



THE FOLLOWING PRESENTATION WILL GIVE YOU A BRIEF OVERVIEW OF CYNERGY'S 300+ REPORTS AND HOW TO BUILD CUSTOM REPORTS.



CRYSTAL REPORTS XI RELEASE 2

Create New

Search For

Tickets

Enter Ticket Number

Go

Saved Ticket Search's

Saved Ticket Group's

Quick Ticket

Ticket Wizard

CRM

Saved CRM Search's

Go

Search CRM

Recently Viewed Items

 [Visual Issues](#)

 [Joshua Gates](#)

 [Marcus Robinson](#)

Dashboard

All Tickets

Edit mode

Tickets assigned to me

CYNERGY REPORTS

Print

Status

Priority

Last Update By

Search Returned No Records

« ‹ 1 › »

Page size: 10

0 items in 1 p

Show Closed Tickets

There are over 300 Reports in Cynergy

The screenshot displays the Cynergy software interface. At the top left is the Cynergy logo with the word "software" underneath. A navigation bar contains tabs for Home, Tickets, CRM, Opportunities, Projects, Expenses, ISchedule, Asset, and Knowledge C. Below this is a secondary bar with "Create New" and "Search For" buttons. The main content area is divided into a left sidebar and a main panel. The sidebar has sections for "Tickets" (with a search box and "Go" button), "CRM" (with a search box and "Go" button), and "Recently Viewed Items" (listing "Visual Issues" and "Joshua Gator"). The main panel shows a "Select Report Group" dropdown menu with "Favorites" selected, revealing a list of report options such as "CRM Reports", "Reports by Status", "Reports by Assigned Groups", "Reports by Assigned Users", "Ticket Reports by Category (Group)", "Ticket Reports by Category (Users)", "Ticket Count Reports by Assigned User (Bar Chart) with Aging", "Ticket Count by Assigned User (Pie Chart) with Dating", "Ticket Count by Assigned User by Status (Bar Chart) with Dating", "Ticket Statistics by Assigned User (With Dating)", "Ticket Statistics by Assigned User by Status with Dating", "Ticket Count by Assigned User by Status (Pie Chart) with Dating", "Opportunity Reports Leads by Source with Date Range", "Opportunity Reports by Lead Source by Date Range with Sales Stages", "Opportunity Statistics by Assigned Salesperson", and "Custom Reports". An "Options" button is visible on the right side of the main panel.

After Selecting a Report, click on RUN REPORT

You can also schedule a report to run on predetermined times

Cynergy software

Home Tickets CRM Opportunities Projects Expenses ISchedule Asset Knowledge Cent

Search For

Select Report Group

Ticket Reports by Category (Group)

Report Name	Description	Options
Group Tickets by Category by Group YearToDate	Group Tickets by Category by Group YearToDate	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group AllDatesToYesterday NO PARAMS	Group Tickets by Category by Group AllDatesToYesterday NO PARAMS	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group AllDatesToYesterday	Group Tickets by Category by Group AllDatesToYesterday	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group AllDatesToToday NO PARAMS	Group Tickets by Category by Group AllDatesToToday NO PARAMS	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group AllDatesToToday	Group Tickets by Category by Group AllDatesToToday	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group Aged61To90Days NO PARAMS	Group Tickets by Category by Group Aged61To90Days NO PARAMS	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group Aged61To90Days	Group Tickets by Category by Group Aged61To90Days	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group Aged31To60Days NO PARAMS	Group Tickets by Category by Group Aged31To60Days NO PARAMS	Run Report Toggle Favorites Add to Scheduled Reports Remove
Group Tickets by Category by Group Aged31To60Days	Group Tickets by Category by Group Aged31To60Days	Run Report Toggle Favorites Add to Scheduled Reports Remove

Different Reports have Different Parameters you can request on the Report

The screenshot displays the Cynergy software interface. At the top left is the Cynergy logo and the word "software". A navigation bar contains tabs for Home, Tickets, CRM, Opportunities, Projects, Expenses, ISchedule, Asset, and Know. Below this is a search bar with "Create New" and "Search For" buttons.

The main content area is titled "Group Tickets by Category by Group AllDatesToYesterday" and includes the instruction "Enter prompt values." Below this, a section titled "Please Select From The Following Ticket Categories:" contains an "Enter id:" field. The "Available Values:" list includes: TeleVantage (PCPBX), AutoVoice (AutoDialers), CRM (Contact Management), Internal (USIC Operations), Odyssey (Predictive Dialers), CTI Link (ScreenPops), HEAT (Help Desk Software), and SSI LDL (AutoDialer). Arrows from the green text above point to the "Available Values:" list and the "Selected Values:" field.

On the left side, there are three panels: "Tickets" with a search field and "Go" button; "CRM" with a search field and "Go" button; and "Recently Viewed Items" listing "Visual Issues", "Joshua Gates", "Marcus Robinson", and "Needs Attention/ NONE OF".

At the bottom right, there are "Remove", "Remove All", and "OK" buttons.

Create New Search For

Tickets ^

Enter Ticket Number

Saved Ticket Search's






Saved Ticket Group's

Quick Ticket

CRM ^

Saved CRM Search's

Recently Viewed Items ^

-  [Visual Issues](#)
-  [Joshua Gates](#)
-  [Marcus Robinson](#)
-  [Needs Attention/ NONE OF](#)
-  [Joshua Gates](#)

Select Report Group

- ▼ Reports by Status
- Favorites
- CRM Reports
- Reports by Status
- Reports by Assigned Groups
- Reports by Assigned Users
- Ticket Reports by Category (Group)
- Ticket Reports by Category (Users)
- Ticket Count Reports by Assigned User (Bar Chart) with Aging
- Ticket Count by Assigned User (Pie Chart) with Dating
- Ticket Count by Assigned User by Status (Bar Chart) with Dating
- Ticket Statistics by Assigned User (With Dating)
- Ticket Statistics by Assigned User by Status with Dating
- Ticket Count by Assigned User by Status (Pie Chart) with Dating
- Opportunity Reports Leads by Source with Date Range
- Opportunity Reports by Lead Source by Date Range with Sales Stages
- Opportunity Statistics by Assigned Salesperson
- Custom Reports

Options

[Toggle Favorites](#) | [Add to Schedule](#) | [Remove](#)

[Toggle Favorites](#) | [Add to Schedule](#) | [Remove](#)

Custom Reports are available by purchase at:
<http://www.businessobjects.com>

A 30 day trial can be obtained at:
<http://www.businessobjects.com/campaigns/forms/crystal/reports/developer/edition/default.asp>

BUILDING YOUR OWN CUSTOM REPORTS IN CYNERGY

First you must acquire Crystal Reports XI Release 2, also make sure you install all available service packs for that build.

<http://www.businessobjects.com/campaigns/forms/crystal/reports/developer/edit/extension/default.asp>

there is a trial for it...just make sure latest service packs etc are applied.

In order to modify an existing report, you must remote desktop into the server.

Then navigate to the reports folder. By default this path is

C:\inetpub\wwwroot\reports\systemreports\

All the files in that directory have an .rpt file extension...

You can simply copy out the file open it up in the crystal report designer, make the needed changes, and then just copy is back over and overwrite the existing file.

In order to upload a completely new report file, simply log into your Cynergy, click on the reports tab and open the section you would like to save the file to.

At the bottom of the section there is a section to upload new reports files.

If one of the 300+ reports in Cynergy do not work for you, and you do not want to build your own, just submit a request to our help desk, and we will build the report for you.