

Version Comparison: Analytic Reporting PRO versus Basic

Item Description	Advanced Reporting PRO	Advanced Reporting Basic
Charts		
Chart Types: Pie, Line, Column, Combined (3 axes), Funnel, Gauge	+	+
Geographic Chart Type, Area Chart Type	+	-
Increase/Decrease Chart Size/Chart Height	+	+
Save Chart as PNG	+	+
Add Chart to Dashboard	+	+
Add Chart to Dashboard to other Role Users	+	-
Hide Decimals From Chart Numbers;	+	-
Drill down from Chart to detailed data (from Chart and from Dashboard)	+	-
Multi date dimension comparison; e.g. monthly comparison by year	+	-
Report Builder		
More than 100 pre-defined report templates	+	+
Report template builder (inc. Add Custom modules & relationships; many-to-many relation)	+	+
Can add modules to already created reports	+	-
Add custom relation and custom tables	+	-
Add data from history to the report	+	-
Combined Report: e.g. All activities by User (Leads, Calls, Meetings, etc)	+	-
Hide/Unhide for Folders and Reports in the Report list	+	-
Report Layout		
Report types: Detailed Report, Detailed with grouped by Summaries, Summary, Pivot/Matrix Report (also known as Crosstab), unlimited levels of groups	+	+
„Aggregate as Column” for crosstab reports (change row to column layout of summarized items – „Grouping and sorting tab”)	+	+
Totals on both sides (Vertical and Horizontal) for Pivot/Matrix Summary	+	-
Detailed report combined with Pivot/Matrix summary	+	-
Multiple group by levels by SAME date field (e.g. month as column, year as row for crosstab report); monthly comparison by year on the chart.	+	-
Select to display Top n Items (e.g. Top 5, top 10 product categories by sales amounts)	+	-
Sum, Count, Calculate Average, Identify, which of the columns should be summarized for which grouped level (under „Grouping and Sorting” tab)	+	+
Min / Max value calculation for amounts and dates, date-time fields	+	-
Calculating Functions: add/subtract/multiply/divide	+	+
Calculating Functions: if..then/add dates/subtract dates Ability to write your own function (manually) *TBA	+	-
Sorting of the list items by the order identified via Module Builder	+	-

Standard filters for text, picklists, date&time (between, greater than, less than, this/next week, month, etc.), amounts, checkbox checked/unchecked, etc. Filter: „Current user”, for amounts: greater than, less than	+	+
Filters for roles and teams	+	-
Saving of Collapsed/ Expanded states for report groups and report sections; changed column width saving	+	-
Export as PDF/Excel, Print Report with Chart, Print Report, Print Chart,	+	+
Sharing (permissions management: view, edit, delete) public for all/for selected users/ for selected groups) for each report	+	+
Report Scheduling via E-mail (PDF / Excel / Link to Report) to registered users, role users Report Filters are run-time for scheduled e-mail	+	+
Report Scheduling via E-mail: manual e-mail address	+	-
Mass edit for Permissions and E-mail Scheduling (for all selected Reports in the list)	+	+
Renaming Labels in the Report	+	+
Adding your own formatted Excel Templates to a Report	+	-
Horizontal Bar Chart	TBA	-
Ability to edit functions manually	TBA	-

*TBA – to be added within nearest month

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