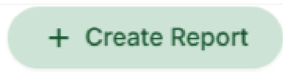
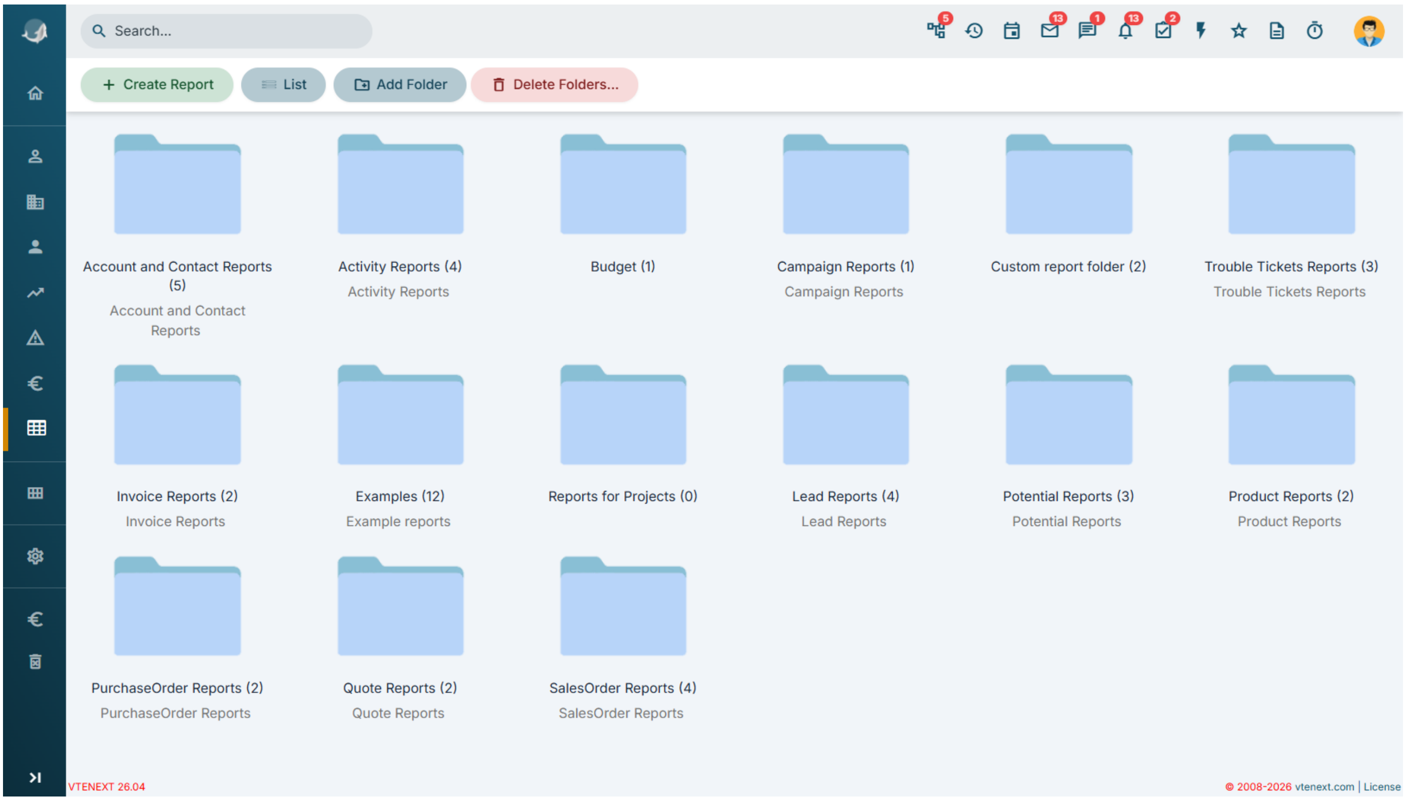
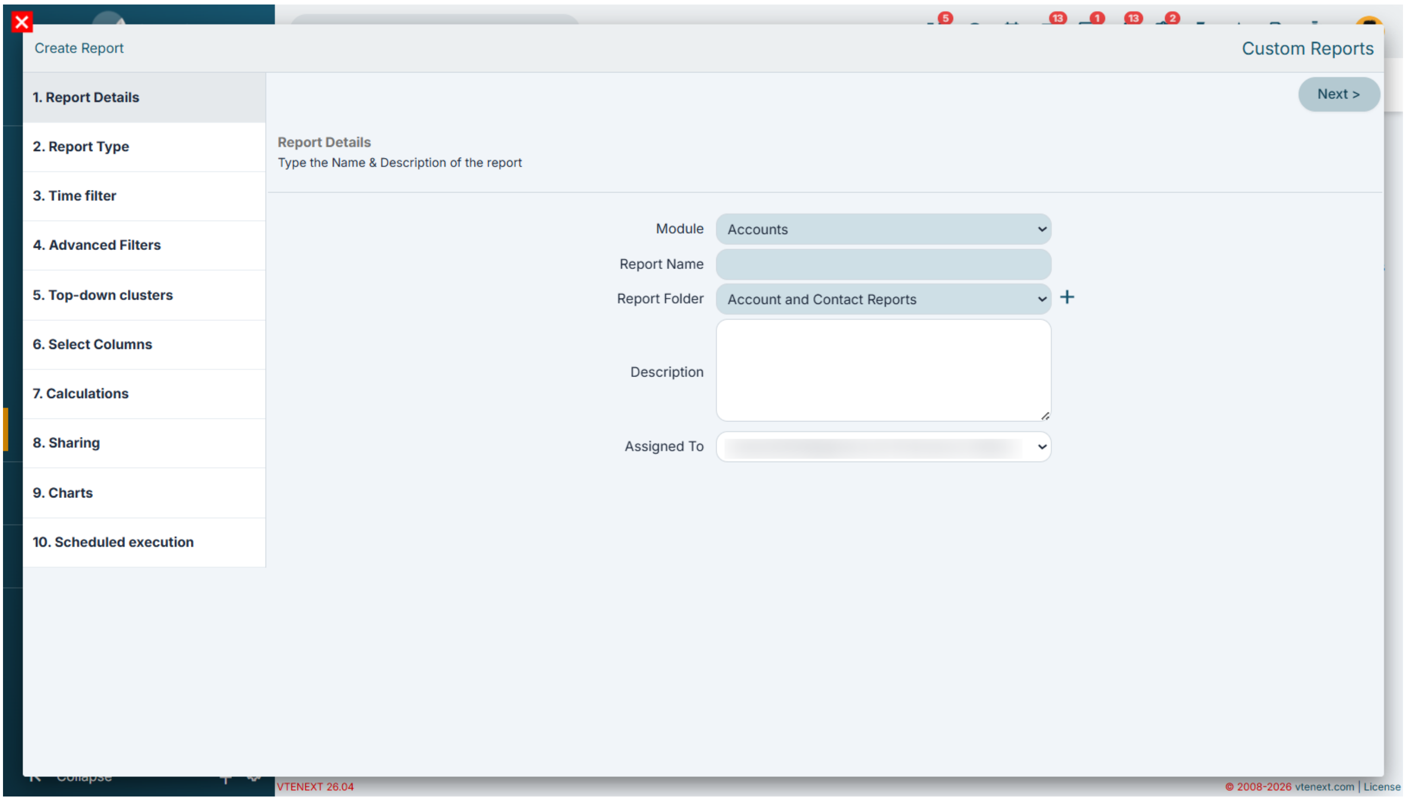
13.1 Reports

Reports are organised in folders. You can create new ones and delete them (only empty folders can be deleted), and also switch to list view via the List button.

To create a new report, click on the button from the Reports module 



Once you click the button, a wizard opens up with an 10-step guided procedure that will allow you to make the report intuitively.

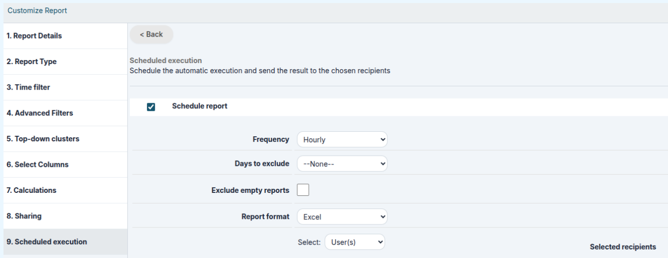


For example, you want to create a report on the Sales Orders module that only displays orders from IT companies. In this case the main data to be displayed are the orders, while the companies are involved only if they meet a condition (sector)

STEP 1	**Report Details:** Give a name to the report (so that, in the future, even at first glance, you will understand its contents), choose the main module, a destination folder and a description (optional). You can also create a new folder by clicking the button +.
STEP 2	**Report Type:** Choose the report format to display it the way you prefer. Tabulation involves the extraction of the expected results with a standard of all completed cells. Summary allows you to indicate grouping criteria for the data, so as to avoid displaying duplicate fields and thereby making it easier to read. It also allows you to create graphs from the report. For example, you want to view orders grouped by customer, i.e.: when there are two order lines for the same customer, the customer's name will group the two lines and will only be reported once.

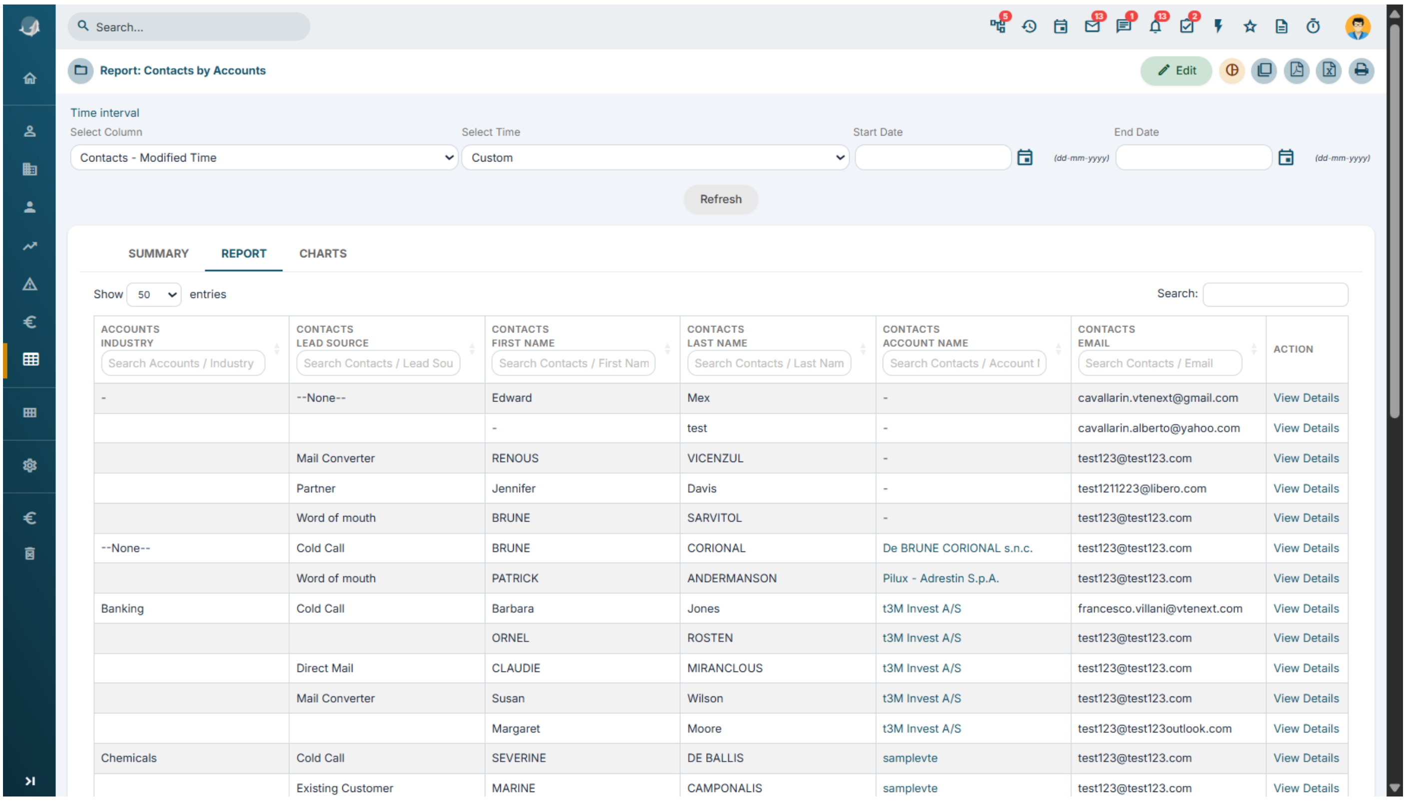
STEP 3	**Time filter:** Choose the time filter to apply to your report. The first drop-down menu line allows you to choose the module to refer to. Starting from the main module previously chosen, it is possible, moving through the various links between the modules, to choose the data of any one of them. In the second line, on the other hand, you choose the field (belonging to the module just chosen) to be used as the subject for the time criterion specified in the "Select Time" picklist. In this menu there are numerous time options, including "Custom", which allows you to filter data for a period of time specified by you. In this example, we want to see the records that have been created ("Time created" column) in the "Sales Orders" module in the last 30 days (as defined in "Select Time").
STEP 4	**Advanced Filters:** Choose the advanced filters to apply to your report. As in the previous point, the first line is used to define which module fields you are interested in comparing. In our example, select Accounts because we need to filter by industry. Then once you have chosen the module field (in the "Field” picklist), choose which condition to use to compare the record and the data you are interested in. The options "is equal to", "not equal to", "starts with", "ends with", "contains" and "does not contain" are available. When you enter a value in the text type field on the right, you can use these options to make comparisons between the contents of the record and the data of your choice (also taken from other modules, with the button). It is also possible to make more comparisons and more groups of filters using the New condition and New group buttons, also using different fields from different modules.
STEP 5	**Top-down clusters:** It allows the creation of clusters to further segment the results, both in the summary tab and within the graphs, and also allows you to set the colour for the latter. By choosing "add segment", you will be able to access a screen where you can choose the name and colour of the individual segment. Repeat this operation by completing the selection of all desired segments. **N.B.: the top-sown cluster does not duplicate the results but only rearranges them. If a record has a link for both segment A and B, it will only be shown in the segment A.**

STEP 6	**Select Columns:** Select the fields to be displayed in the report columns, using the same picklists used in the previous steps. You can then sort them by dragging them left or right with the mouse, and group the results for a specific field (or even more than one) by clicking on the "Group by this field" checkbox which is contained within each field. Enabling View Report, a tab will appear with a count of the number of records according to the grouping. Warning! If you want to create a graph from the report, you must indicate only one grouping criterion, otherwise the final result may differ from expectations.
STEP 7	**Calculations:** Select the desired calculations for the numeric or currency fields: maximum, minimum, average and sum are available. The Summary flag allows you to see the calculation entry according to the choice in step 6. Through the Add total button you can add other numeric fields contained in the selected modules.
STEP 8	**Sharing:** Select sharing type: Private (the report will be visible only to the user), Public (the report will be visible to all users) or Shared (allows you to choose which users to share the report with). Warning! What is shared is not the content of the report, the display of which depends on the user's data access permissions, but the structure of the report, i.e. the series of settings (fields, filter rules, etc.). If a user to whom the report has not been shared enters the Reports modules, they will simply not find it.
STEP 9	**Charts:** By clicking, or leaving empty, the flag that appears, you can choose whether to generate a graph for the report you are creating. If selected, a number of options will appear for customising the appearance of the chart. These functions are described in the next paragraph.

STEP 10	**Scheduled execution (admin users only):** This function makes it possible to schedule the execution of the report and send it automatically to the chosen recipients. It is possible to program the frequency of sending, the file format and obviously all the desired recipients, selectable only from the list of CRM users or groups. Starting from version 26.04, two new options are available for scheduled reports: • Exclude report delivery on public holidays. • Prevent report delivery when no records match the report criteria. These features help reduce unnecessary communications and make automated report distribution more efficient.  **Warning:** If you decide to use this function, the CRM will send a report displaying all the records it contains, without considering roles or profiles set in the CRM or the type of report sharing previously selected.

At the end of the wizard, you will be able to view the report. Below are the functions available on the screen.

Summary Tab	Visible only if the report is of the Summary type (step 2), it displays report information (counts and calculations divided according to grouping criteria)
Report Tab	Table with the results of the report
Charts Tab	Visible only if set in step 8, it shows the chart based on the report
Time Interval	Apply a time-based filter (temporary field, cannot be saved)
Edit Button	To edit the Report by repeating the previous steps
Create Chart	Generate a new chart relating to the report
Duplicate	Opens the wizard to save a new report, starting from the settings of the previous one
Export in PDF	Export the total report in PDF format
Export in Excel	Export the total report in Excel format
Print	Print the total report directly



ACCOUNTS INDUSTRY	CONTACTS LEAD SOURCE	CONTACTS FIRST NAME	CONTACTS LAST NAME	CONTACTS ACCOUNT NAME	CONTACTS EMAIL	ACTION
Search Accounts / Industry	Search Contacts / Lead Sou	Search Contacts / First Nam	Search Contacts / Last Nam	Search Contacts / Account I	Search Contacts / Email	
-	--None--	Edward	Mex	-	cavallarin.vtenext@gmail.com	View Details
		-	test	-	cavallarin.alberto@yahoo.com	View Details
	Mail Converter	RENOUS	VICENZUL	-	test123@test123.com	View Details
	Partner	Jennifer	Davis	-	test1211223@libero.com	View Details
	Word of mouth	BRUNE	SARVITOL	-	test123@test123.com	View Details
--None--	Cold Call	BRUNE	CORIONAL	De BRUNE CORIONAL s.n.c.	test123@test123.com	View Details
	Word of mouth	PATRICK	ANDERMANSON	Pilux - Adrestin S.p.A.	test123@test123.com	View Details
Banking	Cold Call	Barbara	Jones	t3M Invest A/S	francesco.villani@vtenext.com	View Details
		ORNEL	ROSTEN	t3M Invest A/S	test123@test123.com	View Details
	Direct Mail	CLAUDIE	MIRANCLOUS	t3M Invest A/S	test123@test123.com	View Details
	Mail Converter	Susan	Wilson	t3M Invest A/S	test123@test123.com	View Details
		Margaret	Moore	t3M Invest A/S	test123@test123outlook.com	View Details
Chemicals	Cold Call	SEVERINE	DE BALLIS	samplevte	test123@test123.com	View Details
	Existing Customer	MARINE	CAMPONALIS	samplevte	test123@test123.com	View Details

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