

IT-Solutions4You

REPORTS 4 YOU for VTIGER CRM 6.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, does not modify your vtiger source code
- You can create **unlimited reports for all vtiger CRM modules** (incl. vtiger compatible custom modules)
- Allows you to use all fields from primary module and his related modules
- Supports unlimited count of uitype 10 fields related to same module
- **5 Report types** (Tabular report, Summaries, Summaries with details, Matrix report and for admin user also Custom report)
- Custom Labels definition
- Enhanced conditions functionality
- Support of Scheduler
- Graphs in High Charts style, possible Add to dashboards widgets
- PDF, Excel Export and print are possible
- Inclusive support & FREE lifetime Updates for 6.x version
- Key Metrics functionality

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License agreement

- The Reports 4 You License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.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.
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- 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.

Privacy policy

During installation it is necessary to exchange following information:

- vtiger CRM version (e.g. 6.x)
- Reports 4 You version (e.g. 2.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**. Click on the **Install from Zip**.

🕏 vtiger	All Records	 Type k 	eyword and press enter Q Advanced				CR/M Settings	
Studio	V	==	Dashboard	1	5	Opportunities	Manage Users	
dit Fields		4	Contacts	121	00	Organizations		
cklist Editor	V		Leads	1	87.5. 19	Documents		
enu Editor 2.	V	20	Calendar	2		Emails		
odule Manager	V	0	Tickets	1		Products		
Templates	V	2	FAQ	2	 .	Vendors		
Other Settings	V	æ	Price Books	V	6	Quotes		
Integration	V	Po	Purchase Order	V	5	Sales Order		
Extension Store		<u>.</u>	Invoice	2	2	RSS		
	v 0	4	ExtensionStore	v 0		PDFMaker		
	v 0	*	Preinvoice					

Picture 1.1: Installation of Reports 4 You – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the **Import** button.

Import Module	e from Zip	
	Disclaimer - Custom Files could put your CRM at risk This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules co vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Voger.	uld include security
2. [I accept with disclaimer and would like to proceed	
1.	Choose File	3. 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 Import Now to proceed Cancel or to cancel.

Verify Import Details	
Vtger Version :	
* Module : * Version : * Vulger : * Author : IT-SolutionsHYou s.r. e - www.its4you s.k * Supported towares : internet Explorer 7 or higher, Mozilla Fieldox 3.0 or higher	
IV accept the license agreement.	2. Import Now Cancel

Picture 1.3: Installation of Reports 4 You – Step 3

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

Import Successfull	×
module was imported successfully.	
	Ok

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 check your Company information and insert license key. Make sure that your server has **Internet access**. Click on **Validate** button. If you want to change your Company information click on **Change Company Information** button.

installation	
1 Validation 2 Finish	
Welcome to the Installation Wizard	
This will install into your vtiger CRM. It is highly recommended to finish the installation with	out any interruption.
Please check your Company information. Please insert a license key you received in purchase co Please make sure that your server has an internet acco	
Your Company Information	Change Company Information
Company Name:	10
Address	R. 10 Nor-Nut. 31 Not. Nagrage
City:	leges -
State:	anasa .
Country:	10
Postal Code:	887
VAT ID:	10/07/01
License settings	
Your vtiger url:	High Heritype, anger en uit fallen pleasant schalphacht i
License key:	keykeykeykeykeykeykeykeykeykey
	Validate Order now

Picture 1.5: Validation of Reports 4 You – Step 1

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

Collegest C	installation
1 Validation	2 Finish
	has been installed successfully.
	Finish

Picture 1.6: Validation of Reports 4 You – Step 2

For Upgrade please check 5.3 Upgrade.

After successful installation, you are able to see Reports into your vTiger (Picture 1.7).



Picture 1.7: Start Reports 4 You

2 How to create Reports 4 You

Types of Reports

You are able to create 4 types of Reports like Standard User.

Tabular Report	Summaries Report	Summaries Report with Details	Matrix Report

And 5 types of Reports like Admin User.



Picture 2.2: Types of Reports (admin user)

1. **Tabular Report** – Tabular report is very simple type of report, with a columns heading row followed by table data information.

Lead Number	Annual Revenue	First Name	Last Name	Primary Phone	Mobile Phone	Lead Source	Industry	Assigned To
LEA4	€120.00	-	L1 b	-	-	Employee	Construction	Marketing Group
LEA3	€60.00	-	L3	-	-	Cold Call	Banking	BV
LEA2	€40.00	-	L2	-	-	Existing Customer	Construction	BV
LEA1	€20.00	-	L1	-	-	Employee	Construction	BV

 Field Names
 SUM
 AVG
 MIN
 MAX

 Annual Revenue
 €240.00
 €60.00
 €20.00
 €120.00

Picture 2.3: Tabular Report

Columns: Subject, Sales Order, Invoice	No, Contact Name, Invoice Date, Status,	Assigned To					
Summaries Columns: None							
Filters: (Status not equal to Paid)							
Total: 23 Records			Module				
Report owner: Administrator			Group E				
Sharing: public			Schedu				
Limit: All records			Chart I	nfo: (No charts a	vailable)		
	Subject	Sales Order	Invoice No	Contact Name	Invoice Date	Status	Assigned To
	INV to SO 2	Sales Older	INV1	Contact Maine		Created	Assigned To
	INV 0 30 2		INV2		-	Created	
	INV 3		INV3		15-04-2015		
						Created	
	Jay Smith Invoice	•	INV9	•		Created	
	pre inv to SO 2		INV11	•		Cancel	
	SO 2	SO 2	INV13	•		-	
	J&J Touchscreen Replacement	•	INV15	•	18-03-2015	Created	
	asd	•	INV16	•		-	
	testdan	•	INV18	•		•	Sector States (1998)
	SO 8test	SO 8	INV20	•		-	
	DN0001	civera	INV21	•		•	
	SO 2		INV25		15-04-2015	Created	
	Quote A8 02		INV27			•	1
	Test	SO 2	INV28			-	
	Invoice MM Training		INV30	Ashish Goyal	25-04-2015	-	
	testpictures		INV33				
	moj test invoice		INV34			-	-
	jommono	jnmmnmn	INV36				
	Test		INV37	dominik nowak		-	
	1 INV for payment a	1 SO -> 3 payments (a,b,c)	INV38			-	
	INV from 1 SO -> 3 payments (a,b,c) second	1 SO -> 3 payments (a,b,c) second	IN//39				
	thdrftudgyikdf		IN//40				
	sys_bab		INV42		29-05-2015	Sent	

Picture 2.4: Tabular Report

Summaries Report – Summaries report is intended to use when performing data calculations grouped by selected columns. Group data choosing rows values by one row or combination (rows-rows), (rows-rows).

Lead Source, Assigned To, Industry	COUNT Records	SUM Annual Revenue	AVG Annual Revenue	MIN Annual Revenue	MAX Annual Revenue
Cold Call	1	€60.00	€60.00	€60.00	€60.00
BV	1	€60.00	€60.00	€60.00	€60.00
Banking	1	€60.00	€60.00	€60.00	€60.00
Employee	2	€140.00	€70.00	€20.00	€120.00
BV	1	€20.00	€20.00	€20.00	€20.00
Construction	1	€20.00	€20.00	€20.00	€20.00
Marketing Group	1	€120.00	€120.00	€120.00	€120.00
Construction	1	€120.00	€120.00	€120.00	€120.00
Totals	3	€200.00	€65.00	€20.00	€120.00

Picture 2.5: Summaries Report

Examples:

• Report grouped by **one row** (Invoice status). Summaries columns are COUNT Records, SUM Total, AVG Total, MIN Quantity, MAX Quantity. Filter is not set. Pie Chart (SUM Total).

Summaries Columns: COUNT Records, SUM Total, AVG Total, M	IIN Quantity, MA)	Quantity							
Filters: None									
Total: 5 Records				Module:	nvoice				
Report owner: Administrator				Group By	: Status Ascend	ling			
Sharing: public				Schedule	: None				
Limit: Summaries 20 Records				Chart Inf	o: Data Series S	Status [Pie Cha	(SUM Total)]		
	Status	COUNT Records	SUM Total			MAX Quantity			
	-	25	€32,063.67	€1,282.55	1.00	10.00			
	Cancel	1	€12.70	€12.70	1.00	1.00			
	Created	6	€5,219.70	€869.95	1.00	1.00			
	Paid	17	€23,169.63	€1,362.92	1.00	100.00			
	Sent	1	€793.76	€793.76	5.00	5.00			
	Totals	50	€61,259.46	€864.38	1.00	100.00			
		Paid (€) Created (€)	Sent (€)		(€)				Ξ
	re 2.6: 1	Created (©)	Cancel (€)						Ξ

• Report grouped by **two rows** (Invoice status, Customer No.). Summaries columns are COUNT Records, SUM Total, AVG Total, MIN Quantity, MAX Quantity. Filter is not set. Horizontal Chart (SUM Total).

Columns: None											
ummaries Columns: COUNT Records, SUM Total, AVG Total, MIN Quantity, N	IAX Quantity										
ilters: None											
otal: 5 Records			Mo	dule: Invoice							
eport owner: Administrator			Gr	oup By: Stat	us Ascending, Cu	istomer No Asce	nding				
iharing: public			Sc	hedule: None							
imit: Summaries 20 Records			Ch	art Info: Dat	a Series Status	[Horizontal Chai	t (SUM Total)]				
	Status, Customer No	COUNT Records	SUM Total	AVG Total	MIN Quantity	MAX Quantity					
		25		€1,282.55	1.00	10.00					
	0.000	25	€32,063.67	€1,282.55	1.00	10.00					
	Cancel	1	€12.70	€12.70	1.00	1.00					
	0.000	1	€12.70	€12.70	1.00	1.00					
	Created	0	€5,219.70	€869.95	1.00	1.00					
	0.000	5	€5,092.70	€1,018.54	1.00	1.00					
	2233	1	€127.00	€127.00	1.00	1.00					
	Paid	17	€23,169.63	€1,362.92	1.00	100.00					
	0.000	10	€21,899.63	€1,368.73	1.00	45.00					
	1FuID	1		€1,270.00	100.00	100.00					
	Sent	1	€793.76	€793.76	5.00	5.00					
	0.000	1	€793.76	€793.76	5.00	5.00					
	Totals	50	€61,259.46	€864.38	1.00	100.00					
0 2000 4000 6000 8000	10000 1200	00 14000	SUM T	otal 18000	20000	22000 24	1000 26000	28000	30000	32000	3 4000
(¢)											
Cancel (6)											
Created (€)											
Paid (¢)											
Sent (C)											
	7. Sum		SUM Total			1 1					

Picture 2.7: Summaries Report grouped by two rows

• Report grouped by **three rows** (Invoice status, Contact Name, Invoice Date). Summaries columns are COUNT Records, SUM Total, AVG Total, MIN Quantity, MAX Quantity. Filter is not set. No Chart.

Columns: None						
Summaries Columns: COUNT Records, SUM Total, AV	/G Total, MIN Quantity, MAX Quantity					
Filters: None						
Total: 5 Records			Module:	Invoice		
Report owner: Administrator			Group By	: Status Asc	ending, Contact	Name Ascendir
Sharing: public			Schedule	: None		
Limit: Summaries 20 Records			Chart Inf	o: (No chart	s available)	
					_	
	Status, Contact Name, Invoice Date	COUNT Records	SUM Total			MAX Quantity
	-	25			1.00	10.00
	0.000	23		€1,382.81	1.00	10.00
	Ashish	1	€189.24	€189.24	1.00	1.00
	25-04-2015	1	€189.24	€189.24	1.00	1.00
	dominik	1	€69.86	€69.86	1.00	1.00
	0.000	1	€69.86	€69.86	1.00	1.00
	Cancel	1	€12.70	€12.70	1.00	1.00
	0.000	1	€12.70	€12.70	1.00	1.00
	Created	6	€5,219.70	€869.95	1.00	1.00
	0.000	6	€5,219.70	€869.95	1.00	1.00
	Paid	17	€23,169.63	€1,362.92	1.00	100.00
	0.000	14	€22,524.47	€1,608.89	1.00	100.00
	Sander \	2	€518.16	€259.08	1.00	1.00
	0.000	2	€518.16	€259.08	1.00	1.00
	tommy /	1	€127.00	€127.00	1.00	1.00
	0.000	1		€127.00	1.00	1.00
	Sent	1		€793.76	5.00	5.00
	0.000	1			5.00	5.00
	Totals		€61,259.46		1.00	100.00
	Totals	50	01,239.40	0004.38	1.00	100.00

Picture 2.8: Summaries Report grouped by three row

 Summaries Report with Details – Summaries report with Details is intended to use when performing data calculations grouped by one selected column with displayed record details. You can define calculations for all report datas and define limited/unlimited count of displayed record details.

First Name	Last Name	Lead Number	Primary Phone	Mobile	Company	Lead Source	Annual Revenue
Lead Source	= Cold Call (1): COUNT Record	ds = 1				
	L3	LEA3				Cold Call	€60.00
Lead Source	= Existing Cu	stomer (1): COU	NT Records = 1				
	L2	LEA2				Existing Customer	€40.00
Lead Source	= Employee (2	2): COUNT Recor	rds = 2				
	L1	LEA1				Employee	€20.00
	L1 b	LEA4				Employee	€120.00

Picture 2.9: Summaries Report with Details

Example:

There is Report with details from Invoice 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.



Picture 2.10: Summaries Report with Details

 Matrix Report – Matrix report is a summaries report with one group column displayed in columns structure. For example COUNT, SUM, AVG, MIN, MAX columns summaries calculated and displayed by date intervals, status, or other column values.

Assigned To, Lead Source	Co	old Call	Existin	g Customer	т	otals
Assigned 10, Leau Source	COUNT Records	SUM Annual Revenue	COUNT Records	SUM Annual Revenue	COUNT Records	SUM Annual Revenue
B∨	1	€60.00	1	€40.00	2	€100.00
Totals	1	€60.00	1	€40.00	2	€100.00
		D: 1	1. 16.4.	·		

Picture 2.11: Matrix Report

Example:

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

Total: 4 Records Report owner: A Sharing: public Limit: Summaries													Schedule: Nor	tus Ascendir Ie	ng, Organization Nan atus [Pie Chart (SU)		
			Oragnisation 1					A-Team			1				Totals		
atus, Organization Name	SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance	SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance			SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance
E)	€3,473.45	€1,157.82	€2,140.00	€2,140.00	€2,901.05	€279.40	€279.40	€139.72	€139.72	€139.68			€3,752.85	€938.21	€2,279.72	€2,279.72	€3,040.
incel (€)	€12.70	€12.70	€4.30	€4.30	€8.40								€12.70	€12.70	€4.30	€4.30	€8.
eated (€)	€2,679.70	€669.93	€1,531.70	€1,531.70	€1,148.00								€2,679.70	€669.93	€1,531.70	€1,531.70	€1,148.
id (€)	€12,367.00	€1,374.11	€28,489.30	€28,489.30	€234.00	€189.24	€189.24	€189.24	€189.24	€0.00	differ the	10	€20,878.55	€1,606.04	€37,746.85	€37,746.85	€234.
otals	€18,532.85		€32,165.30	€32,165.30	€4,291.45	€468.64		€328.96	€328.96	€139.68	-	dist	€27,323.80		€41,562.57	€41.562.57	€4 431.1

Picture 2.12: Matrix Report

Paid (€)

5. Custom Report – Custom report have to be programmed by skilled user with programming experiences. Do not forget that custom SQL Report display Records based on defined SQL query. Keep in your mind to use user permissions queries and share with permitted users only! Take care to be really careful with custom report SQL definitions.

SELECT DISTINCT
AS ,
COUNT () AS
SUM AS ,
MIN AS ,
COUNT _ AS
FROM
INNER JOIN ON AND
LEFT JOIN V AS ON
LEFT JOIN AS ON
LEFT JOIN : AS ON
LEFT JOIN AS ON AND
GROUP BY
ORDER BY
ASC
LIMIT 20
Picture 2.13: SQL query of Custom Report

2.1 Creating Report

In the following parts you can see how to create the Report. To create a Report please click on + Add Report, creating consists of 9 steps:

- Select Report Type
- Report Details
- Specify Grouping
- Select Columns
- Labels
- Filters
- Sharing
- Scheduler
- Graphs
- Dashboard

Select Report Type

Now, you can choose type of Report you want to create and click on Next . To see differences between types of Reports please check chapter Types of Reports.

Tabular Report		Summaries Re	eport	S	ummaries Rep	ort with Detai	ils	Matrix	Report	
ular report is very simple type of	report, with a colu	-	-							
	Lead Number	Annual Revenue	First Name	Last Name	Primary Phone	Mobile Phone	Lead Source	Industry	Assigned To	
	LEA4	€120.00	-	L1 b	-	•	Employee	Construction	Marketing Group	
	LEA4 LEA3	€120.00 €60.00	-	L1 b	-	•	Employee Cold Call	Construction Banking	Marketing Group	
					- -	- - -		Banking	BV	
	LEA3	€60.00	- - -	L3	- - -	- - -	Cold Call	Banking	BV BV	
	LEA3 LEA2	€60.00 €40.00	- - -	L3 L2 L1	- - - SUM AVG	- - - -	Cold Call Existing Customer Employee	Banking Construction	BV BV	
	LEA3 LEA2	€60.00 €40.00		L3 L2 L1	- - - - SUM AVG £240,00 £60,00	- - - MIN MAX	Cold Call Existing Customer Employee	Banking Construction	BV BV	
	LEA3 LEA2	€60.00 €40.00		L3 L2 L1	- - - SUM AVG €240.00 €60.00		Cold Call Existing Customer Employee	Banking Construction	BV BV	

Picture 2.14: Select Report Type

Report Details

In the second step, you will have to provide basic Report information and then click on button.

Report Details	Select Columns	Calculations	Labels	Filters	Sharing	Scheduler				
						< Back	Cancel Next	>		
Report Details										Report Details
	Report Name*	ReportName								In this Step you have to provide basic Report informations:
	Primary Module	Invoice		Ŧ						Report name, Primary Module, Report Folder and Description.
	Report Folder	Default		•						Attention: After first module selection you
		Description of Re	port						 7	will be not allowed to change it!
	Description									
									 li.	
						< Back	Cancel Next	› 4		

Picture 2.15: Report Details

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**. **Summaries with details** and **Matrix Report**. If you want to Tabular report please skip this step.

eport Details Specify Grouping Labels Filters Sharing Scheduler Graphs	
< Back Cancel Nexts	
Group by	Specify Grouping
Rows V Invoice ID V Ascending V	Summaries report is intended to use when performing data calculations grouped by
Rows V None V Ascending V	selected columns.
Rows V None V Ascending V	
	<u>i</u> 1
Available Summaries Fields	
Select Module Invoice	
Count Records of Invoice	
Limit and Sort order	
Summaries Select order None 🔻 🖲 Ascending 🕞 Descending	
Max entries 20 (empty for show all entries)	
< Back Cancel Next >	

Picture 2.16: 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). Columns you can choose if you select Matrix Report. You can also define how should be your Report ordered (Ascending/Descending).

Group by			
1	Rows 🔻	Invoice ID 🔹	Ascending •
	Rows •	None •	Ascending •
J	Rows 🔻	None •	Ascending •

Picture 2.17: Group by

Group by					
	Rows	Invoice Date	T	Ascending •	Days 🔻
					Days
	Rows	 None 	•	Ascending •	Weeks Months
					Quarters
	Rows	None	•	Ascending •	

Picture 2.18: Group by date intervals

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

• Available Summaries Fields – SUM, AVG, Min, Max



Picture 2.19: Available Summaries Fields

• Limit and Sort order – allows you to limits and order grouping records

Limit and Sort order	
Summaries Select order	None
Max entries	20 (empty for show all entries)
Diate	and 2 20. Limit and South and an

Picture 2.20: 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	Due Date	Purchase Order
Status = (15): ⊤otal = €12,846.25; ⊤otal = €8	356.42						
SO 2	SO 2		INV13				
asd			INV16				
testdan			INV18			30-04-2015	
SO 8test	SO 8		INV20				
DN0001	civera		INV21				
Quote A8 02			INV27				
Test	SO 2		INV28				
Invoice MM Training			INV30	Ashish Goyal	25-04-2015	30-04-2015	
testpictures			INV33				
moj test invoice			INV34				
jnmmnmn	jnmmnmn		INV36				
Test			INV37	dominik nowak			
1 INV for payment a	1 SO -> 3 payments (a,b,c)		INV38				
INV from 1 SO → 3 payments (a,b,c) second	1 SO -> 3 payments (a,b,c) second		INV39				
thdrftudgyikdf			INV40				
Status = Cancel (1): Total = €12.70; Total =	€12.70						
pre inv to SO 2			INV11				
Status = Created (6): Total = €5,219.70; Tot	tal = €869.95						
INV to SO 2			INV1				
INV 2			INV2				
INV 3			INV3		15-04-2015	15-04-2015	
Jay Smith Invoice			INV9				
J&J Touchscreen Replacement		2233	INV15		18-03-2015	21-03-2015	
SO 2			INV25		15-04-2015	16-04-2015	

Picture 2.21: Limits in Grouping

Select Columns

In this step, 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. **Since 6xx.6.4 version there is option to sort by more then One Column.**



You can use it in Tabular report and Summaries Report with details.

Picture 2.22: Select Columns

There is also useful option to search fields from chosen and related modules, choosing module and typing name of field (Picture 2.25)

elect Module - Cashflow4You	dat	
Payment Information (More Information) Due Date Payment Date	^ Add >>	* * *
Accounting Information (More Information) Accounting Date		

Picture 2.23: 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 2.24) Subject Safes Order Customer No Invoice No Contact Name Invoice Date Status

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			INV42		11-29-2012	Approved	
Test			INV51		01-29-2013	Approved	there are summarized all of
Status = AutoCreated (75): SUM Paid Amou	int = 0.000€;SUM	Open Amount = 1	0 605 921.690€;	SUM Sub Total = 10 623 455.750	€;AVG Sub Tota	= 141 646.077€	
test			INV19	Elizabeth Brown	07-20-2012	AutoCreated	
test 2			INV21		08-18-2012	AutoCreated	
Status = AutoCreated (21): SUM Paid Amou	int = 0.000\$;SUM	Open Amount = 8	69 499.240 \$;SU	M Sub Total = 869 753.240\$;AV	G Sub Total = 41	416.821\$	
test negative qty			INV77		06-26-2013	AutoCreated	there are records limited
zetztezetzet			INV78		06-26-2013	AutoCreated	on 2 records
Status = Created (3): SUM Paid Amount = 1	75 432.000€;SUM	Open Amount = 9	243.000€;SUM	Sub Total = 183 770.000€;AVG	Sub Total = 61 25	6.667€	
vendtl_inv214	SO_vtiger		INV5	Maria Miller	05-31-2012	Created	
Test2			INV11	Patricia Johnson	06-19-2012	Created	
Status = Created (2): SUM Paid Amount = 0	.000\$;SUM Open	Amount = 1 143.00	00\$;SUM Sub T	otal = 1 143.000\$;AVG Sub Tota	I = 571.500\$		
test 5			INV102		01-24-2014	Created	
Testing Factura con pago previsto	Test SO 1038		INV111		07-02-2014	Created	

Picture 2.24: Limit in Select Columns

Calculations

Now, you can select the calculations for the fields available across the Report modules and only in **Tabular Report**. You can select the calculations like SUM, AVG, MIN and MAX values (Numeric Columns: Sub Total, Total, ...) across the Report result records.

ColumnsSumAverageLowest ValueLargest ValueInvoice - Adjustment <th>Invoice - AdjustmentIIIInvoice - Excise DutyIIIIInvoice - Sub TotalIIIIInvoice - Sales CommissionIIIIInvoice - TotalIIIIInvoice - Discount PercentIIIIInvoice - Discount AmountIIIIInvoice - Discount AmountIIII</th> <th>Calculations</th> <th></th> <th></th> <th></th> <th></th>	Invoice - AdjustmentIIIInvoice - Excise DutyIIIIInvoice - Sub TotalIIIIInvoice - Sales CommissionIIIIInvoice - TotalIIIIInvoice - Discount PercentIIIIInvoice - Discount AmountIIIIInvoice - Discount AmountIIII	Calculations				
Invoice - Excise Duty Import Invoice - Sub Total Import Invoice - Sales Commission Import	Invoice - Excise Duty Invoice - Sub Total Invoice - Sub Total Invoice - Sales Commission Invoice - Sales Commission Invoice - Total Invoice - Discount Percent Invoice - Discount Amount Invoice - Discount Amount Invoice - Discount Amount Invoice - Use -	Columns	Sum	Average	Lowest Value	Largest Value
Invoice - Sales Commission Invoice - Sales Commi	Invoice - Sub Total Invoice - Sales Commission I Invoice - Sales Commission I Invoice - Total Invoice - Total I Invoice - Discount Percent I Invoice - Discount Amount I Invoice - Discount Amount I Invoice - UISCOURT Amount I I	Invoice - Adjustment				
Invoice - Sales Commission	Invoice - Sales Commission I I I I I I I I I I I I I I I I I I I	Invoice - Excise Duty				
	Invoice - Total Impose	Invoice - Sub Total				
Invoice - Total	Invoice - Discount Percent Invoice - Discount Amount - Discount - Disco	Invoice - Sales Commission				
	Invoice - Discount Amount	Invoice - Total				
Invoice - Discount Percent	Custom Calculation	Invoice - Discount Percent				
Invoice - Discount Amount		Invoice - Discount Amount				
My calculation Sub Total v total-subtotal		Add Calculation				
	Add Calculation			< Back	Cancel Next >	

Picture 2.25: Calculations in Tabular Reports

In **Cusstom Calculation** you can define expression of custom calculations based on fields available across the Report modules.

You can define basic mathematical operations like: + , - , * , / or some other expressions: if ... then ... else ... end (==,<=,>=,<,>) concat(\dots, \dots)

Labels

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

< Back Cancel Next>	
	Labels
Selected Columns	Labels Step gives you the flexibility to customize selected field labels.
your own Label of Status	customize selected relatabels.
Organization Name	
Summary Columns	
SUM Sub Total	
AVG Sub Total	
MIN Sub Total	
MAX Sub Total	
	Selected Columns Your own Label of Status Organization Name Summary Columns SUM Sub Total AVG Sub Total MIN Sub Total

Picture 2.26: Labels

Filters

Now, 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 chosen based on type of field selected. You are allowed to provide unlimited number of conditions, we recommend 5 conditions.

New Report Report Details Specify Grouping Labels Filters Sharing Sched	luler Graphs Dashboard	
	< Back Cancel Next >	
Filters		 Filters
None v Add Condition	None •	In Filters you can specify the conditions to filter the results in a report. We can specify conditions in Filters and Summaries Filters. Filters. Condition can be choosed based on type of field selected. You are allowed to provide unlimited number of conditions.
Summaries filters		
Add Condition		
	< Back Cancel Next	



Filters – here you are able to create Filter, add new Condition to Filter Add Condition or add New Group of Filters Add Group. Course, there are options to Delete Condition(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 N,...). (For example you can use it to Report Invoices that are not paid more then 7,... days). Since 6xx.6.6 version of Reports 4 You you can compare also 2 variables like (Invoice Date greater then field is Due Date)

here you can new Group of Filters				
Sales Order Add Gr Sales Order None Invoice No None Due Date None Purchase Order and Adjustment Add Gr	roup Add Condition		ogical relations ween Conditions	option to delete Condition
Summaries	s filters			
None 🔻	None	•	â	
Add Con	ndition			

Picture 2.28: Filters

• Summaries filters – powerful option to create Filters from Summaries fields

Summaries filters			
AVG Sub Total (Invoice) 🔻	greater than	•	 一
Add Condition	None equals not equal to starts with ends with contains does not contain less than		
	greater than less or equal greater or equal between not between after before		

Picture 2.29: Summaries Filters

Sharing

In Sharing part, 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.

Report Details	Select Columns	Calculations Labels Filters Sharing Scheduler	
		< Back Cancel Next)	
Sharing Type			Sharing
	Report owner Sharing	Administrator	Also 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.
		< Back Cancel Next >	

Picture 2.30: Sharing

Scheduler

In this step, you can Send Reports at regular intervals to specific users through email without logging in to the CRM. Do not forget to check "Active" to run this report using workflow scheduler. **Attention:** Schedule Report data will be generated for report owner! Be careful, because you can send data generated for Report owner to not permitted Users!

Report Details Select Columns	Calculations Labels Filters Sharing Scheduler	
	< Back Save Cancel Save & Run Next>	
Schedule Email		Scheduler
Activ		Scheduler gives you possibility to Send Reports at
Subjec	Subject of Email	regular intervals to specific users through email without logging in to the CRM. Do not forget to check "Scheduling Active" to run
Ter	Text of scheduled email	this report using workflow scheduler. Attention: Schedule Report data will be generated
Frequenc	Daily • Time: 15:00 hh:mm (24 hour format)	for report owner! Be carefull, because you can send data generated for Report owner to not permitted Users!
Report Forma	t PDF 🖉 EXCEL 🛄	
Recipients 🗗	Select: Users viger650 Administrator User:.viger650 Administrator User:.salesmanager User:.Migtest viger650	
	email1@email1.com.email2@email2.com	
Generate For 🕤	Select Some Options	
Generate without lim		
	c Back Save Cancel Save & Run Novt	

Picture 2.31: Scheduler

Name	Description
Subject	Subject of Scheduled Email (Auto-generated if empty)
Text	Text (Body) of Email
Frequency	Frequency of Email sending
Time	Time of sending Email
Report Format	Format of included File
Select	Here you can choose who want to send mail to. (Users, Groups, Roles, Roles and Subordinates) (also you can find here search option)
Recipients	Based on Select you can choose Recipients
Other Emails	Here you can add other mail to CC.
Generate For	Based on Generate For Reports 4 You makes and sends Emails to Users based on their own privileges.
Generate without Limit	You receive Report without Limit set in Picture 2.20: Limit and Sort order – in your CRM Limit is still applied only in Email you will see without Limit

Table 2: Report Details

Differences between Recipients/Other Emails and Generate For

When you choose Recipients/Other Emails, all Users receive the same Reports like Reports Owner based on his privileges(e.g. 1 Email to 20 Users). If you choose Generate For, then Reports 4 You send for each User particular Report based on User Field you choose (e.g. 20 Emails to 20 Users).

When you turn on Scheduler for some Reports, in ListView of Report 4 You you can see at this Reports.

	ITS4You: Ivoices by Organization and Status - Summaries O2	Summaries Report	Invoice	Invoices	Administrator
	ITS4You: Qty Products sold by Year 🔊	Summaries Report	Invoice	Products and Services	Administrator
	ITS4You: Ivoices by Organization - Detail	Summaries Report with Details	Invoice	Invoices	Administrator

Picture 2.32: ListView of Report 4 You with Scheduler

Since 6xx.6.4 version is included in email Link to Report Detail.

This is an auto-generated email sent on behalf of a scheduled report.

Report Name : test Description :

For details click here

Picture 2.33: Link to Report Detail

Graphs

Here, 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. You are able to create up to 3 Charts. Here you can choose Chart type, Data Series and Chart title.

	Report Details Specify	Grouping Labels	Filters Sharing S	cheduler Graphs			
				< Back Save	Cancel Save & Run Next	>	
	Graphs						Graphs
	Chart title	Chart title					In this step you can select and define Charts for your Reports.
	Data Series	Status	•				 "Chart title" of your Chart, "Chart Style" means data values populated in charts
None Bar Stacked bar	Chart 1	None	▼ None		None SUM Sub Total AVG Sub Total		- and finaly Chart definition contains chart type and series column.
Column Stacked column Line	Chart 2	None	▼ None	۲	MIN Sub Total MAX Sub Total		
Pie Funnel	Chart 3	None	 None 	۲			
				< Back Save	Cancel Save & Run Next	>	

Picture 2.34: Graphs

Ð

Dashboard

In Summaries Reports, Summaries Reports with Details and Matrix Report if you have Graphs you can use our new functionality: **Dashboards.** Dashboards function allow add Widget to Dashboard of some modules and use also Primary search column to filter Graph direct from Dashboard.

Report Deta	ils Specify Grouping	Select Columns	Labels Filt	ers Sharing	Scheduler	Graphs	Dashboard					
					<	Back Sa	ve Cancel	Save & Run	Next>			
Dashboar	I										Dashboard	
	Primary search column	Status		T							In this Step you can define dashboard param Primary search column.	eters:
	Allow in Modules	Home × Org	anizations ×									
					<	Back Sa	ve Cancel	Save & Run				
					Pic	cture 2	2.35:1	Dashba	oard			

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

More about Dashboard you can find: 4.4 Dashboard

3 Work area

The Work Area of the Reports 4 You consists of:

- ListView used for common tasks like add new, edit, duplicate and delete Reports, and access to others tools
- DetailView shows already created Reports in details
- 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 All \rightarrow Analytics \rightarrow Reports 4 You and Reports 4 You ListView will appear on your screen.

Il Records Type keyword and press enter	Advanced						License set	ings
							Upgrade Re	ports 4 Yo
Actions 👻 🕂 Add Report 🕂 Add Folder	All Reports		4			1 to 50 C	< ₽	> 1
Delete	Calendar		٩	er Name	Report owner	Description		
Move Reports	Campaigns			lucts and Services	Administrator			
ITS4You: Worked hours Project - User -Task	Default		П	ects	Administrator			
ITS4You: Worked hours Project - User	Invoices			ects	Administrator			
ITS4You: Worked hours Project - Project Task	Leads Opportunities			ects	Administrator			
📄 test movimenti cassa	Organization			ult	Standard User			/=
Movimenti di cassa	Products and Services		*	ult	Standard User			
test matrix quotations by user, stage by months	Matrix Report	Quotes	Que	otes	Standard User			
Purchase Order	Summaries Report	Purchase Order	Pro	ducts and Services	Standard User			

Picture 3.1: Reports 4 You ListView

The main part of the Reports 4 You ListView consists of list of the Reports, which gives you information about a Report name, Report Type, Module, Folder Name, Report owner and Description of Report. As shown in the picture, above the list of the reports you can find following:

ListView of Reports 4 You consists of:

- Actions contains actions for delete and move Reports to other Folder
- + Add Report is used to add new Reports
- + Add Folder is used to add new Folder
- All Reports
 to use filtering or create new filter
- • P > next/previous page of Reports
- • is used for License setting and Upgrade option
- ✓ I = 🛍 to Edit, Duplicate or Delete Reports

3.2 DetailView

From ListView you can directly open any Reports 4 You in DetailView. The DetailView consists of:

- Report details part
- Group of action buttons
 - Customize ✓ open EditView of Report
 - Duplicate to duplicate Report
 - Print allow to print Report
 - Export Excel allow to export your Report to Excel format
 - Export To PDF allow to export your Report to PDF file
 - Generate Now generate your Report again
 - Save to save Report
 - Add Widget to Home Page add Report with chart to Home Page (if is added now, there is no this button visible)

omize / Duplicate	ITS4You: Qty Products sold by Y Total records : 9	/ear		Print Export Excel Export To
Add Group				
	Generate Now	Save Add Widget to Home Pa	ge	
	ITS4You: Qty Produ	cts sold by Year		
olumns: None				
ummaries Columns: SUM Quantity				
ilters: None				
otal: 9 Records		Iodule: Invoice		
eport owner: Administrator		iroup By: Name of product/service Ascending		
haring: share (User::standarduser) mit: Summaries 20 Records		ichedule: PDF, EXCEL Daily at 14:56		
mit, auninaries zu keturtits		hart Info: Data Series Name of product/serv	the [Line Codft (SUM Quantity)]	
	Name of product/service	SUM Quantity		
	-	1.00		
	Firewall HW	34.00		
	Internet Connection	12.00		
	Product 1	21.00		
	Product 2	12.00		
	Streader	104.00		
	Show 1	1.00		
	Show 2	2.00		
	Transportation	47.00		
	Totals	234.00		
		\wedge		125 =
	/			75 SUM Quantity 50 23
(t) Firewall HW (t) Internet Connection (t)	Product 1 (€) Product 2 (€)	S1 reader (6) Sh	iow 1 (€) Show 2 (€)	0 -25 Transportation (6)

Picture 3.2: DetailView

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:

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

Report Details Specify Groupin	g Labels Filters Sharing Scheduler Graphs 1.	
	< Back Save Cancel Save & Run Next > 2.	
Report Details	3.	Report Details
Report Name*	ITS4You: Ivoices by Organization and Status - Summaries O2	In this Step you have to provide basic Report informations:
Primary Module	Invoice v	Report name, Primary Module, Report Folder and Description.
Report Folder	Invoices 🔹	Attention: After first module selection you will be not allowed to change it!
		·'
Description		
	< Back Save Cancel Save & Run Nexts	

Picture 3.3: EditView of Reports 4 You

4 Additional feature

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/pdf_maker_for_vtiger6_crm.pdf



Picture 4.1: Export to PDF

4.2 Support of Excel Export

With Reports 4 You you can save your Reports as Excel files. To save click on **Export Excel** button.

Invoice No	Contact Name	Invoice Date	Sales Commission	Status	Total	Assigned > Organiz	at Organization Numbe
		18-05-2015		Paid		International West Training	ACC5
						Assessment West Travel	ACC5
					€3,000.00	Address and Print	ACC5
INV39			0.000		€279.40	Address and Property Vision	ACC5
INV40			0.000		€189.24	Income the Party	ACC5
INV42		29-05-2015	0.000	Sent	€793.76	Income the Party of	ACC5
INV30	Ashish Goyal	25-04-2015	0.000		€189.24	Income de la company	ACC7
INV18			0.000		€12.70	And in case of the local division of the loc	ACC4
INV1			0.000	Created	€1.270.00	And in case of the local division of the loc	ACC1
INV2			0.000	Created	€1.270.00	And in case of the local division of the loc	ACC1
		15-04-2015				and the second division of the	ACC1
						And and a state of the local division of the	ACC1
		10 00 2010				the second se	ACC1
	Sector Charles						ACC1
							ACC1
							ACC1
							ACCI
							ACCI
							ACC1
				Cancel			ACC1
				Desited.			
							ACC1
		18-03-2015		Created		And a second sec	ACC1
						Property of Longian	ACC1
						And the second s	ACC1
						And the Party of Street, or other	ACC1
						And the Party of t	ACC1
		15-04-2015				And the second second second	ACC1
				Paid		Assessed in Congress	ACC1
						Assessed Williams	ACC1
				Paid		Assessed Williams	ACC1
				Paid		Assessed Billingson	ACC1
INV33			0.000		€189.24	And in case of the same in	ACC1
INV34			0.000		€2,051.05	Station of Longing	ACC1
INV12			0.000	Paid	€127.00	Income Street,	ACC2
INV28			0.000		€12.70	Annual Street,	ACC3
INV31	Sander van Ful	pen	0.000	Paid	€259.08	Income of the local division of	ACC3
INV37			0.000		€69.86	And and a subscription of	ACC3
		1					
INV22		19-05-2015	0.000	Paid	€1.459.23	Inclusion, Manager State	ACC6
	INV35 INV36 INV37 INV38 INV39 INV39 INV39 INV39 INV39 INV39 INV3 INV3 INV3 INV3 INV3 INV3 INV3 INV3	NV35 NV35 NV36 NV38 NV38 NV39 NV30 NV30 NV30 NV30 NV30 NV30 NV31 NV2 NV3 NV24 NV25 NV26 NV27 NV28 NV29 NV21 NV22 NV31 Sadder van Euf	NV35 18-05-2015 NV36 18-05-2015 NV38 18-05-2015 NV38 29-05-2015 NV40 29-05-2015 NV42 29-05-2015 NV38 18-03-2015 NV18 18-03-2015 NV18 18-03-2015 NV18 18-03-2015 NV18 18-03-2015 NV40 18-03-2015 NV40 18-03-2015 NV10 18-03-2015 NV11 18-03-2015 NV12 18-03-2015 NV13 18-03-2015 NV14 18-03-2015 NV13 18-03-2015 NV14 18-03-2015 NV13 18-03-2015 NV24 15-04-2015 NV25 15-04-2015 NV24 14-04-2015 NV34 14-04-2015 NV34 14-04-2015 NV34 14-04-2015	NV35 12-05-2015 12.000 NV35 0.000 0.000 NV38 0.000 0.000 NV38 0.000 0.000 NV39 0.000 0.000 NV40 29-05-2015 0.000 NV42 29-05-2015 0.000 NV18 0.000 0.000 NV19 0.000 0.000 NV2 0.000 0.000 NV3 15-04-2015 0.000 NV11 0.000 0.000 NV12 0.000 0.000 NV21 0.000 0.000 NV11 0.000 0.000 NV21 0.000 0.000 NV21 0.000 0.000 NV22 0.000 0.000 NV23 15-04-2015 0.000 <t< td=""><td>NV35 18-05-2015 12.000 Paid NV35 18-05-2015 0.000 10.000 NV38 0.000 10.000 10.000 NV38 0.000 10.000 10.000 NV39 0.000 10.000 10.000 NV420 29-05-2015 0.000 58:11 NV420 25-04-2015 0.000 10.000 NV18 0.000 Created NV20 15-04-2015 0.000 Paid NV31 15-04-2015 0.000 Paid NV32 15-04-2015 0.000 Paid NV31 15-04-2015 0.000 Paid NV32 15-04-2015 0.000 Paid NV33 0.000 Paid 10.000 NV41 0.000 Paid 10.000 NV33 0.000 Paid 10.000 NV34 15-04-2015 0.000 Paid NV35 15-04-2015 0.000 Paid NV24<!--</td--><td>NV35 12:00:00 Paid E18:3.4 NV35 18:05:2015 12:00 Paid 653:60 NV38 0:000 6273:40 657:85 NV38 0:000 6273:40 6273:40 NV40 0:000 6273:40 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 0:000 6273:40 12:02 NV12 0:000 6273:70 12:70:00 NV13 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV13 0:000 Created 61:270:00 NV14 10:03:000 Paid 12:000 NV15 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV15 0:000 Paid 61:270:00 NV16 0:000 Created 61:270:00 NV17 0:000 C</td><td>NV35 12:05:2015 12:00 Paid CBB-24 <thcb-24< th=""> <thcb-24< th=""> CBB-24</thcb-24<></thcb-24<></td></td></t<>	NV35 18-05-2015 12.000 Paid NV35 18-05-2015 0.000 10.000 NV38 0.000 10.000 10.000 NV38 0.000 10.000 10.000 NV39 0.000 10.000 10.000 NV420 29-05-2015 0.000 58:11 NV420 25-04-2015 0.000 10.000 NV18 0.000 Created NV20 15-04-2015 0.000 Paid NV31 15-04-2015 0.000 Paid NV32 15-04-2015 0.000 Paid NV31 15-04-2015 0.000 Paid NV32 15-04-2015 0.000 Paid NV33 0.000 Paid 10.000 NV41 0.000 Paid 10.000 NV33 0.000 Paid 10.000 NV34 15-04-2015 0.000 Paid NV35 15-04-2015 0.000 Paid NV24 </td <td>NV35 12:00:00 Paid E18:3.4 NV35 18:05:2015 12:00 Paid 653:60 NV38 0:000 6273:40 657:85 NV38 0:000 6273:40 6273:40 NV40 0:000 6273:40 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 0:000 6273:40 12:02 NV12 0:000 6273:70 12:70:00 NV13 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV13 0:000 Created 61:270:00 NV14 10:03:000 Paid 12:000 NV15 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV15 0:000 Paid 61:270:00 NV16 0:000 Created 61:270:00 NV17 0:000 C</td> <td>NV35 12:05:2015 12:00 Paid CBB-24 <thcb-24< th=""> <thcb-24< th=""> CBB-24</thcb-24<></thcb-24<></td>	NV35 12:00:00 Paid E18:3.4 NV35 18:05:2015 12:00 Paid 653:60 NV38 0:000 6273:40 657:85 NV38 0:000 6273:40 6273:40 NV40 0:000 6273:40 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 25:05:2015 0:000 6273:40 NV40 0:000 6273:40 12:02 NV12 0:000 6273:70 12:70:00 NV13 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV13 0:000 Created 61:270:00 NV14 10:03:000 Paid 12:000 NV15 0:000 Created 61:270:00 NV14 0:000 Created 61:270:00 NV15 0:000 Paid 61:270:00 NV16 0:000 Created 61:270:00 NV17 0:000 C	NV35 12:05:2015 12:00 Paid CBB-24 CBB-24 <thcb-24< th=""> <thcb-24< th=""> CBB-24</thcb-24<></thcb-24<>

Picture 4.2: Excel Export

4.3 Key Metrics

New functionality of Reports 4 You is **Key Metrics**. Key Metrics allows you create Views on Dashboard with information like Count of records based on Filter. With Reports 4 You, Key Metrics also allows, after creating Tabular Report, use these Metrics (SUM, AVG, Min, Max) on Dashboard.



Picture 4.3: Key Metrics

How to create and add Key Metrics on Dashboard?

To create Key Metrics please provide following steps:

1. Open Reports 4 You and click on Key Metrics List

Calendar Leads Organizations	Contacts	Opportunitie	s Products Documents Tickets Reports 4 You All -					× 0 ¢
⇒vtiger [.]	F	All Records	Type keyword and press enter Advanced					-
Reports List	•	Actions ~	+ Add Report + Add Folder	All Reports		¥		1 to 20 🗘 ⊀ 🗄 🕨 🗡 -
Key Metrics List			Report Name	Report Type	Module	Folder	Report owner	Description
Settings		Search						Search
			testwithdetails	Summaries Report with Details	Sales Order	Default	Warehouses	
tings			testtabular	Tabular Report	Invoice	Default	Warehouses	
			sales order	Summaries Report	Sales Order	Default	Warehouses	
			ITS4You: Qty Products sold by Year	Summaries Report	Invoice	Products and Services	Warehouses	
			ITS4You: Ivoices by Organization - Detail	Summaries Report with Details	Invoice	Involces	Warehouses	
			ITS4You: Organizations by Campaigns (Campaign Rel Status)	Summaries Report with Details	Campaigns	Campaigns	Warehouses	
			ITS4You: Contacts by Campaigns (Campaign Rel Status)	Summaries Report with Details	Campaigns	Campaigns	Warehouses	
			ITS4You: Ivoices by Organization - Detail	Summaries Report with Details	Invoice	Invoices	Warehouses	

Picture 4.4: How to create Key Metrics

- 2. Now, you can see list of your KeyMetrics.
 - To edit or delete Widget click on
 - To add Key Metrics Row to show on Widget please click on Name of Widget
 - to add new Widget click on Add Widget

Options Search
/

Picture 4.5: ListView of Key Metrics

3. Click on Add Widget insert Widget name and also you can insert Description and save it.



Picture 4.6: How to create Key Metrics

4. Next step, is adding Key Metrics Row to calculate. Please click on Name of Widget.

Add Widget	
Widget Name	Description
KeyMetrics4You for manual	Test for manual
KeyMetrics4You2	
KeyMetrics4You	

Picture 4.7: How to create Key Metrics

5. Click on Add Key Metrics Row

KeyMetrics4You for manual		
View Name	Created by	Add Key Metrics Row
👯 No Key Metrics Created		

Picture 4.8: How to create Key Metrics

6. Insert

- Label Name
- Report Name you can choose filter or tabular Report
- Column if you choose only filter then you can select only Count of Records. If you choose tabular Report then you can select SUM, AVG, Min, Max from this Report



7. Now, you can repeat step 6 like you need.

 KeyMetrics4You for manual
 Add Key Metrics Row

 View Name
 Created by
 Add Key Metrics Row

 III Invoice - paid invoices
 Image: Created by
 Image: Created by

 Directory 4.0: Llow to supervise Key Metrics
 Image: Created by
 Image: Created by

Picture 4.9: How to create Key Metrics

8. To add Widget on Dashboard visit Home Dashboard, click on Add Widget and find Name of Your Key Metrics.

4.4 Dashboard

How to add Widget on Dashboard?

• Open module which you choose in 'Allow in Modules'(in Dashboard functionality) (Home, Organizations, ...) and click Dashboard on .

A Calendar Leads Organizations Con	taxts Opportunities Products Documents Tickets All -	🖌 🕧 🌣 Warehouses -
🕲 vtiger	All Records	+
Organization List	< Organizations	Add Widget -
Dashboard		
 Recently Modified 		

Picture 4.10: How to add Dashboard

Click on Add Widget
 and choose Name of Report



Picture 4.11: How to add Dashboard

• Now, you can see Widget on Dashboard.



Picture 4.12: Key Metrics on Dashboard

😚 Calendar Leads Organizations	Contacts Opportunities Products Documents Tickets Ali -
⊚vtig∈r [.]	All Records
Organization List	 Organizations
Dashboard	testwithdetails
Recently Modified	Status:
	SUM Total 0 20000 40000 60000 COUNT Records 0 5 10 15 org1 (€) (2) COUNT Records SUM Total

Picture 4.13: Widget on Dashboard

If you choose in Dashboard part Primary search column, then you can this Widget filter from Dashboard by this column.



Picture 4.14: Filter Graph by Primary search column

4.5 Print

There is also option to print your Reports directly from vtiger CRM as well as print end export Charts. Click on Print

Total, I Sheet	t of paper				testw	ithdeta	ils					
	Print Cancel	Module: Sales Order Total: 2 Records										
		Report o	By: Organization	anization Name Ascending								
		Sharing:	Sharing: public				Schedule: None					
Destination	C HE LOUR AT HIS WITH WILL	Limit: Su	mmaries 20 Records	, Details 20 Red	cords	Chart Info: Data Series Organization Name [Horizontal Chart (COUNT Records), Horizontal Chart (SUM Total)]						
	Channel	Columns	mer No, Sales Order									
	Change		es Columns: COUN	Records, SUM	I Total, AVG Total, MI	N Total, MAX T	otal					
	_	Filters: N	ione									
Pages	 All 	Subject	Onnortunity Name	Customer No.	Sales Order Number	Quete Name	Dumbase Order	Contact Name	Total	Organization Nam		
	e.g. 1-5, 8, 11-13				M Total = €51,202.46;AV					Organization Nam		
	e.g. 1-5, 6, 11-15	First Matus			SO1				€2,917.06	org1		
		salesorder			SO2			testwithemail	€25,400	org1		
Copies	1 + -	<u>so</u>			SO3				€2,540	org1		
		TestSO			SO4				€25.4	org1		
		Test-SO-DN-INV			S05				€1,905	org1		
Layout	Portrait 👻	SD-INV-DN2			S07				€15,621	org1		
		testsales			SO8				€254	org1		
Options	Simplify page	<u>SO • VZ</u>			SO9					org1		
			ame = org2 (2): COUNT	Records = 2;SU	M Total = €3,683;AVG T	lotal = €1,841.5;N	IIN Total = €1,841.0	5;MAX Total = €1,8				
	Two-sided	SO-DN-INV SO-DN-INV VZ			S06 S010				€1,841.5 €1,841.5			
	stem dialog (Ctrl+Shift+P)											

Picture 4.15: Print Reports

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:



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

License settings	
Your vtiger url:	
License key:	
	Reactivate license Deactivate license

Picture 5.2: Deactivate Reports 4 You – Step 3

Do you really want to deactivate your license key?	
	No Yes

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 either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

- 1. Click on Activate license button
- 2. Insert license key
- 3. Click on Save

License settings Your vtiger url:	
License key:	
	Activate license

Picture 5.4: Activate license of Reports 4 You – Step 1

License k	y <mark>keykeykeykeykeykeykeykeykeykey</mark>

Picture 5.5: Activate license of Reports 4 You – Step 2,3

5.2 Reactivate license

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

1.	Click on	Reactivate license						
2.	Click on	Finish						
	Delivery Note Rea	ctivate license						
	1 Reactivate license	e 2 Finish						
		Welcome to the Delivery Notes 4 You reactivate license Your URL installation has been changed. To activate the						
		Your Company Information Change Company Information						
		Company Name:						
		Address:	 If the first of the figure gas 					
		City:	august					
		State:	0.1000					
		Country:						
		Postal Code:						
		VAT ID:	0.0101					
		License settings						
		Your vtiger url:	No. No. 1. Specific and the second					
		License key:						
			Reactivate Incense					

Picture 5.6: Reactivate license of Reports 4 You – Step 1



Picture 5.7: Reactivate license of Reports 4 You – Step 2

5.3 Upgrade

The upgrade of the Reports 4 You is initiated in the same way as Reports installation (How to install Reports 4 You) or click on Upgrade link in ListView of Reports (Picture 5.8). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade the notification about successful upgrade is shown (Picture 5.10)and click on or button.

😚 PDF Maker EMAIL Maker 🤅	Cashflow	Preinvoice	Credit Notes 4 You	Reports 4 You	Leads	Organizations	Contacts	Opportunities	Products	Documents	All -			1	🥡 🔅 Administrato
	A	All Records	▼ Type key	vord and press en	ter	Q Adv	anced								
Reports List	•	Actions -	+ Add Report	+ Add Folde	r		All Rep	orts				Y		1 to 50 🖸	< 🗄 🗲 🗡 -
 Settings 		Report	t Name				Report Type		Module	Folder N	ame	Report owner	Description		nse settings
Settings		TEstrep	port				Fabular Repo	rt	Assets	Caja		Susanne Rößler-Garbe	sdögjösdfghj	Upg	rade Reports 4 You
		Recent	ly Modified Contacts				Fabular Repo	rt	Contacts	Contacts		Susanne Rößler-Garbe	A test to see how t	o generate a re	port of recently modified co

Picture 5.8: Upgrade of Reports 4 You

t Module from Zip Disclaimer - Custom Files could put your CRM at risk This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Viger. I accept with disclaimer and would like to proceed Chooses File I inport Cancel			
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtger.	port Module from Zip		
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtger.			
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtger.			
This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include security vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtger.			
	This functionality has been made	e available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include sec	urity
Choose File Cancel	I accept with disclaimer and wo	uld like to proceed	
	Choose File		port Cancel

Picture 5.9: Upgrade of Reports 4 You

Import Successfull	×
module was imported successfully.	
	ОК

Picture 5.10: Upgrade of Reports 4 You

6 Tips

6.1 Show converted Leads

As you may know, converted Leads are no more shown in your vtiger CRM. But for lot of customer it is important to see these Leads.

With Reports 4 You you have option to show these Leads or no. It is really up to you.

Since **6xx.9.2** version is default filter for Leads module "Converted not equals to Yes" it means that Reports4you show records diplayed in your vtiger CRM (only not converted Leads) but when you change it to No then you will see converted leads and if you remove this filter you will see all Leads (Converted and Not Converted).

A Calendar Leads Organization	s Contacts Opportunit	ies Products Documen	ts Tickets All -					🗞 💼 🗸	Ø Ø Mojtest
🛇 vtiger [.]	Quick Search	• Type keyword a	ind press enter Q	Q Advanced					-
Leads List	< Actions	- + Add Lead		¥ All Leads		¥		1 to 1 🕽 🔍	₽ > ≁ -
Dashboard	A	B C D	E F G	н і ј)	L M N	O P Q	R S T	U V W X	Y Z
 Recently Modified 		First Name	Last Name	Company	Primary Phone	Website	Primary Email	Assigned To	
									Search
	0		Lead2					Mojtest vtiger650	

Picture 6.1: One Lead displayed in your CRM (not converted)

Filters	
Converted v not equal to	• X YES
Add Condition	
Add Group	
	Generate Now Save
	test
Module: Leads	Total: 1 Records
Report owner: Mojtest vtiger650	Group By: None
Sharing: public	Schedule: None
Limit: 20 Records	Chart Info: (No charts available)
Columns: First Name, Lead Number, Last Name, Converted	
Summaries Columns: None	
Filters: (Converted equals)	
	First Name Lead Number Last Name Converted . LEA2 Lead 2 Not Converted

Picture 6.2: Report of not converted Leads

Converted	v not equal to	v No.	<i>م</i> د
Add Condition			
Add Group			
		Generate Now Save	
		test	
Module: Leads		Total: 1 Records	
Report owner: Mojtest vtiger650		Group By: None	
Sharing: public		Schedule: None	
Limit: 20 Records		Chart Info: (No charts available)	
Columns: First Name, Lead Number, Last Name, Converted			
Summaries Columns: None			
Filters: (Converted not equals to 0)			
		First Name Lead Number Last Name Converted	
		First Name Lead Number Last Name Converted	

Picture 6.3: Report of converted Leads

Filters Add Group	
	Generate Now Save
	test
Module: Leads	Total: 2 Records
Report owner: Mojtest vtiger650	Group By: None
Sharing: public	Schedule: None
Limit: 20 Records	Chart Info: (No charts available)
Columns: First Name, Lead Number, Last Name, Converted	
Summaries Columns: None	
Filters: None	
	First Name Lead Number Last Name Converted

Picture 1: Report of all Leads

Change log of Reports 4 You

- February 2017: 6xx.9.2
 - \circ $\;$ Leads Module auto definition condition of "Converted not equals to Yes" $\;$
 - Automatic identification of inventory modules
 - fr_fr translation Added (thanks to Guillaume Hilt [BJ Sécurité www.bjsecurite.fr])
 - bug fixes
- January 2017: 6xx.9.0 6xx.9.1
 - Query generation time updated
 - option to search recipients for scheduling
- December 2016: 6xx.8.5 6xx.8.8
 - bug fixes
- October 2016: 6xx.8.3 6xx.8.4
 - Report Edit View design update longer fields Report Name, Sort By Columns
 - bug fixes
- September 2016: 6xx.8.1 6xx.8.2
 - Sort by Probability percentage
 - Percentage Stacked Charts format Update
 - bug fixes
- August 2016 6xx.8.0
 - Stacked Charts
- July 2016: 6xx.7.0 6xx.7.3
 - Total Tax Amount column for Reports
 - Date conditions interval missing first date records -fix
 - Dashboard search fix
- June 2016: 6xx.6.6 6xx.6.7
 - bug fixes
 - Daily scheduling fixes
 - Compare fields Filters enhancement
- May 2016: 6xx.6.4 6xx.6.5
 - Filters Redesign
 - Custom calculated columns
 - Sort by More then One Column
 - UI10 fields like hyperlink to Record Details
 - Link to Report Detail in Scheduled Emails
 - minor improvements
 - bug fixes

- April 2016: 6xx.6.3
 - Scheduling Enhancement
 - Option to add other mails
 - generate for option
 - Generate Without limit
 - Subject of Email
 - Text of Email
 - Hyperlink to Records from Reports
- March 2016: 6xx.6.0 6xx.6.2
 - KeyMetrics functionality
 - Widget Search Primary Column
 - php 7 compatibility
 - minor improvements
 - $^{\circ}$ bug fixes
- December 2015: 6xx.5.0 6xx.5.2
 - N Days Filters Enhancement
 - minor improvements
 - bug fixes
- November 2015: 6xx.4.0 6xx.4.7
 - Custom Reports
 - ListView Search
 - minor improvements
 - $^{\circ}$ bug fixes
- May July 2015: 6xx.2.2 6xx.3.1
 - minor improvements
 - bug fixes
- April 2015: 6xx.2.1

Change log of Manual for Reports 4 You

- February 2017: manual based on Reports 4 You version: 6xx.9.2
 - updated chapters: Select Columns Calculations Filters Scheduler Graphs
 - new chapters: 6.1 Show converted Leads
- April 2016: manual based on Reports 4 You version: 6xx.6.3
 - updated chapters: Scheduler
- March 2016: manual based on Reports 4 You version: 6xx.6.2
 - new chapters: Dashboard, 4.3 Key Metrics, 4.5 Print
 - updated chapters: Types of Reports
- April 2015: manual based on Reports 4 You version: 6xx.2.1
 - first initiate version for vTiger 6.2