

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

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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.

Settings > Modu Manage module behavior	l le Manager Inside vliger CRM	 				
	Standard Modules	Custom Modules				
				≯	mport I	lew
Businesscase			0		÷	~
CalculateFields			0		÷	~
Calendar4You			0		٠	~
Cashflow4You			9		÷	~
ConfigEditor			0		٠	
CreditNotes4You			0		٠	~
CronTasks			0		٠	
Descriptions4you			0		٠	~
2 DocumentsMoreInfo			0		•	

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.

Settings > Module Manager > Import Manage module behavior inside vtger CRM		
Select the Package File		
* File location:	Choose 7/e) vriger modele is packaged as a zip file.	
		Import Cancel

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.

	Settings > Module Manager > Import Manage module behavior inside vliger CRM
Impor	rting Module
11111111111	

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		



		1.77 01						
Coummas: subject, sales Urder, invoice No, Contact Name, invoice Date, Status, Assigned To, Phone								
Summaries Columns: None								
Filters: (Status not equal to Paid)	(Status not equal to Paid)							
Total: 20 Records	Module: Invoice							
Report owner: Demo User				Group By:	None			
Sharing: public				Schedule:	None			
Limit: 20 Records				Chart Info	•: (No Charts ava	ilable for this re	port!)	
	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 Miler	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 Nam	ne, Invoice Dat	e, Status, To	tal			
mmaries Columns: None						
iters: None						
otal: 9 Records						Module: Invoice
eport owner: Demo User						Group By: Statu
haring: public						Schedule: None
imit: 20 Records						Chart Info: (No C
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		08-28-2013	AutoCreated	1 680.000\$
zetztezetzet		INV78		08-28-2013	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	08-29-2012	Created	8 388.000€
DN20140015		INV132		10-20-2014	Created	508.000€
Status = Created (2):						
test 5		INV102		01-24-2014	Created	1 000.0005
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	168.670€
Test		INV118		08-05-2014	Credit Invoice	168.670€
Status = Paid (10):						
Prod Quote		INV8		05-25-2012	Paid	160.000€
Prod. Quete		INV7		05-25-2012	Paid	
		-				
Status = Paid (2):						
		INV82		07-07-2013	Paid	60.0005
Testing Facture con page amiliary devices	Test SO 1029	INI/112		07-02-2014	Paid	142,0000
resurg racura con pago emitido y devueito	rest 50 1036	awy 112		07-02-2014	1 alo	143.0005
otatus - oent (3):		IND/4C		07.08.0040	Cast	1 000 0000
wgwrgwrgwrgwr		INV16		07-08-2012	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, In	voice No, Contact Name,	Invoice Date, Status				
Summaries Columns: SUM Paid Amount, SUM Op	en Amount, SUM Sub To	tal, AVG Sub Total				
Filters: None						
Total: 9 Records					Module: Invoice	
Report owner: Demo User					Group By: Statu:	s Ascending, Organization Name Ascending
Sharing: public					Schedule: None	
Limit: Summaries 50 Records, Details 2 Records					Chart Info: Pie 3	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€	
	68.7L	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\$	33 138.000\$	33 390.000\$	8 347.500\$	
	58.7L	0.0005	721 665.6405	721 665.6405	72 100.0045	
	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€	420 424.000€	
	4 provasasa	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€	
	68.7L	0.000€	27 809.000€	27 809.000€	27 809.000€	
	Paid	237.000\$	0.000\$	203.000\$	101.500\$	
	ABC Corp	177.000\$	0.0005	143.000\$	143.000\$	
	ARNAUD PASQUIER	60.000\$	0.0005	60.0005	60.0005	
	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€	523.007 €	
	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\$	
		22/8	29 x x	AntOrsend (8) AntOrsend (8) Created (8) Created (8) Created (8) Parks (8) Parks (8) Created (8) Create		

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, Stat	us				
Summaries Columns: SUM Paid Amount, SUM Open Amo	ount, SUM Sub Total, AVG Sub Tota	d.				
Filters: (Paid Amount greater than 0)						
Total: 5 Records				Module: Invoi	e	
Penert owner: Demo Licer				Group But Sta	tus Ascendina (Construction Name According Invoice Date According by Quarter
Report owner: Deno oser				Group by: Sta	tus Ascending, t	organization Name Ascending, Invoice Date Ascending by Quarter
Sharing: public				Schedule: Nor	1e	
Limit: All records				Chart Info: Pi	e 3D Chart (Stat	tus, 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€	
	2012-20	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€	
	2013-10	1 155 024.500€	0.000€	17 050.000€	17 050.000€	
	Paid	237.000\$	0.0005	203.0005	101.600\$	
	ABC Corp	177.0005	0.0005	143.0005	143.0005	
	2014-3Q	177.0005	0.0005	143.000\$	143.0005	
	ARNAUD PASQUER	00.0005	0.0005	60.0005	60.0005	
	2013-3Q	60.0005	0.0005	60.0005	60.000\$	
	Paid	111 522.630€	0.000€	111 422.030€	15 917.519€	
	demovtiger	103 437.000€	0.000€	103 387.000€	34 462.333€	
	2012-20	8 383.000€	0.000€	8 333.000€	4 166,500€	
	2012-30	95 054.000€	0.000€	95 054.000€	95 054.000€	
	DP&L	2 000.000€	0.000€	2 000.000€	2 000.000€	
	2013-10	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€	
	2012-30	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€	
	2012-30	98.000€	2.000€	100.000€	100.000€	
	Totals	1 442 077.130C 237.000\$	2.000C 0.000\$	303 099.630C 203.000\$	51 898.630C 101.500\$	
		2	BX	eliko Trener ett G		

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.

Load Source Appianed To	Admini	strator	Totals			
Leau source, Assigned to	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		
D	- ~	-				

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".

	stname	Lead No	Phone	Company	Mobile					
Lead Source = Conference (2):										
Bro	wn	LEA5	(743) 356-0951	X-ceed inc 99	(580) 478-1816					
Jon	es	LEA4	(864) 668-7332	Vtigercrm inc	(359) 595-3729					
•	erence (2): Bro Jon	Brown Jones	Brown LEAS Jones LEA4	Brown LEA5 (743) 356-0951 Jones LEA4 (884) 668-7332	Brown LEA5 (743) 356-0951 X-ceed inc 99 Jones LEA4 (864) 668-7332 Vtigercrm inc					

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.

	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€									
Group by "Organization Name"	Chinese	INV24	Summaries Colum "SUM Total"	ins	100						
Organization Hame - 1 prova (4): \$UM Total - 33 380.0003											
	drgdrgdfg	INV103		01-23-2014	0.000	AutoCreated	30 088.000\$	Demo User	1 prova	ACC95	
Invoices grouped by	invoice test	INV105		03-24-2014	0.000	AutoCreated	3 048.000\$	Demo User	1 prova	ACC95	
"Organization Name"	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

ios Columns: SUM Total									
es columns, som rotal									
one									
lecords								Module: Invoid	:e
er: Demo User								Group By: Org	anization Nar
ublic								Schedule: Non	e
lerorde								Chart Info: Pie	e 3D Chart (O
Publicat	Investor No.	Contract Name	Investore Date	Rates Commission	Olatur	Total	Assisted To	Ormanization Name	Organization No.
Organization Name = JUt0 (1): SUM Total = 3	149.000€	Contace Hame	invoice baik	ales commission	364103	TOLAN	Assigned to	organization name	Organization no
Chinese	INV24		09-14-2012	0.000	Credit Invoice	3 149.000€	Demo User	JUto	ACC39
Organization Name = 1 prova (4): SUM Total	= 33 390.000	5							
drgdrgdfg	INV103		01-23-2014	0.000	AutoCreated	30 088.0005	Demo User	1 prova	ACC95
			-						
Organization Name = 2 Muse = c.o. (5): SUM	Total = 2 404	511 6906							
TEST	INV22	011.0000	09.29.2012	0.000	AutoCreated	11 225 6906	Demo Liter	214-00-000	ACC18
1201				0.000					
Organization Name = 4 provasasa (13): SUI	I Total = 2 073	844.250€	•	•••					
asfas	INV44		12-07-2012	0.000	AutoCreated	50.000€	Demo User	4 provasasa	ACC99
Organization Name = 4 provasasa (1): SUM	Total = 1 000 0	000\$							
test 5	INV102		01-24-2014	0.000	Created	1 000 0005	Demo User	4 provasaa	ACC99
Organization Name = 587L (18): SUM Total	- 2 121 048.01	o€							
teste de invoice	INV42		11-29-2012	0.000	Approved	0.000€	Demo User	58.7L	ACC38
Organization Name = 5&7L (10): SUM Total	721 665.6405	3						-	
test negative qty	INV77		08-28-2013	0.000	AutoCreated	1 680.0005	Demo User	58.7L	ACC38
							-	-	
Organization Name = 6?N (4): SUM Total = 2	464.000€								
Test100	INV29	Elizabeth Brown	10-18-2012	0.000	AutoCreated	900.000€	Demo User	6?N	ACC55
Organization Name = 6 (3): SUM Total = 3 86	0.720€								
sirteo	INV38		11-14-2012	0.000	AutoCreated	235.000€	Demo User	8	ACC74
			•	• •					
Organization Name = 6 (1): SUM Total = 156	000\$								
prueba edwin	INV107		05-09-2014	0.000	AutoCreated	155.0005	Demo User	•	ACC74
Organization Name = a (1): SUM Total = 1 30	€000.00								
AMITECH	INV68		04-25-2013	0.000	AutoCreated	1 300.000€	Marketing Group	a	ACC28
Organization Name = ABC (5): SUM Total = 1	3 901.000€								
Test for Celculate	INV78		06-21-2013	0.000	AutoCreated	2 090.000€	Administrator	ABC	ACC109
			•	• •				-	
Organization Name = ABC (1): SUM Total = 1	52.400\$								
test invoice	INV93	EMAIL ASKED	11-13-2013	0.000	AutoCreated	152.400\$	Demo User	ABC	ACC109
Organization Name = ABC Corp (3): SUM To	tal = 338.330€								
asd	INV62		04-04-2013	0.000	AutoCreated	5.000€	Demo User	ABC Corp	ACC106
44444	INV108		08-22-2014	0.000	AutoCreated	333.330€	Demo User	ABC Corp	ACC108
			•	•••			-	-	
Organization Name = ABC Corp (5): SUM To	tal = 109 275.2	005							
involce test	INV99		01-23-2014	0.000	AutoCreated	107 989 2005	Demo User	ABC Corp	ACC108
Organization Name = ABCIT (1): SUM Total =	172.000€								
sasas	INV26		01-27-2013	U.000	sent	172.000€	Demo User	ABCIT	ACC113
Organization Name = ARNAUD PASQUIER ()	r): SUM Total =	2 523.340€		0.000			D	10000	40000
phtischigogerl	19735		11-09-2012	0.000	AutoCreated	144.000€	Demo User	ARNAUD PASQUIER	ACC88
			•	•••					
Organization Name = ARNAUD PASQUIER (1): SUM Total =	60.000\$					-		
PRUEBA ABCTECH	INV82		07-07-2013	0.000	Paid	60.0005	Demo User	ARNAUD PASQUIER	ACC58
Organization Name = demovtiger (8): SUM 1	otal = 292 527	.540€							
Prod_Quote	INV6		05-25-2012	0.000	Paid	160.000€	Demo User	demovtiger	ACOB
Ornanization Name = DP&I (1): SUM Total =	2 000 000€		•						
DPAL Invoice for rack	INV50		01-28-2019	0.000	Paid	2 000 0005	Demo User	OPAL	ACC102
	147.00		01-20-2013	0.000	Faile (C)	2 000.0004	Danio Osar	Dres	Accilos
			3.9%		2 Muse s.r.o. (4 provasasa (587L (€)	€) €)			
		9.69		28.1%	58.7L (S) ABC (€) ABC Corp (S)				
					Other				
		28.3%							
				27.7%					
	_							. 1	

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 **Nexton** 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.

New Report													
Report Details	Specify Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Grap	15				
				< Back	Next >								
Group by								Step 2 - Sp	ecify Rep	ort Type			
Rows None	×		Ascending Operation	scending				This is very impor Pay special attent	tant step when ion to this step	e you will def please!	ine what type o	of Report you	will generate.
Rows 💌 None]	Ascending Open	acending				1/ Tabular Report report), skip this	rt: - records di itep and go to '	splayed in sta Select Colum	ndard tabular s ns" step.	structure (mos	tly Activity
Rows 💌 None		×	Ascending Operation	scending				Lead No Salutat	on Last Name	Company	Lead Source	Phone (691) 225-356	Assigned To
								LEA2 -	Johnson	T3m invest als	Public Relation	15 (014) 125-762	7 Administrator
Available Summaries F Select Module Invoice Count Records of hvoice Invoice - Paid Amount AVG of Paid Amount MAX of Paid Amount MAX of Paid Amount Invoice - Open Amount MAX of Open Amount MN of Open Amount MN of Open Amount	Search column.		Add >>	ted Summaries Field	is		* * *	2/ Summaries F type it's necessa Based on Rows i 2a/ Summaries (rows-rows) or (Lead States, Compa Contact in Future Edity group Inite Vigerom Inic 2b/ Summaries and you will get in Lead Scorec, Assis Cald Call Conference	report: - Pleas y to define "Su r Columns stru- report: - Grou- rows-rows-ro rows-rows-ro rows-rows-ro report with c ows-columns s med To COUNT	e define Grou immaries Field icture you can p data choos ws), ds Sutt Rever 2 66,00 1 62,00 1 64,00 columns : - Ir structure, Administrate Record SU	p by fields from s" which you v get this two ty ng rows value at AVG Revenue 0000 €3.000 0000 €3.000 0000 €4.000 second select r c 64.000 c 6.000 c 6.000	n first block. In want to report. ypes of tables: s by one of coo etc.coo.or coo etc.coo.or coo etc.coo.or coo etc.coo.or tbox choose c Total NURT Records 1 2	this Report mbination 151X Revenue 0 €4,000,000 0 €4,000,000 0 0 44,000,000 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Limit and Sort order Summari	es Select order None 💌 🍘	Ascending Oescending						3/ Summaries F select "summarie	eport with de s fields".	etails: - Defin	e ONE group b	y field, addition	ally you can
Summari	ies Max entries 20	(empty for show all entries)						Status Se Lead Source = Con	lutation Last N	ame Lead No	Phone	Company	Mobile
								Contact in Future	Brown	LEAS	(743) 356-0951	X-ceed inc 99	(580) 478-1816
								Not Contacted	Jones	LEA4	(864) 668-7332	Vtigerorm inc	(359) 595-3729
								Limit and Sort ord	er block allows	you to limits i	and order group	ping records.	
				< Back	Next >								

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).

Group by	
Rows None	Ascending Oescending
Rows 💌 None 💌	Ascending Oescending
Rows 💌 None 💌	Ascending Oescending

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.

Group by		
Rows Invoice Date	Days Weeks Months Quarters Half Years Years	Ascending Oescending
Rows None	v	Ascending Oescending
Rows 💌 None	•	Ascending Descending

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

Limit and Sort order							
Summaries Select order	None 💌 💿 Ascending 💿 Descending						
Summaries Max entries	Summaries Max entries 20 (empty for show all entries)						
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 Amo	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			NV42		11-29-2012	Approved						
Test			NV51		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			NV19	Elizabeth Brown	07-20-2012	AutoCreated						
test 2			NV21		08-18-2012	AutoCreated						
TEST			NV23		08-28-2012	AutoCreated						
Prod_Quote Nguyễn Cao Khánh			NV28		10-08-2012	AutoCreated						
Status = AutoCreated (21): SUM Paid A	mount = 0.000\$;SUM	Open Amount = 8	69 499.240 \$;SU	M Sub Total = 869 763.2405	AVG Sub Total = 41	416.821\$						
test negative qty			NV77		06-26-2013	AutoCreated						
zetztezetzet			NV78		06-26-2013	AutoCreated						
******			NV79		06-26-2013	AutoCreated						
"janek"			NV80		06-26-2013	AutoCreated						
bab1			NV81		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.

New Report									
Report Details Specify	Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs	
Report Details Specify Available Fields Available Fields Select Module Invoice Trovice - Invoice Information Subject Customer Ho Invoice To Invoice To Invoice To Purchase Order Event To Due Date Purchase Order Adjustment Excee Duty	Grouping	Select Columns	Calculations Selected Field Subject Private Content Viange Private	Labels 	Filters	Sharing	Scheduler	Graphs Step 3 - Select Cr In Step 3, you can select These Step 3, you can	Diumns e fields to display in report with details. a from the Report module selected in Step 1 and its related able moduler from "Select Module" options and for easy navigation areh most ox. Ilows you to limits and order detailed records.
Sub Totai Sate Commission Totai Descourt Percent Descourt Ansunt Status Status Assigned To Limit and Sort order Sort b Max entrie	y <u>None</u> s 20	Ascending () Amply (or show all entries)	Descending	clask			*		

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).

Subject	Sales Order	Customer No	Invoice No	Contact Name	Invoice Date	Status					
Status = Approved (2): SUM Paid Amount	= 0.000€;SUM Ope	n Amount = 100.0	00€;SUM Sub T	otal = 100.000€;AVG Sub Total	= 50.000€						
teste de invoice			NV42		11-29-2012	Approved					
Test			NV51		01-29-2013	Approved	All and a second second all as				
Status = AutoCreated (76): SUM Paid Amo	unt = 0.000€;SUM	Open Amount = 1	0 605 921.690€;	SUM Sub Total = 10 623 455.750	€;AVG Sub Total	= 141 646.077€	records (not only shown)				
test			INV19	Elizabeth Brown	07-20-2012	AutoCreated					
test 2			INV21		08-18-2012	AutoCreated					
Status = AutoCreated (21): SUM Paid Amo	us = 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			NV77		06-26-2013	AutoCreated	there are records limited				
zetztezetzet			NV78		06-26-2013	AutoCreated	on 2 records				
Status = Created (3): SUM Paid Amount =	175 432.000€;SUM	Open Amount = 9	243.000€;SUM	Sub Total = 183 770.000€;AVG	Sub Total = 61 25	6.667€					
vendti_inv214	SO_vtiger		INV5	Maria Miller	05-31-2012	Created					
Test2			NV11	Patricia Johnson	06-19-2012	Created					
Status = Created (2): SUM Paid Amount = (0.000\$;SUM Open	Amount = 1 143.0	00\$;SUM Sub T	otal = 1 143.000\$;AVG Sub Tota	l = 571.500\$						
test 5			NV102		01-24-2014	Created					
Testing Factura con pago previsto	Test SO 1038		NV111		07-02-2014	Created					

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.

New Report											
Report Details Specify Grouping S	Select Columns	Calculations Labels	Filters	Sharing Scheduler	Graphs						
< Back Berty ←											
Calculations	Calculations										
Columns	Sum	Average	Lowest Value	Largest Value	In Step 4, you can select the calculations for the fields available across the Report modules.						
Invoice - Sub Total	1	V	8		result records.						
Invoice - Total	V										
Invoice - Discount Amount											
< Buck Renty -											

Picture 2.22: Calculations

Labels

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

New Report									
Report Details	Specify Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs	
				< Back	Next> 4				
Labels						abels			
Selected Columns						u the flexibility to custom	ize selected field labels.		
Subject	Your own name of Subject								
Sales Order	Sales Order								
Customer No	Customer No								
Invoice No	Invoice No								
Contact Name	Contact Name								
Invoice Date	Invoice Date								
Sub Total	Sub Total								
Total	Total								
Discount Amount	Discount Amount								
Summary Columns									
AVG Paid Amount	AVG Paid Amount								
				< Back	Nexts				

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.

New Report									
Report Details	Specify Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs	
				< Back	Next >				
Filters New Group								Step 6 - Filters	
None New Condition	▼ None	•]2				8	In Step 6, you can specify We can specify conditions Filters have all the fields fr comparator and condition of You are allowed to provide	the conditions to filter the results in a report. In Filters and Summaries Filters. To the selected module and its related modules where the can be choosed based on type of field selected. I unimited number of conditions, recommender into 5 conditions.
Summaries filters									
None	None	×	2				ŧ		
New Condition									
				< Back	Next>				

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).

None None Invoice - Invoice Information	Ē	Filters New Group	you car	add New Gro	oup o	f Filter				option to delet Group of Filter	te 's
Salas Order Customer No Invicio No Contact Name Invicio Date Due Date Purchase Order Adjustment Excise Duty Sub Total Salas Commission Total Total Total Total Total Organization Name	*	None None None None None None None	add Nev	None V Condition None None None	•	None Custom Less than today Yesterday Today Today Today Last Week Last Week Lurrent Week Last Month Current Nonth Heet Ilonth Last 7 Days Last 30 Days Last 30 Days Last 30 Days Last 50 Days]2]2]2]2]2	logical relations between Groups	logical relations between conditions opt	ion to delete Cor	ि ति Idition सि सि
		Summaries filters									
		None New Condition	•	None	•			2			Ť

Picture 2.25: Filters

You can create filters by using fields according to checkboxes.

Filters New Group			
Status Status	None None equals not equal to	AutoCreated Created Approved	8

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!

Report Details	Specify Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs	
						y	unioudici		
				< Back	Next>				
hedule Email							1	Step 8 - Scheduler	
Daay Weeky BAVeel Monthy Annual	Scheduling Active Frequency L W Report Format: Se V Recipients Se	Al Time: hh.m Hect FOF Hect For Holes Walable Recipients Hest Organisation Hest Organisation	(24 hour format) Users Groups Roles Roles and Subordinates		Selected Rec	pients ation	A A	n Step 8, you can Send Reports at regu gging in to the CRM. In ont forget to check "Scheduling Activ ttention: Schedule Report data will be ou can send data generated for Report	lar intervals to specific users through email with e" to run this report using workflow sheduler. generated for report ownerl Be careful, becau owner to not permitted Users!
	हा स स स स स स स स	oles:ICEO oles:Sales Manager oles:Sales Manager oles:Sales Man oles:Manazer2 oles:Poradca2 oles:Poradca xy		>>) <<	Roles::CEO Roles::Sales M	anager			

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.

Report Details	Sp	ecify Grouping	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs			
				< Back	Save Cancel	Save & Run	Nexts					
15 									Step 9 - Graphs			
None	Chart type	None 💌	News						In Step 9, you can define C	harts for every Report that is having a "Group by" def		
Horizontal Vertical	Data Series	None	AVG Paid Amount						Data series is using Summ	aries columns values so you can define which one yo		
Line	Chart title	Chart title							Additionally you can define Chart title which is used in output files.			
Pie 3D				< Back	Save Cancel	Save & Run	Next>					
Funnei	;				T		—					
						- I						

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** \rightarrow **Analytics** \rightarrow **Reports 4 You** and Reports 4 You ListView will appear on your screen.

Analyti	ics > Reports 4You 🕂 💽 🖉 🕲 🖉 😰 🔍 🖾 😨 🚳								
Se	arch	In Report Name	Search for		Search Now				
	A	B C D E F G H	I J K L	M N O	P Q R S	T U V W	X	Y Z	
								Add Report	
	Select	Report Name	Module	Folder	Owner	Description	Order 🖬	Action	
1		ITS4You: Contacts by Campaigns (Campaign Rel Status)	Campaigns	Campaigns	Administrator		1	edit duplicate del	
2		ITS4You: Organizations by Campaigns (Campaign Rel Status)	Campaigns	Campaigns	Administrator		1	edit duplicate del	
3		ITS4You: Leads by Campaigns (Campaign Rel Status)	Campaigns	Campaigns	Administrator		1	edit duplicate del	
4		ITS4You: Project by Users with Details	Project	Calendar	Administrator		1	edit duplicate del	
5		ITS4You: Activities by User with Details	Calendar	Calendar	Administrator		1	edit duplicate del	
6		ITS4You: Activities by User, Status and Month - Summary with Columns	Calendar	Calendar	Administrator		1	edit duplicate del	
7		ITS4You: Tickets by User by Month - Summary with Columns	Trouble Tickets	Tickets	Administrator		1	edit duplicate del	
8		ITS4You: Tickets by Month	Trouble Tickets	Tickets	Administrator		1	edit duplicate del	

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. 2 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
 - \circ 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

т	S4You:	Tickets b	y Month	h
Rick is reports the switch to EditView		Generate Now		select another Report from folder TS4You: Toats by Monh TS4You: Toats by Uwe - Datalide TS4Y
				Sever Charl Image Expect To PD Print Repo
ITS	^{De} 4You: 1	tails part of Rep Tickets	ort Dy Mon	nth
Columns: None Summarise Columns: COUNT Records, SUM Hours Editors Inno Editors Inno				
Tetal I Records		Module: T	rouble Tickets	s
resport owner: Administrator Sharing: public Limiti Summaries 10 Records		Schedule Chart Inf	: None : Vertical Char	e Lescencing by Montres
	Created Time 2014-08 2014-03 2014-02 2013-12 2013-11 2013-09 2013-09 2013-05 2013-05 Z013-05 Totals	COUNT Records 6 1 1 1 1 1 1 1 2 4 5 3 23	UM Hours 0.000 24.000 0.000 0.000 0.000 0.000 2.000 0.000 2.000 0.000 31.000	Chart Tickets by Month Could force a Decision of the second force at the second force

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

Edit	idit "ITS4You: Tickets by Month"										
	Report Details	Specify Group	ng	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler	Graphs	
	TATANA LAN DATA LAND										
Rej	port Details									Step 1 - Report Detail	s
		Report Name	ITS4You: Tickets	by Month						In Step 1, you will have to prov Report name, Primary Module, F	ide basic Report informations: Report Folder and Description
	Primary Module Tridiat							Attention: After first module a	election you will be not allowed to change #		
		Report Folder	Tickets								
	2	Description									
	Э.							6		4.	

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 \bigcirc button in next window.

.	Module Manage mod	Manager > [TS4YouReports] duie behavior inside viger CRM		
8	*	Upgrade Uggrade Reports 4You	License settings Manage al settings related to your license.	

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

Module Manager > Reports 4You > Licens Manage all settings related to your license.	e settings
Manage all settings related to your license.	
License settings	keykeykeykeykeykeykeykey

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

Module Manager > Reports 4You > License settings Manage al settings related to your loose.							
Manage all settings related to your licer							
License settings							
نا	zense key keykeykeykeykeykeykeykeykey Reactivate license Deactivate 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