Creating Reports

Sage 200 CRM Help Sheet

1. Creating Reports in Sage 200 CRM

This help sheet will show you how to compile list based reports and charts within Sage 200 CRM.

1.1 Accessing Reports

To access reports, the user must have permission. There are levels of access when it comes to reports:

▶ **No Access** – No reports can be accessed, and the report menu is not present.

▶ **Personal Reports** – The user can run reports, but only reports they have created. They do not have access to all reports.

▶ **Enterprise** – The user has access to all reports (unless the report is marked as private, by another user on creation).

▶ **Crystal Reports** – This option is used if you have a separate Crystal Reports licence to be used in conjunction with CRM.
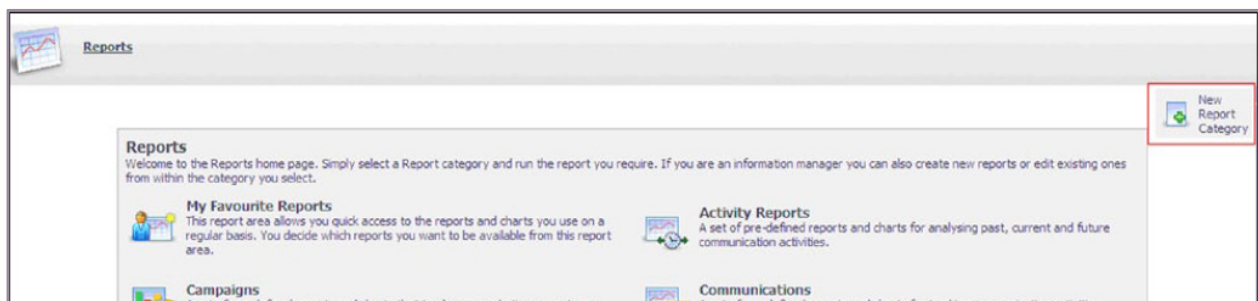
1.2 Creating Reports

Report Catagories

Report categories are simply a way to group your reports into relevant groups, such as **Sales, Customer Service, Management etc.**
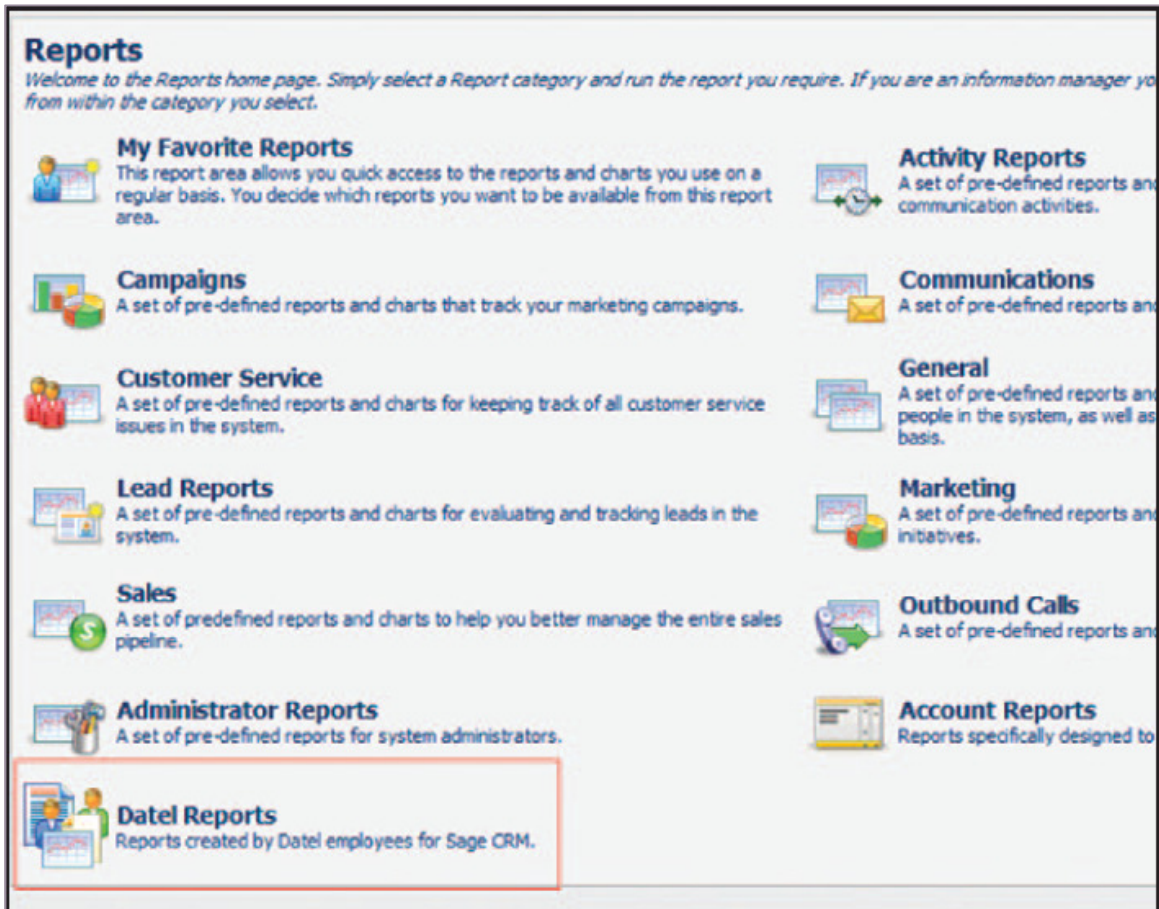You can create new report categories, and move reports from one category to another if required.
To create a report category, select New Report Category from the top-right of the Reports screen:

Give the category a name, and a description (if required), then select Save.

The report category will now be available to you from the reports screen:

1.3 Creating the report

Once you are in the report category you wish to create a report for, select New from the right hand side of the screen:
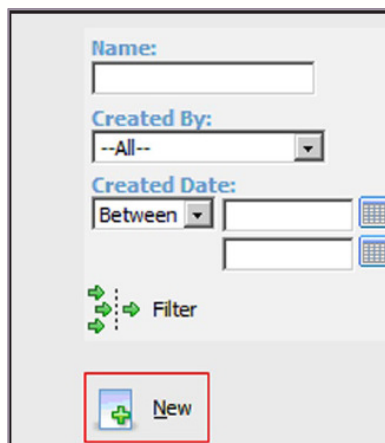
The above screen is presented when the New report action is selected.

The salient fields that will be covered in this help sheet are:

▶   **Name** – The name you wish to give the report.

▶   **Source view** – This is the data view that you wish to base the report on. This view must contain the data you want within the report. Report views can be created if there is not a relevant view available. The views are named logically, so locating the correct view for the report should not be an issue.

▶   **Category** – This will default to the category you are currently in, but this can be changed if required.

▶   **Report type** – List is the most commonly used report type. More information on the report types can be found in the System Administrator guide.

Once a view is selected, the screen will amend itself and will look similar to the screen below:

1.3.1 Select Column

The **Select Column** tab lists all available fields in the view that have been selected for the report:
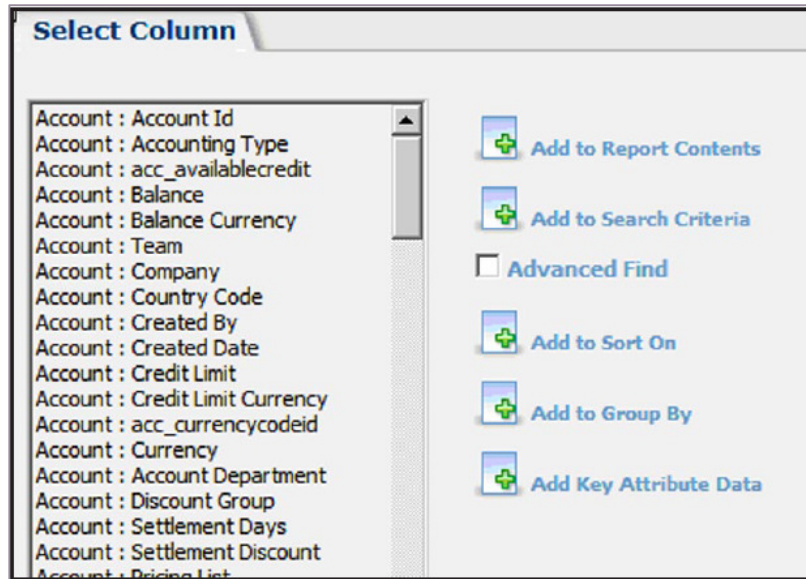
To the right of the columns, there are 5 buttons. When an option is selected, it can then be added to the relevant section, by selecting the corresponding button.

1.3.2 Report Output

The report output displays which fields will be in the report itself, which fields will be selected for the criteria and how the criteria is grouped and sorted.

In the below example, the report will show the account Name and Type in the report. The search criteria will be the date it was created and will be sorted by the date created, with the earliest accounts being shown first:

Once the Report Output is completed as required, select Continue from the top right-hand corner. Because we have specified a search criteria, we will be presented with the following screen:

If you wish to set a default search value, this will be saved. Alternatively it can be left blank and specified when the report is run. For this example, a created date relative to the current year will be used, so only accounts created in the current year will be shown:

Select Continue, from the top right of the screen.

The second step of creating the report, is fundamentally to format the aesthetics of the report, as well as the addition of a chart.

1.3.3 Title Settings

The above section of the screen is to set the Title, Header and Footer settings. In the Header and the Footer, if required, you can specify the date/time the report was run, and the user that ran the report. If you have a company logo you wish to add to the report (if configured) this can be added here.

1.3.4 Sort Orders and Column Formatting

The fields that are present in the 'Sort On' section of the report, can then be configured to be descending (they are ascending by default) and by either a code or caption (if a selection field).

The column formatting allows a count to be added, this will simply add a count to the 'Group By', so if a group by is used, it will show account per group. If a group by is not used, it will count the whole report. The justification for the columns (center, right & left) can be set also.

1.3.5 Chart Options

For a chart to be present on the report, the Show Chart check box must be checked.

If you wish to add the chart to a **Classic Dashboard** you will need to ensure that Available on dashboard is also checked.

If you wish to display a legend for the chart, ensure Show Legend is checked, and that the Legend Alignment is set to where you wish for it to be displayed.

Chart style – Select the type of chart you wish to display.

▶ **Value** – This is the Y Axis for the chart.

▶ **Label** – The label for the Y Axis

▶ **Function** – The function that will be carried out usually set to 'Count'.

▶ **Category** – This is the X Axis for the chart

▶ **Label** – The label for the X Axis

▶ **Function** – The function that will be carried out usually set to 'Value'.

The chart and report is now complete. You can now save the report and run it from the Report Category menu.