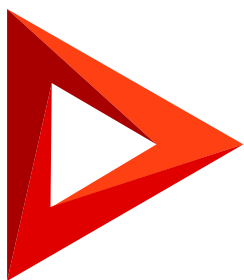


Print-ready reports

Add a new MS Word report in Creatio

Version 7.18



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Add a new MS Word report in Creatio

PRODUCTS: [ALL CREATIO PRODUCTS](#)


After you [install the MS Word plug-in](#), you can start setting up the report.

To add a new report:

1. Add a new report record in Creatio. [Read more >>>](#)
2. Set up the fields and tables to display in the report, on the page of the added record. [Read more >>>](#)

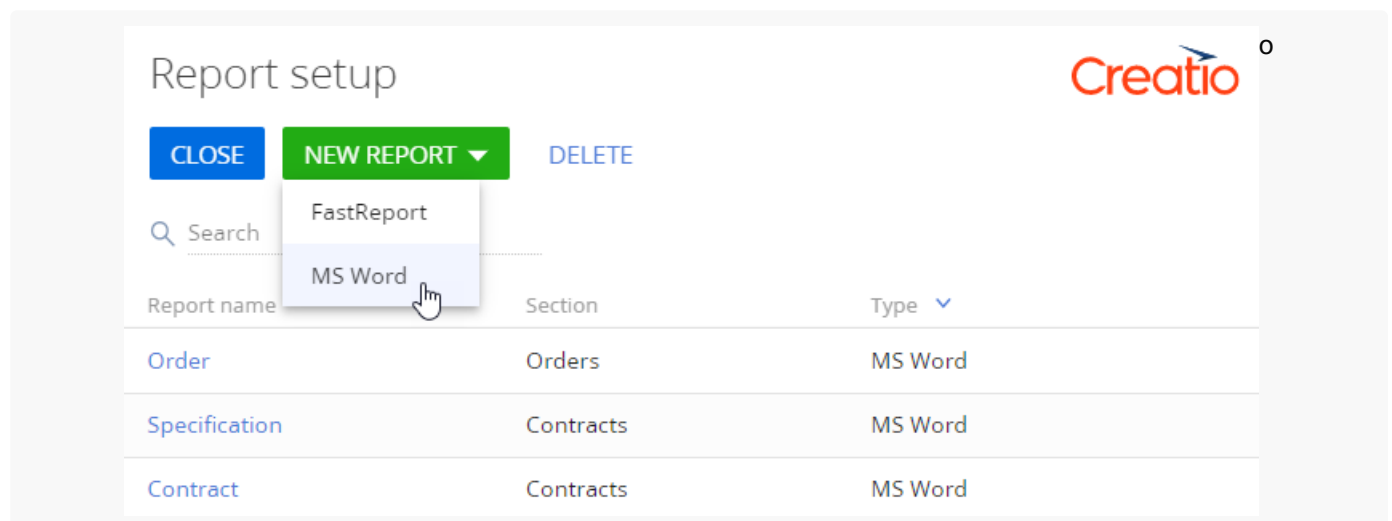
Case. Set up a “Meeting minutes” report in the [*Activities*] section.

Add a new MS Word report record in Creatio

1. Click  to open the System Designer.
2. Go to the [*System setup*] block and click [**Report setup**].
The [*Report setup*] section opens.
3. Click [*New report*] -> **MS Word** ([Fig. 1](#)).

Note. Learn more about setting up the FastReport reports in the “[Report setup](#)” article of the development guide.

Fig. 1 Set up MS Word reports



4. Enter the new report name, e.g. “Meeting minutes”.
5. In the [*Section*] field, select a section where the report should be available. For example, to add the “Meeting minutes” report, specify “Activities” in the [*Section*] field.

6. Select the [*Show in the section list view*] and [*Show in the section record page*] checkboxes, depending on where exactly the report should be available ([Fig. 2](#)).

Fig. 2 Adding a “Meeting minutes” report

Meeting minutes

SAVE CANCEL

Report name*
Meeting minutes

Section*
Activities

Type*
MS Word

Show in the section list view

Show in the section record page

Proceed to configure the report data fields and tables.

Set up MS Word reports

You can add simple data, such as a contact name or activity date, as well as table data. In the table data, you can display records that are directly connected to the primary report object, as well as records of objects with the reverse connection.

Set up the report fields

1. Open an MS Word report record in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. On the report page, under [*Set up report data*], click + .
3. A column selection window opens. Select all columns that hold the data required for the report ([Fig. 1](#)). For example, select the [*Subject*] column to be able to display the activity (i.e., the meeting) name in the report. To display the activity time frame, add the [*Start*] and [*Due*] columns, etc.

Fig. 1 Setting up page fields

Meeting minutes

SAVE **CANCEL**

Report name*
Meeting minutes

Section*
Activities

Type*
MS Word

Show in the section list view

Show in the section record page

Set up report data ⓘ +

Column name

Subject

Start

Due

Owner

As a result, the added columns will become available when setting up the report layout in the Creatio MS Word plug-in.

If necessary, you can add Boolean fields, such as the [*Do not use phone*] checkbox, to your report. Use special macros to set up displaying of the Boolean fields in the report. See the “[Basic macros in the MS Word reports](#)” article for more information.

Set up the report tables

In the tables, you can display a number of records connected to the primary report object. The displayed records can belong to objects that are connected to the report object directly, as well as to objects with the reverse connection.

Set up a table by data of the connected object

Case. The primary object of the “Meeting minutes” report is an activity. Set up displaying a table with the list of activity participants (records of the “Activity participant” object connected by a corresponding activity) in the meeting minutes.

1. Open an MS Word report record in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. On the report page, under [*Set up report tables*], click + .
3. Populate the fields on the report table page ([Fig. 1](#)):
 - a. In the [*Table object*] field, select an object whose data will be used to create a table. For example, select the “Activity participant” object to add a table containing the list of the meeting participants.
 - b. In the [*Table name*] field, specify the table title that will display in the Creatio MS Word plug-in.
 - c. In the [*Column of report table object*] field, specify the column that will link the records in the table object

to the primary object of the report. In our example, it is the "Activity" column.

- d. In the [*Column of the primary report object*] field, specify the column that Creatio will use to filter the table records. In most cases, the column of the report table object is the "Id".
- e. Select the [*Hide the table if it contains no data*] checkbox to avoid displaying empty tables in the report.

Fig. 1 Setting up the "Activity participants" table

Activity participants

APPLY CANCEL

Table object*	Column of report table object*
Activity participant	Activity
Table name*	Column of the primary report object*
Activity participants	Id

Hide the table if it contains no data


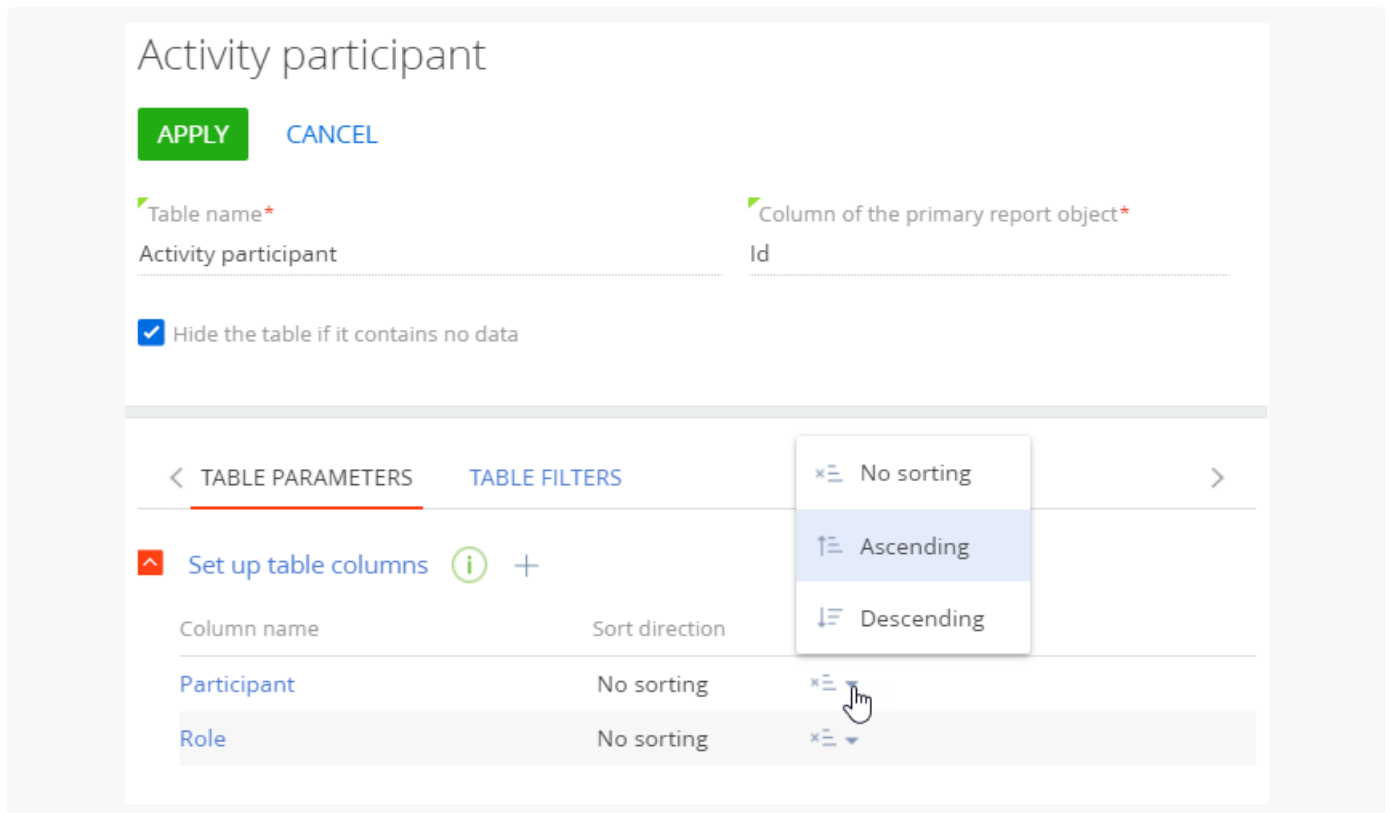
4. On the [*Table parameters*] tab, set up the list of report table columns. Click + and select the columns to add to the list. For example, to create a list of activity participants with their names and roles, add the [*Participant*] and [*Role*] columns.
5. Set the sorting order of the table records. Click  next to a column and select [*Ascending*] or [*Descending*] in the menu to sort the table records based on the values in that column. For example, set the [*Ascending*] sorting order for the [*Participant*] column to sort the list of participants alphabetically, by name ([Fig. 2](#)).

Fig. 2 Sorting the report table records



To sort the table rows in the report by multiple columns, make sure that your MS Word template includes all the report table columns that are involved in the sorting rules. Learn more about adding table data in the template using the plug-in in the [“Set up report in the MS Word plug-in and upload in Creatio”](#) article.

You can also sort the table records by several columns. The sorting is performed by the column with a higher position in the group of settings of the table columns.

1. Go to the [*Table filter*] tab and set up an additional filter whose conditions will define which records should appear in the report table. For example, you can display only the participants who are the company employees and customers using the following filter: “Participant.Type = Employee, Customer” ([Fig. 3](#)).

Fig. 3 Filtering records in a report table

Activity participants

Table object*	Column of report table object*
Activity participant	Activity
Table name*	Column of the primary report object*
Activity participants	Id

Hide the table if it contains no data

< TABLE PARAMETERS **TABLE FILTERS**

Actions ▾

Participant.Type = Customer; Employee

AND

+ Add condition

2. Click [*Apply*] to save the report table settings.
3. Click [*Save*] on the report setup page.

As a result, the added table columns will become available when setting up the report layout in the Creatio MS Word plug-in.

Set up table by data of object with reverse connection

Case. The primary object of the “Meeting minutes” report is an activity. Set up displaying a list of participants of the opportunity connected to the current meeting in the meeting minutes. This list should be additional to the table with the list of activity participants.

1. Open an MS Word report record in the [*Report setup*] section. For example, open the “Meeting minutes” report created earlier.
2. On the report page, under [*Set up report tables*], click + .
3. Populate the fields on the report table page ([Fig. 1](#)):
 - a. In the [*Table object*] field, select an object whose data will be used to create a table. For example, to add a table with the opportunity participants, select “Opportunity participant”.
 - b. In the [*Table name*] field, specify the table title that will display in the Creatio MS Word plug-in.
 - c. In the [*Column of report table object*] field, specify the column that will link the records in the table to the

primary object of the report - the activity. In our example, it is the “Opportunity” column of the “Opportunity participant” objects.

- d. In the [*Column of the primary report object*] field, specify the column of the primary report object that connects the object with the table. In our example, it is the “Opportunity” column of the “Activity” object.
- e. Select the [*Hide the table if it contains no data*] checkbox to avoid displaying empty tables in the report.

Fig. 1 Setting up the “Opportunity participants” table

4. On the [*Table parameters*] tab, set up the list of report table columns. Click **+** and select the column to add it to the list. For example, to display the addresses of the meeting participants, select the [*Contact*], [*Role*] and [*Account*] columns.
5. Set the sorting order of the table records. Click **⌵** next to a column and select [*Ascending*] or [*Descending*] in the menu to sort the table records based on the values in that column.
6. Go to the [*Table filter*] tab and set up an additional filter whose conditions will define which records should be included appear in the report table. For example, to display the participants who are the company customers, use the following filter: “Account.Type = Customer.”
7. Click [*Apply*] to save the report table settings. Click [*Save*] on the report setup page.

As a result, the added table columns will become available when setting up the report layout in the Creatio MS Word plug-in.

After you create a report record in Creatio, you can [set up the report](#) in the MS Word plug-in.