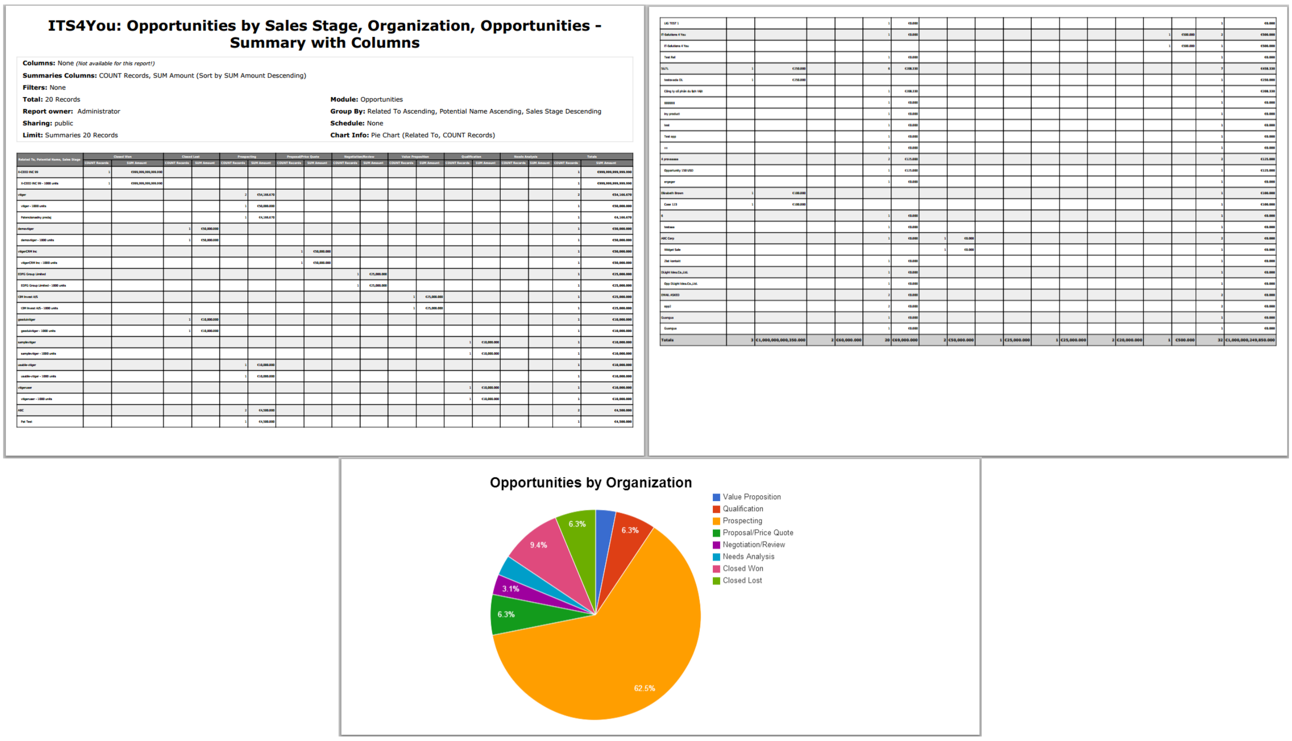
4 Additional features

4.1 Support of PDF Maker

With Reports 4 You you are able to save your Reports as PDF files. To save Reports as PDF you need to have PDF Maker (Free version sufficient). PDF Maker is extension tool designed by ITS4You for vtiger CRM.

For more info about PDF Maker please see:

http://www.its4you.sk/images/pdf_maker/pdfmaker-for-vtigercrm.pdf



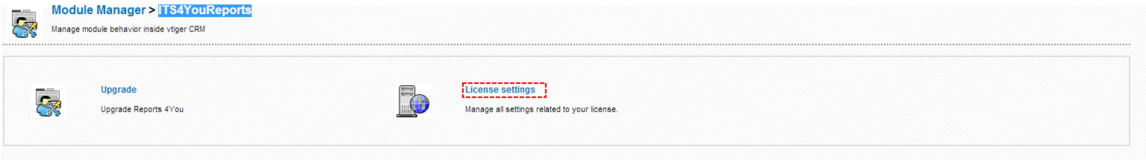
Picture 4.1: PDF file from Report

5 Settings

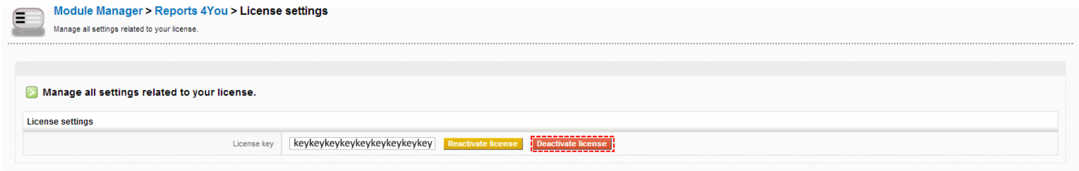
5.1 Deactivate license

In case you need to reinstall Reports 4 You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

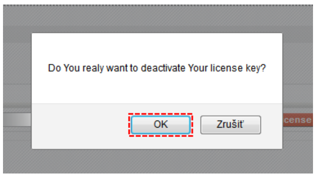
1. Click on **Settings** -> **CRM Settings** -> **Module Manager** -> **ITS4YouReports**
2. Click on **License settings**
3. Now click on Deactivate license button
4. Confirm deactivation using OK button in next window.



Picture 5.1: Deactivate Reports 4 You – Step 1,2



Picture 5.2: Deactivate Reports 4 You – Step 3

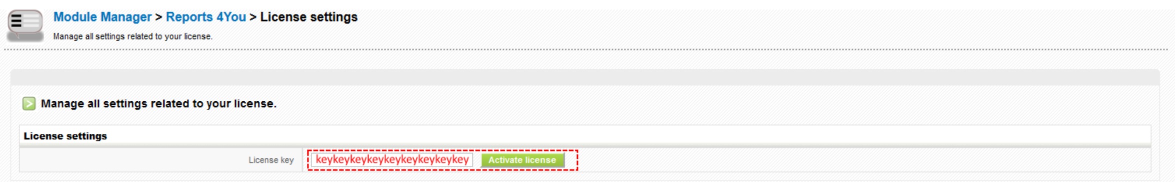


Picture 5.3: Deactivate license of Reports 4 You – Step 4

After deactivation of license Reports 4 You doesn't work at all and Reports 4 You work area is not accessible.

To activate license you have to provide following steps:

1. Insert license key
2. Click on Activate license

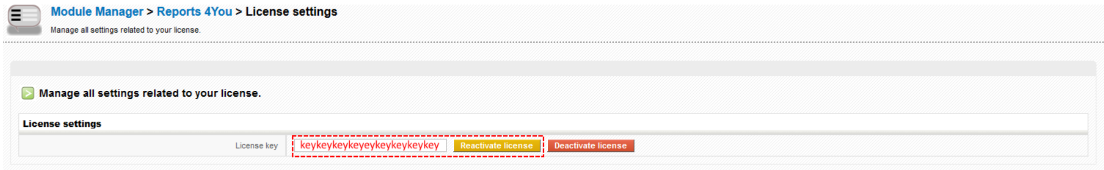


Picture 5.4: Activate license of Reports 4 You

5.2 Reactivate license

In case that some problem occurs with license key (moving, copying, migrating) you need to reactivate your license key. To reactivate license key please provide following step:

1. Insert license key
2. Click on Reactivate license



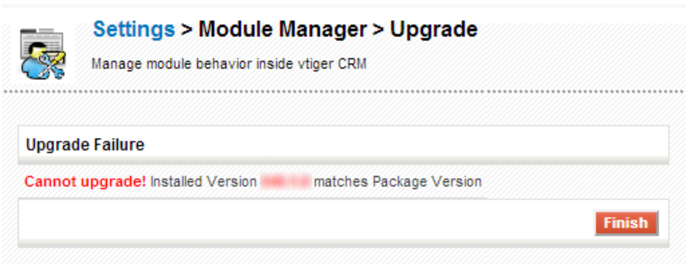
Picture 5.5: Reactivate license of Reports 4 You

5.3 Upgrade

The upgrade of Reports 4 You can be started using **Upgrade** link in the Settings of Reports 4 You. Please browse the package and click on Upgrade button.

Picture 5.6: Upgrade Reports 4 You

In case that installed version of Reports 4 You matches package version, upgrade will be not provided and following information will appear on the screen.



Picture 5.7: Upgrade failure

Next steps are similar with installaion of the Reports 4 You, therefore please refer to chapter How to install Reports 4 You for additional information.

Change log of Reports 4 You

- October 2014: **540.1.0**

Change log of Manual for Reports 4 You

- October 2014: manual is based on Reports 4 You version: **540.1.0**
    - first initiate version for vTiger 5.4