



KReporter v3.0

The Contacts without Calls Problem

<http://www.youtube.com/user/theKReporter>

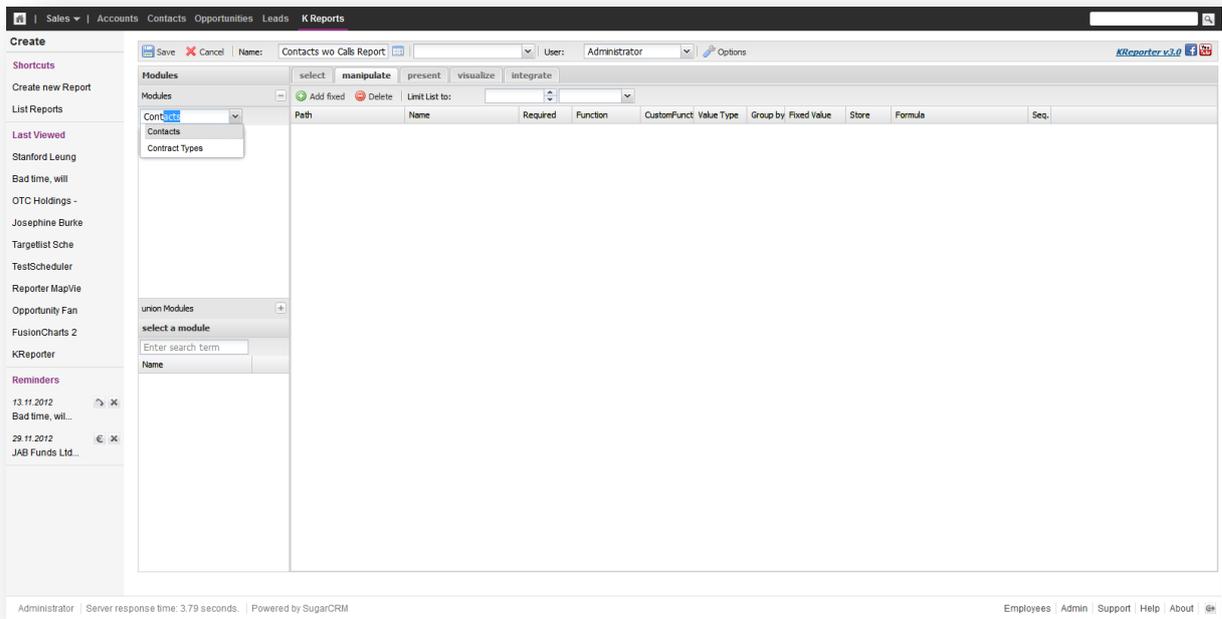


<http://www.facebook.com/kreporter.org>

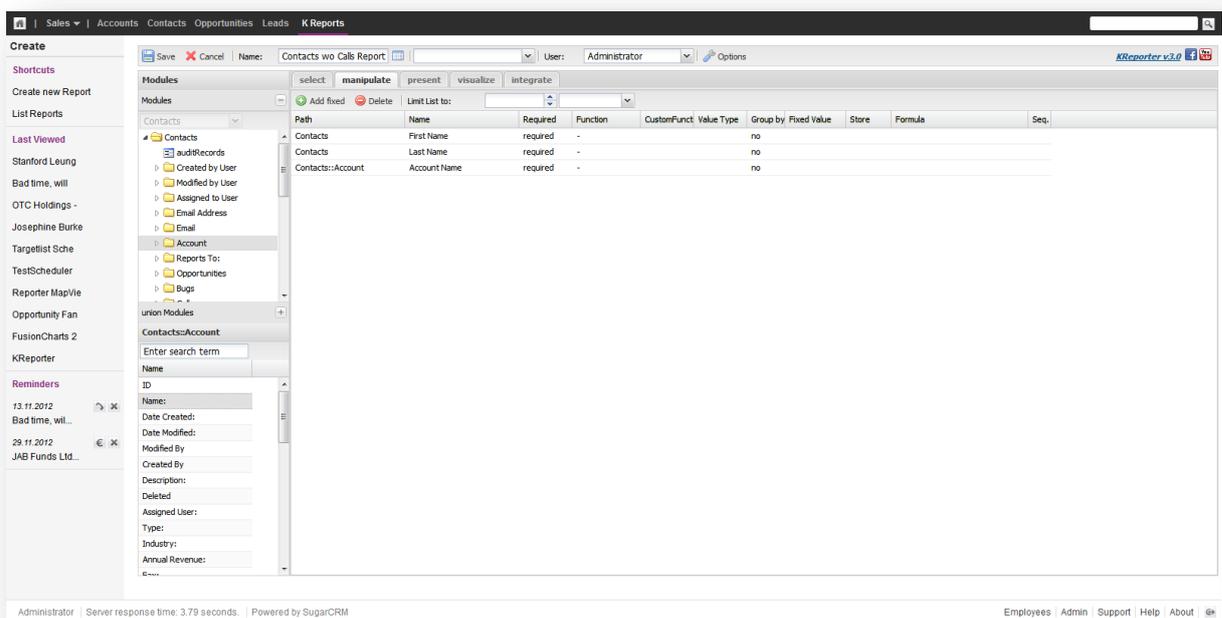


Generating a Report that reports what does not exist

In many cases it is quite easy to report on data that exists and analyze the data. Yet in some cases you want a report to show you what does not exist. One example is to get a list of Contacts (or also e.g. Opportunities) where no Call or other interaction exists. There is more than one way to do this – in the following we want to show one way how this can be done in the example of creating a list of contacts that do not have a planned call.

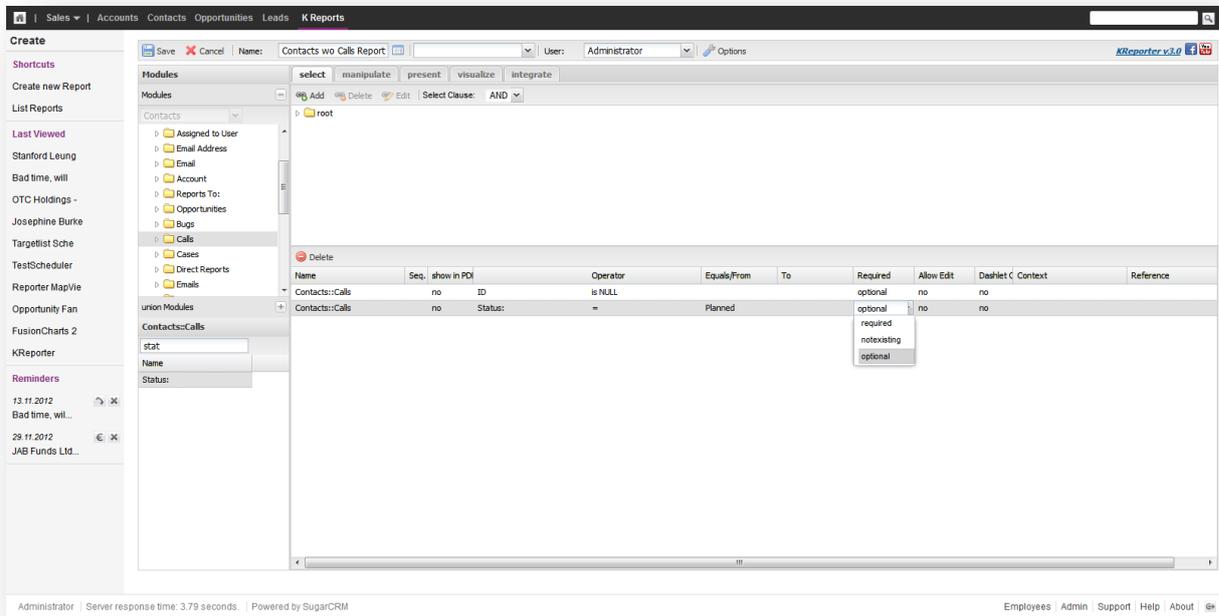


We start by creating a new Report we call *Contacts wo Calls Report* and select Contacts as the main module.



In a second step drag over the fields you want to show in the report like in the example above the Contacts first name, last name and the account name.

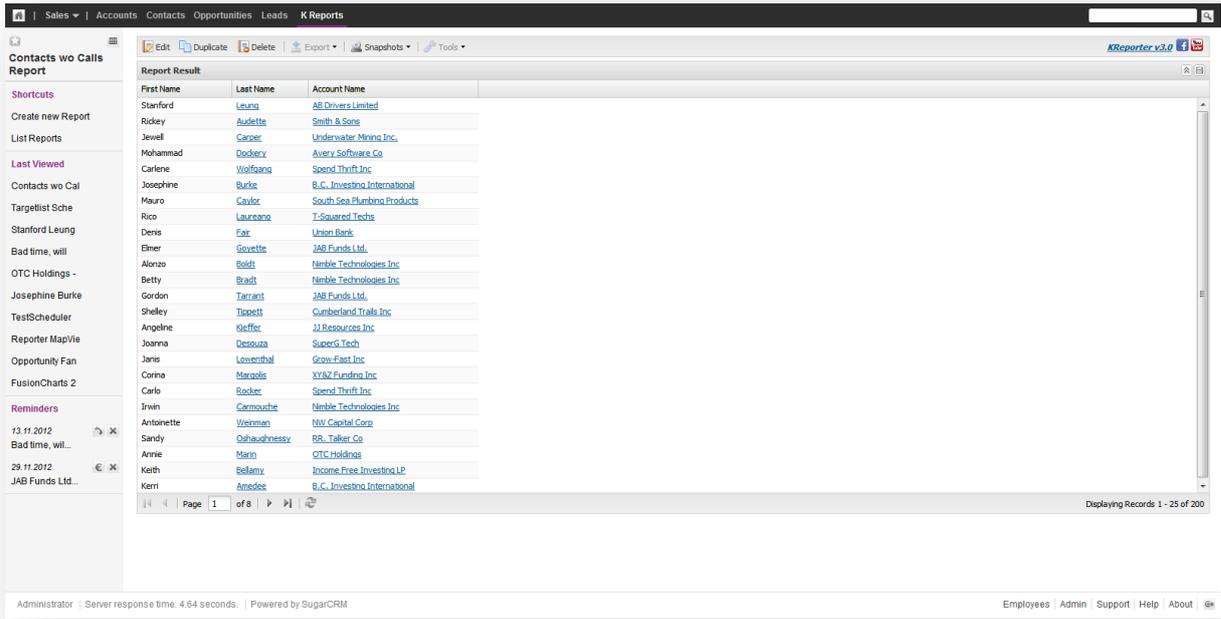
In the next step we do the magic going to the select options. We open the related modules underneath the contacts module, go to calls and select the two fields *ID* and *status*.



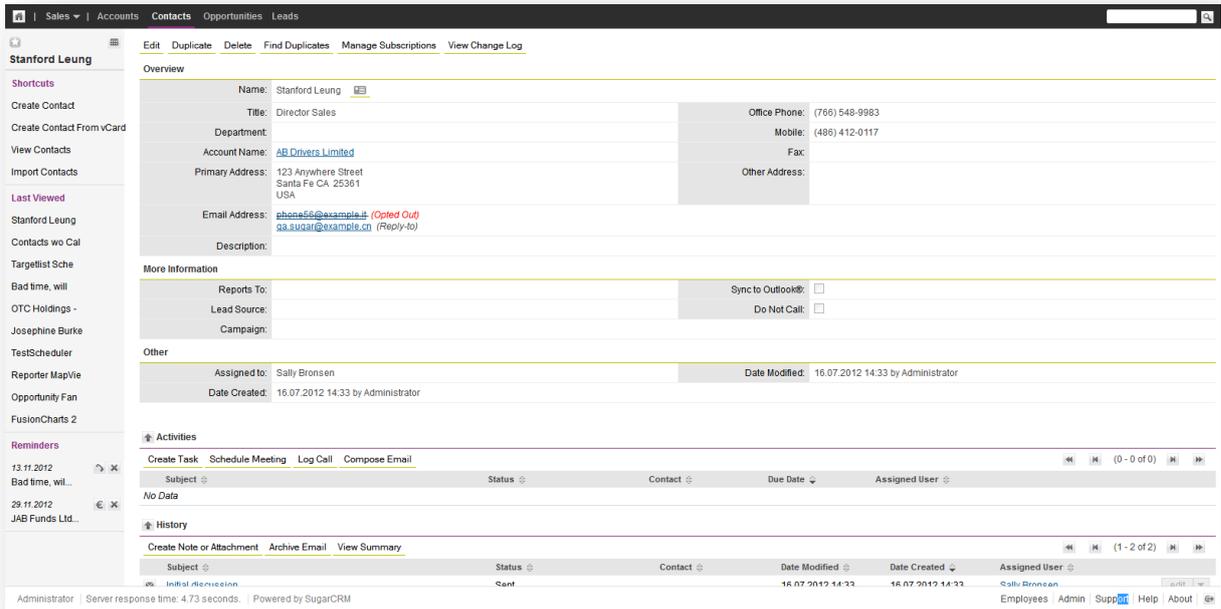
Both fields we select on the *required* column as optional. For the status we set the Operator to '=' and select the value *Planned* from the dropdown list. For the ID we set the Operator to '*is NULL*'. The Select Clause we set to '*AND*'.

What this results in is that the Calls are joined to our contacts with a "left join" meaning that contacts are selected that either have a call where the status is planned or that do not have a call. This gives us the first of the required results we are looking at. The second important part is to set the ID field of the Call to '*is NULL*'. Due to our first part of the selection clause all contacts that have a planned call will have a call in the report so for them the call ID will not be null (there is a call linked). All that do not have a call linked will still be selected but the call id will be NULL. So if we set the value to be NULL as required this will only select those contacts that have no planned call.

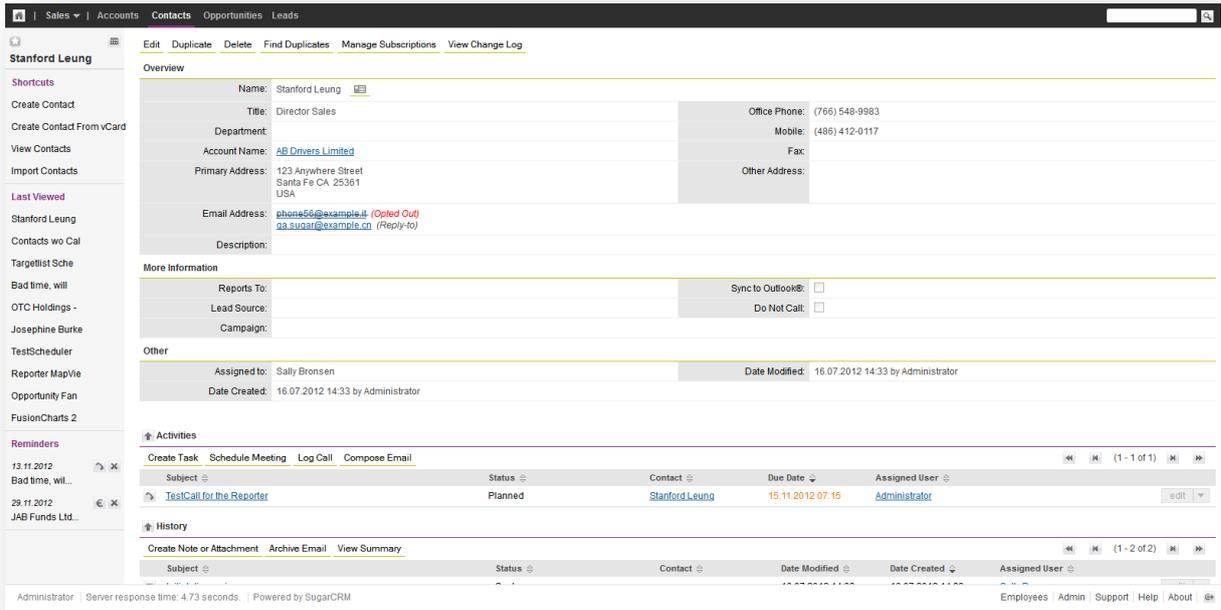
Save the Report and the result looks as follows.



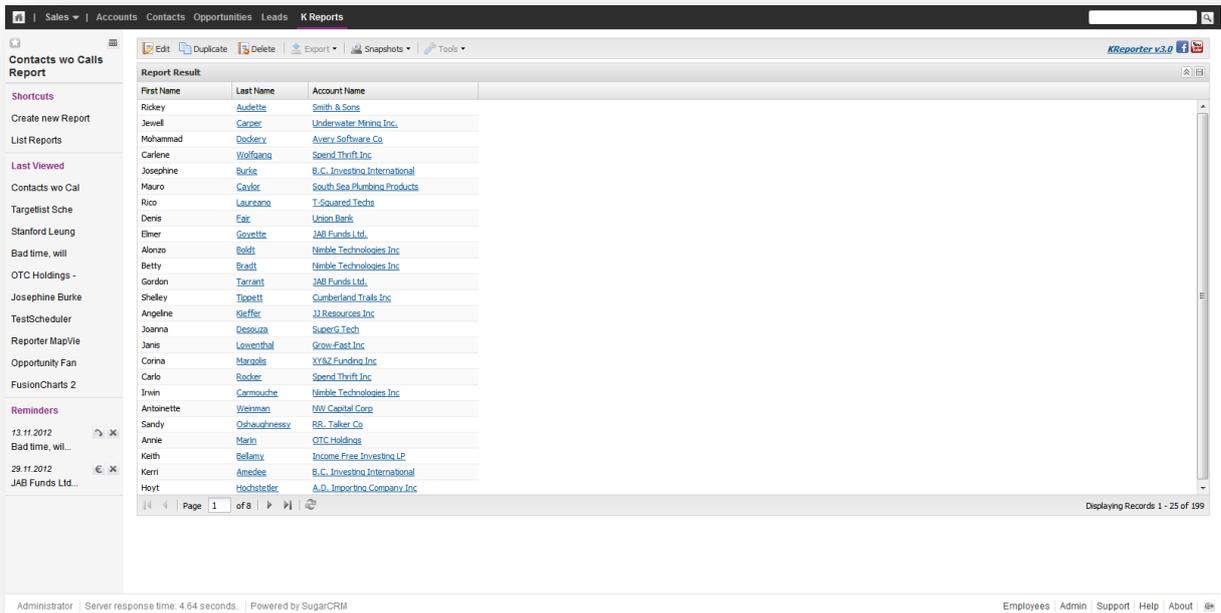
We have selected 200 Contacts. Let us simply check on the first record.



As to be expected there is no call scheduled. So to test the Report we simply schedule a call in status planned.



If we go back to our Report and Refresh it the result now looks as follows:



The Report now return 199 records and the Contact we just created the planned call for is no longer listed.

The alternative Option would be to use the *notexisting* operator instead of optional but that requires a patch to the core sugarcrm system. We will most likely in the next release change that the option also only shows up when the patch is installed.