



# ZuckerReports Manual





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## Introduction

ZuckerReports is an extension module for Sugar Suite, the well-known commercial Open Source Customer Relationship Management software. It is fully integrated into the Sugar Suite and provides a design and runtime environment for building visually appealing and significant output screens from your CRM system.

### Short feature list

- Management of report definitions and query templates
- Management of Microsoft Office templates with binding to Sugar data (mailmerge with Word, Excel reports)
- Management of OpenOffice/StarOffice templates with binding to Sugar data (mailmerge with StarWriter)
- Management of parameter selection lists
- Parametrization and execution of report definitions and query templates
- Categorization of executed reports and query results for later use
- Export of executed reports and query results in various formats

### Supported Output Formats

- PDF (with charts – based on JasperReports)
- HTML Tables (full customizable)
- CSV (usable with Microsoft Excel or OpenOffice)
- Microsoft Word
- OpenOffice
- Prospectlists for your Campaign-Management



## Quickstart

- Make sure that you have installed Java on your Sugar server (if you intend to use JasperReports)
- Install the ZuckerReports module as described in “Add ZuckerReports module to your Sugar installation”
- Check the file “modules/ZuckerReports/config.php” and read the comments about how to apply those settings.  
**Note: nearly all problems are due to java not installed or configured correctly**
- Download and install the sample modules (using Sugar Module Loader) in this order:
  - Contacts\_Queries
  - Sample\_Listings
  - Office\_Templates
  - PipelineBySalesStageChart\_Report
  - ...
- Look at the chapter “Binding Reports or Queries to a Module – IMPORTANT!!!” to get the most out of ZuckerReports.



## ZuckerReports Module

The user and administration frontend is embedded as own module in Sugar Suite. It can be enabled/disabled for each user just as with all the other modules coming with Sugar Suite.



### )) ZuckerReports:

Edit	Delete	Run Rep
Template Name	Mee	
Description		
Allowed Formats	Adol	

The module provides the following functions for your **Sugar administrators**:

- Upload and configure report definitions and Microsoft Office / OpenOffice templates Configure report parameters for reuse among your report definitions
- Manage report categories for clean separation of reporting results for later use
- Define and configure query templates (arbitrary SQL)

### ▾ Parameters

Friendly Name
Meeting

For your **Sugar users**, the module provides the following functions:

- Parametrize and execute the report definitions and query templates defined by your Sugar administrators
- Export results in various formats
- Attach results to accounts, cases, projects etc.
- Publish results to “Home” view

### ▾ Parameter Selectio

Attach	
Parameter	Acc
Parameter Name *	ACCC
Default Value	



## Installation of Requirements

Please be sure to meet the following requirements before installation of ZuckerReports.

### **Sugar >= 4.2**

This product has been tested with Sugar 4.2 and will be supported in future releases as well.



### **Java Development Kit >= 1.4.2 (recommended)**

ZuckerReports uses a Java backend for running your JasperReports designs and providing it's outstanding reporting capabilities (<http://java.sun.com/>). Please be sure to install the Development Kit, not only the Runtime Environment on your **Sugar Server**.



If you don't intend to use the JasperReports engine, you may omit this step. Without a Java installation, the following features are enabled:

- Design and execution of your custom listings
- Design and execution of your custom SQL queries
- Design and execution of MS Word and OpenOffice Mailmerge templates

Having a running Java installation enables you to additionally run the following features:

- Execution of JasperReports designs

**Note: If you decide not to install a Java Development Kit, you have to configure your ZIP utility in the file modules/ZuckerReports/config.php. Some samples are included there, and in most of cases, it is sufficient to simply uncomment one of the preconfigured sample settings. If you have a working Java Development Kit, the integrated ZIP utility will be used by default.**

### **iReport (recommended)**



iReport is a powerful, intuitive and easy to use visual report designer, suitable for use with ZuckerReports (<http://jasperforge.org/sf/projects/ireport>). Please follow our "iReport Tutorial" after successful installation of ZuckerReports for getting to know iReport.

### **Which iReport version to use ?**

ZuckerReports is tested with current iReport release on publication. For future upgrades, ZuckerReports can be used with **any iReport release**, as long as it is compatible with the included jasperreports library. To ensure compatibility:



- Download and install iReport on your workstation
- Remove the full contents of the “modules/ZuckerReports/jasper” folder on your Sugar server **except** file “zuckerreports-1.0.jar”
- Copy the full contents of the “lib” folder of your iReport installation to the folder “modules/ZuckerReports/jasper” on your Sugar server after installation of ZuckerReports.

### ***.net Framework 1.1 and Microsoft Office (on your desktop)***

Please be sure to have a working installation of the .net Framework 1.1 and Microsoft Office on your desktop (in case you are using corresponding features of ZuckerReports).

### ***Java Runtime Environment >= 1.4.2 and OpenOffice (on your desktop)***

Please be sure to have a working installation of a Java Runtime Environment >= 1.4.2 and OpenOffice on your desktop (in case you are using corresponding features of ZuckerReports).



## Installation Steps for ZuckerReports

Since Sugar 3.5 the Sugar Module Loader is used for ZuckerReports installation. In case you want to use ZuckerReports with Sugar releases prior to 4.2, please contact us at [support@go-mobile.at](mailto:support@go-mobile.at) to receive installation instructions.

### **Add ZuckerReports module to your Sugar installation**

Login to Sugar with your “admin” account and click on “Admin” (right on the top) to open the “Admin”-module.  
Click on “Module Loader”

es	Backups	Perform a backup
	Module Loader	Add or remove modules to Sugar

Click on the “Browse...” button and select to file “ZuckerReports\_Professional\_<version>\_module.zip” included in the ZuckerReports distribution. Click on the “Upload” button.

### Administration: Module Loader

Upload a Module:

The following Modules are locally queued for installation:

Name	Type	Version	Date Published	Installable	Description
------	------	---------	----------------	-------------	-------------

**Note: if you receive the error “Please specify a file and try again!”, then open your php.ini with your favourite text editor, increase the maximum filesize for upload to 20M and restart apache afterwards:**

```
post_max_size=20M  
upload_max_filesize = 20M
```

**Note: If you have problems uploading such large files, you may follow these steps.**

- **Delete the modules/ZuckerReports/jasper folder out of the ZuckerReports module file**
- **Follow all the installation steps in here, the module file now is much smaller**
- **Copy the original modules/ZuckerReports/jasper folder from the ZuckerReports module file to your ZuckerReports installation in your Sugar directory**

You can now see ZuckerReports in the list of available modules. Click on the “Install” button to install the module.



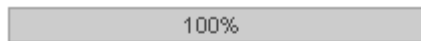
The following Modules are locally queued for installation:

Name	Type	Version	Date Published	Uninstallable	Description		
 ZuckerReports	Module	1.2	2005/09/29	No	ZuckerReports	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>

On the next screen click on “Commit” to start installation.

Module is ready to be installed. Click "Commit" to proceed with installation.

If everything works, you will see a screen telling that installation is completed.

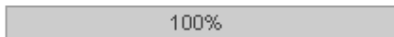


[Display Log](#)

Complete

Module Installed successfully!

Note: you may receive more detailed information when clicking on “Display Log”



```
Merging application files for modules.ext.php in Ext/Include
Copying .../module/ZuckerDocs to modules/ZuckerDocs
Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/module/ZuckerDocs
Copying .../root/download.php to download.php
Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/root/download.php
Installing Images
Copy C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/images
Installing Language Pack ...C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/application/app_strings.en_us.lang.php for application
Installing Language Pack ...C:\DOCUME~1\tremif\LOCALS~1\Temp\31D.tmp/application/app_strings.ge_ge.lang.php for application
Rebuilding Language...en_us
Merging module files for en_us.lang.ext.php in Ext/Language/
Merging application files for en_us.lang.ext.php in Ext/Language/
Rebuilding Language...ge_ge
Merging module files for ge_ge.lang.ext.php in Ext/Language/
Merging application files for ge_ge.lang.ext.php in Ext/Language/
Installing Bean : ZuckerDocs
File Does Not Exist:
Complete
Module Installed successfully!

```



Click on the “Back to Module Loader” button to return to the module list. You can now see ZuckerReports in the list of installed modules.

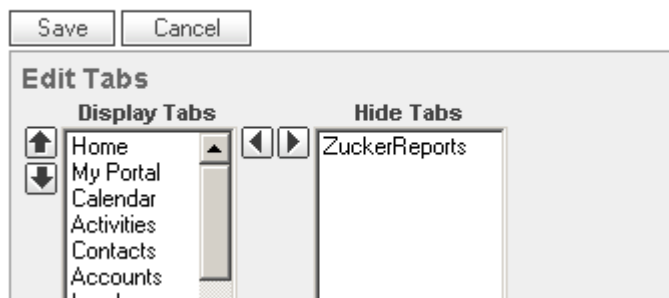
The following Modules have been installed:

Name	Type	Version	Date Installed	Description	Action
ZuckerReports	module	1.2	2005-09-30 13:34	ZuckerReports	Not Available
ZuckerDocs	module	1.4	2005-09-30 12:12	Document Management and Knowledge Base	Not Available

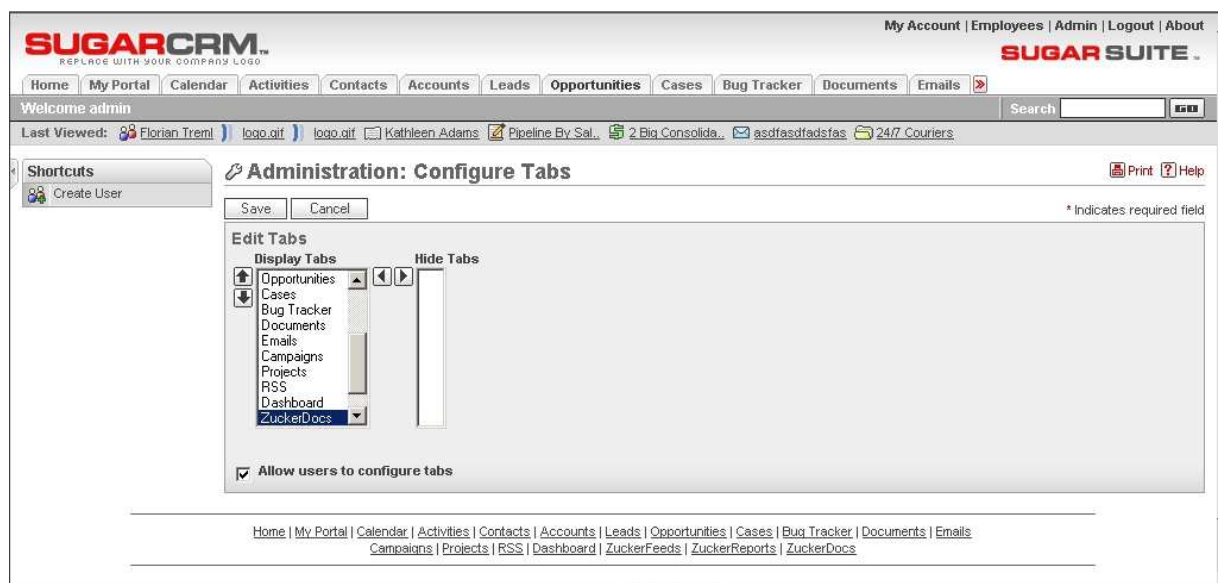
Back in the „Admin“-module, click on „Configure Tabs“. You will see a line “ZuckerReports” in the “Hide Tabs” box.

**Note: If you don't see ZuckerReports there, this may be because the “Rename Tabs” function in the Sugar Admin screen currently has a defect. If you ever used this function, ZuckerReports won't be shown in here until you add the new module “ZuckerReports” manually with the “Rename Tabs” function now.**

### Administration: Configure Tabs



Select „ZuckerReports“ in the „Hide Tabs“ box and click on the arrow pointing to the left. Click on the “Save”-button.



You can now see the new “ZuckerReports” tab in Sugar.





## Post-Installation Steps

### **Picture Files**

Copy the files starting with “Zucker” from the directory <Sugar>/themes/Default/images into the images subdirectory of the theme you are using (<Sugar>/themes/<your-theme>/images).

**Note: only with “Sugar” and “SugarClassic” theme the files are already there**

### **ZuckerReports Configuration**

The file “modules/ZuckerReports/config.php” contains some configuration settings, most important the path to your Java installation. Open this file with a text editor and read the comments on how to apply the different settings.

The most important are:

- “java\_cmdline” for configuration of your java installation (if not working out-of-the-box) – see section “Java Development Kit >= 1.4.2 (recommended)”
- “zip\_cmdline” for configuration of your ZIP utility (if **not** using a Java Development Kit which contains an integrated ZIP utility) – see section “Java Development Kit >= 1.4.2 (recommended)”



## **Uninstallation Steps for ZuckerReports**

- Uninstall all report packages you installed with the Sugar Module Loader BEFORE uninstalling the ZuckerReports package
- Uninstall the ZuckerReports package with the Sugar Module Loader



## Upgrading ZuckerReports

### **Patch available**

- Login to Sugar with your “admin” account and click on “Admin” (right on the top) to open the “Admin”-module.
- Use the “Upgrade Wizard” to upload and install the patch file.

### **Patch not available**

If there are heavy changes with ZuckerReports from one release to another, the patching mechanism provided by Sugar doesn’t work anymore. Follow these generic steps to do an upgrade without losing your settings:

- Make a backup copy for “modules/ZuckerReports/resources” folder
- Make a backup copy for “modules/ZuckerReports/config.php” file
- Make a mysql database dump (**data only, no scheme !!!**) for all tables starting with “zucker\_” using phpmyadmin or another database tool
- Make a backup copy for “modules/ZuckerListingTemplate/lists” folder (only if changed templates manually)
- Make a backup copy for “modules/ZuckerQueryTemplate/html” folder (only if changed templates manually)
- Uninstall previous release of ZuckerReports
- Install new release of ZuckerReports
- Merge the “modules/ZuckerReports/config.php” backup with the new one
- Restore the other backup copies you made above, including the database dump



## Modify “Home” to include published reports

You have to change the files “Home.html” and “index.php” within the “<Sugar-Root>/modules/Home” directory. This step is optional.

Note: please do a backup of these files before making the changes. You have to be something familiar with PHP coding.

Home.html

Add a “MYREPORTS” slot to the layout

```
...
<!-- BEGIN: main -->
<table cellspacing="0" cellpadding="0" border="0"
valign="top" width="100%">
<tr> <td valign="top" width="100%">
...
<slot>{MYREPORTS}</slot>
<slot>{MYOPPORTUNITIES}</slot>
<slot>{MYCASES}</slot>
...
</td>
</tr>
</table>
<!-- END: main -->
...
```

index.php

Add the code for the subpanel:

```
...
if(array_key_exists('ZuckerReports', $modListHeader))
    $panels['MYREPORTS'] =
    "modules/ZuckerReports/ReportHomeView.php";
if(array_key_exists('Bugs', $modListHeader))
    $panels['MYBUGS'] = "modules/Bugs/MyBugs.php";
...
```



Afterwards, you will find a the “Reports” panel showing the published reports on your “Home” view.

The screenshot shows a web browser window with several tabs: 'ssion', 'Sales Pipeline', 'Hugo', 'Hugo', 'X-SELL HOLDINGS', 'Pipeline By Sal..', '2 Big Consolida..', and 'ZuckerOffice\_Ma'. The main content area is divided into two sections:

**Reports**

Filename	Category	Date Modified
050617_145221_salespipeline.jasper.pdf	Sepp	2005-06-17 14:52:00
050617_132608_salespipeline.jasper.pdf		2005-06-17 13:41:00

**My Upcoming Appointments** through  (2005-06-23)

Close	Subject	Date
	Demo	2005-04-11 10:53

On the right side, there is a calendar for the month of June. The days of the week are Sun, Mon, and Tue. The dates 5, 6, 7, 12, 13, 14, 19, 20, 21, 26, 27, and 28 are visible. A 'Previous Month' button is located at the bottom of the calendar.



## ZuckerReports Administration

This chapter describes common administration tasks necessary to use ZuckerReports.

### *Parametrization of your reports*

Parametrization is one of the most important topics covered by ZuckerReports: it allows the runtime configuration of report and query execution in a user-friendly way. For example, when designing a report showing sales forecasts, it makes sense to include the timerange for which to do the forecast as a parameter (“Q1”-“Q4”), so you can reuse the report design next year.

To save your time, ZuckerReports maintains a “pool” of parameter definitions you can reuse in all of your reports – for example if you have a bunch of reports showing various information about an account, you only have to define the “Account”-Parameter once and attach it to a number of reports handling the parameter. ZuckerReports enables your Sugar administrators to configure a user-friendly selection box for a parameter, so your users don’t have to enter the value for the parameter with their keyboard, which is cumbersome and rather errorprone.

### *Defining a Parameter*

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Parameters”. You now see a list of already configured parameters.

**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

**ZuckerReports: Home**

**Report and Query Parameters**

New Report Parameter

Friendly Name	Default Name	Default Value	Selection
Account	ACCOUNT_ID		User-Defined Query
Contact Group	CONTACT_GROUP		User-Defined List
Contact	CONTACT_ID		User-Defined Query
Meeting	MEETING_ID		Direct Input
Search term	SEARCH_TERM		Direct Input



- Click on “New Report Parameter” to define a new parameter, or on the name of an existing parameter for making changes. Click on the “Save” button when you are ready.

“Friendly Name” – Enter the name of the parameter as shown to the user. It should be a short, descriptive text telling the purpose of the parameter, for example “Account Selection”

“Default Name” – Enter the name of the parameter as defined in the report (see chapters on report and query definitions), for example “ACCOUNT\_ID”

“Default Value” (optional) – This value is the default value which is presented to the user at report and query execution

“Description” (optional) – A descriptive text for the parameter, which contains clear information on how to use this parameter

“Selection” – you can choose between “Direct Input”, “Date Input”, “User-Defined Query”, “User-Defined List”, “Current User” and “PHP Script”

### Selection “Direct Input”

When executing a report or query, a textbox is presented to the user for enter a value for the parameter by keyboard.

### Selection “Date Input”

A date selection popup is shown.



### Selection “User-Defined Query”

You can get the value for a parameter from your database, which opens nearly endless possibilities for parameter selection. In the field “User-Defined Query” enter an arbitrary SQL-query which returns a resultset with one or two rows. Click on the “Test SQL-Query” button to test your query and get a snapshot of the parameter selection.

Selection: User-Defined Query

User-Defined Query: `select id, name from accounts where deleted = 0 order by name`

Test SQL-Query

KEY	VALUE
95f13d19-4269-0653-8d84-425a3a302ce8	2 Big Consolidation Corp
9afbbe63-1456-0c84-c608-425a3a5df2ae	2 Tall Stores
8ffde53a-1b19-527e-24c1-425a3ac98466	24/7 Couriers
a001660e-0154-af95-3359-425a3a6995aa	360 Vacations

When executing a report or query, a selection box is presented to the user for mouse selection.

Parameters

Account: 2 Big Consolidation Corp

Run Report

- 2 Big Consolidation Corp
- 2 Tall Stores
- 24/7 Couriers
- 360 Vacations

### Selection “User-Defined List”

Selection: User-Defined List

User-Defined List: Partners, B2B, Customers, Other

You can enter a list of values manually for providing a range of valid selections to your users. Enter the values separated by a colon.

When executing a report or query, a selection box is presented to the user for mouse selection.

Parameters

Contact Group: Partners

Run Report

- Partners
- B2B
- Customers
- Other

### Selection “Drop-Down List”

You may use a pre-defined Drop-Down-List from your Sugar environment for parametrization of your report. Very useful for “status”- or “category”-like fields.

go-mobile  
[office@go-mobile.at](mailto:office@go-mobile.at)  
<http://www.go-mobile.at/>



**go**mobile  
www.go-mobile.at

**Selection “Current User”**

The id of the currently logged on user is returned (no input required)

**Selection “PHP Script”**

The output of a PHP script is used for parametrization. You may enter any PHP code you want, and finish with a “return” statement.



## Category Management

For easy retrieval of your report and query result, you can assign it to a category, which essentially is the same concept as a “Folder” in common Operating Systems. You can create and delete subcategories in the “Report Archive”.

**Shortcuts**

- On-Demand Reporting
- Report Archive
- Report and Query Templates
- Report and Query Parameters
- About us

### Category: Root Category

Subcategory

Name	Description		
Hias	asdf		
Hugo			
Sepp1			
Sepp2			

### Reports

Filename	Date Modified		
050617_132538_salespipeline.jasper.pdf	2005-06-17 13:46:00	Not Published	
050617_132608_salespipeline.jasper.pdf	2005-06-17 13:41:00	Published	



## Upload and Configuration of report designs

ZuckerReports can handle reports designed for JasperReports, which are held in files ending in “.jrxml”. The ZuckerReports frontend supports the administrator in upload and configuration of these report design files, as well as attaching and detaching parameters.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New JasperReports Template” for uploading a new “.jrxml”-file.
- Click on the “Save” button when you are ready.

### )) ZuckerReports: Home

#### Template List

New Report Template			New Query Template			New Word Template		
Name	Type	Description						
Meeting Printout	Report							
Pipeline By Sales Stage	Report							
Sales Pipeline	Report							
All Contacts	Query							
Contacts by Account	Query							
MailMergeTest (MS Office Mailmerge Demo)	Word Template							

### )) New Report Template

Save
Cancel

**Template Name \***

**Template File**

**Description**

**Allowed Formats**

**Other Resources**

Browse...  

Adobe PDF (\*.pdf)

Excel (\*.xls)

Comma Separated Values (\*.csv)

HTML (\*.html)

XML (extern images, \*.xml)

XML (embedded images, \*.xml)

**Upload Resource**  Browse...

**Upload Resource**  Browse...

**Upload Resource**  Browse...

**Upload Resource**  Browse...

**Upload Resource**  Browse...

**Reports**

**Upload Subreport**  Browse...

**Upload Subreport**  Browse...

**Upload Subreport**  Browse...

**Upload Subreport**  Browse...

**Upload Subreport**  Browse...

“Template Name” - The name for the template as shown to the user

“Template File” – using the “Browse”-button select the “.jrxml” file to upload

“Description” (optional) - A descriptive text which contains clear information on how to use this template

“Allowed Formats” – select the formats the report can be exported to after execution

### Resource Upload

In case your report uses external resources such as “.class”-files or pictures, upload them as well by using the “Browse”-button in the “Other Resources”-section

### Subreport Upload

In case your report is built on subreports, upload the “.jrxml”-files by using the “Browse”-button in the “Reports”-section

**Note:** please consult the report design manual for correct usage of resources and subreports



## Bind and unbind parameters to report designs

For your report designs you first have to define your parameters in the “.jrxml”-file when designing the report. Please be sure to use exactly the same value for the parameter name in ZuckerReports, as otherwise parameter handling won’t work.

### )) ZuckerReports: Home

#### Template List

New Report Template			New Query Template			New Word Template		
Name	Type	Description	Name	Type	Description	Name	Type	Description
Meeting Printout	Report							
Pipeline By Sales Stage	Report							
Sales Pipeline	Report							
All Contacts	Query							
Contacts by Account	Query							
MailMergeTest (MS Office Mailmerge Demo)	Word Template							

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on the name of a report for showing the details.

### Binding a parameter

- Select the parameter to bind in the “Parameter Selection” section on the bottom
- Enter the “Parameter Name” as used in the report design or accept the suggestion
- Optionally enter a “Default Value” to suggest to the user when executing the report
- Click on the “Bind Parameter”-button.
- The attached parameter now is shown in the “Parameter Bindings” list.

### )) ZuckerReports: Sales Pipeline

Edit
Delete
Run Report

Template Name: **Sales Pipeline**

Description:

Allowed Formats: **Adobe PDF (\*.pdf)**  
**HTML (\*.html)**  
**XML (extern images, \*.xml)**  
**XML (embedded images, \*.xml)**

**Parameter Bindings**

Friendly Name	Parameter Name	Selection
Account	ACCOUNT_ID	User-Defined Query

**Module Bindings**

Module	Parameter Name

**Parameter Selection**

Parameter:

Parameter Name:

Default Value:

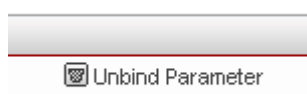
**Module Selection**

Module:

Linked Parameter:

### Unbinding a parameter

Simply click on the “Unbind Parameter” button in the “Parameter Bindings” list to detach the parameter from the report.

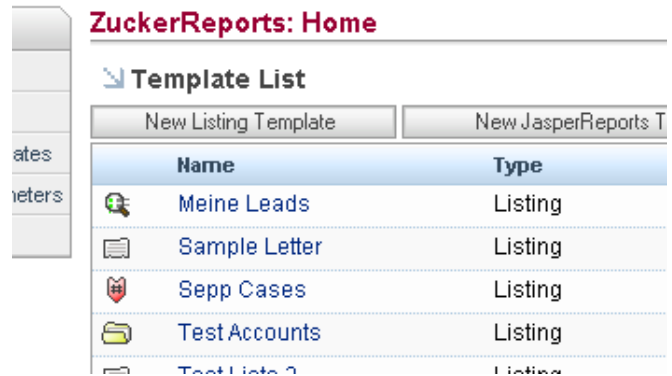




## Defining listing templates

Listing templates are the most basic reporting capability within ZuckerReports- just select the object to list (contacts, cases, etc), set your filters and sort order and you are ready to go.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New Listing Template”
- Click on the “Save” button when you are ready.



### New Listing Template

Save Cancel

Listing Name \*

Listing Module \*  
 Leads  
 Leads  
 Contacts  
 Accounts  
 Opportunities  
 Cases  
 Notes  
 Email Templates  
 Call

Filter Type \*  
 LL of th

Description

- “Listing Name” - The name for the template as shown to the user
- “Listing Module” – just select the objects you want to get listed
- “Filter Type” – select if ALL your filters or only ONE of them have to match (for filter definitions see below)
- “Description” (optional) - a descriptive text

Back on the listing template screen, you can now **add filters**

- Select the field to which to apply this filter
- Select the comparator to apply
- Select the filter value
  - Either from a runtime parameter (see Defining a Parameter above)
  - Or from a selection box (only for fields providing option lists)
  - Or enter a query (for “like”-searches you can use “%” as wildcard)
- Finally click on “Add Filter”

New Filter

Add Filter

Field ID  
 Comparator Deleted  
 Converted  
 Date Created  
 Last Modified

Select Filter Value  
 from Parameter --None--  
 or enter



Now you can add **order criterias**

- Select the field to order by
- Select the order type
- Finally click on “Add Order Criteria”

➤ **New Order Criteria**

Add Order Criteria

Field	ID
Order Type	Created by
	Salutation
	First Name
	Last Name

➤ **Module Bindings**

### ***Customizing output of listing templates***

The folder `modules/ZuckerListingTemplate/lists` contains some ready-to-use output templates for your listings. Just create a new one and include it in the “`config.php`” file right in there to make it available for output.



## Definition of query templates

ZuckerReports enables Sugar administrator to define arbitrary SQL-queries and let them execute by common Sugar users, including parametrization of the query.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New Query Template” for entering an SQL-query.
- Click on the “Save” button when you are ready.

### )) ZuckerReports: Home

#### Template List

Name	Type	Description
Meeting Printout	Report	
Pipeline By Sales Stage	Report	
Sales Pipeline	Report	
All Contacts	Query	
Contacts by Account	Query	
MailMergeTest (MS Office Mailmerge Demo)	Word Template	

“Query Name” - The name for the template as shown to the user

“Query” – enter your SQL query including placeholders for your parameters (see below)

“Description” (optional) - A descriptive text which contains clear information on how to use this query

### )) New Query Template

Save Cancel

Query Name \*

Query \*

Description



## Bind and unbind parameters to queries

For filling your queries with parameters, you have to use placeholders when entering the query (see above). Use the parameter name prepended with a "\$", and the parameter value is filled in when executing the query – for example, if you have a parameter named "ACCOUNT\_ID", use the placeholder "\$ACCOUNT\_ID" in your query.

### )) ZuckerReports: Home

#### Template List

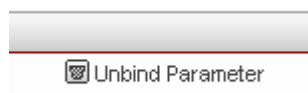
Name	Type	Description
Meeting Printout	Report	
Pipeline By Sales Stage	Report	
Sales Pipeline	Report	
All Contacts	Query	
Contacts by Account	Query	
MailMergeTest (MS Office Mailmerge Demo)	Word Template	

### Binding a parameter

- Select the parameter to attach in the "Parameter Selection" section on the bottom
- Enter the "Parameter Name" as used as placeholder in the query or accept the suggestion
- Optionally enter a "Default Value" to suggest to the user when executing the report
- Click on the "Bind Parameter"-button.
- The attached parameter now is shown in the "Parameter Bindings" list.

### Unbinding a parameter

Simply click on the "Unbind Parameter" button in the "Parameter Bindings" list to detach the parameter from the query.



- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on the name of a query for showing the details.

### )) ZuckerReports: Contacts by Account

Edit	Delete	Run Report
Query Name	Contacts by Account	
Query	select c.*, a.name as account_name from contacts c, accounts_co accounts a where c.deleted = 0 and ac.deleted = 0 and a.deleted = ac.contact_id and ac.account_id = a.id and a.id = "\$ACCOUNT_ID"	
Description		

#### Linked Word Templates

Template Name	Template File	Description
MailMergeTest (MS Office Mailmerge Demo)	MailMergeTest.doc	

#### Parameter Bindings

Friendly Name	Parameter Name	Selection
Account	ACCOUNT_ID	User-Defined Query

#### Module Bindings

Module	Parameter Name	
Accounts	ACCOUNT_ID	<input checked="" type="checkbox"/> Unbind from Module

#### Parameter Selection

Bind Parameter	
Parameter	Account (User-Defined Query)
Parameter Name *	ACCOUNT_ID
Default Value	

#### Module Selection

Bind to Module	
Module	Lead
Linked Parameter	ACCOUNT_ID



### ***Customizing output of query templates***

The folder `modules/ZuckerQueryTemplate/html` contains HTML snippets for formatting the query output. Just edit them with a text editor.

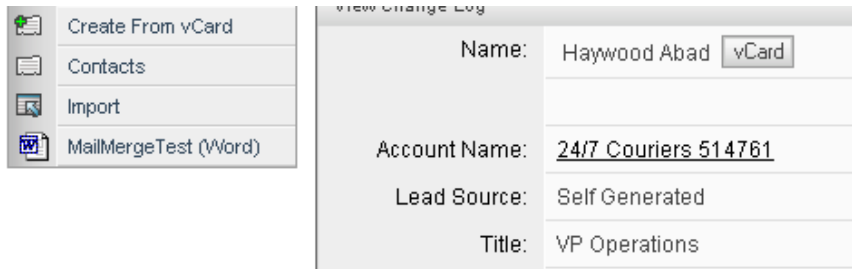


## ***Binding Reports or Queries to a Module – IMPORTANT!!!***

ZuckerReports allows the user to bind reports and queries to modules, which is very useful if you have reports or queries requiring the database identifier for a sugar object (contact, account, project, ...) as parameter. You can simply bind the report or query to this module, defining the parameter to set on execution, and the report or query can be called directly from the detail view of the other module.

This is one of the most essential features of ZuckerReports: it provides one-click-report execution from within all other modules. Usage Examples:

- Send letter to all contacts within an account, automatically mailmerged with your Sugar data
- Replace the plain old “Print” button coming with Sugar with pixel exact PDF printouts
- Replace the “Export to PDF” button in the Quotes module with pixel exact and easy-to-design PDF templates





- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on the name of a report or query for showing the details.

### ZuckerReports: Home

#### Template List

Name	Type	Description
Meeting Printout	Report	
Pipeline By Sales Stage	Report	
Sales Pipeline	Report	
All Contacts	Query	
Contacts by Account	Query	
MailMergeTest (MS Office Mailmerge Demo)	Word Template	

### Binding to a module

- Select the module to bind to in the “Module Selection” section on the bottom
- Select the parameter to link the database identifier for the module item to
- Click on the “Bind to Module”-button.
- The bound module now is shown in the “Module Bindings” list.

#### Module Selection

Bind to Module

Module	Account
Linked Parameter	Account

Account  
Opportunity  
aCase  
Note  
Call

ir | Activities | Contacts | Accd E... | es | Case:

### Unbinding from a module

Simply click on the “Unbind from Module” button in the “Module Bindings” list to detach the module from the query or report.



## Upload and Configuration of Microsoft Office/OpenOffice files

ZuckerReports can handle Microsoft Office and OpenOffice files bound to a datasource (Word, Excel and StarWriter). At runtime these files are connected to data resulting from a ZuckerReport query template. The ZuckerReports frontend supports the administrator in upload and configuration of these queries and Microsoft Office/OpenOffice files.

Note: Your Microsoft Office/OpenOffice files are always bound to a query template defined in ZuckerReports (see “Definition of query templates”). Parameter and module binding are always taken from these query templates.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New Office Template” for uploading a new “.doc”-file.
- Click on the “Save” button when you are ready.

### ZuckerReports: Home

#### Template List

Name	Type	Description
Meeting Printout	Report	
Pipeline By Sales Stage	Report	
Sales Pipeline	Report	
All Contacts	Query	
Contacts by Account	Query	
MailMergeTest (MS Office Mailmerge Demo)	Word Template	

### New Office Template

Save Cancel

Template Name \* MailMergeTest.doc

Template File rces\MailMergeTest.doc Browse...

Description

Query All Contacts

“Template Name” - The name for the template as shown to the user  
“Template File” – using the “Browse”-button select the file to upload  
“Description” (optional) - A descriptive text which contains clear information on how to use this template  
“Query” – select the query template to bind to

go-mobile  
[office@go-mobile.at](mailto:office@go-mobile.at)  
<http://www.go-mobile.at/>



**go**mobile  
www.go-mobile.at

## Contact

For licensing questions please contact us at <mailto:sales@go-mobile.at>  
For support questions please contact us at <mailto:support@go-mobile.at>  
For general questions please contact us at <mailto:office@go-mobile.at>