

# Custom Reports: Phase 2

Rob Alber

Technical Development Manager



PCR°360™

# Phase 1 - 2024.1

- Released 01/11/2024
- Designed to mimic and replace Crystal Reports
- Crystal Reports Officially deprecated
- Uses Custom Logic & Smarty Templating Engine to deliver Customizable HTML and PDF reporting capabilities.



# Phase 1 - Walk Thru

- Writing
  - Custom Logic
  - Template
  - Options
- Viewing
  - Available grid
  - Saved grid
  - CustomerCenter
  - Grid/Form Buttons



PCR°360™

# Phase 2 - 2024.2

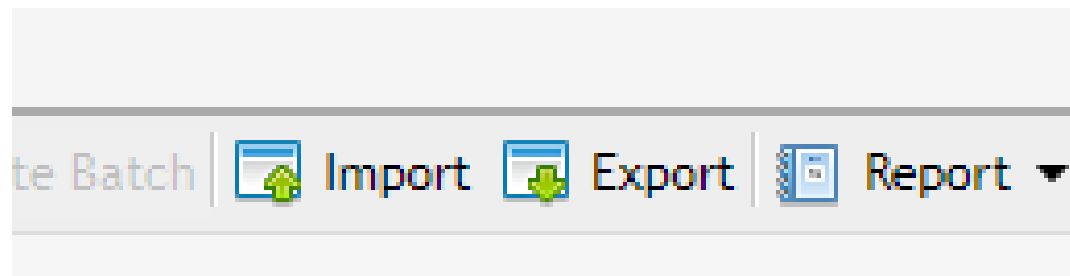
- Import / Export
- Reports API
- PDF Options
- Exports
- Attachments Overhaul
- Miscellaneous
  - Better error handling
  - Bill Picker
  - ViewBill Invoice Config Option
  - Bootstrap Upgrade to v5.1.3



PCR<sup>o</sup>360™

## Phase 2 - Import/Export

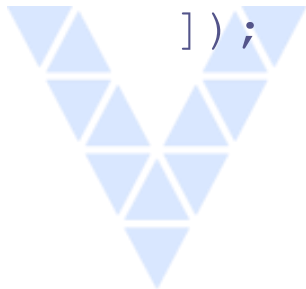
- Develop in Test - Import to Prod
- Exports JSON file
- Exports 1 report or many
- Import adds Unique Identifier



# Phase 2 - Reports API

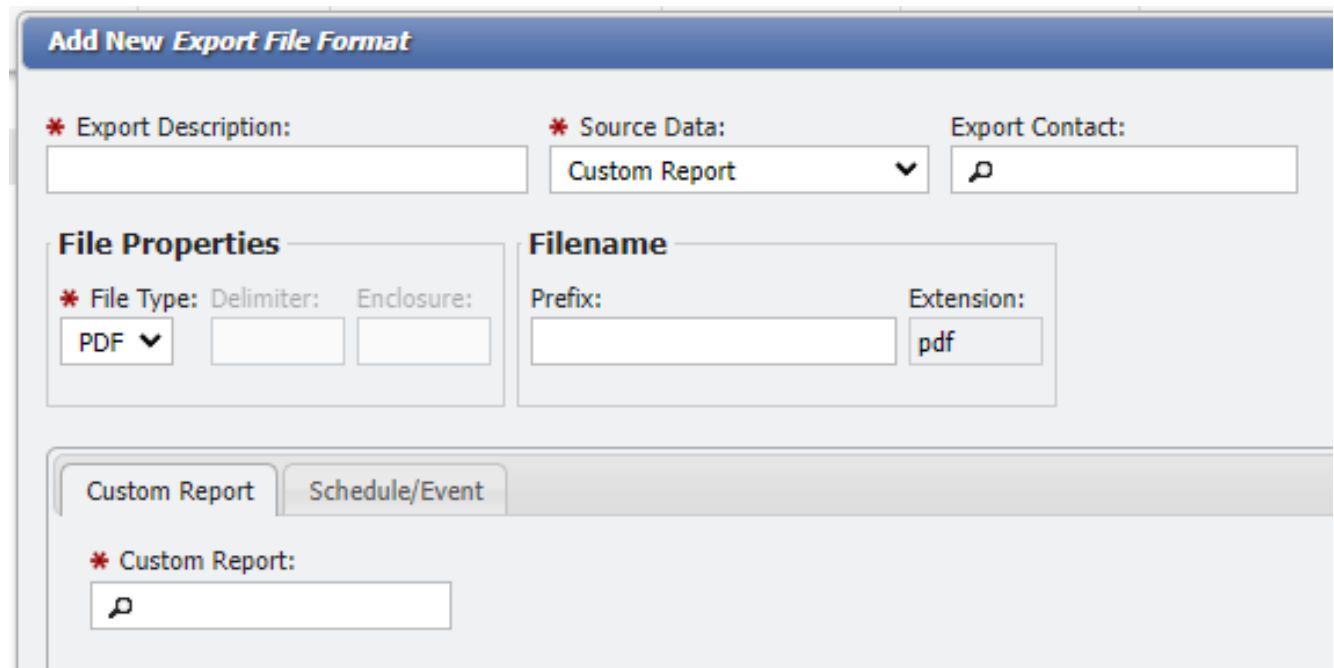
- API GET Call
- Accessible via Custom Logic:

```
$this->call(  
    'renderCustomReport',  
    [  
        'identifier' => 'someReport',  
        'format' => 'pdf',  
        ... ..  
    ] );
```



# Phase 2 - Exports

- Bill Completion Trigger
- Scheduled Export



**Add New Export File Format**

\* Export Description:

\* Source Data: Custom Report

Export Contact:

**File Properties**

\* File Type: PDF  Delimiter:  Enclosure:

**Filename**

Prefix:  Extension: pdf

Custom Report Schedule/Event

\* Custom Report:



# Phase 2 - Attachments

- Reworked
  - Removed: Availability
  - Added: Exists in Directory
  - Added: Attach from Directory
  - Imports/Exports





## Phase 2 - Misc.

- Upgraded Bootstrap v4.0.0 to v5.1.3
  - <https://getbootstrap.com/docs/5.0/migration/>
- Bill Picker
  - Works for UDFs Too!



# Examples

- Reports loading Reports
- Template Files in Attachments
- Forms!!!
- Dashboard Reports



# Phase 3

- Retention Settings for Saved Reports
- Crystal Historical Conversion
- Service Desk Printout Conversion
- Bill Coordinator Email
- Report Dialog

