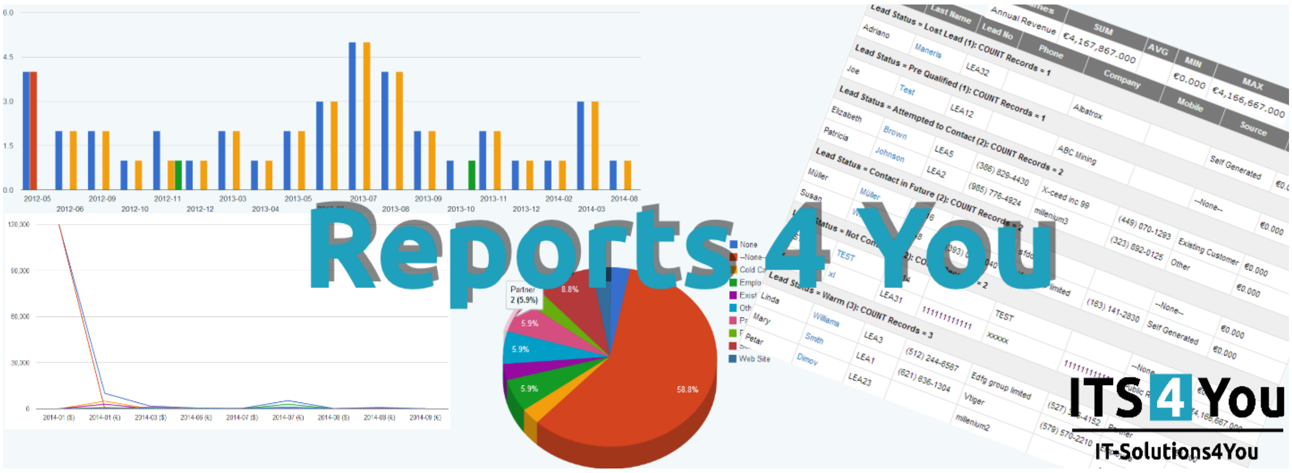
ITS 4 You

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

Content

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.
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- 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

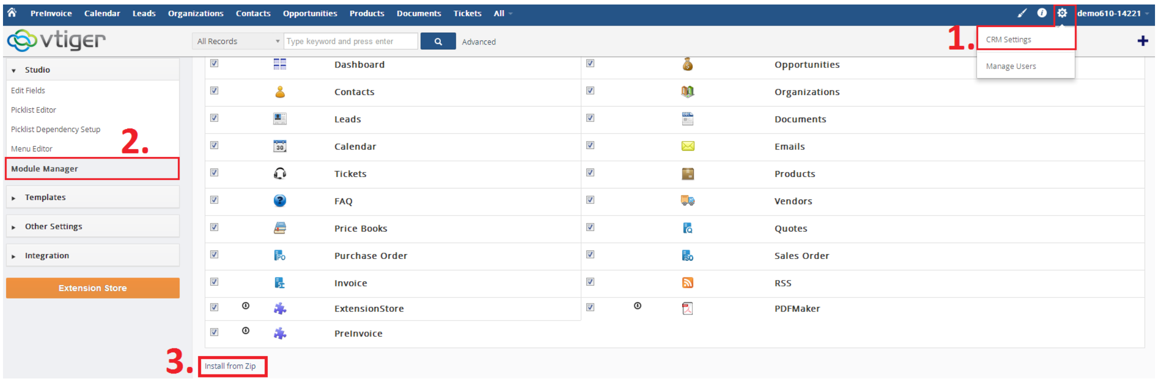
During installation it is necessary to exchange following information:

- 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

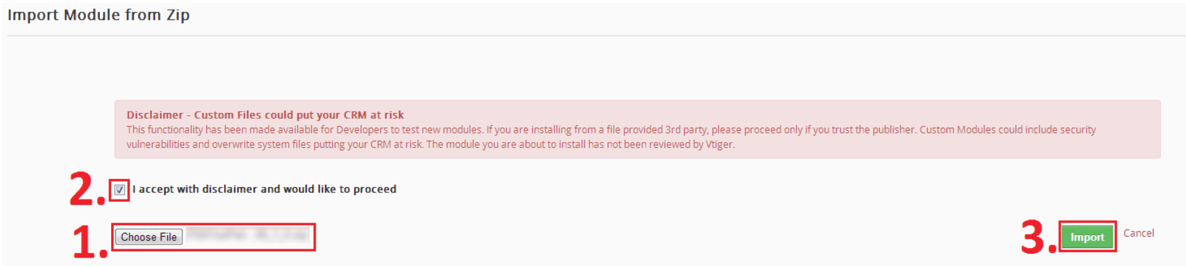
Please provide following steps in order to install Reports 4 You:

1. Install the .zip (package) file of the Reports 4 you module via **CRM Settings -> Module Manager**. Click on the **Install from Zip** .



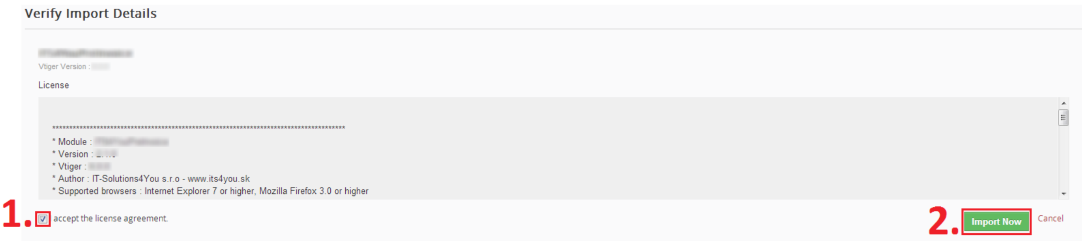
Picture 1.1: Installation of Reports 4 You – Step 1

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.



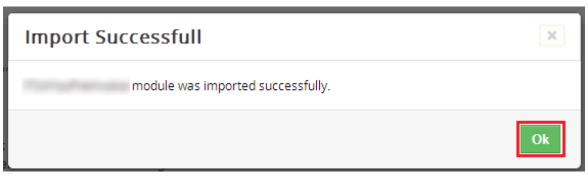
Picture 1.2: Installation of Reports 4 You – Step 2

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.



Picture 1.3: Installation of Reports 4 You – Step 3

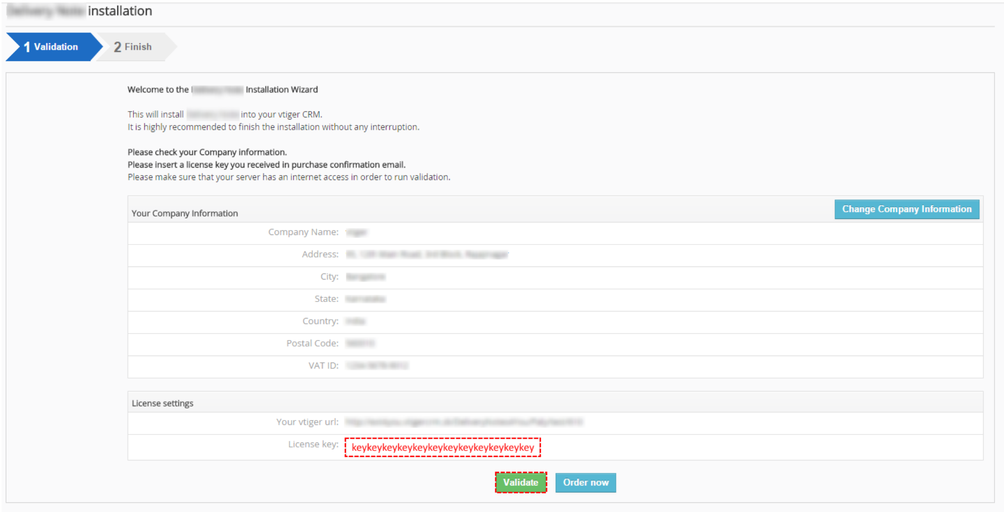
4. Click on Ok button to complete the module import.



Picture 1.4: Installation of Reports 4 You – Step 4

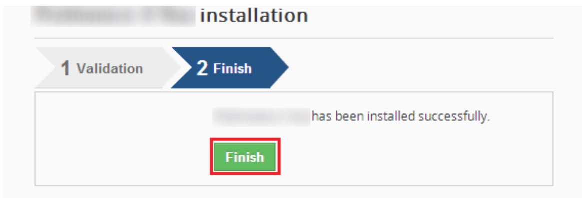
In order to finish installation, please provide following validation steps:

1. Reports 4 You Validation Step. Please 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.



Picture 1.5: Validation of Reports 4 You – Step 1

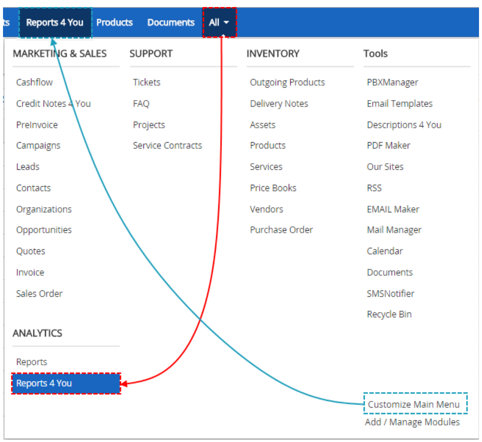
2. Click on **Finish** to complete Validation.



Picture 1.6: Validation of Reports 4 You – Step 2

For Upgrade please check 5.3 Upgrade.

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

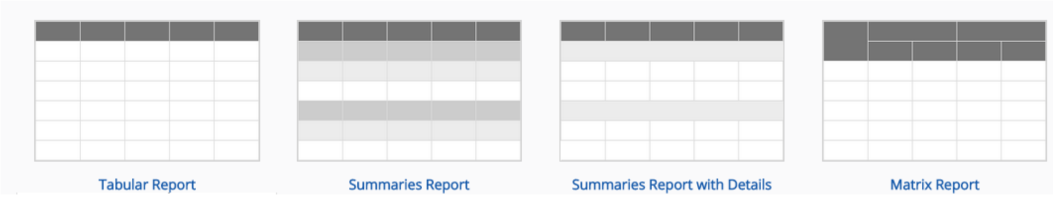


Picture 1.7: Start Reports 4 You

2 How to create Reports 4 You

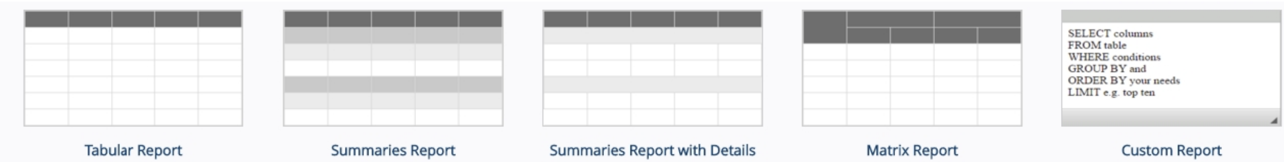
Types of Reports

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



Picture 2.1: Types of Reports (standard user)

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
Report owner: Administrator
Sharing: public
Limit: All records
Module: Invoice
Group By: None
Schedule: None
Chart Info: *(No charts available)*

Subject	Sales Order	Invoice No	Contact Name	Invoice Date	Status	Assigned To
INV to SO 2	-	INV1	-	--	Created	[illegible]
INV 2	-	INV2	-	--	Created	[illegible]
INV 3	-	INV3	-	15-04-2015	Created	[illegible]
Jay Smith Invoice	-	INV9	-	--	Created	[illegible]
pre inv to SO 2	-	INV11	-	--	Cancel	[illegible]
SO 2	SO 2	INV13	-	--	-	[illegible]
J&J Touchscreen Replacement	-	INV15	-	18-03-2015	Created	[illegible]
asd	-	INV16	-	--	-	[illegible]
testdan	-	INV18	-	--	-	[illegible]
SO 8test	SO 8	INV20	-	--	-	[illegible]
DN0001	civera	INV21	-	--	-	[illegible]
SO 2	-	INV25	-	15-04-2015	Created	[illegible]
Quote A8 02	-	INV27	-	--	-	[illegible]
Test	SO 2	INV28	-	--	-	[illegible]
Invoice MM Training	-	INV30	Ashish Goyal	25-04-2015	-	[illegible]
testpictures	-	INV33	-	--	-	[illegible]
moj test invoice	-	INV34	-	--	-	[illegible]
jnmmnmn	jnmmnmn	INV36	-	--	-	[illegible]
Test	-	INV37	dominik nowak	--	-	[illegible]
1 INV for payment a	1 SO –> 3 payments (a,b,c)	INV38	-	--	-	[illegible]
INV from 1 SO –> 3 payments (a,b,c) second	1 SO –> 3 payments (a,b,c) second	INV39	-	--	-	[illegible]
thdrftudgyikdf	-	INV40	-	--	-	[illegible]
sys_bab	-	INV42	-	29-05-2015	Sent	[illegible]

Picture 2.4: Tabular Report

2. **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 -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).

Columns: None

Summaries Columns: COUNT Records, SUM Total, AVG Total, MIN Quantity, MAX Quantity

Filters: None

Total: 5 Records

Module: Invoice

Report owner: Administrator

Group By: Status Ascending

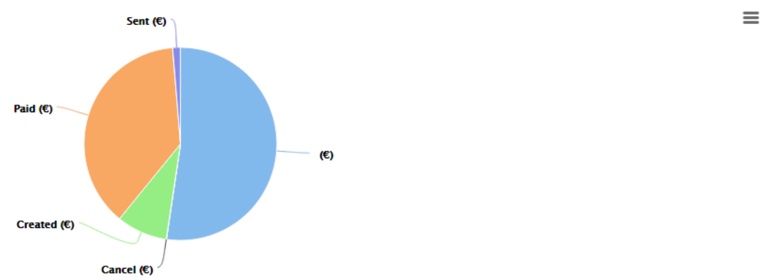
Sharing: public

Schedule: None

Limit: Summaries 20 Records

Chart Info: Data Series Status [Pie Chart (SUM Total)]

Status	COUNT Records	SUM Total	AVG Total	MIN Quantity	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**

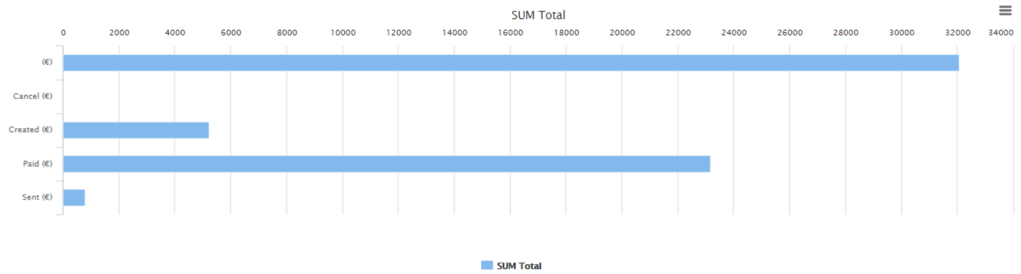


Picture 2.6: Summaries Report grouped by one row

- 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
Summaries Columns: COUNT Records, SUM Total, AVG Total, MIN Quantity, MAX Quantity
Filters: None
Total: 5 Records
Report owner: Administrator
Sharing: public
Limit: Summaries 20 Records
Module: Invoice
Group By: Status Ascending, Customer No Ascending
Schedule: None
Chart Info: Data Series Status [Horizontal Chart (SUM Total)]

Status, Customer No	COUNT Records	SUM Total	AVG Total	MIN Quantity	MAX Quantity
-	25	€32,063.67	€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	6	€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	16	€21,899.63	€1,368.73	1.00	45.00
1FullD	1	€1,270.00	€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**



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, AVG Total, MIN Quantity, MAX Quantity
Filters: None
Total: 5 Records
Report owner: Administrator
Sharing: public
Limit: Summaries 20 Records
Module: Invoice
Group By: Status Ascending, Contact Name Ascending, Invoice Date Ascending by Days
Schedule: None
Chart Info: *(No charts available)*

Status, Contact Name, Invoice Date	COUNT Records	SUM Total	AVG Total	MIN Quantity	MAX Quantity
-	25	€32,063.67	€1,282.55	1.00	10.00
0.000	23	€31,804.57	€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 v	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	€127.00	1.00	1.00
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**

Picture 2.8: Summaries Report grouped by three row

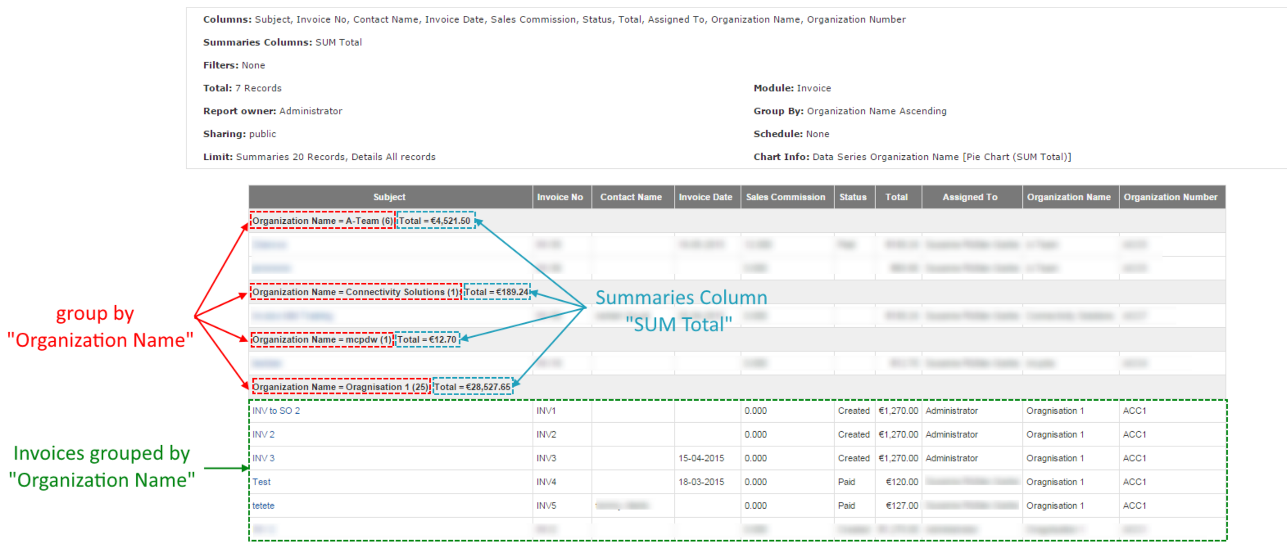
3. **Summaries Report with Details –** Summaries report with Details is intended to use when performing data calculations grouped by one selected column with displayed record details. You can define calculations for all report datas and define limited/unlimited count of displayed record details.

First Name	Last Name	Lead Number	Primary Phone	Mobile	Company	Lead Source	Annual Revenue
Lead Source = Cold Call (1): COUNT Records = 1							
	L3	LEA3				Cold Call	€60.00
Lead Source = Existing Customer (1): COUNT Records = 1							
	L2	LEA2				Existing Customer	€40.00
Lead Source = Employee (2): COUNT Records = 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

4. **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	Cold Call		Existing Customer		Totals	
	COUNT Records	SUM Annual Revenue	COUNT Records	SUM Annual Revenue	COUNT Records	SUM Annual Revenue
BV	1	€60.00	1	€40.00	2	€100.00
Totals	**1**	**€60.00**	**1**	**€40.00**	**2**	**€100.00**

Picture 2.11: Matrix Report

Example:

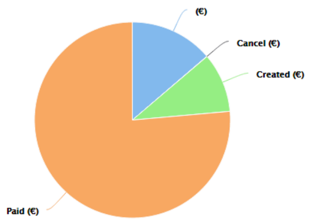
Report is grouped by row: Status and column: Organization Name. With filter: Paid Amount is greater than 0.

Columns: None *(Not available for this report!)*
Summaries Columns: SUM Total, AVG Total, SUM Paid Amount, SUM Received, SUM Balance
Filters: (Paid Amount greater than 0)
Total: 4 Records
Report owner: Administrator
Sharing: public
Limit: Summaries 20 Records

Module: Invoice
Group By: Status Ascending, Organization Name Ascending
Schedule: None
Chart Info: Data Series Status [Pie Chart (SUM Total)]

Status, Organization Name	Oragnisation 1					A-Team				
	SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance	SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance
- (€)	€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
Cancel (€)	€12.70	€12.70	€4.30	€4.30	€8.40					
Created (€)	€2,679.70	€669.93	€1,531.70	€1,531.70	€1,148.00					
Paid (€)	€12,367.00	€1,374.11	€28,489.30	€28,489.30	€234.00	€189.24	€189.24	€189.24	€189.24	€0.00
Totals	**€18,532.85**		**€32,165.30**	**€32,165.30**	**€4,291.45**	**€468.64**		**€328.96**	**€328.96**	**€139.68**

Status, Organization Name	Totals				
	SUM Total	AVG Total	SUM Paid Amount	SUM Received	SUM Balance
- (€)	€3,752.85	€938.21	€2,279.72	€2,279.72	€3,040.73
Cancel (€)	€12.70	€12.70	€4.30	€4.30	€8.40
Created (€)	€2,679.70	€669.93	€1,531.70	€1,531.70	€1,148.00
Paid (€)	€20,878.55	€1,606.04	€37,746.85	€37,746.85	€234.00
Totals	**€27,323.80**		**€41,562.57**	**€41,562.57**	**€4,431.13**



Picture 2.12: Matrix Report

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
 [illegible] AS [illegible] ,
                                        COUNT ([illegible]) AS [illegible],
                                        SUM [illegible] AS [illegible],
                                        MIN [illegible] AS [illegible],
                                        COUNT( [illegible] AS [illegible]

FROM [illegible]
INNER JOIN [illegible] ON [illegible] AND [illegible]
LEFT JOIN [illegible] AS [illegible] ON [illegible]
 LEFT JOIN [illegible] AS [illegible] ON [illegible]
LEFT JOIN [illegible] AS [illegible] ON [illegible]
LEFT JOIN [illegible] AS [illegible] ON [illegible] AND [illegible]
    GROUP BY [illegible]
    ORDER BY [illegible]
    ASC
    LIMIT 20
```

Picture 2.13: SQL query of Custom Report

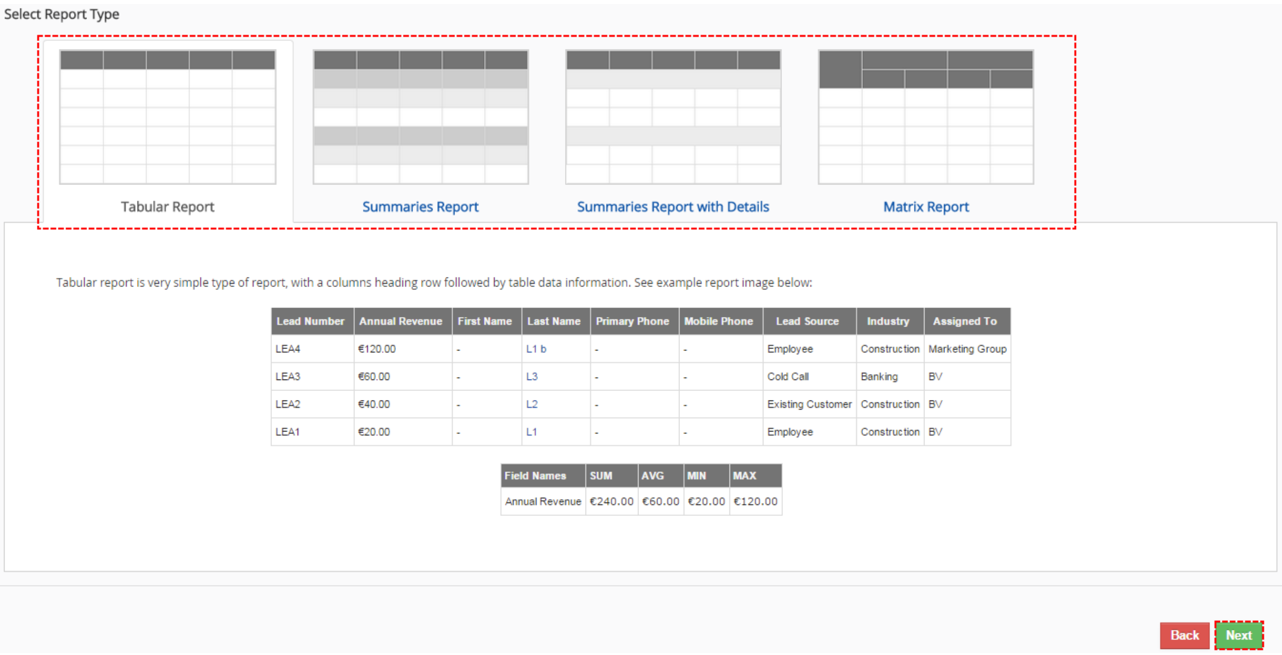
2.1 Creating Report

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.

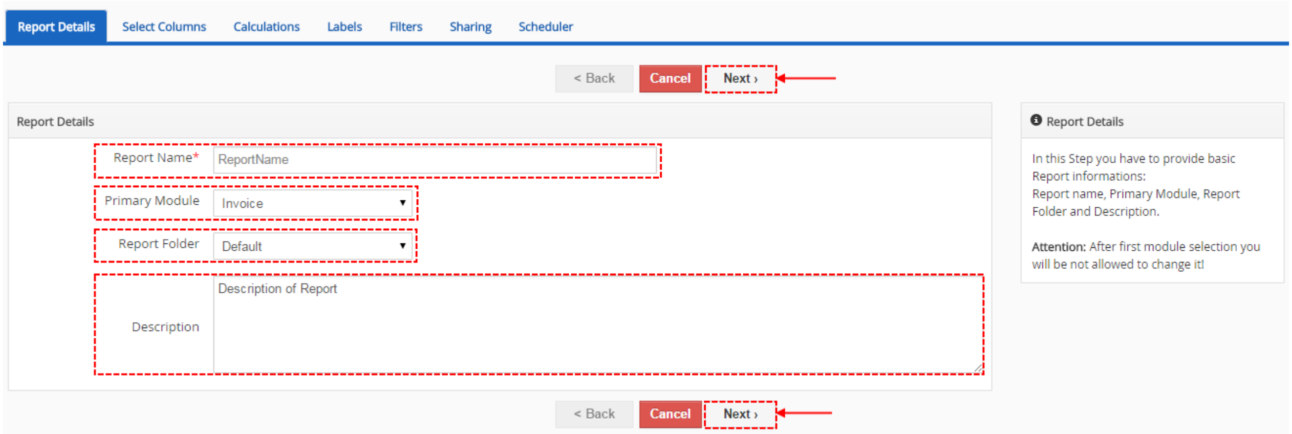


Picture 2.14: Select Report Type

Report Details

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

button.



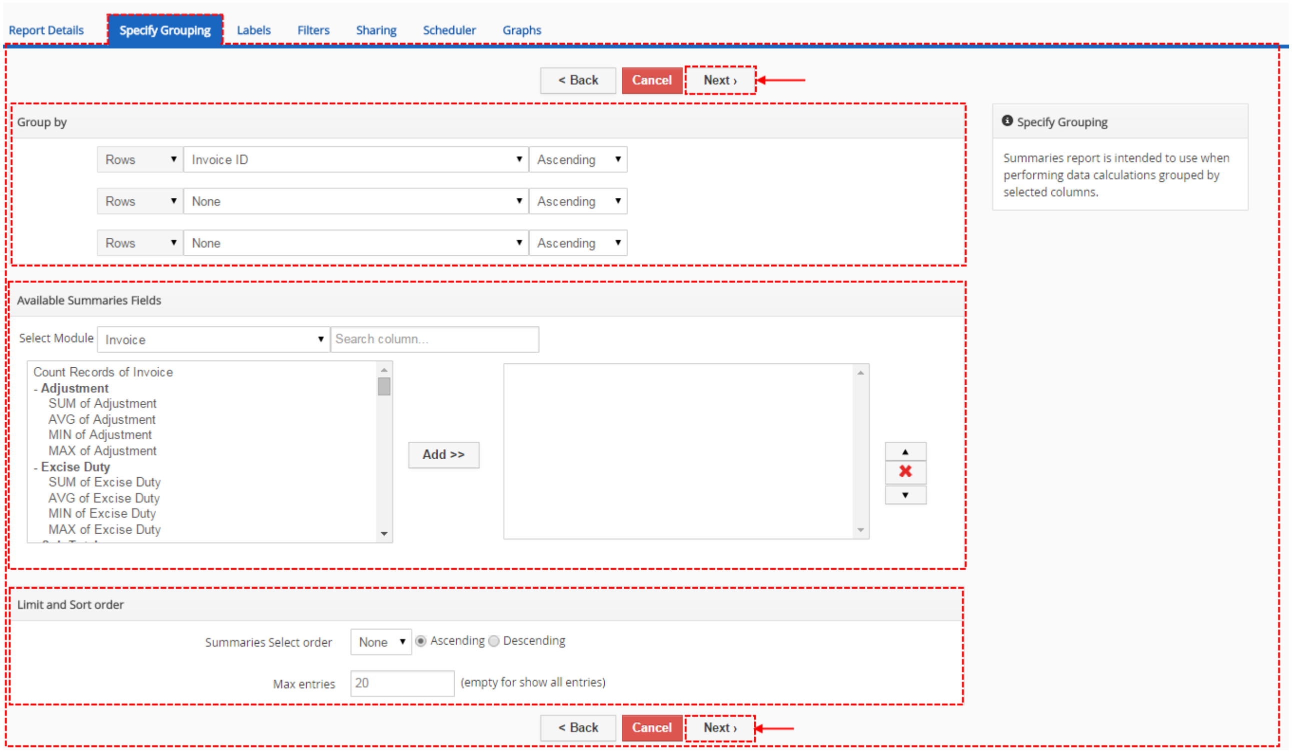
Picture 2.15: Report Details

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

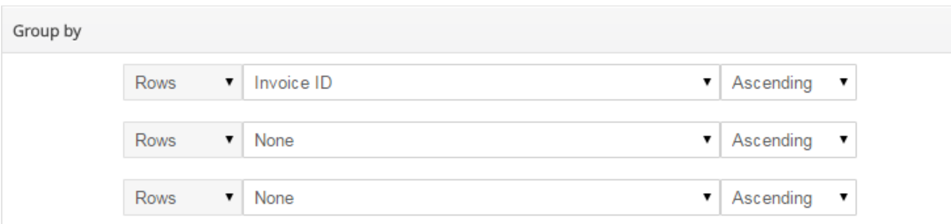
Specify Grouping

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.

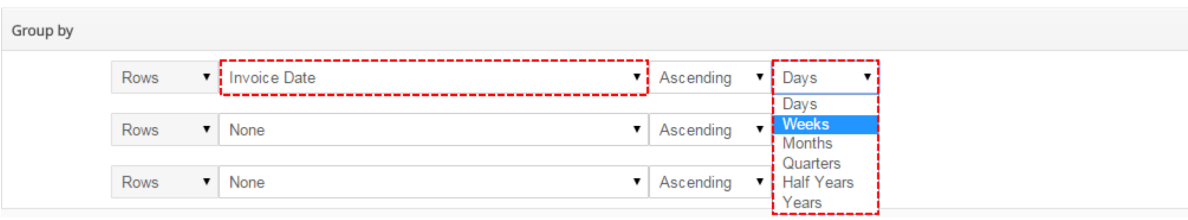


Picture 2.16: Specify Grouping

- **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).



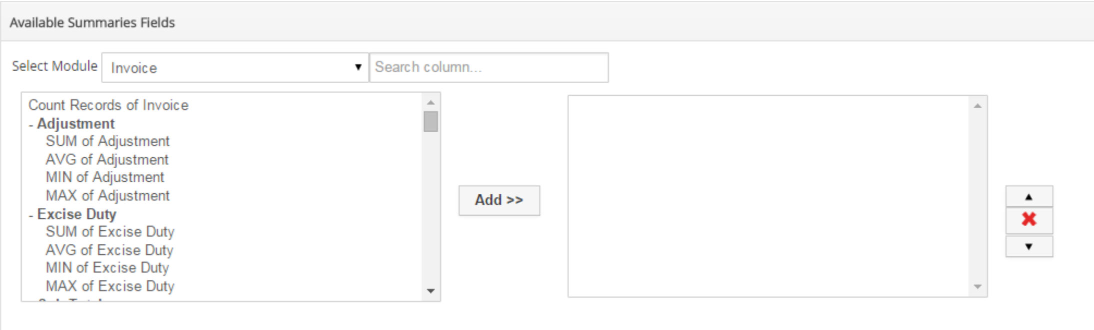
Picture 2.17: Group by



Picture 2.18: Group by date intervals

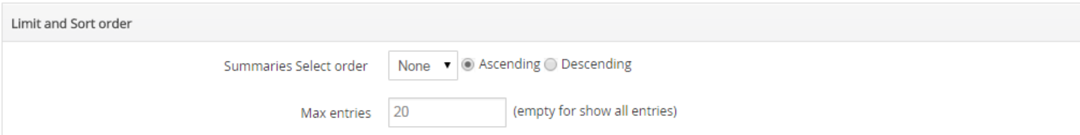
Here is also good option to choose date and group by date based on days, weeks, months, quarters, half years and years.

- **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



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.

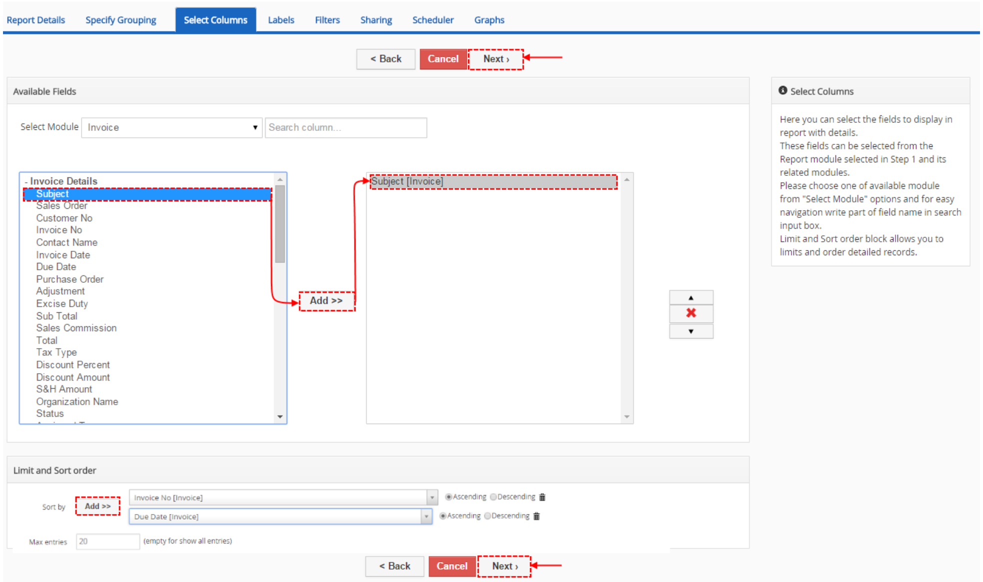
Subject	Sales Order	Customer No	Invoice No	Contact Name	Invoice Date	Due Date	Purchase Order
Status = (15): Total = €12,846.25; Total = €856.42							
SO 2	SO 2		INV13				
asd			INV16				
testdan			INV18			30-04-2015	
SO 8test	SO 8		INV20				
DN0001	civera		INV21				
Quote A8 02			INV27				
Test	SO 2		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; Total = €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

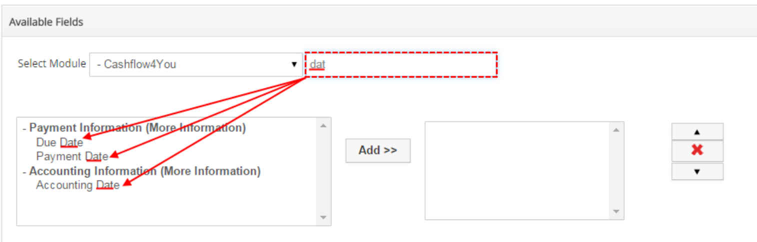
In this step, you can select the fields to display in report with details. These fields can be selected from the Report module selected in Step 1 and its related modules. Please choose one of available module from "Select Module" options and for easy navigation write part of field name in search input 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.**



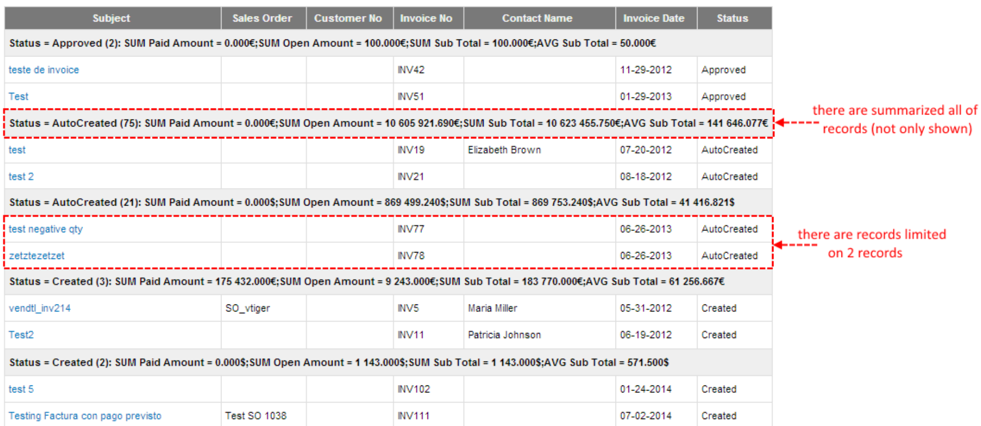
Picture 2.22: Select Columns

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



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)

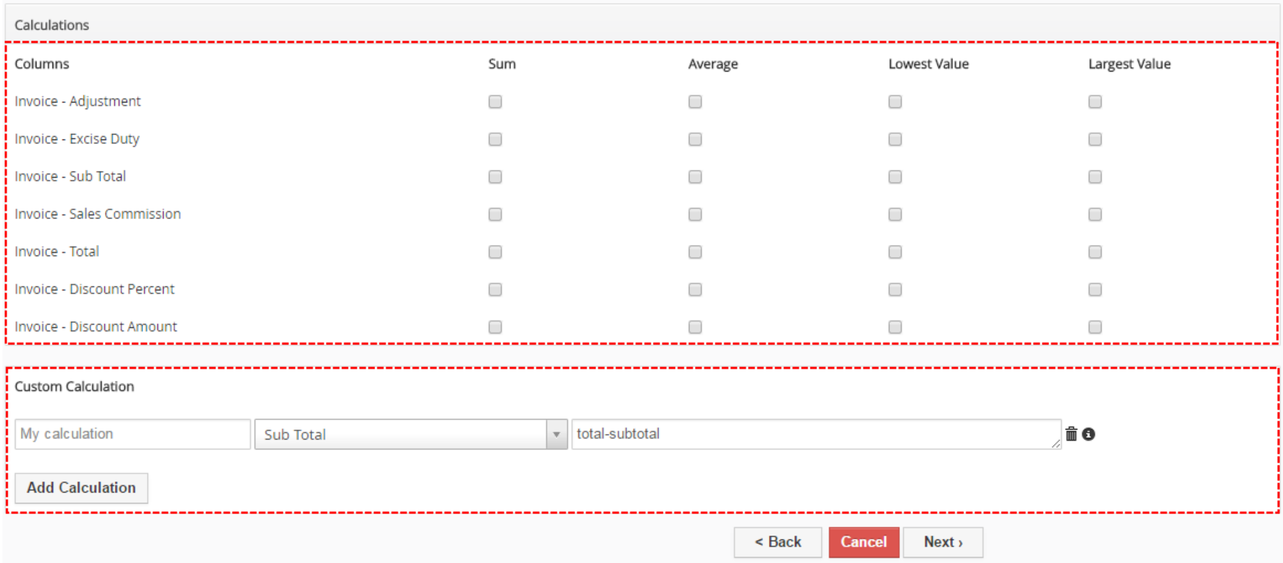


Subject	Sales Order	Customer No	Invoice No	Contact Name	Invoice Date	Status
Status = Approved (2): SUM Paid Amount = 0.000€;SUM Open Amount = 100.000€;SUM Sub Total = 100.000€;AVG Sub Total = 50.000€						
teste de invoice			INV42		11-29-2012	Approved
Test			INV51		01-29-2013	Approved
Status = AutoCreated (75): SUM Paid Amount = 0.000€;SUM Open Amount = 10 605 921.690€;SUM Sub Total = 10 623 455.750€;AVG Sub Total = 141 646.077€						
test			INV19	Elizabeth Brown	07-20-2012	AutoCreated
test 2			INV21		08-18-2012	AutoCreated
Status = AutoCreated (21): SUM Paid Amount = 0.000$;SUM Open Amount = 869 499.240$;SUM Sub Total = 869 753.240$;AVG Sub Total = 41 416.821$						
test negative qty			INV77		06-26-2013	AutoCreated
zetztezetzet			INV78		06-26-2013	AutoCreated
Status = Created (3): SUM Paid Amount = 175 432.000€;SUM Open Amount = 9 243.000€;SUM Sub Total = 183 770.000€;AVG Sub Total = 61 256.667€						
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$;SUM Open Amount = 1 143.000$;SUM Sub Total = 1 143.000$;AVG Sub Total = 571.500$						
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.



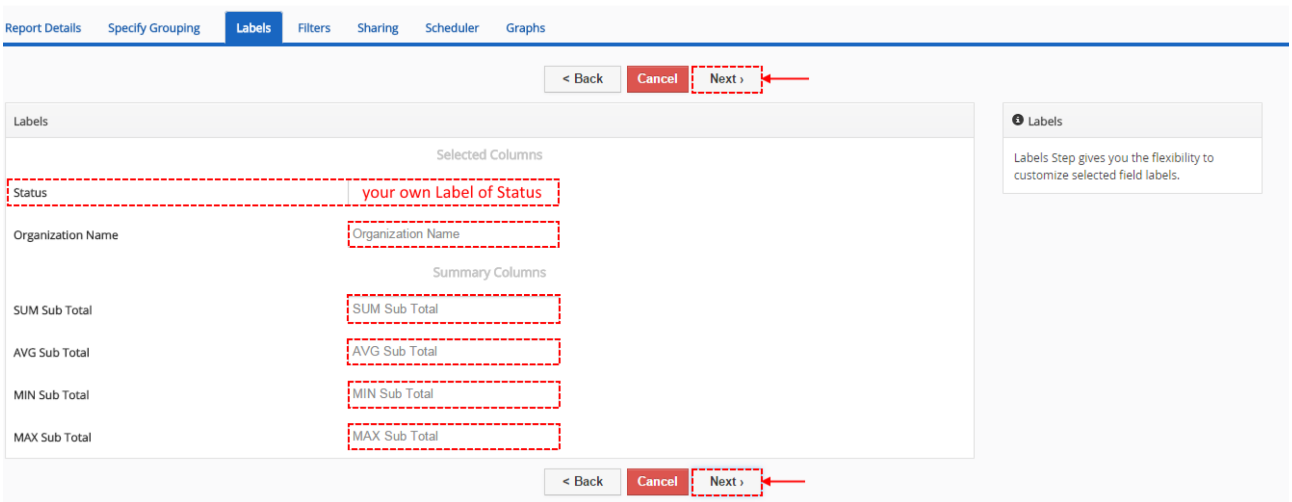
Picture 2.25: Calculations in Tabular Reports

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(... , ...)

Labels

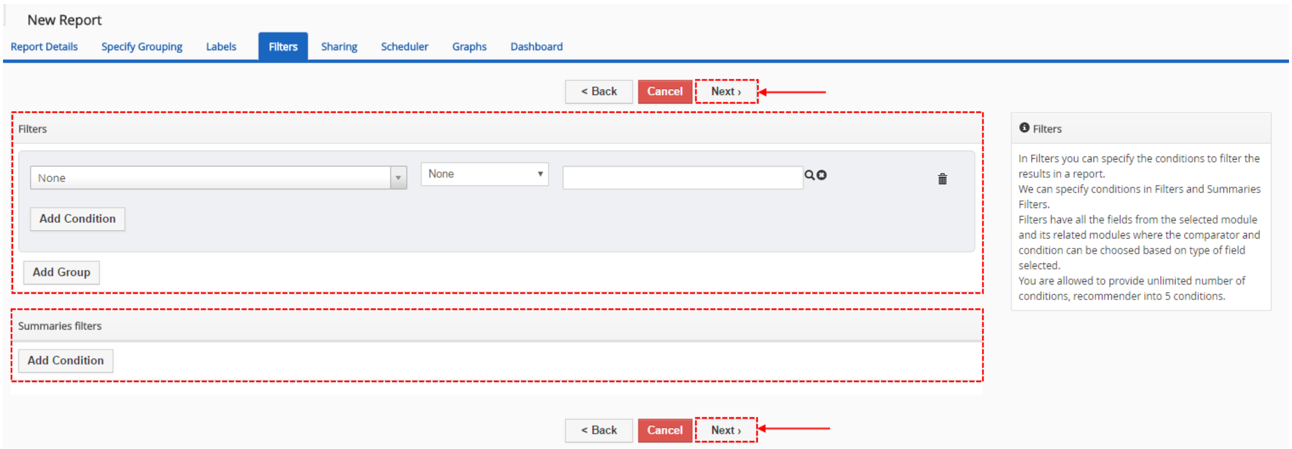
This step gives you the flexibility to customize selected field labels. You can rename Selected Columns how you want.



Picture 2.26: Labels

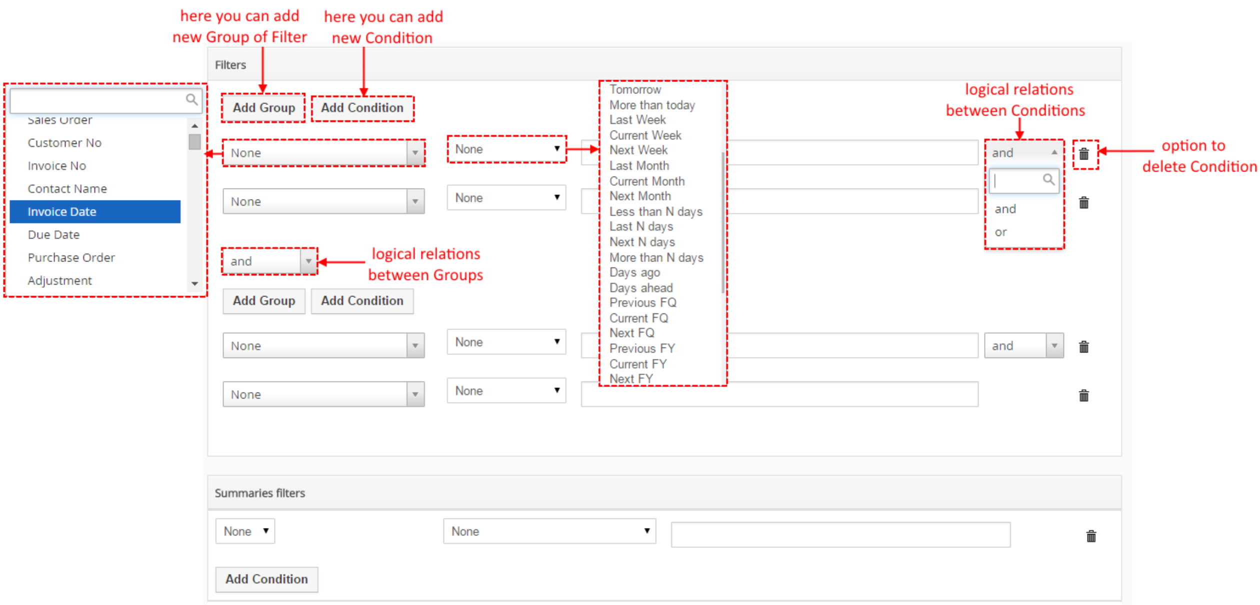
Filters

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.



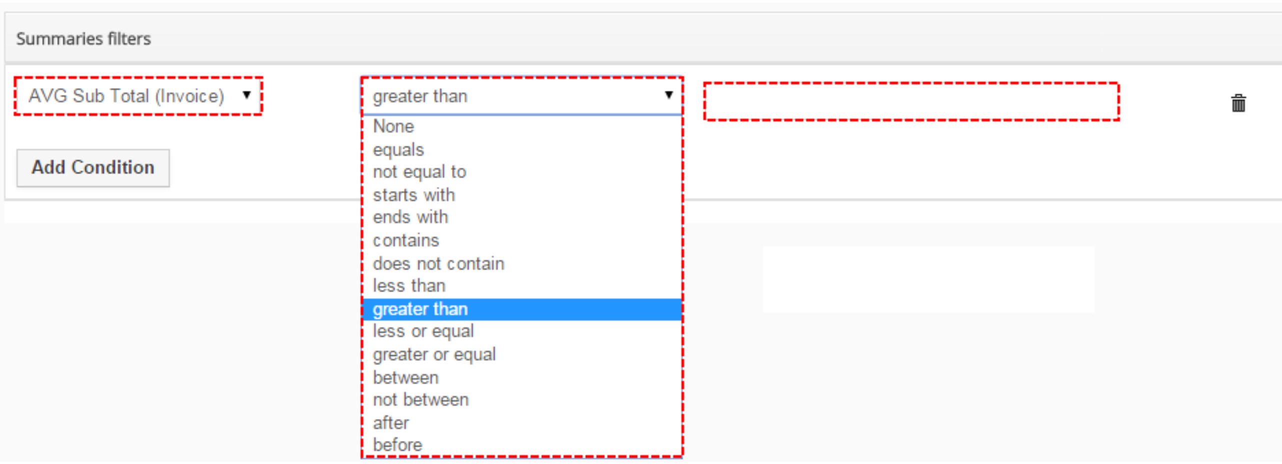
Picture 2.27: Filters

- **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)



Picture 2.28: Filters

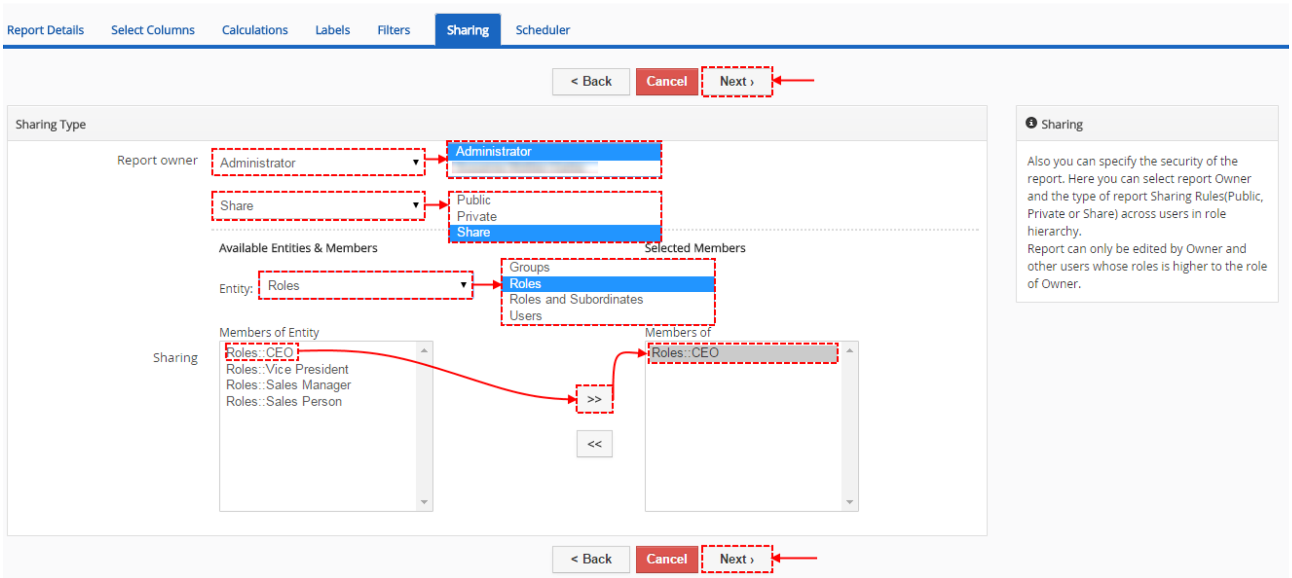
- **Summaries filters** – powerful option to create Filters from Summaries fields



Picture 2.29: Summaries Filters

Sharing

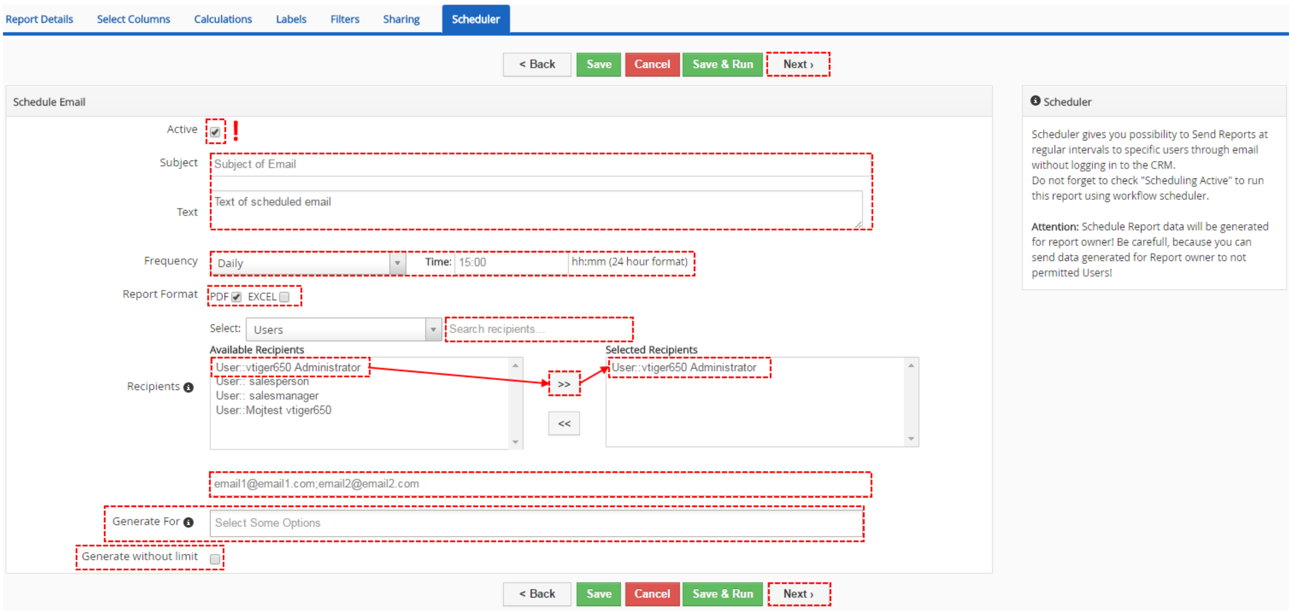
In Sharing part, you can specify the security of the report. Here you can select report Owner and the type of report Sharing Rules (Public, Private or Share) across users in role hierarchy. Report can only be edited by Owner and other users whose roles is higher to the role of Owner.



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!



Picture 2.31: Scheduler

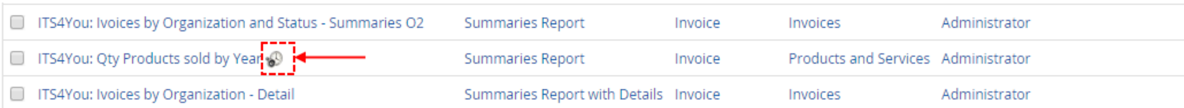
Name	Description
Subject	Subject of Scheduled Email (Auto-generated if empty)
Text	Text (Body) of Email
Frequency	Frequency of Email sending
Time	Time of sending Email
Report Format	Format of included File
Select	Here you can choose who want to send mail to. (Users, Groups, Roles, Roles and Subordinates) (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

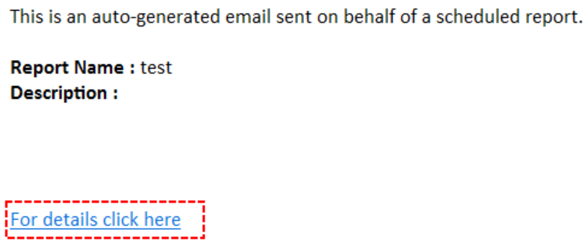
When you choose Recipients/Other Emails, all Users receive the same Reports like Reports Owner based on his privileges(e.g. 1 Email to 20 Users) . If you choose Generate For, then Reports 4 You send for each User particular Report based on User Field you choose (e.g. 20 Emails to 20 Users).

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



Picture 2.32: ListView of Report 4 You with Scheduler

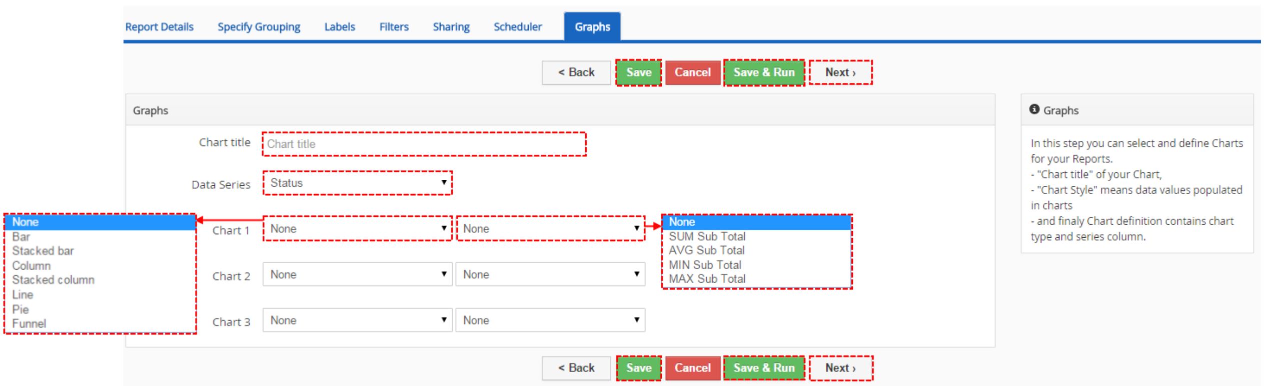
Since **6xx.6.4** version is included in email Link to Report Detail.



Picture 2.33: Link to Report Detail

Graphs

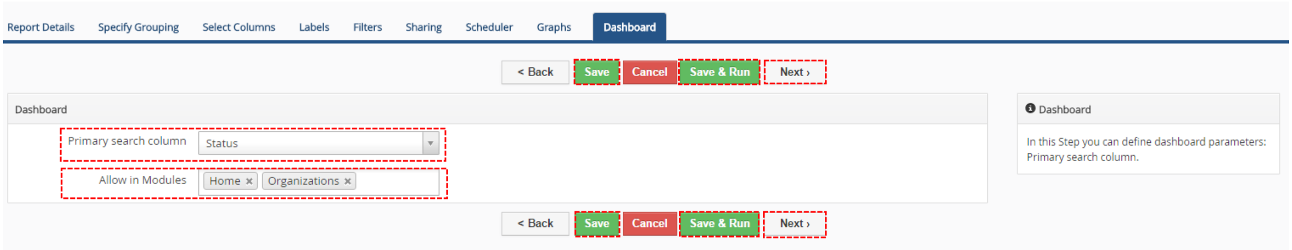
Here, you can define Charts for every Report that is having a "Group by" definition and "Summaries columns". Data series is using Summaries columns values so you can define which one you want to used in charts. Additionally you can define Chart title which is used in output files. You are able to create up to 3 Charts. Here you can choose Chart type, Data Series and Chart title.



Picture 2.34: Graphs

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.



Picture 2.35: Dashboard

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

More about Dashboard you can find: **4.4 Dashboard**

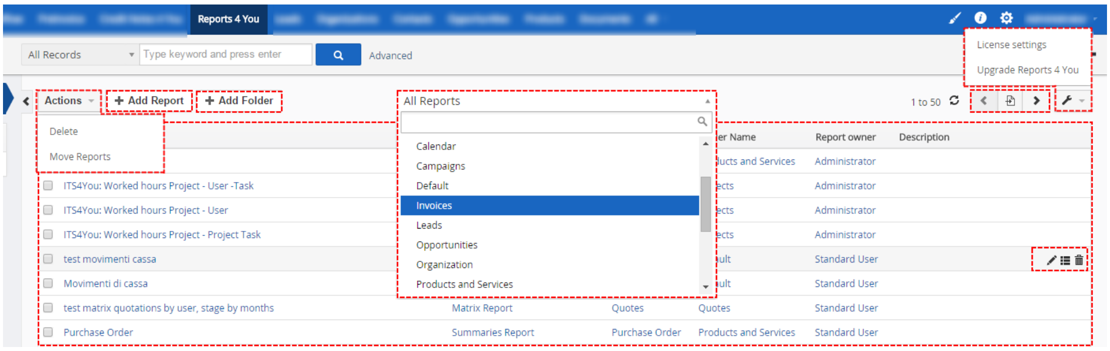
3 Work area

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



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:

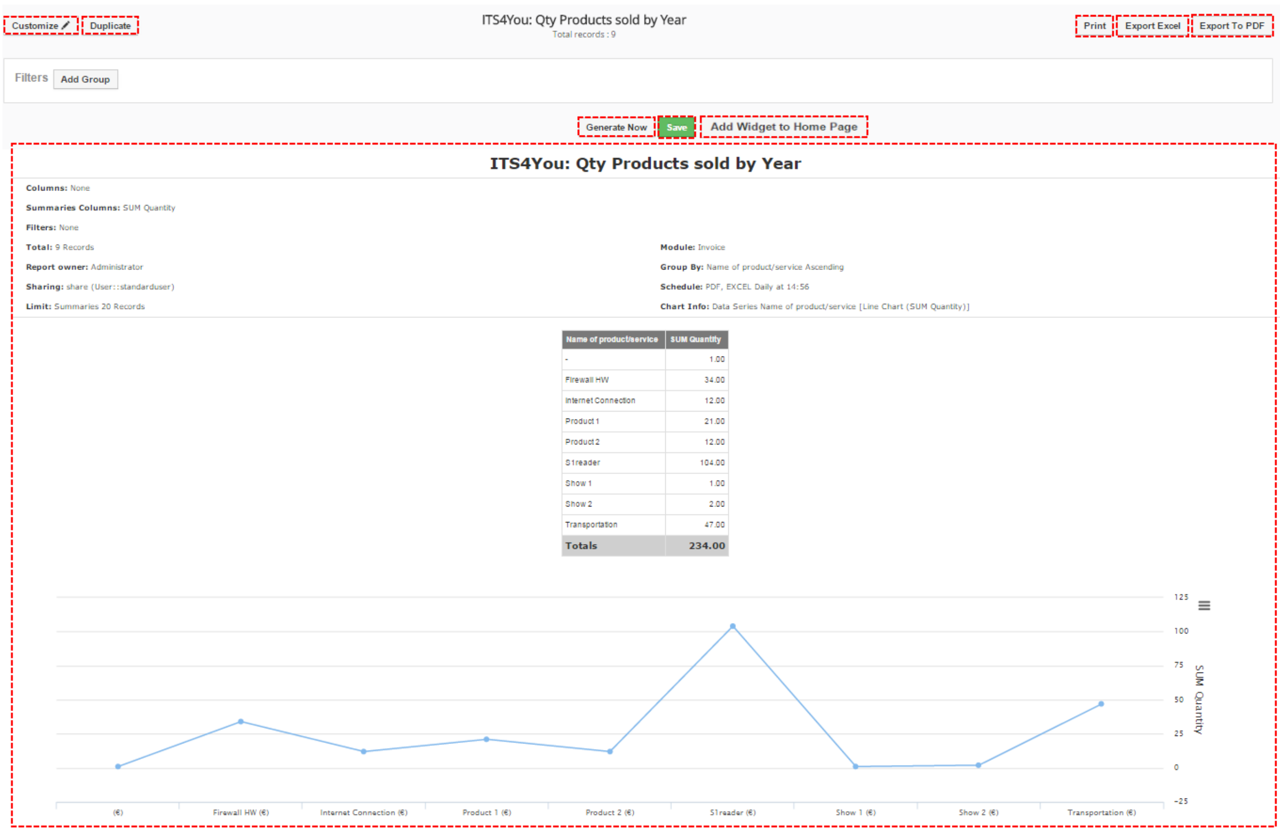
ListView of Reports 4 You consists of:

- 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
- – next/previous page of Reports
- – is used for License setting and Upgrade option
- – 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)

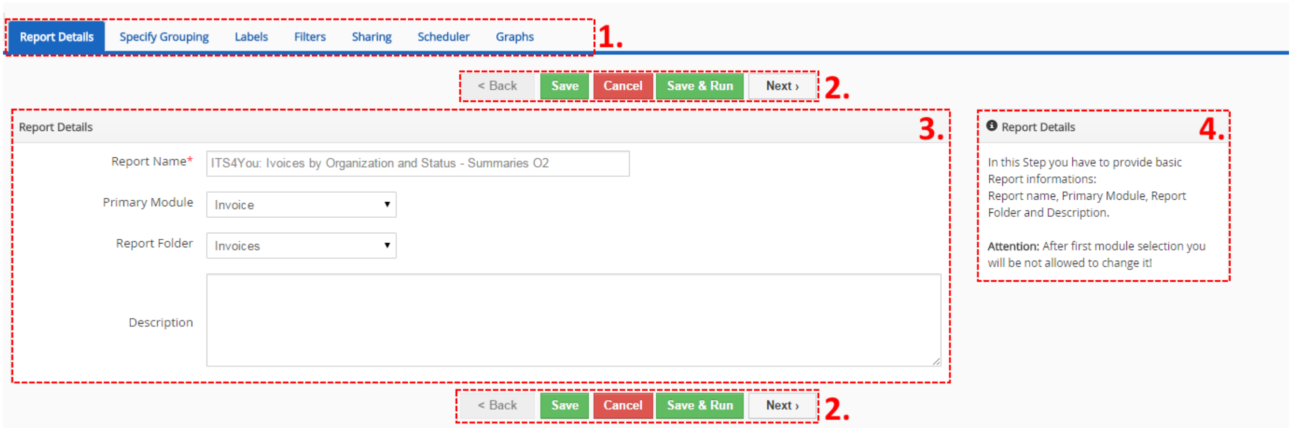


Picture 3.2: DetailView

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



Picture 3.3: EditView of Reports 4 You

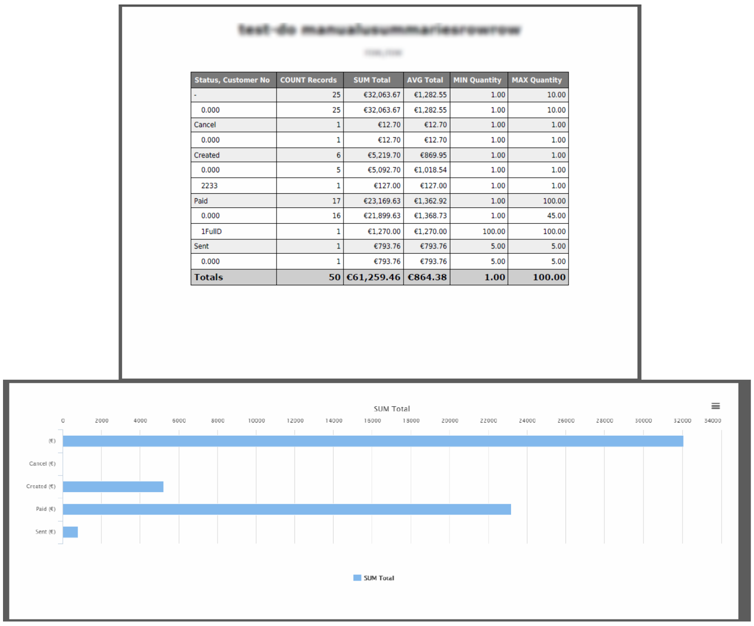
4 Additional feature

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:

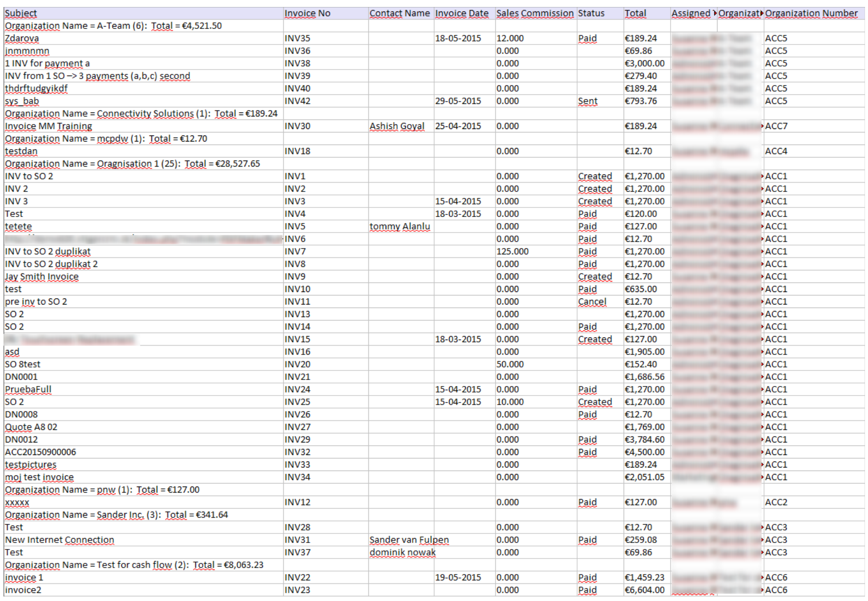
http://www.its4you.sk/images/pdf_maker/pdf_maker_for_vtiger6_crm.pdf



Picture 4.1: Export to PDF

4.2 Support of Excel Export

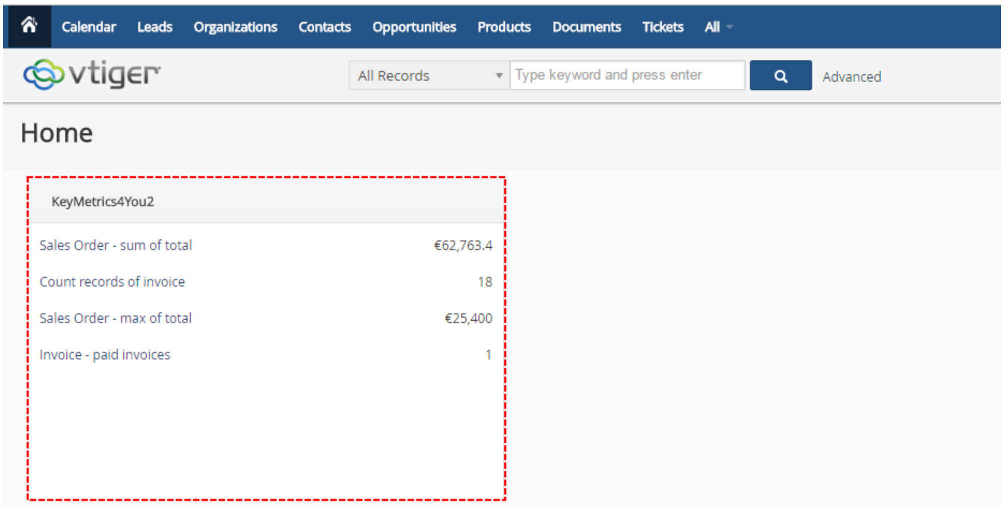
With Reports 4 You you can save your Reports as Excel files. To save click on Export Excel button.



Picture 4.2: Excel Export

4.3 Key Metrics

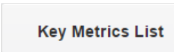
New functionality of Reports 4 You is **Key Metrics**. Key Metrics allows you create Views on Dashboard with information like Count of records based on Filter. With Reports 4 You, Key Metrics also allows, after creating Tabular Report, use these Metrics (SUM, AVG, Min, Max) on Dashboard.

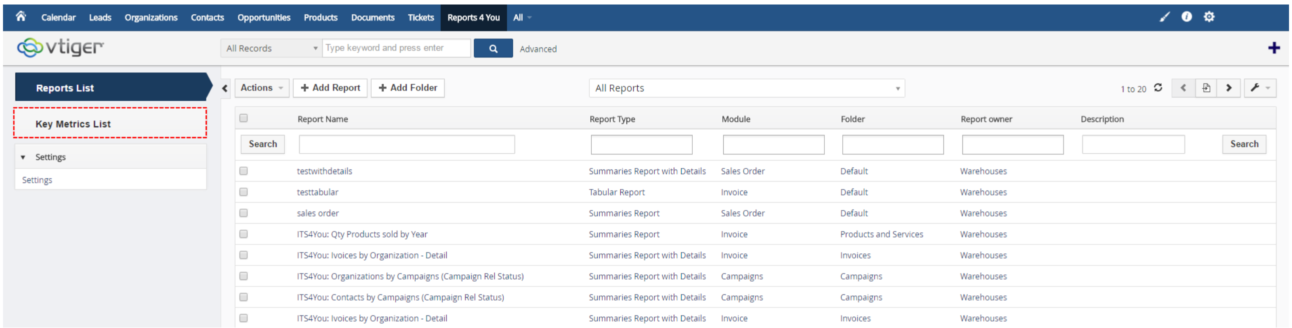


Picture 4.3: Key Metrics

How to create and add Key Metrics on Dashboard?

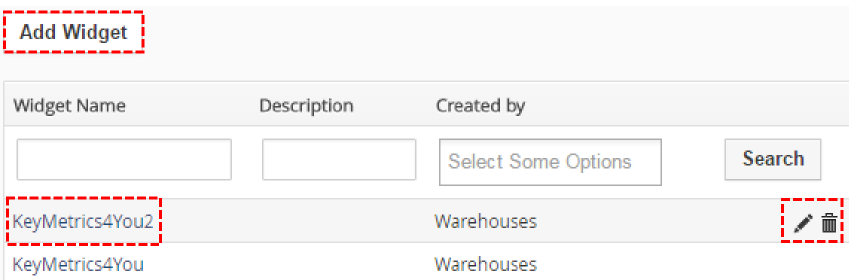
To create Key Metrics please provide following steps:

1. Open Reports 4 You and click on 



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 

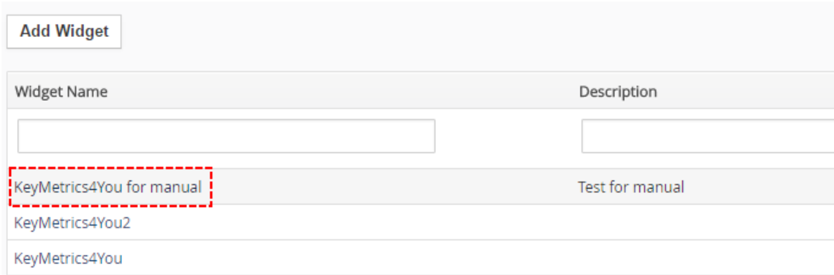


Picture 4.5: ListView of Key Metrics

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

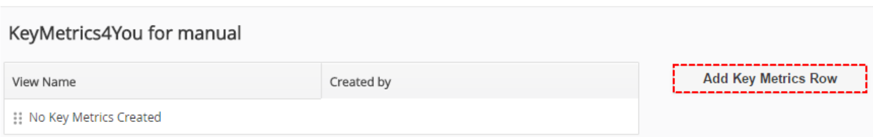
Picture 4.6: How to create Key Metrics

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



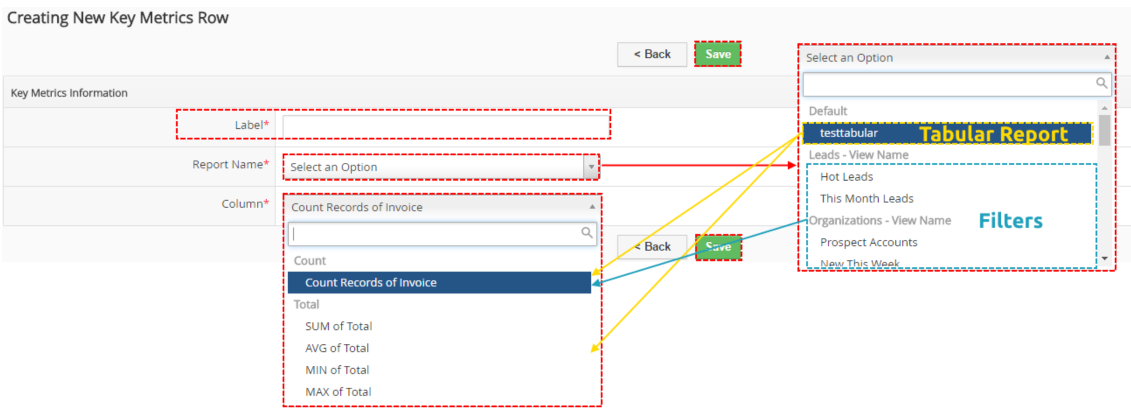
Picture 4.7: How to create Key Metrics

5. Click on Add Key Metrics Row

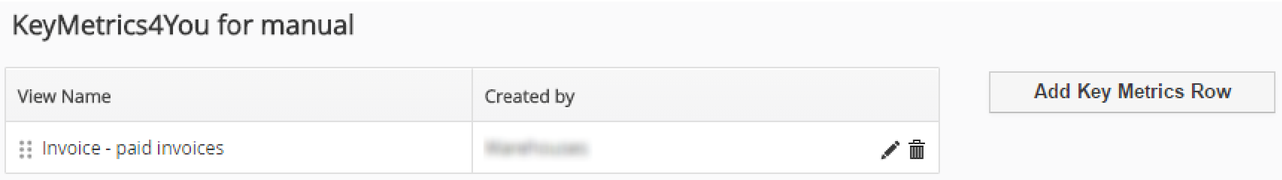


Picture 4.8: How to create Key Metrics

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.



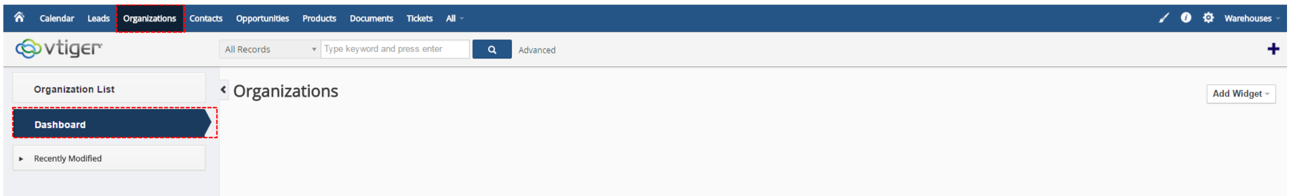
Picture 4.9: How to create Key Metrics

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

4.4 Dashboard

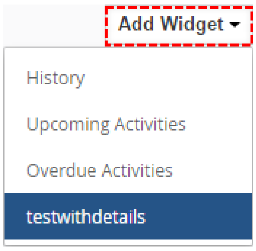
How to add Widget on Dashboard?

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



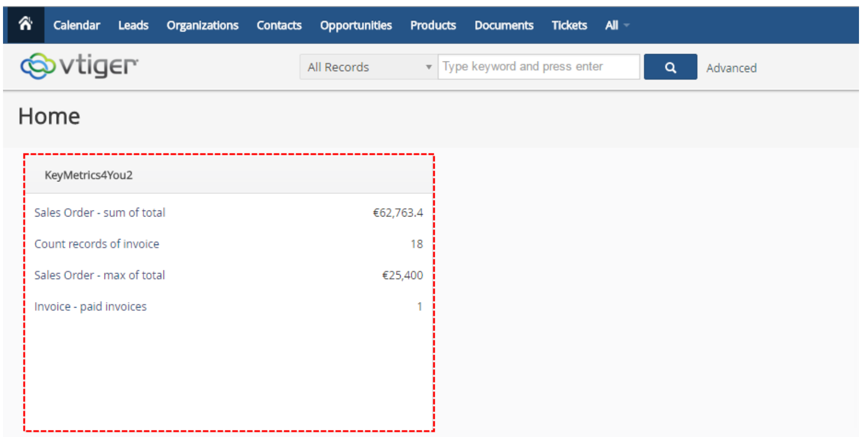
Picture 4.10: How to add Dashboard

- Click on **Add Widget ▾** and choose Name of Report

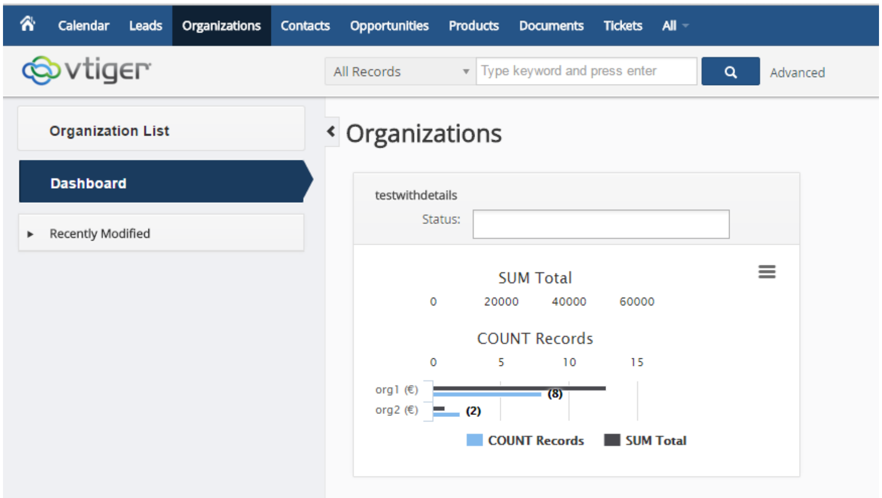


Picture 4.11: How to add Dashboard

- Now, you can see Widget on Dashboard.

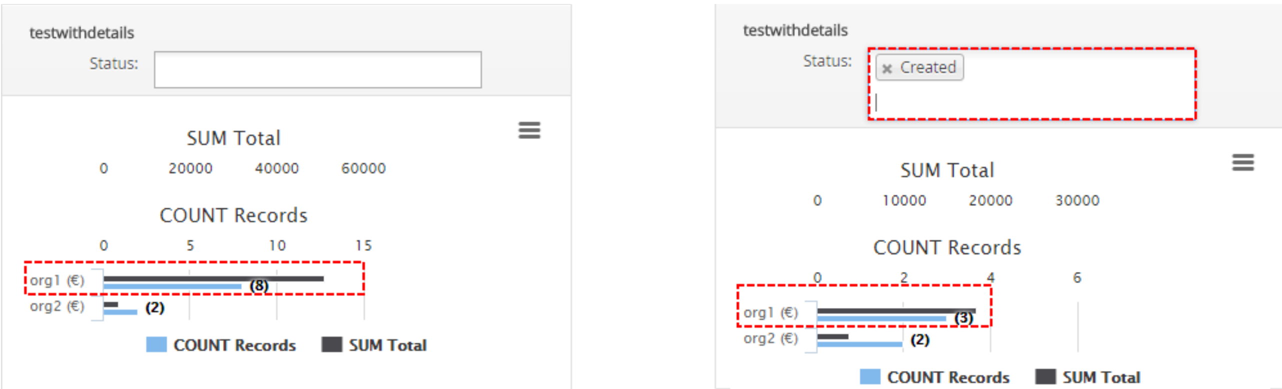


Picture 4.12: Key Metrics on Dashboard



Picture 4.13: Widget on Dashboard

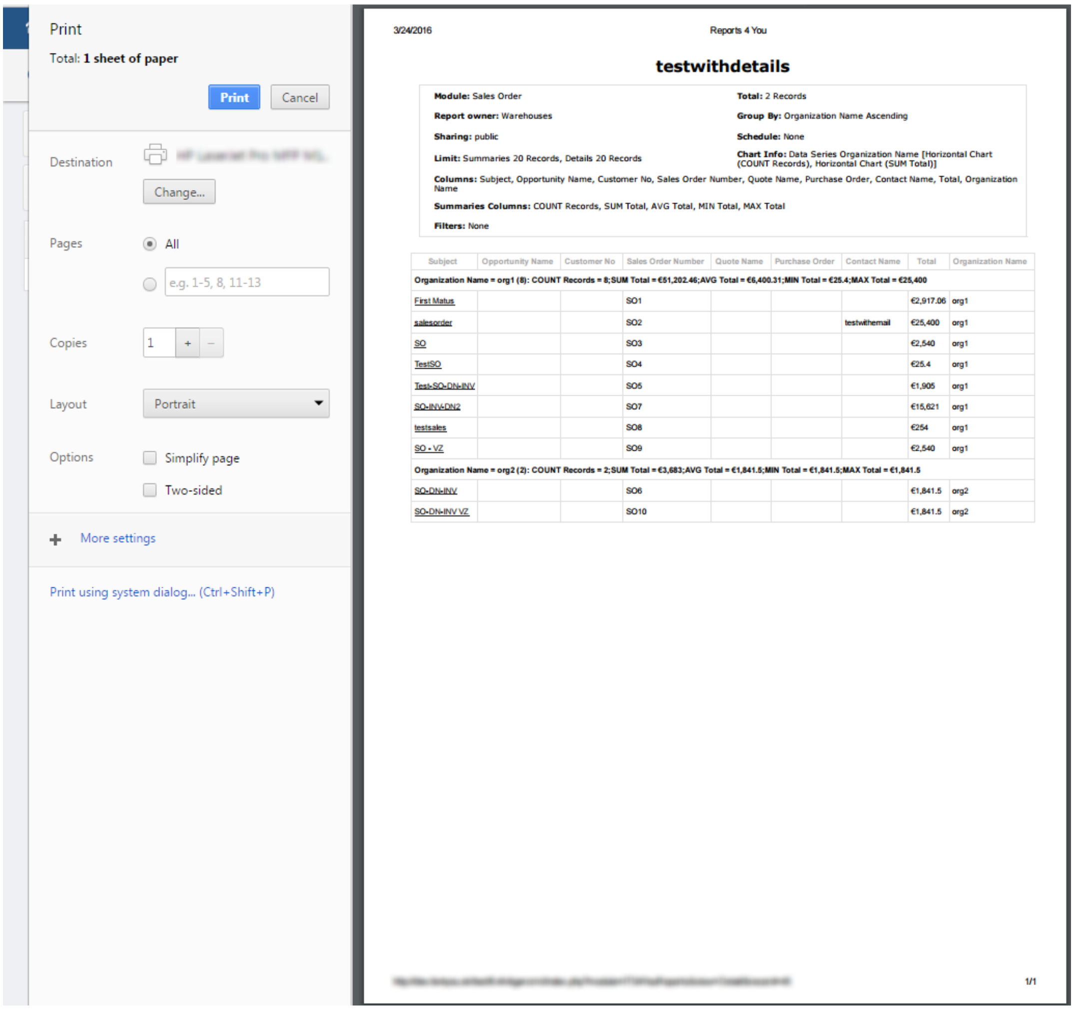
If you choose in Dashboard part Primary search column, then you can this Widget filter from Dashboard by this column.



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



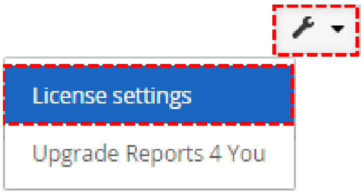
Picture 4.15: Print Reports

5 Settings

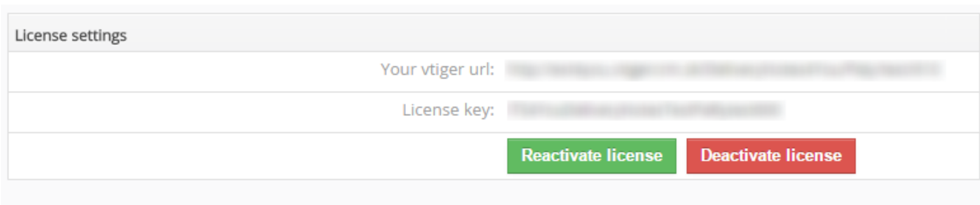
5.1 Deactivate license

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:

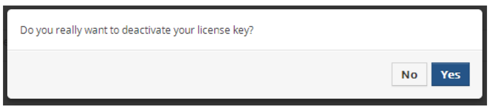
1. Click on 
2. Click on License settings
3. Click on Deactivate license button
4. Confirm deactivation with button Yes



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



Picture 5.2: Deactivate Reports 4 You – Step 3

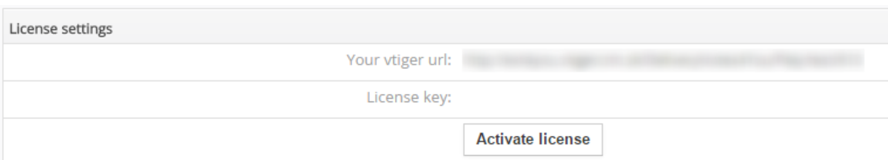


Picture 5.3: Deactivate license of Reports 4 You – Step 4

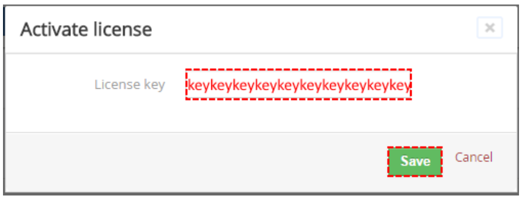
After deactivation of license Reports 4 You doesn't work at all and Reports 4 You work area is not accessible either as you can see on Picture 5.4.

To reactivate license you have to provide following steps:

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



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

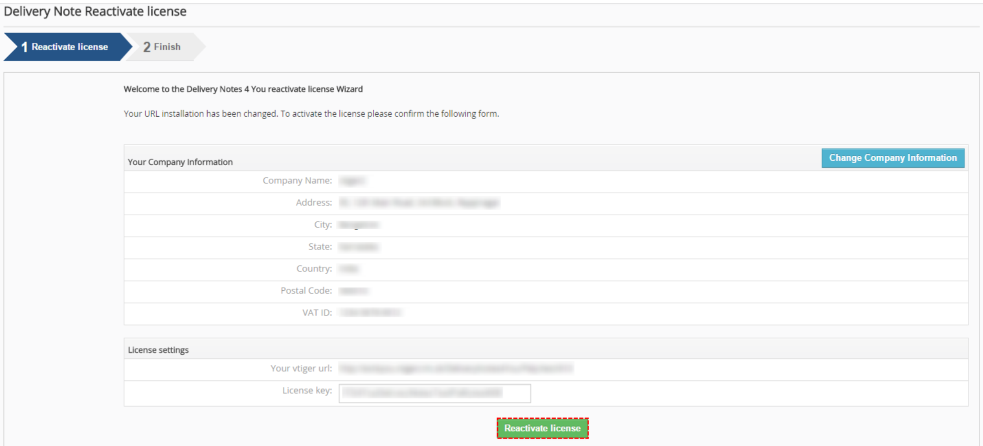


Picture 5.5: Activate license of Reports 4 You – Step 2,3

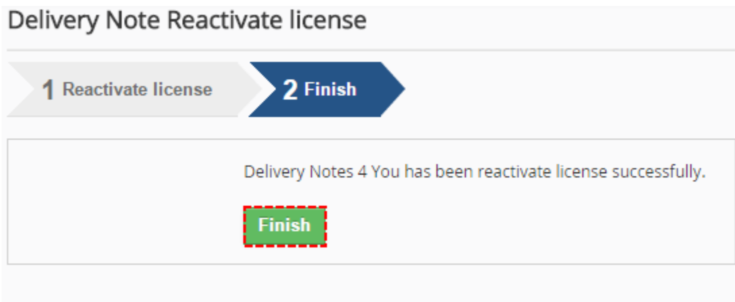
5.2 Reactivate license

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



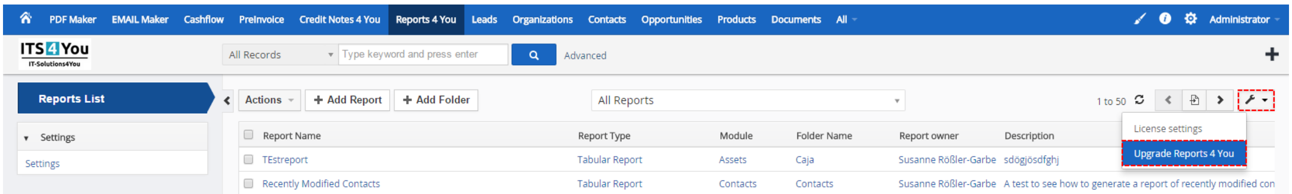
Picture 5.6: Reactivate license of Reports 4 You – Step 1



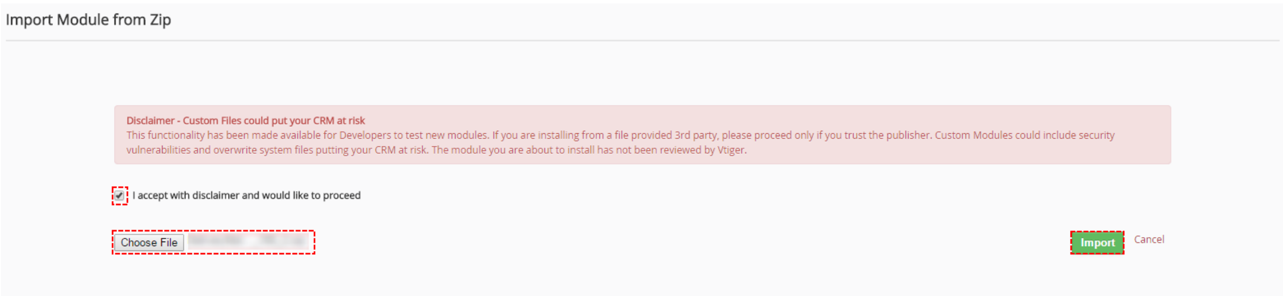
Picture 5.7: Reactivate license of Reports 4 You – Step 2

5.3 Upgrade

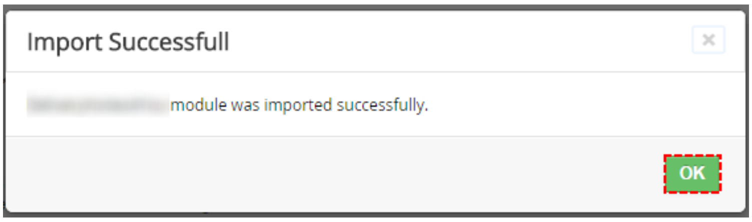
The upgrade of the Reports 4 You is initiated in the same way as Reports installation (How to install Reports 4 You) or click on Upgrade link in ListView of Reports (Picture 5.8). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade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



Picture 5.8: Upgrade of Reports 4 You



Picture 5.9: Upgrade of Reports 4 You

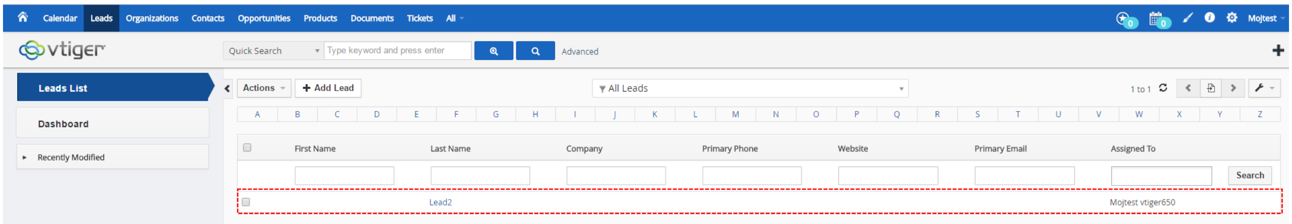


Picture 5.10: Upgrade of Reports 4 You

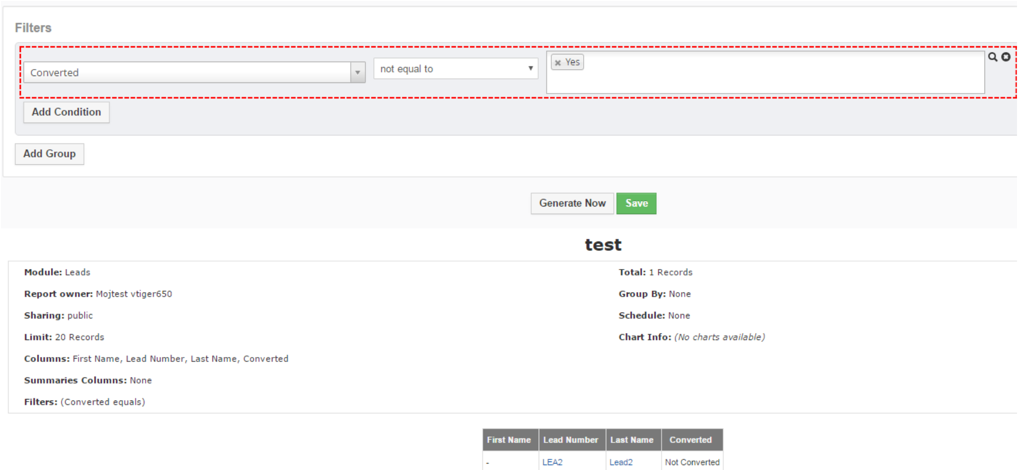
6 Tips

6.1 Show converted Leads

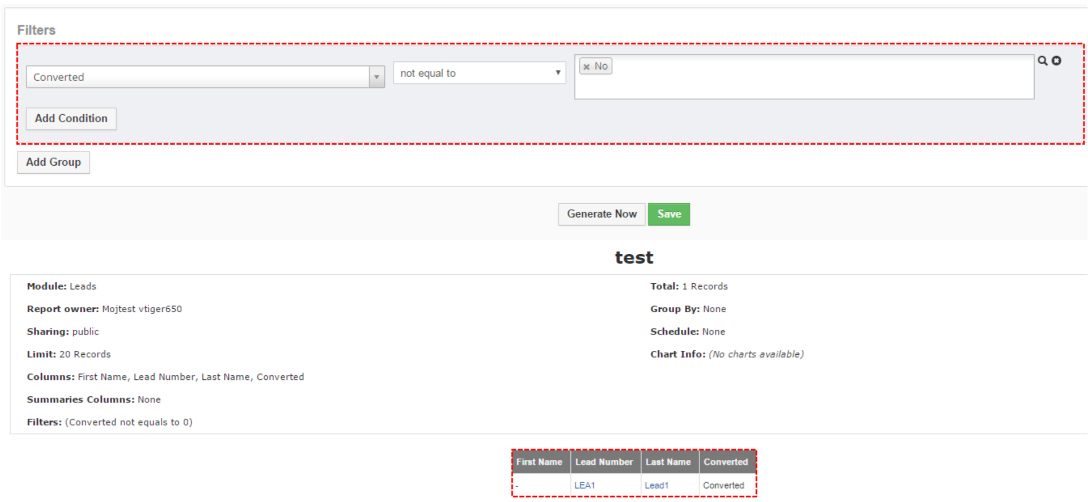
As you may know, converted Leads are no more shown in your vtiger CRM. But for lot of customer it is important to see these Leads.
With Reports 4 You you have option to show these Leads or no. It is really up to you.
Since **6xx.9.2** version is default filter for Leads module “Converted not equals to 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).



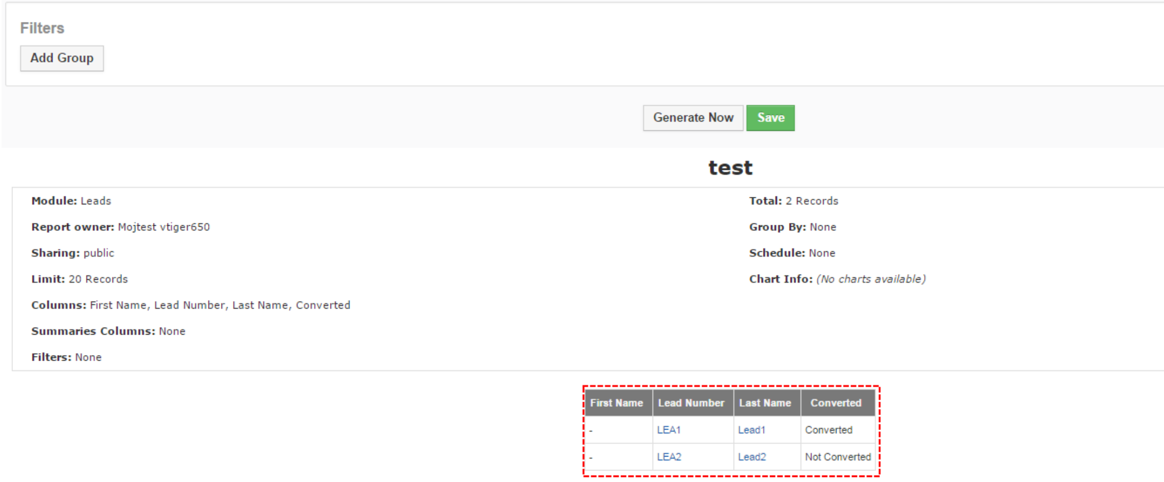
Picture 6.1: One Lead displayed in your CRM (not converted)



Picture 6.2: Report of not converted Leads



Picture 6.3: Report of converted Leads



Picture 1: Report of all Leads

Change log of Reports 4 You

- February 2017: **6xx.9.2**
  - 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
  - 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
  - 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