



KReporter v4.0

Bucket Manager

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



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



Introduction.....	3
Define a grouping	3
Define the mapping grouping.....	4
Use defined grouping in report	7

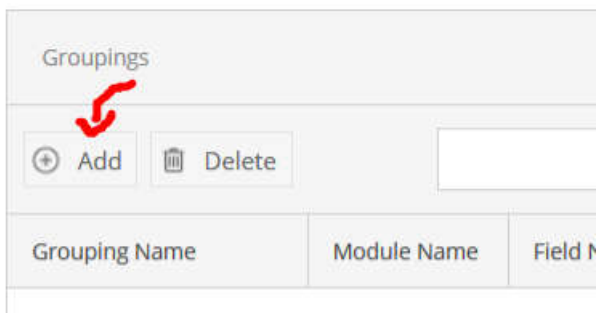
Introduction

The **Bucket Manager** allows to group records based on enum values or text fields in different buckets. For example, you can take Opportunities and group stages into the buckets Open, Won and Lost. Then you can assign existing stages to the groups and report only on the new buckets. Buckets can be used for display but also for selection purposes. A quite powerful tool to summarize and structure reports.

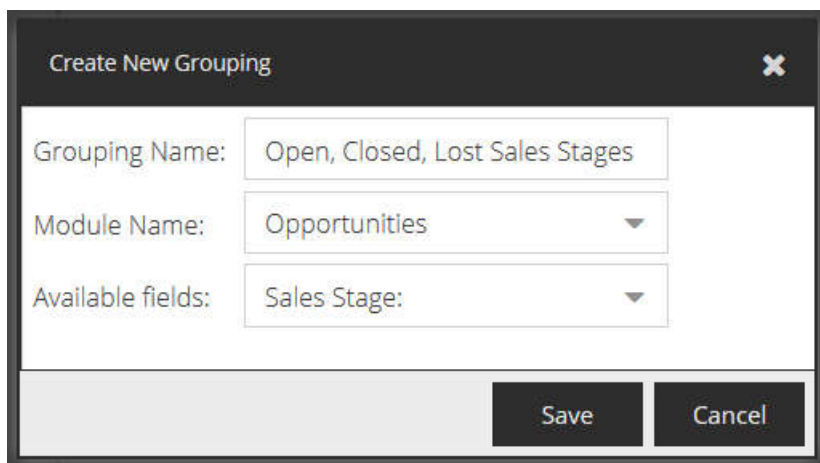
Define a grouping

Go to Bucket Manager

Click **Add** in left panel **Groupings** and create new Grouping.



Enter adequate name, select module and related list.



Click Save

Now you have your grouping name on the left, the possible values on the right. In the middle you can now define your 3 sales stages.

Groupings			Mappings		« Drag Values
<div> <div>+</div> Add <div>🗑</div> Delete <div></div> </div>			<div> <div>+</div> Add <div>🗑</div> Delete </div>		<input type="checkbox"/> Group remaining values with others
Grouping Name	Module Name	Field Name	Mapping Name		Label
Open, Closed, Lost Sales...	Opportunities	sales_stage			Prospecting
					Qualification
					Needs Analysis
					Value Proposition
					1st Decision Makers
					Perception Analysis
					Proposal/Price Quote
					Negotiation/Review
					Closed Won
					Closed Lost

Define the mapping grouping

Click **Add** in middle panel **Mappings**.

Mappings

+

 Add

🗑

 Delete

Mapping Name

Enter adequate name

New Mapping

Please, enter a name

Open Sales Stage


OK

Cancel

Click OK

Now drag & drop the values related to Open Sales Stage.

Mappings		<< Drag Values
<div> <div>+ Add</div> <div>🗑 Delete</div> </div>		<input type="checkbox"/> Group remaining values into 'others'
Mapping Name	Label	Label
▼ 📁 Open Sales Stage		Prospecting
		Qualification
		Needs Analysis
		Value Proposition



Mappings		<< Drag Values
<div> <div>+ Add</div> <div>🗑 Delete</div> </div>		<input type="checkbox"/> Group remaining values into 'others'
Mapping Name	Label	Label
📁 Open Sales Stage		Prospecting
		Qualification
		Needs Analysis

+ 1 selected row

Mappings		<< Drag Values
<div> <div>+ Add</div> <div>🗑 Delete</div> </div>		<input type="checkbox"/> Group remaining values into 'others'
Mapping Name	Label	Label
▼ 📁 Open Sales Stage		Qualification
📄 Prospecting	Prospecting	Needs Analysis
		Value Proposition
		Id. Decision Makers
		Perception Analysis
		Proposal/Price Quote

Press Ctrl-Key to select multiple values and drag them at once.

Mappings		<< Drag Values
<input type="button" value="Add"/> <input type="button" value="Delete"/>		<input type="checkbox"/> Group remaining values into 'ot
Mapping Name	Label	Label
▼ Open Sales Stage		
<input type="checkbox"/> Prospecting	Prospecting	Qualification
		Needs Analysis
		Value Proposition
		Id. Decision Makers
		Perception Analysis
		Proposal/Price Quote
		Negotiation/Review
		Closed Won
		Closed Lost

Define a mapping for Won and a mapping for Lost.

To rename a mapping double click on the tree label and overwrite

Mapping Name
▼ Open
<input type="checkbox"/> Prospecting

Your **grouping** now looks like

Groupings			Mappings		<< Drag Values
<input type="button" value="Add"/> <input type="button" value="Delete"/>			<input type="button" value="Add"/> <input type="button" value="Delete"/>		<input type="checkbox"/> Group remaining values into 'others'
Grouping Name	Module Na...	Field Name	Mapping Name	Label	Label
Open, Won, Lost S...	Opportunities	sales_stage	▼ Open		
			<input type="checkbox"/> Prospecting	Prospecting	
			<input type="checkbox"/> Qualification	Qualification	
			<input type="checkbox"/> Needs Analysis	Needs Analysis	
			<input type="checkbox"/> Value Proposition	Value Proposition	
			<input type="checkbox"/> Id. Decision Makers	Id. Decision Makers	
			<input type="checkbox"/> Perception Analysis	Perception Analysis	
			<input type="checkbox"/> Negotiation/Review	Negotiation/Review	
			<input type="checkbox"/> Proposal/Price Quote	Proposal/Price Quote	
			▼ Won		
			<input type="checkbox"/> Closed Won	Closed Won	
			▼ Lost		
			<input type="checkbox"/> Closed Lost	Closed Lost	

Definition is saved automatically after each action.

Use defined grouping in report

Let us create a simple report listing Open and Won Opportunities.

In SELECT tab drag sales stage field to selection panel. The **grouping** is now available in **Grouping field**. Select the grouping, select the operator, now you have your **mappings** as possible values.

SelectManipulatepresentVisualizeIntegrate

AddDelete

group

type

+ root

AND

Delete

Path	Seq.	Name	Fixed Value	Grouping	Operator	Equals/From
Opportunities		Sales Stage:		Open, Won, Lost S...	is one of	Open, Won
						Open
						Won
						Lost