21CRM Reports Viewer for Sage CRM Version 3.0

Administrators Guide

Publisher: 21CRM Systems Inc, Winnipeg MB Canada

Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- Sage CRM 5.8B+
- MS SQL Server 2000+
- Experience implementing and customizing CRM
- Using Sage Accpac ERP

How this guide is organized

You must read the "End-User License Agreement For 21CRM Systems Corporation Software" in the pages that follow. Acceptance of this agreement is required in order install and use the software.

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of the 21CRM Report Viewer Extension.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

END-USER LICENSE AGREEMENT FOR 21CRM SYSTEMS INC. SOFTWARE

IMPORTANT-READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you, an individual, corporate entity, or organization, and 21CRM Systems Inc concerning the access to and use of any and all 21CRM Systems Inc original material available through its dealer programs, which includes, but is not limited to, web and application software, video, audio, and graphical media, printed materials, site or application presentation and navigation, and all "online" or electronic documentation ("SOFTWARE"). By installing, copying, or otherwise using this SOFTWARE, you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, do not install, run or otherwise use this SOFTWARE.

SOFTWARE LICENSE: This SOFTWARE is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. This SOFTWARE is licensed, not sold. The rights granted herein are limited to 21CRM Systems Inc's and its licensed partners' intellectual property rights in the SOFTWARE and do not include any other patents or intellectual property rights. You own the media on which the SOFTWARE is recorded but 21CRM Systems Inc and/or its licensed partners retain ownership of the SOFTWARE itself.

GRANT OF LICENSE. This EULA grants you the following rights.
Application Use. You may install, access, or otherwise use, as appropriate, one copy of this SOFTWARE or any prior version of this SOFTWARE for the same operating system on a single computer. The primary user of the computer on which this SOFTWARE is installed may make a second copy for exclusive use on a portable computer.

Network Use. You may store or install a copy of this SOFTWARE on a storage device, such as a network or web server, to be used exclusively for the purpose of installing or running this SOFTWARE on other computers over an internal network, subject to the requirement that you must acquire a license for each separate computer onto which this SOFTWARE is installed or run from that storage device. A license for this SOFTWARE may not be shared or used concurrently on different computers.

License Pak. If you acquired this EULA in a 21CRM Systems Inc License Pak, you may make the specified number of additional copies of this SOFTWARE as authorized on the printed copy of this EULA, and you may use each copy in the manner specified above. You may also make a corresponding number of secondary copies for portable computer use as specified above.

END-USER LICENSE AGREEMENT (continued)

DESCRIPTION OF OTHER RIGHTS AND LIMITATIONS.
Not for Resale. If the software you acquired was done so as “Not for Resale” or “NFR”, notwithstanding other sections of this EULA, you may not resell, or otherwise transfer this SOFTWARE for value.

Reverse Engineering, Decompilation, and Disassembly. You may not reverse engineer, decompile or disassemble this SOFTWARE or otherwise reduce this SOFTWARE to human readable form, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation.

Separation of Components. This SOFTWARE is licensed as a single product, unless as specified on individual components. Component parts may not be separated for use on more than one computer.

Rental. You may not rent, lease or lend this SOFTWARE.

Support Services. 21CRM Systems Inc may, but is not obligated to provide you with support services related to this SOFTWARE (“Support Services”). Use of Support Services is governed by the 21CRM Systems Inc polices and programs described in the user manual, in “online” documentation, and/or in other 21CRM Systems Inc copyrighted materials. Any supplemental software, documentation, or other original material provided to you as part of the Support Services shall be considered part of this SOFTWARE and subject to the terms and conditions of this EULA. With respect to technical information you provide to 21CRM Systems Inc as part of the Support Services, 21CRM Systems Inc may use such information for its business purposes, including for product support and development. 21CRM Systems Inc will not utilize such technical information in a form that personally identifies you.

Software Transfer. You may permanently transfer all of your rights under this EULA, provided that you retain no copies, that you transfer all of this SOFTWARE including all component parts, media and printed materials, upgrades, this EULA, and, any applicable Certificates of Authenticity, and the recipient agrees to the terms of this EULA and so evidences such acceptance in writing. If this SOFTWARE is an upgrade, any transfer must include all prior versions of this SOFTWARE.

Termination. This EULA is effective until terminated. Without prejudice to any other rights, 21CRM Systems Inc may terminate this EULA, without any notice from 21CRM Systems, if you fail to comply with any of the terms and conditions of this EULA. In such event, you must destroy all copies of this SOFTWARE and all of its component parts.

END-USER LICENSE AGREEMENT (continued)

UPGRADES. If this SOFTWARE is an upgrade, you must be properly licensed to use a product identified by 21CRM Systems Inc as being eligible for the upgrade in order to use the upgrade. Any component of this SOFTWARE labelled as an upgrade replaces and/or supplements the product that formed the basis for your eligibility for the upgrade. You may use the resulting upgraded product only in accordance with the terms of this EULA. If this SOFTWARE is an upgrade of a component to a package of software programs that you licensed as a single product, this SOFTWARE may be used and transferred only as part of that single product package and may not be separated for use on more than one computer.

COPYRIGHT. All title and copyrights in and to this SOFTWARE, including by not limited to any images, photographs, animations, video, audio, music, text, and controls, script, or applets incorporated into this SOFTWARE, accompanying printed materials, and any copies of this SOFTWARE are owned by 21CRM Systems Inc or its licensed partners. This SOFTWARE is protected by copyright laws and international treaty provisions. You must treat this SOFTWARE with the same degree of care and concern as any other copyrighted material, with the exception that you may install this SOFTWARE on a single computer provided you keep the original solely for backup or archival purposes. You may not copy the printed materials accompanying this SOFTWARE.

MULTIPLE-MEDIA SOFTWARE. You may receive this SOFTWARE in a number of distinct media. Regardless of the type of medium or size of the material encoded or recorded on that medium, you may use only one medium, as you deem most appropriate for your single computer. You may not use or install the other media on the same or any other computer. You may not loan, rent, lease, or otherwise transfer the other media to another user, except as part of the permanent transfer (as provided above) of this SOFTWARE.

CONTROLLING LAW AND SEVERABILITY

If you acquired this product in Canada, this EULA is governed by the laws of the Province of Manitoba. If this product was acquired outside of Canada, local law will apply. This EULA shall not be governed by the United Nations Convention on Contracts for the International Sale of Goods, the application of which is expressly excluded. If for any reason a court of competent jurisdiction finds any provision of this EULA, or portion thereof, to be unenforceable, the remainder of this EULA shall continue in full force and effect.

END-USER LICENSE AGREEMENT (continued)

CONTACT INFORMATION

Should you have any questions concerning this EULA, or it you desire to contact 21CRM Systems Inc for any reason, please write to:

21CRM Systems Inc
200 - 1335 Erin Street
Winnipeg, MB, Canada
R3E 2S7.

LIMITED WARRANTY

LIMITED WARRANTY FOR SOFTWARE ACQUIRED OUTSIDE THE UNITED STATES AND CANADA. FOR INFORMATION ON LIMITED WARRANTIES AND SPECIAL PROVISIONS PERTAINING TO YOUR PARTICULAR JURISDICTION, PLEASE CONTACT 21CRM Systems Inc AT THE ADDRESS ABOVE.

LIMITED WARRANTY FOR SOFTWARE ACQUIRED INSIDE THE UNITED STATES AND CANADA. 21CRM Systems Inc warrants that: (1) this SOFTWARE will perform substantially in accordance with the accompanying written materials for a period of ninety (90) days from the date of receipt, and (2) any Support Services provided by 21CRM Systems Inc shall be substantially as described in applicable written materials provided to you by 21CRM Systems Inc and that 21CRM Systems Inc support engineers will make commercially reasonable efforts to solve any problem issues. Some jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you. To the extent allowed by applicable law, implied warranties on this SOFTWARE, if any, are limited to ninety (90) days.

CUSTOMER REMEDIES. 21CRM Systems Inc' and its licensed partners' entire liability and your exclusive remedy shall be, at 21CRM Systems Inc's option, either (1) return of the price paid, if any, or (2) repair or replacement of this SOFTWARE that does not meet 21CRM Systems Inc's Limited Warranty and which is returned to 21CRM Systems Inc with a copy of your receipt. This Limited Warranty is void if failure of this SOFTWARE is a result of accident, abuse, tampering, or misapplication. Any replacement SOFTWARE will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer. Outside Canada, neither these remedies nor any product support services offered by 21CRM Systems Inc are available without proof of purchase from an authorized international source.

END-USER LICENSE AGREEMENT (continued)

NO OTHER WARRANTIES. YOU EXPRESSLY ACKNOWLEDGE AND AGREE THAT USE OF THE SOFTWARE IS AT YOUR SOLE RISK AND THAT THE ENTIRE RISK AS TO SATISFACTORY QUALITY, PERFORMANCE, ACCURACY AND EFFORT IS WITH YOU. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, THE SOFTWARE IS PROVIDED “AS IS”, WITH ALL FAULTS AND THE LIMITED WARRANTY SET FORTH HEREIN IS THE ONLY WARRANTY MADE TO YOU AND IS PROVIDED IN LIEU OF ANY OTHER WARRANTIES (IF ANY) CREATED BY ANY DOCUMENTATION OR PACKAGING. 21CRM Systems Inc AND ITS LICENSED PARTNERS DISCLAIM ALL OTHER WARRANTES AND CONDITIONS, EITHER EXPRESS, IMPLIED OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY, OF SATISFACTORY QUALITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS WITH REGARD TO THIS SOFTWARE, AND THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES. 21CRM Systems Inc DOES NOT WARRANT AGAINST INTERFERENCE WITH YOUR ENJOYMENT OF THE SOFTWARE, THAT THE FUNCTIONS CONTAINED IN THE SOFTWARE WILL MEET YOUR REQUIREMENTS, THAT THE OPERATION OF THE SOFTWARE WILL BE UNINTERRUPTED OR ERROR-FREE, OR THAT DEFECTS IN THE SOFTWARE WILL BE CORRECTED. NO ORAL OR WRITTEN INFORMATION OR ADVICE GIVEN BY 21CRM Systems Inc OR BY ITS AUTHORIZED REPRESENTATIVES SHALL CREATE A WARRANTY. SOME JURISDICTIONS DO NOT ALLOW LIMITATIONS ON HOW LONG AN IMPLIED WARRANTY LASTS, THE EXCLUSION OF IMPLIED WARRANTIES OR LIITATIONS ON APPLICABLE STATUTORY RIGHTS OF A CONSUMER, SO THE ABOVE LIMITATION AND EXCLUSION MAY NOT APPLY TO YOU. THIS LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHER RIGHTS WHICH VARY FROM JURISDICTION TO JURISDICTION.

LIMITATION OF LIABILITY. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL 21CRM Systems Inc OR ITS LICENSED PARTNERS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, OR CONSEQUENTAL DAMAGES WHATSOEVER INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, OR ANY OTHER PECUNIARY LOSS ARISING OUT OF THE USE OF OR INABILITY TO USE THIS SOFTWARE PRODUCT OR THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES, HOWEVER CAUSED, REGARDLESS OF THE THEORY OF LIABILITY (CONTRACT, TORT OR OTHERWISE) AND EVEN IF 21CRM Systems Inc HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN ANY CASE, 21CRM Systems Inc’S ENTIRE LIABILITY UNDER ANY PROVISION OF THIS EULA SHALL BE LIMITED TO THE AMOUNT ACTUALLY PAID BY YOU FOR THIS SOFTWARE PRODUCT. SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY, SO THE ABOVE LIMITATION MAY NOT APPLY TO YOU.

Table of Contents

Prerequisites

CRM Prerequisites

The 21CRM Reports Viewer has several prerequisites that must be satisfied prior to attempting installation. Not completing any one of these steps may result in a failed installation.

- CRM 5.8B or higher installed.
- MS SQL Server 2000SP4+ or MS SQL Server 2005 SP1 installed
- CRM must be completely configured and functioning
- SQL Server tools installed on the CRM server
- Exclusive access to CRM and the SQL Server database (no other users are online).
- You must have **Crystal Reports 2005 Redistributable** (available on our website at http://www.21crmsystems.com/software/reportviewer/resources.aspx)
- **Microsoft .NET Framework 2.0** or higher is installed.

CRM is now prepared for the installation process.

Application Installation / Configuration

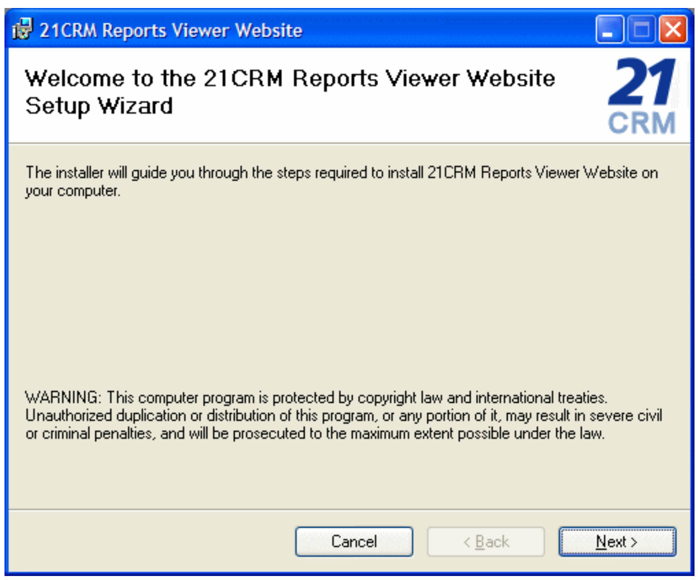
There are two steps to installing the CRM Reports Viewer:

1. the CRM Reports Viewer Website
2. the CRM Reports Viewer Plug-in

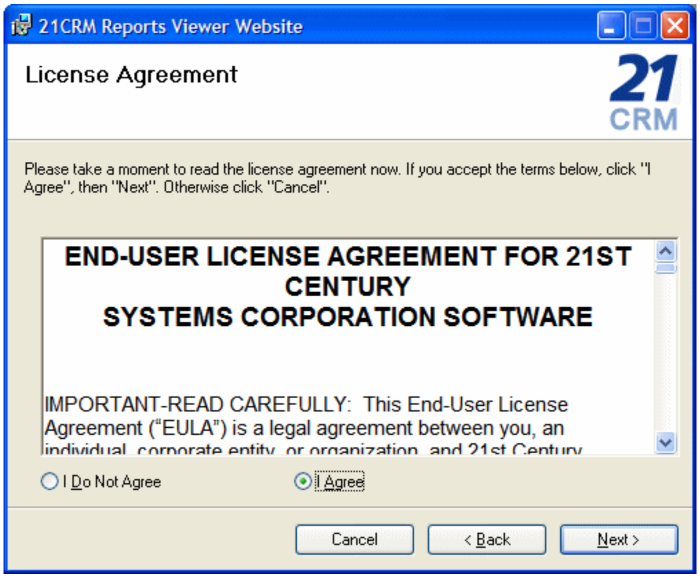
The CRM Reports Viewer Website **must be installed on the CRM server first**, followed by the CRM Reports Viewer Plug-in.

CRM Reports Viewer Website Installation

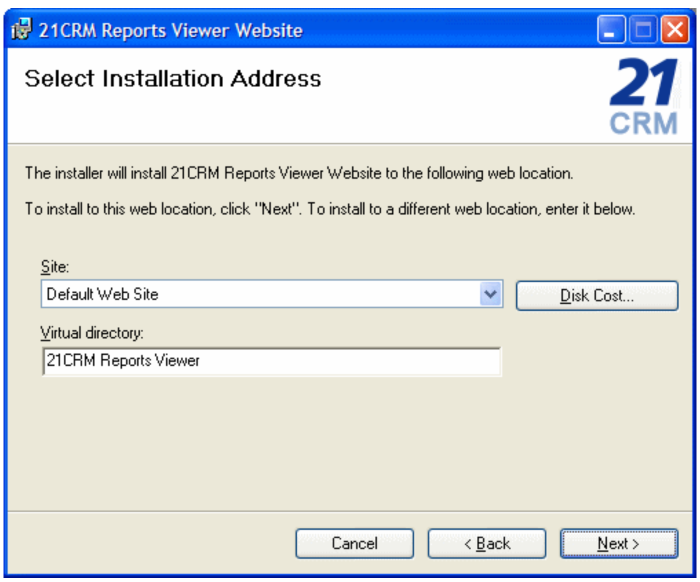
To begin the installation process execute the file name “21CRMReportViewerWebsiteSetup.exe”, this will present you with the following screen.



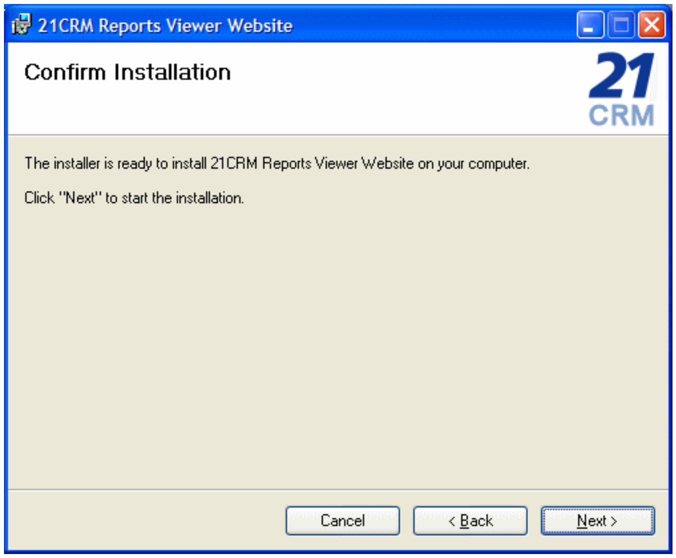
This screen informs you that the installation process is ready to begin. Click the Next button to continue with the installation.



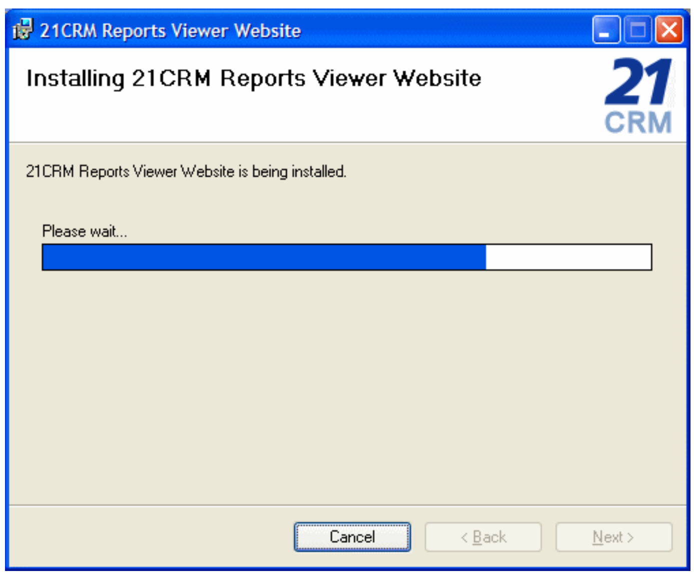
This is the end user license agreement (EULA) and should be read carefully and completely understood prior to continuing with the installation. Once you have fully read the EULA select the "I Agree" option and click Next.



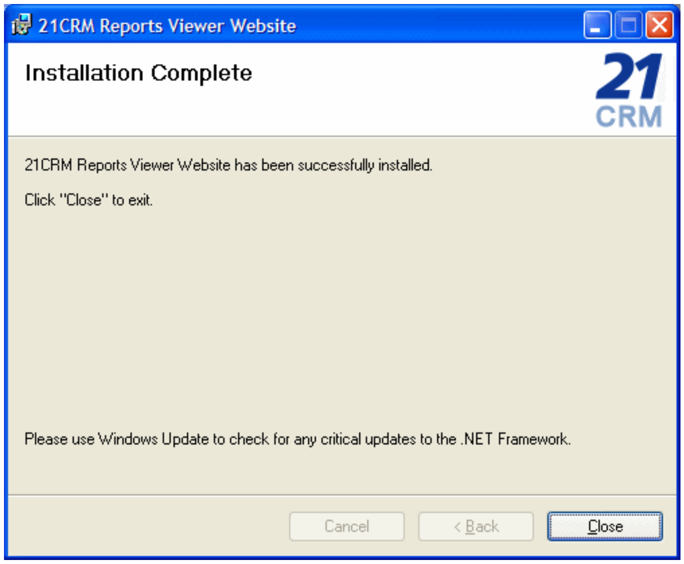
Select which site and virtual directory you would like to install the website. It is recommended that it be installed into the "Default Web Site" in a virtual directory named "21CRM Reports Viewer". Click Next to continue with the installation process.



The installer has collected enough information to begin the installation process. Click Next to continue.



This window illustrates the status of the installation. When the installation is completed the following screen will appear.

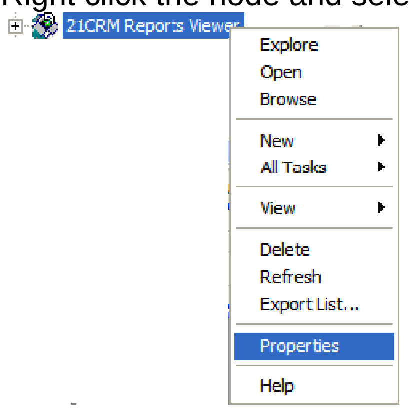


This widow indicates the installation was successfully completed the website is ready for configuration.

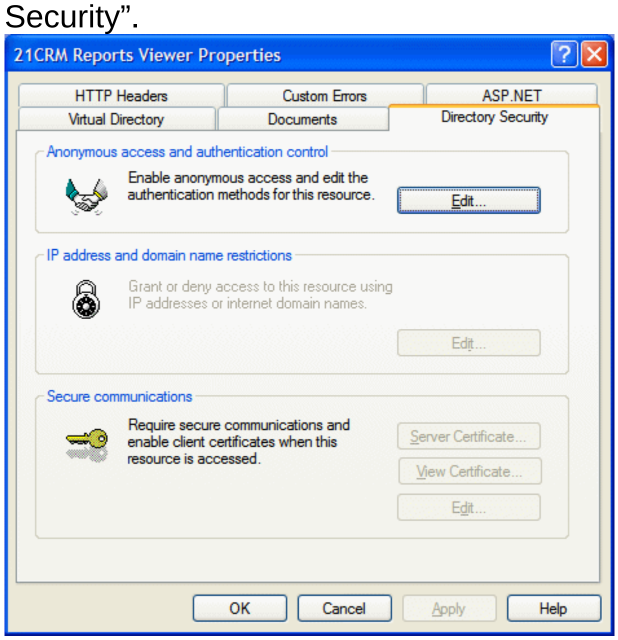
CRM Reports Viewer Website Configuration

After the 21CRM Reports Viewer Website has been installed there are a few configuration settings that must be applied. The user that IIS (Internet Information Services) uses to log on to the system must have access to both the local file system and the registry. To accomplish this, follow the steps outlined below:

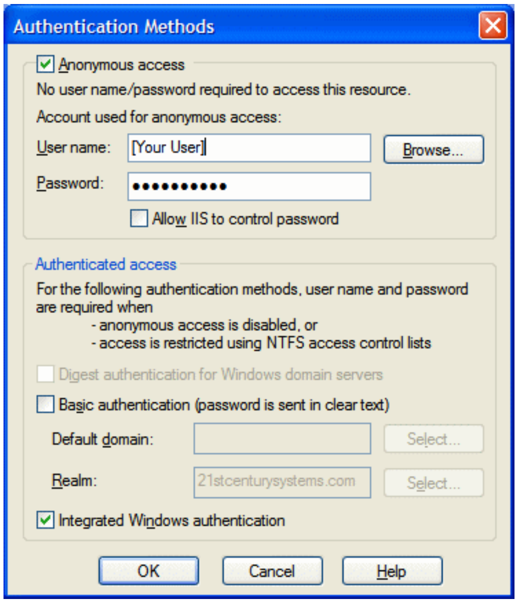
1. Open the Internet Information Services (IIS) Manager
2. Navigate to the 21CRM Reports Viewer node.
3. Right click the node and select properties.



4. This will open the following dialog. Select the tab labeled “Directory Security”.

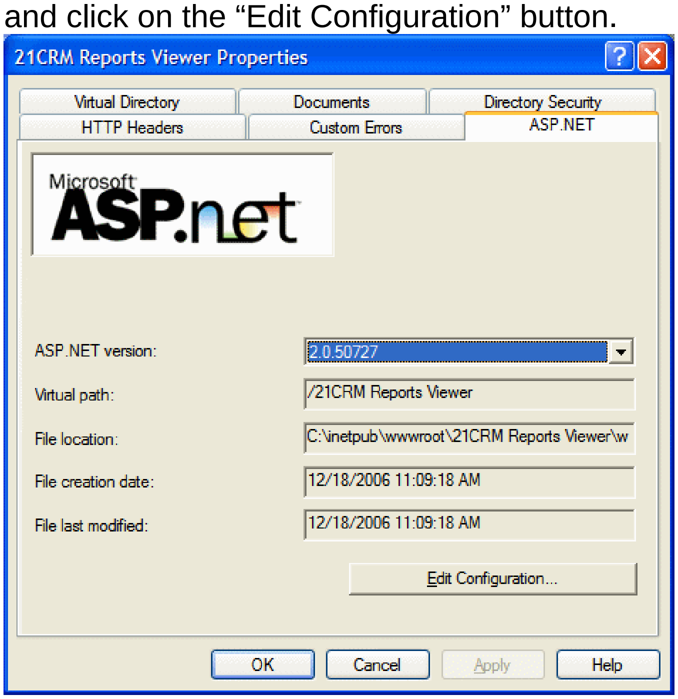


5. Click the Edit button under “Anonymous access and authentication control” to display the following page.

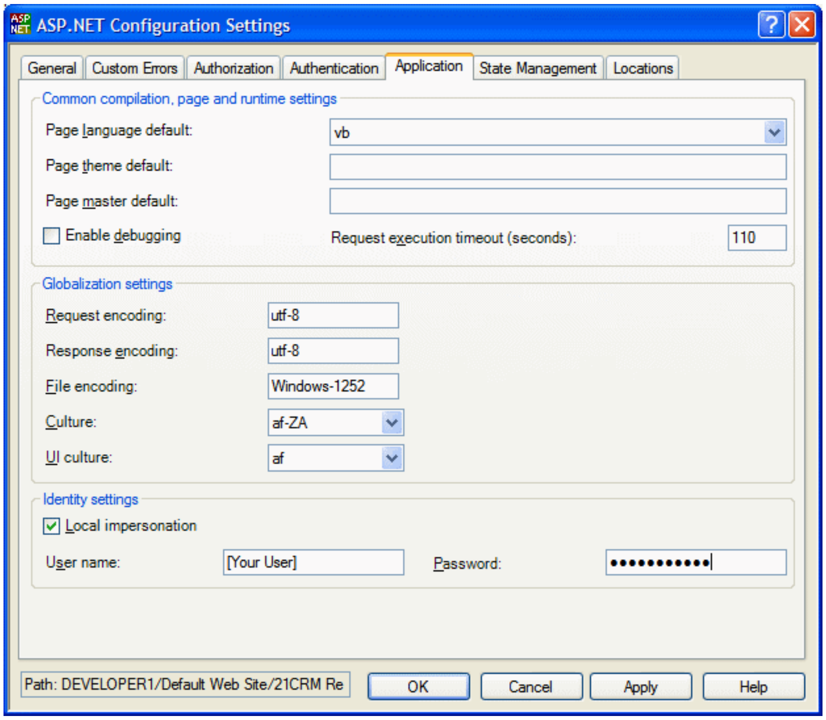


6. Ensure that the "Anonymous access" checkbox is checked and enter a user name and password that has access rights to both the local file system and registry in the "Anonymous access" group. Click OK when you have entered the appropriate credentials. If you have configured CRM to use a security account (the IUSR or another domain account), you can use the same account here.

7. On the "ASP.NET" tab ensure that the "ASP.NET version" is set to 2.0+ and click on the "Edit Configuration" button.



8. Navigate to the "Application" tab and check "Local impersonation". This will enable the "User name" and "Password" textboxes. Enter the same user credentials entered earlier in the "Directory Security" section.

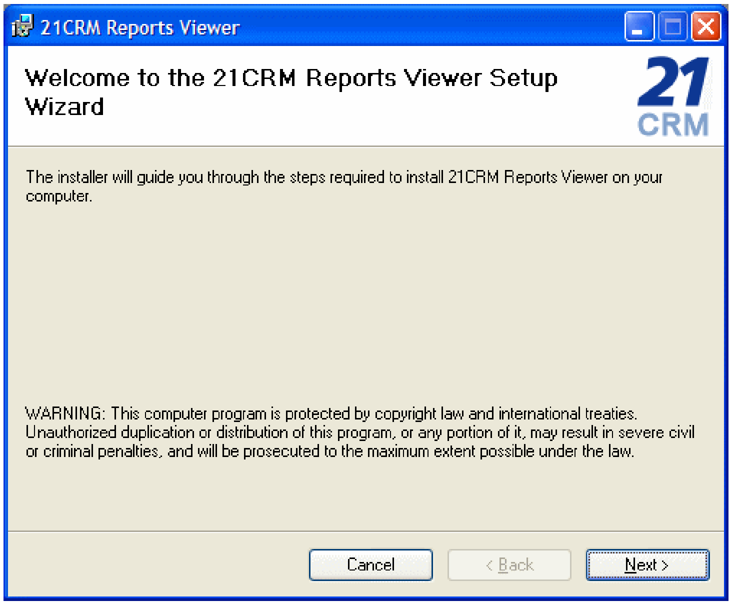


9. Click OK to close the ASP.NET Configuration and click OK again to close the IIS settings.

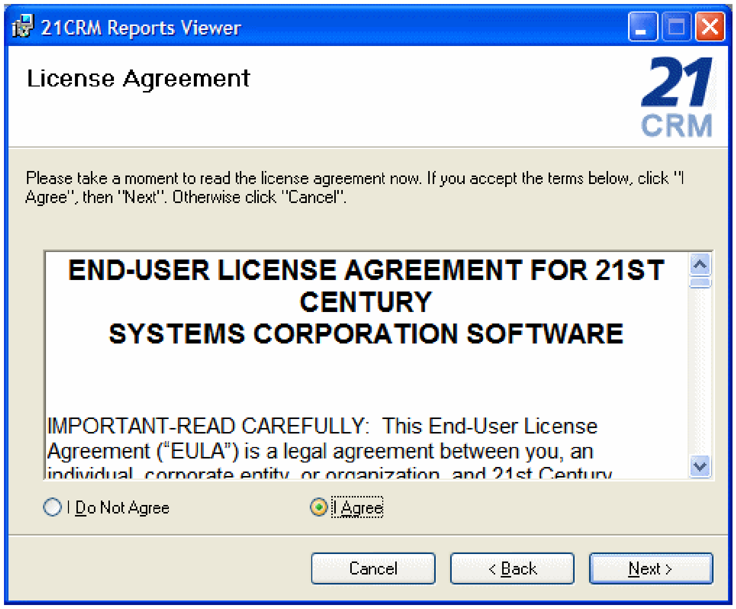
The 21CRM Reports Viewer Website is now installed and configured.

CRM Reports Viewer Plug-in Installation

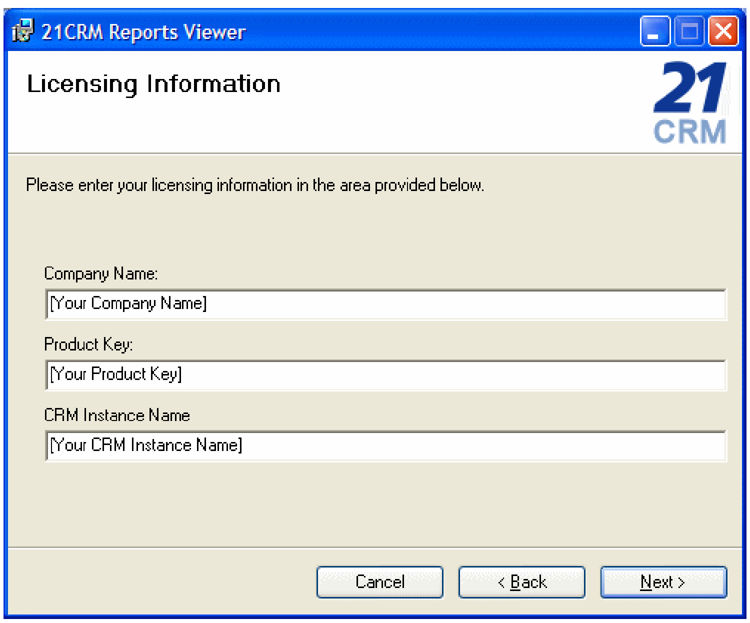
To begin the installation process, execute the file named "21CRMReportsViewerCRMSetup.exe". This will present you with the following screen.



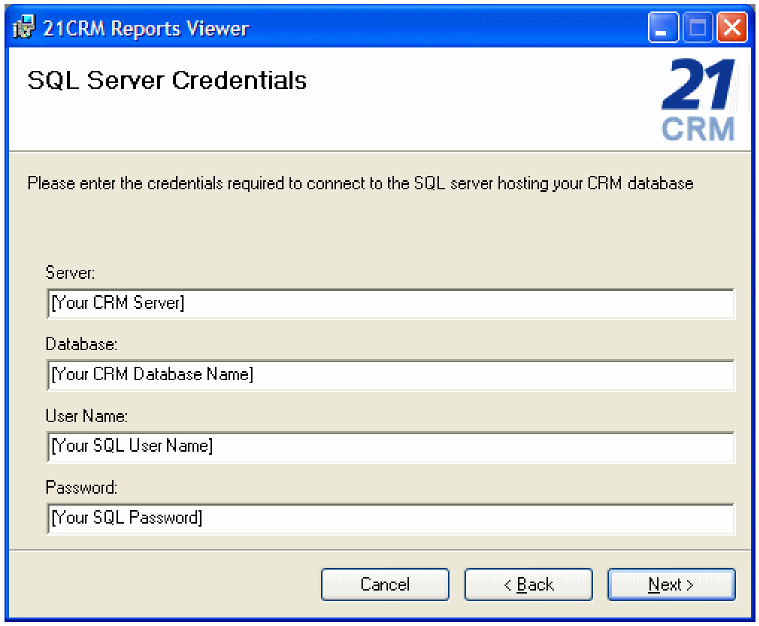
This screen informs you that the installation process is ready to begin. Click the Next button to continue with the installation.



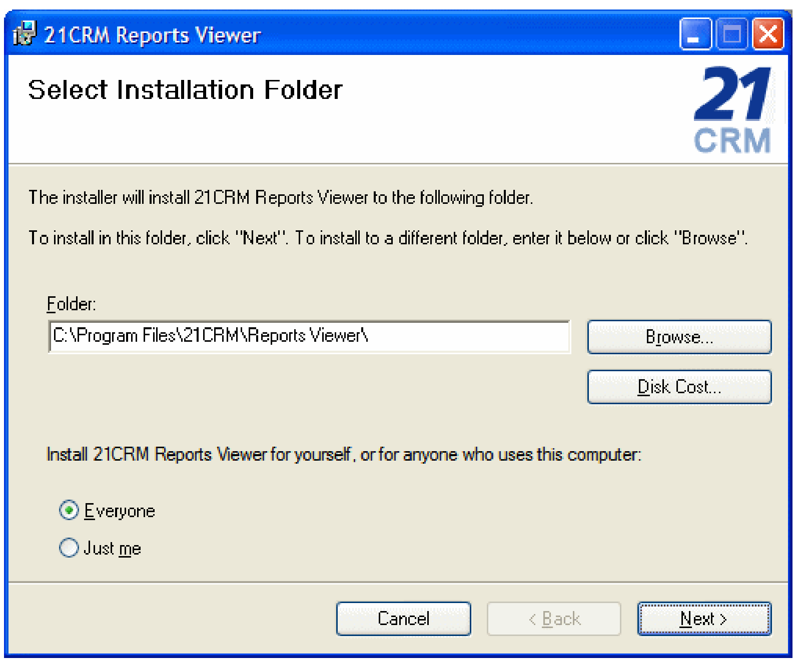
This is the end user license agreement (EULA) and should be read carefully and completely understood prior to continuing with the installation. Once you have fully read the EULA, select the "I Agree" option and click Next.



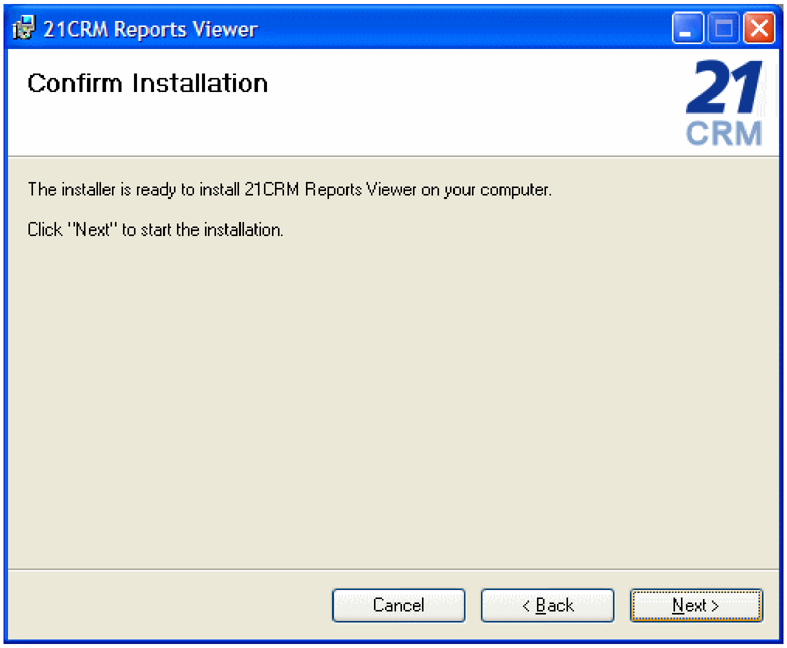
Enter the licensing information in the textboxes provided. Ensure the company name and product key are entered exactly as they were supplied. The instance name can be found in the URL of the CRM website. For example, the instance name of "localhost/**crm**/eware.dll/go" would be *crm*. Once the requested information has been entered, click Next to proceed with the installation process.



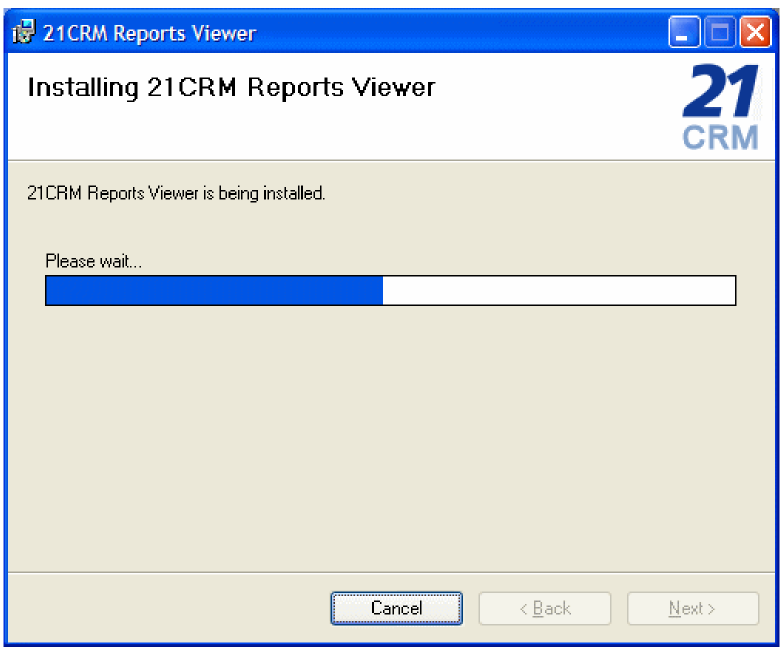
Enter the credentials required to log into the Microsoft SQL Server running the CRM database. Click Next to continue with the installation process.



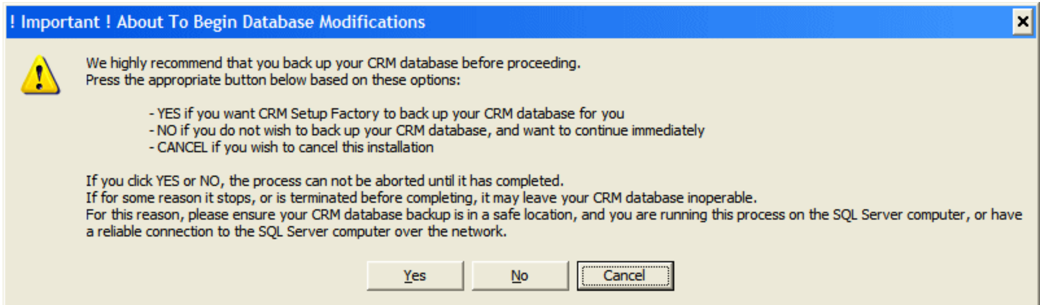
Verify that the installation path is correct. Ensure that the “Everyone” option is selected and click Next to proceed with the installation process. If “Everyone” is not selected, the installation will not operate correctly.



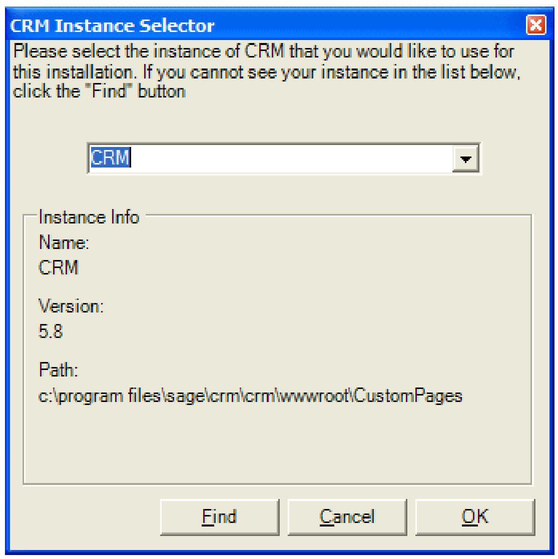
The installer has collected enough information to begin the installation. Click Next to begin the installation.



This screen illustrates the status of the installation. About half-way through the installation the following dialog will appear.



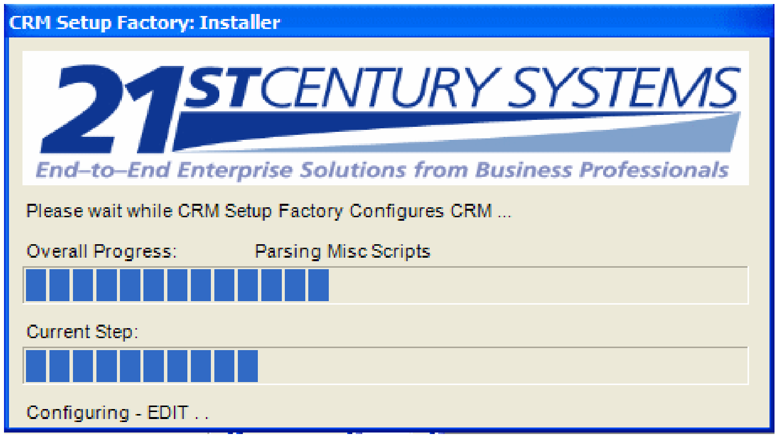
This dialog indicates you that the database and file system modifications are about to begin and prompts you to create a backup of the CRM database. Read the dialog carefully and select the appropriate option before continuing. If you choose to create a backup you will presented with two dialogs. The first will ask for a location on the file system to store the back up and the second will ask for a name. The installer will then display the following screen:



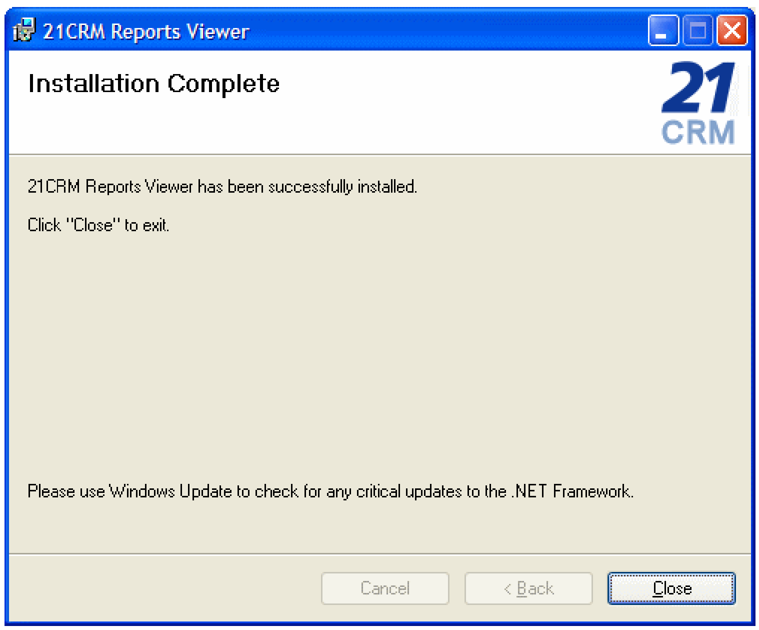
From the drop-down list, select the installation of CRM to which 21CRM Report Viewer will be installed.

Note: If the setup application cannot determine what the installed CRM instances, use the Find button and navigate to the CUSTOMPAGES folder of the CRM instance. Ensure when using Find that you select the CUSTOMPAGES folder and not the root CRM folder. Doing so will cause the installation to fail.

Click OK to continue the installation.



This window illustrates the status of all file system and database modifications. When the file system and database modifications are completed, this screen will automatically close.



This screen indicates that the installation is now complete. The next step is configuring reports and users.

CRM Reports Viewer Plug-in Configuration

21CRM Reports Viewer is licensed based on active users in the system. In order for a user to use the product they must be marked as an active user of 21CRM Reports Viewer. This is accomplished by following the steps outlined below:

1. Navigate to the Users administrative section in CRM.

2. Find the user for whom you would like to enable for 21CRM Reports Viewer.

3. Select the appropriate rights from the select list labeled "Reports Access Level". The available options are describe below.

   - None: User has no access to CRM Reports Viewer.
   - View User can view reports.
   - Manage User can view/add/delete reports.

4. Save the changes to the user's account.

Note: If a user is not enabled for the 21CRM Reports Viewer, the "21CRM Reports Viewer" option will not be available for that user when they go to the "Reports" section of CRM.

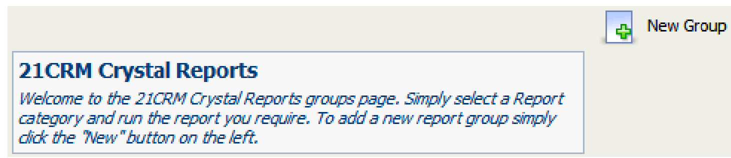
Configuring Report Groups

Once the user has been given access to 21CRM Reports Viewer, create a report group. This is accomplished by following the steps outlined below:

1. Navigate to the reports section of CRM.

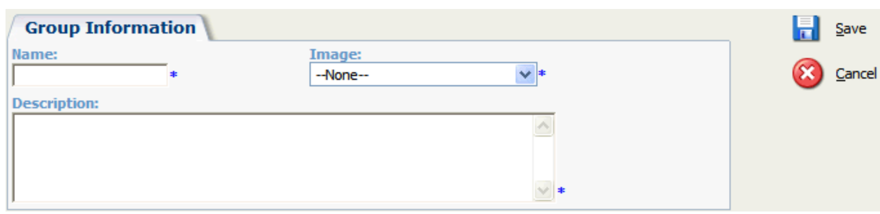
2. Select the 21CRM Reports Viewer button

3. Because this is a fresh installation and no groups have been added to the system yet, this screen will appear.



4. Click the “New Group” button in the top right hand corner of the screen to add a new group to the system.

5. This window asks for 3 key pieces of information:



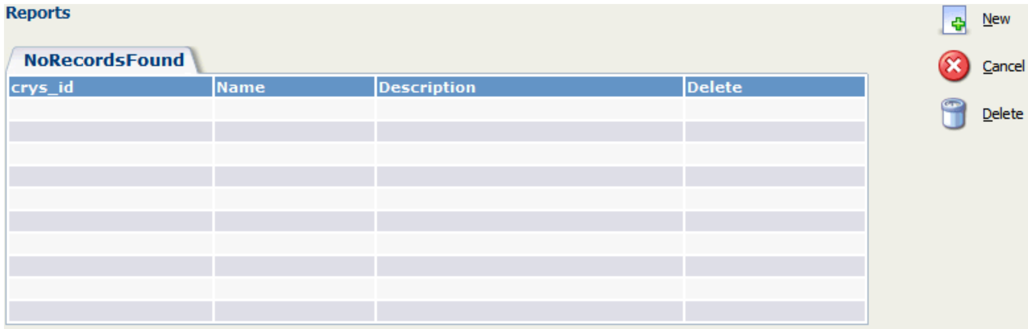
   a. *Name*: The name of the report group.
   b. *Image*: The image to display. (If you would like to use a custom image, place your image in the “*crm/img/icons*” folder and it will be automatically added to this list)
   c. *Description*: This is the description that will appear under the name of the report group.

   When all required information has been entered, click “Save” to create the group.

6. Now on the 21CRM Reports Viewer page, the report group just created will appear (“Developer Sample” is the User Guide example). Click on the newly created button to navigate to the group.

7. At this point during setup, there are no reports in the system for this group, so the list will be empty.

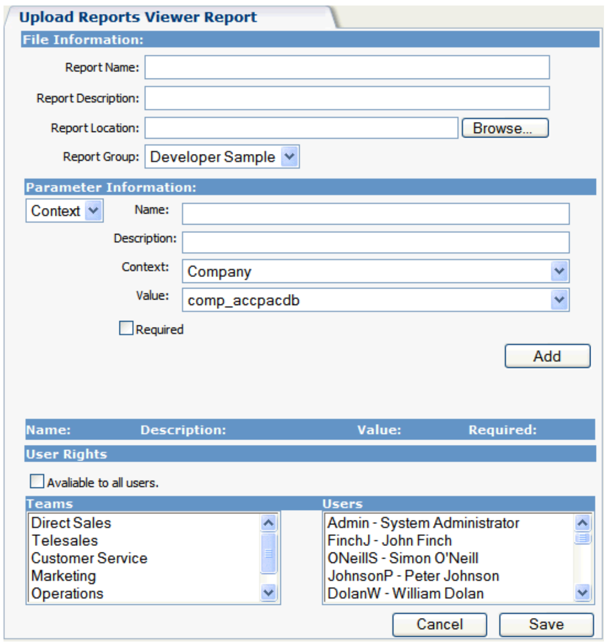
   NOTE: A report group can only be deleted when there are no reports in the group, and the user has appropriate rights.


Reports
NoRecordsFound
crys_id
Name
Description
Delete
New
Cancel
Delete

Adding a Report

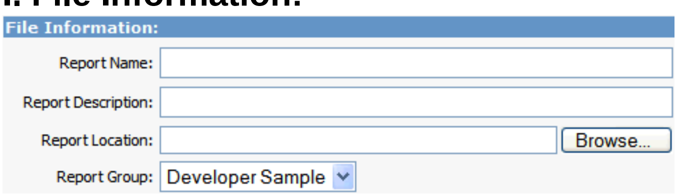
To add a new report to the group click the "New" button in the top right hand corner of the screen.

1. The "New Report" page asks for all the details for a particular report:



This screen is laid out in 3 sections:

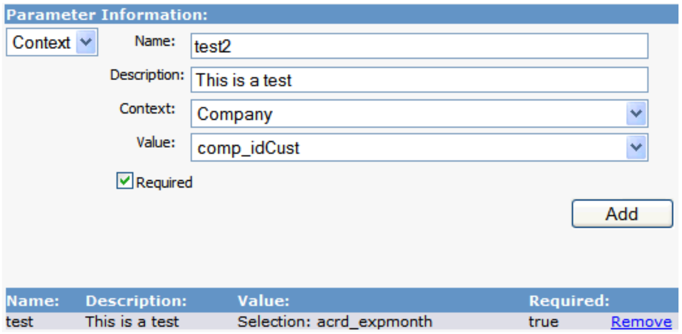
I. File Information:



This section asks for basic information regarding the report to be upload.

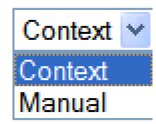
Report Name: The name of the report
Report Description: The description for the report
Report Location: The report to upload (click the browse button to find)
Report Group: The group to add the report to. Will be auto-populated with the current group selected.

II. Parameter Information:

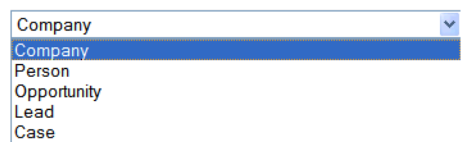


This section is asking for the parameters to be passed to the Crystal Report. The parameters are grouped into two types.

Context:
Context parameters are taken from the current context of the user when they run the report. This type of parameter can be useful when running a report from a workflow.



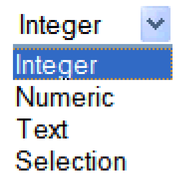
There are several places that the context information can be taken from: Company, Person, Opportunity, Lead, Case, or Solutions. If the report is expecting a parameter from the current context and the user is not in that context, the user will be prompted to provide a value for that parameter.



The value is which field from the current context to be passed into the report. This can be any field that is on the table in the database. For example, if running the report from the Company context, the value could be “Comp_Name”.

The description is shown to the user as a means of informing them of what type of data is expected for this parameter.

Manual:
Manual parameters are useful when the user needs to supply specific information to run the report.



Manual parameters have four possible types Integer, Numeric, Text or Selection. The first three are presented to the user as textboxes that accept the desired parameter. The fourth, “Selection”, displays an existing select list in the system and allows the user to select a particular value.

All parameters can be marked as required by placing a check in the checkbox labeled “Required”.

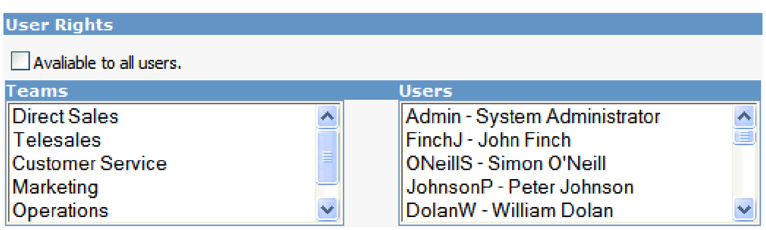
Once all information has been entered for a parameter, click the “Add” button which will add the parameter to the list of parameters for this report. The list is located in the bottom of the parameter section.

Name:	Description:	Value:	Required:	
test	the companies ID	company - Comp_CompanyId	true	Remove

To remove a parameter, click the link labeled “Remove” on the right-hand side of the table row.

III. User Rights:

The last section of the report window specifies which users can run the selected reports. This has been broken up into three possibilities:



- Available to all users
  - The report is available to all users in the system.
- Available to users based on teams
  - The report is available to users in the selected teams.
- Available to specific users
  - The report is available to the users specified

You can specify a combination of teams or individual users that have access to the report.

For example, You can choose to make the report available to the “Telesales” and “Operations” teams, as well as “JohnsonP” by clicking on “Telesales”, then holding CTRL and clicking “Operations”, and then in the users box, clicking “JohnsonP”.

The CTRL-Click allows you to select multiple items in a multi-select box.

NOTE: Only *configured* users (value other then “None” in the “Report Access Level” on the user record in User Administration section) can view reports, even if the report itself allows all users rights.

Once you are satisfied with all the report settings click the Save button located in the bottom right-hand corner of the screen to upload and save the report.

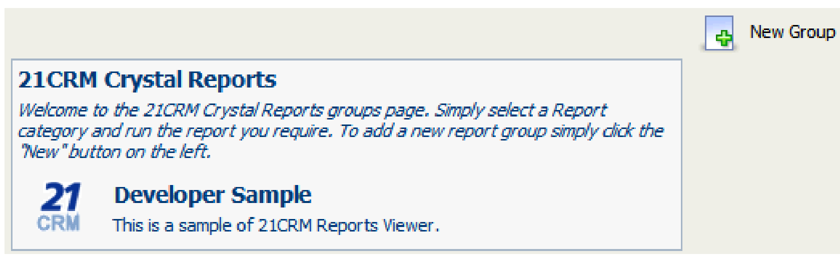
Using 21CRM Reports Viewer

Running a report

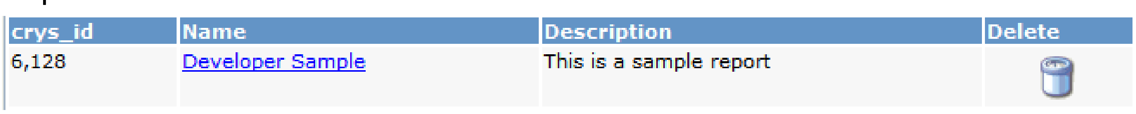
To run a report, click the "Reports" button located in the "Main Menu".

From the reports section of CRM, select "21CRM Reports Viewer".

The following screen displays all the groups that have been set up in the system.

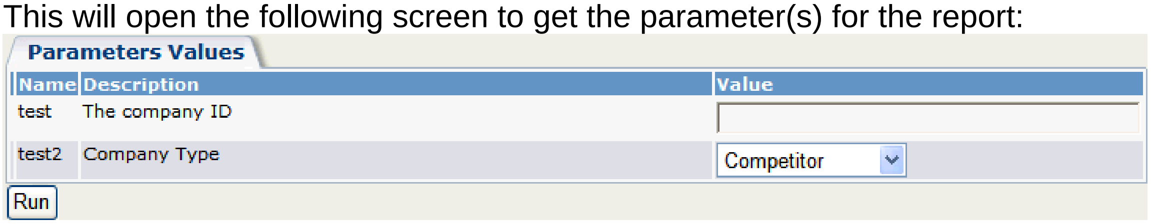


Click on a group to view the reports. From the list of reports shown, select the report to run and click its name.



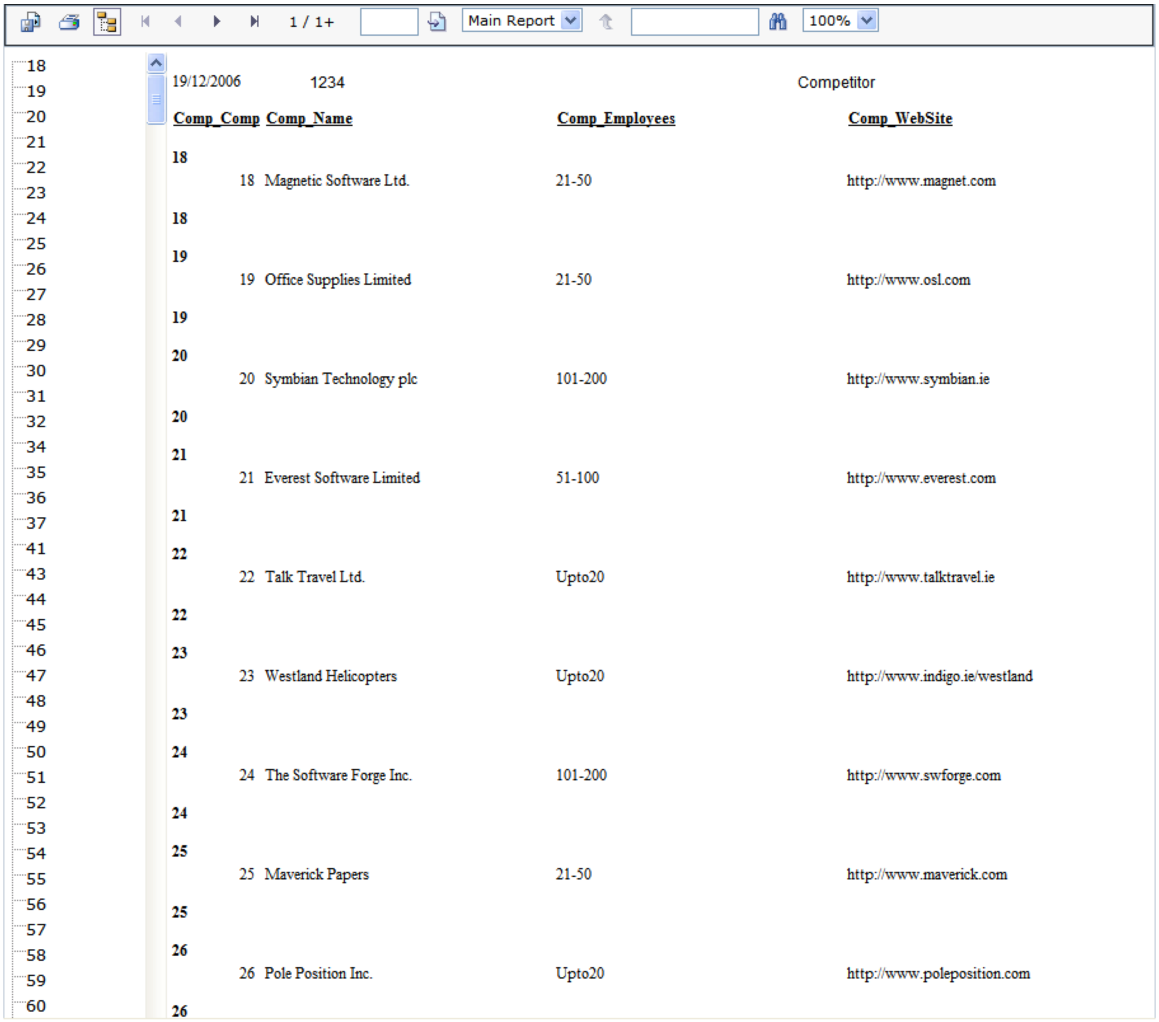
NOTE: You can also delete a report from this screen, if you have sufficient rights.

This will open the following screen to get the parameter(s) for the report:



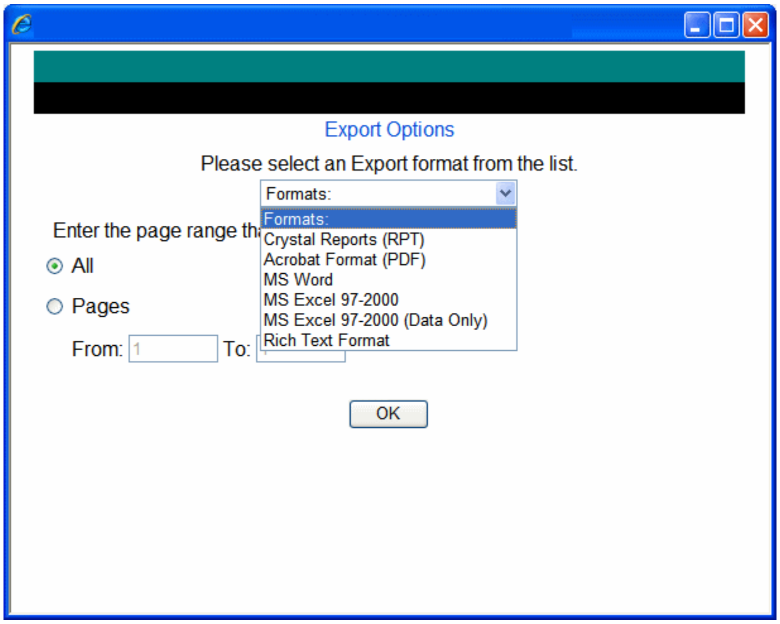
This screen shows how users are prompted for parameters. In this example, the top parameter "test" is a Context parameter which is getting the current company's ID. This example report was not run from the context of a company so it is displayed as a text box expecting the user to provide a value. The second parameter was created as a manual *selection* and comp_type was chosen. The user must select the type of company to use for the report parameter.

Once all the parameters have been provided, click the “Run” button. This button opens a new window where the report will be displayed and it refreshes the CRM screen back to the “Available Reports” page.

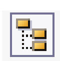


The Report window has several buttons:

-  Click the export button to export the report. The following window prompts you for information such as the desired output file type and which pages to export.



-  Click the print button to print the report.

-  Click the tree list button to show / hide the tree list.

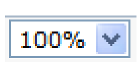
- 

This panel is used to navigate around the report. Enter a page number in the textbox and click the right-side button to navigate to that page.

- 

This dropdown list contains the history of the views of this report. Selecting an item returns you to that view.

-  Use this textbox button combination to search within the report.

- 

Use this dropdown list to specify the zoom level.

Running a report from a workflow

One of the primary advantages of the 21CRM Report Viewer is that Crystal Reports can be run from custom buttons, and from workflow rules. This makes it possible to run Crystal Reports from almost anywhere in CRM.

To run a Crystal Report from a workflow rule, follow the instructions below:

1. Create/Update a workflow as usual.
2. Create a workflow rule (primary or transition) that you will use to run the report.
    a. In the “Custom File Name” field enter the following line “21crm/RViewer/view.asp?crys_id=[report ID]”.
       Replace [report ID] with the report that you would like to run.
    b. The report IDs are listed on the available reports screen. This integer number is the leftmost column in the report list.
3. Save the changes to the workflow.

The workflow can now run the report.

If the report has context parameters, they will automatically be detected and supplied to the report. If it has manual parameters, the Report Viewer will request the parameters from the user when the report is run.

Customization Notes

If you have inquiries about customization of this, or any of 21CRM Systems CRM extension products, please contact your software provider.

Known Issues & Troubleshooting

At this time there are no known issues with the 21CRM Reports Viewer installation process.

If you experience any issues, please report them to us contacting your software provider, or, if you are a 21CRM Systems partner, by logging into our online self-service support portal at http://www.21crmsystems.com and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

For further assistance you can contact us:

21CRM Systems Inc
200 - 1335 Erin Street
Winnipeg, MB, Canada
R3E 2S7
Phone: 1.204.480.9772
Email: support@21crmsystems.com

Online: http://www.21crmsystems.com

Electronically submitted support requests generally will be responded to the fastest. Please consider using that option.