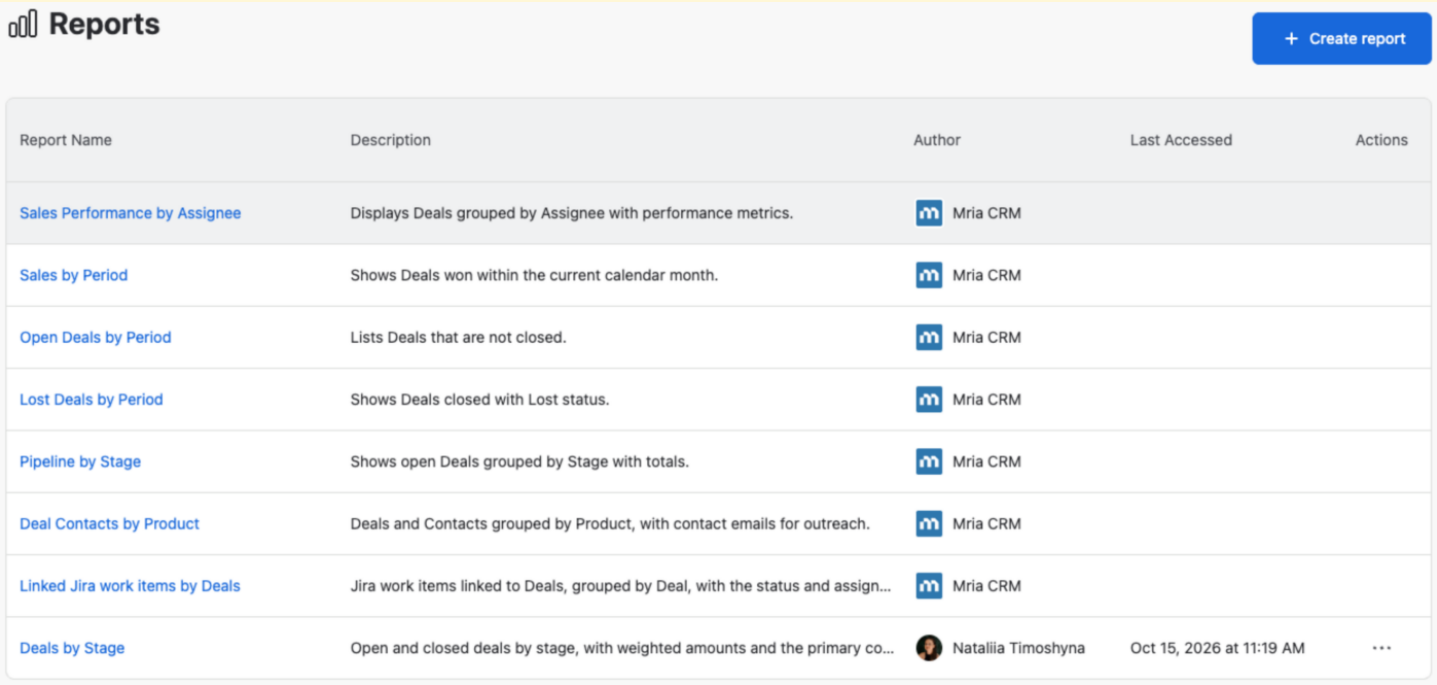
Reports

Using Mria CRM · https://mriacrm.com/docs/reports/

The **Reports** section provides structured insights into your **CRM data**, helping you analyze performance, trends, and outcomes across different entities and dimensions.

Each report focuses on a specific perspective (e.g., by assignee or by time period) and is designed to give you a clear, actionable view of your data. Next to the seven standard reports, you can build your own — see Custom Reports.

Reports do not respect the entity permissions. The **Reports** grant is a single toggle, and turning it on shows Deal, Contact and Company names and email addresses through the reports — and allows exporting them to CSV — regardless of whether the role can see those records anywhere else in the CRM.
This matters most for **Viewer**, which has Reports **on** by default: a role you set up as read-only can still export a list of contact names and email addresses. If that is not what you want, turn the Reports toggle off for that role.



How Reports Work

All reports follow a simple naming pattern:

"<Metric> by <Dimension>"

This means each report is built around a **primary grouping or filter**:

- **By Period** → data is filtered based on a date field
- **By Assignee** → data is grouped by responsible users

Examples

- **Sales by Period** → shows data based on **Closing date**
- **Open Deals by Period** → filtered by **Created date**
- **Lost Deals by Period** → filtered by **Closing date**
- **Sales Performance by Assignee** → grouped by **Assignee**
- **Pipeline by Stage** → grouped by **Deal Stage**
- **Deal Contacts by Product** → grouped by **Product**

This naming helps you quickly understand what each report is focused on.

Common Features

Every report carries the pipeline selector, **Customize table**, **Filters** and **Export CSV**. What differs is how you narrow the report: four are driven by a date range, and three by a scope selector instead.

Filters & Scope

Report	How you narrow it
Sales by Period Open Deals by Period Lost Deals by Period Linked Jira work items by Deals	**Date presets** — 7, 30 and 90 days in the toolbar, with **More** holding 6 months, 12 months, Year-To-Date (YTD) and a Custom range.

Report	How you narrow it
Sales Performance by Assignee Pipeline by Stage Deal Contacts by Product	**A scope selector** — All Assignees, All Stages and All Products respectively. These reports have no date presets; use **Filters** for a date range.

- **Filter data by time range** — on the four date-driven reports above. The other three offer a scope selector in the same place.
- Filter by **pipeline** — for deal-based reports, the pipeline selector also includes the **All Pipelines** option, which aggregates Deals across every pipeline (stages with identical names, such as *Won* and *Lost*, are combined). See Pipelines Configuration → All Pipelines for the full aggregation rules.
- Filter by **assignees** (where applicable)
- Filter by **Deal probability** — narrow the report to Deals within a probability range, useful for spotting at-risk Deals or focusing on near-certain ones.

Table View

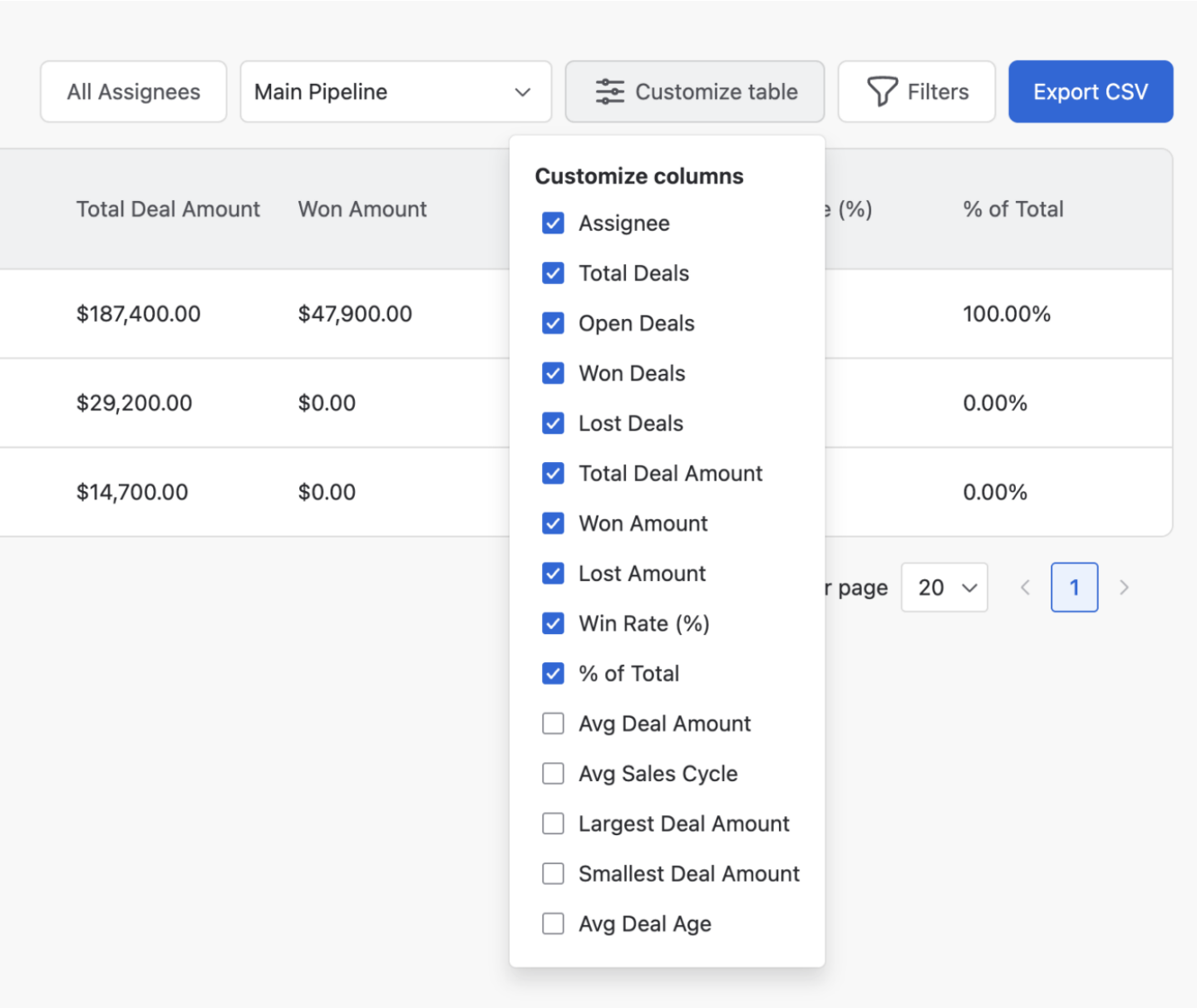
- Displays data in a structured table
- Includes relevant metrics depending on the report type
- A **Total** row sits at the bottom of every report table. Counts and amounts are summed across the visible rows. **Percentages are not summed** — they are recalculated from those totals.

Worked example — on *Pipeline by Stage*, a Total row reading 30 Deals, `€351,699.28` amount and `€207,881.54` weighted shows `59%`, because `207,881.54 ÷ 351,699.28 = 0.59`. Adding up the per-row percentages, or averaging them, gives a different number — the Total is the weighted amount over the amount.

Customize Columns

- You can **show or hide columns** using the **Customize table** option
- This allows you to focus only on the data you need
- For deal-based reports, Deal probability is available as a column alongside the other metrics.

- **Pipeline by Stage** and **Deal Contacts by Product** also offer **Contact Type** and **Company Type** columns, so a forecast or a product list can be read by who the customer is.
- Deal-based reports can be filtered by **Weighted amount**, the same filter as on the Deals list.

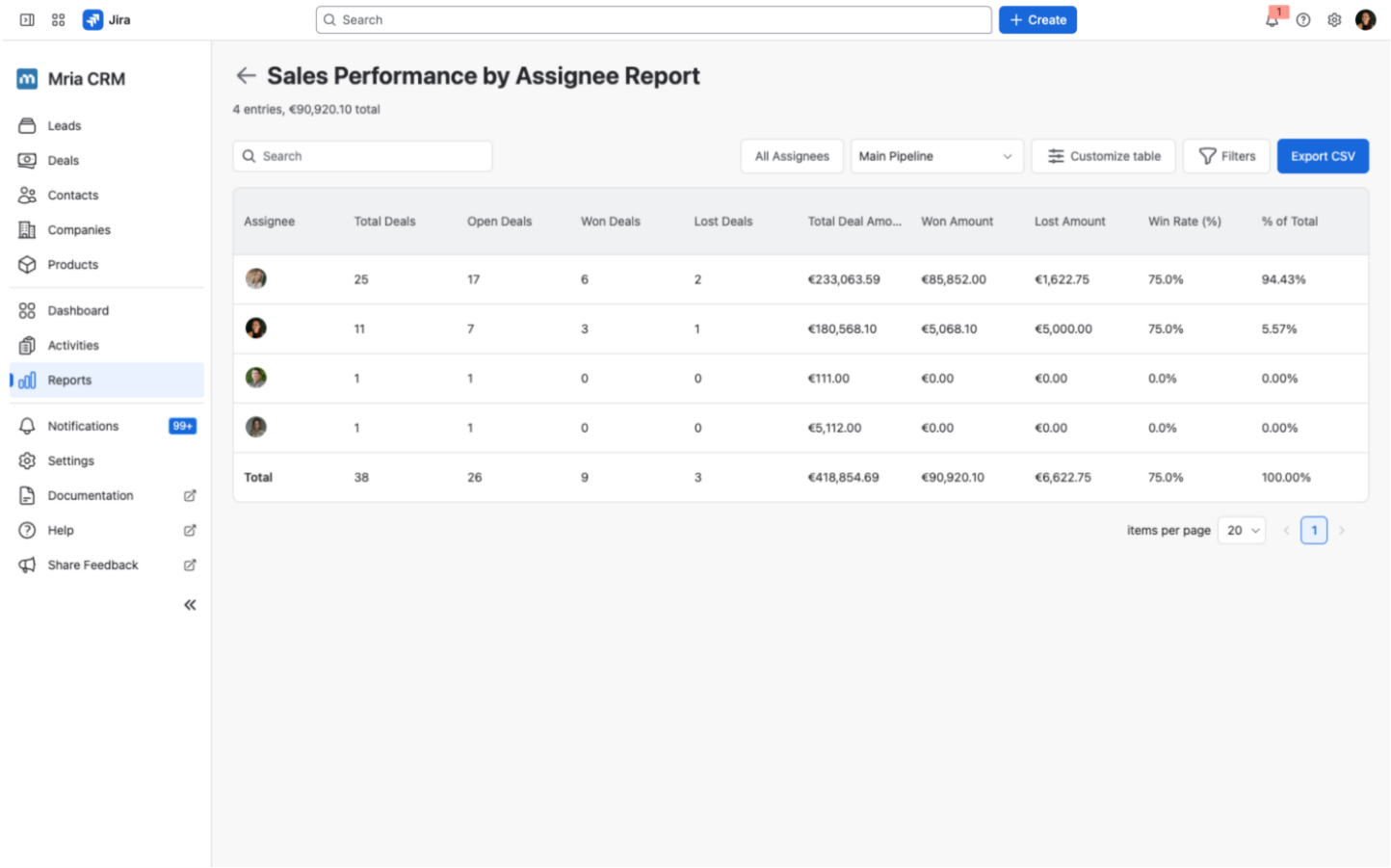


Export

- Export report data as **CSV** for further analysis
- When the **Contact name** column is included in the report, an **Email** column is added to the CSV export automatically so you don't have to chase down email addresses separately.

Available Reports

Sales Performance by Assignee



Displays performance metrics grouped by assignee.

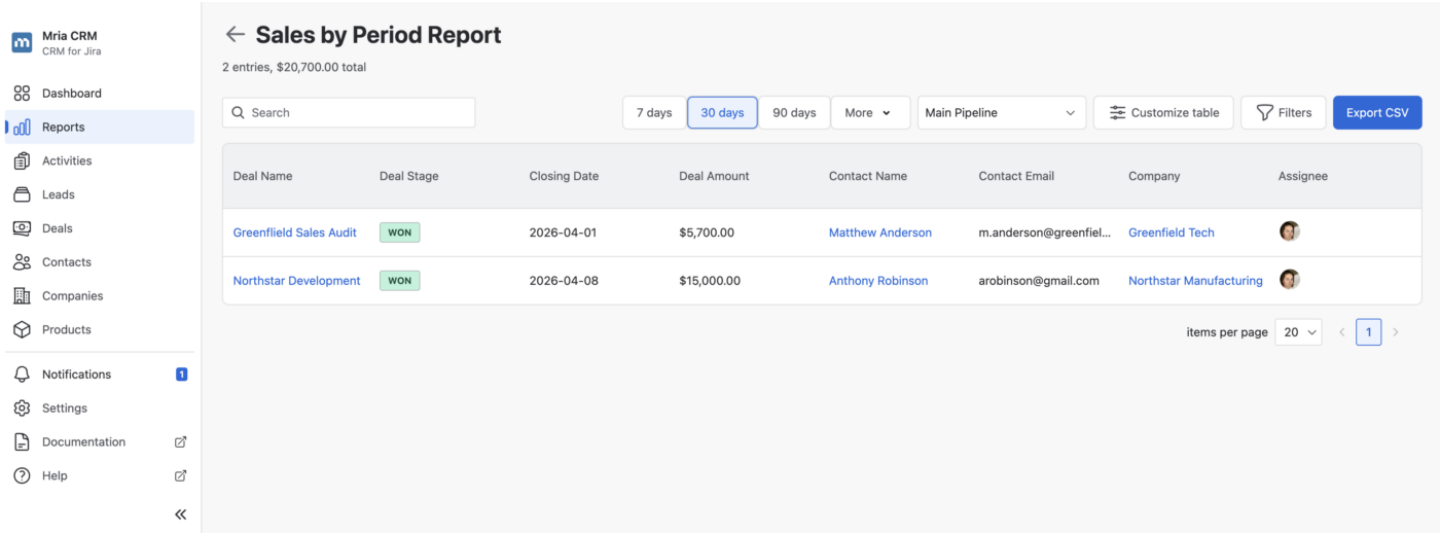
Includes:

- Total Deals
- Open / Won / Lost Deals
- Total, Won, and Lost Amounts
- Win Rate
- Contribution to total (%)
- **Open Amount** and **Weighted Open Amount** — what each person still has in open Deals. Off by default; add them from **Customize table**.

Best used for:

- Comparing team performance
- Identifying top performers

Sales by Period



Shows Deals **won within a selected time period** (based on Closing date).

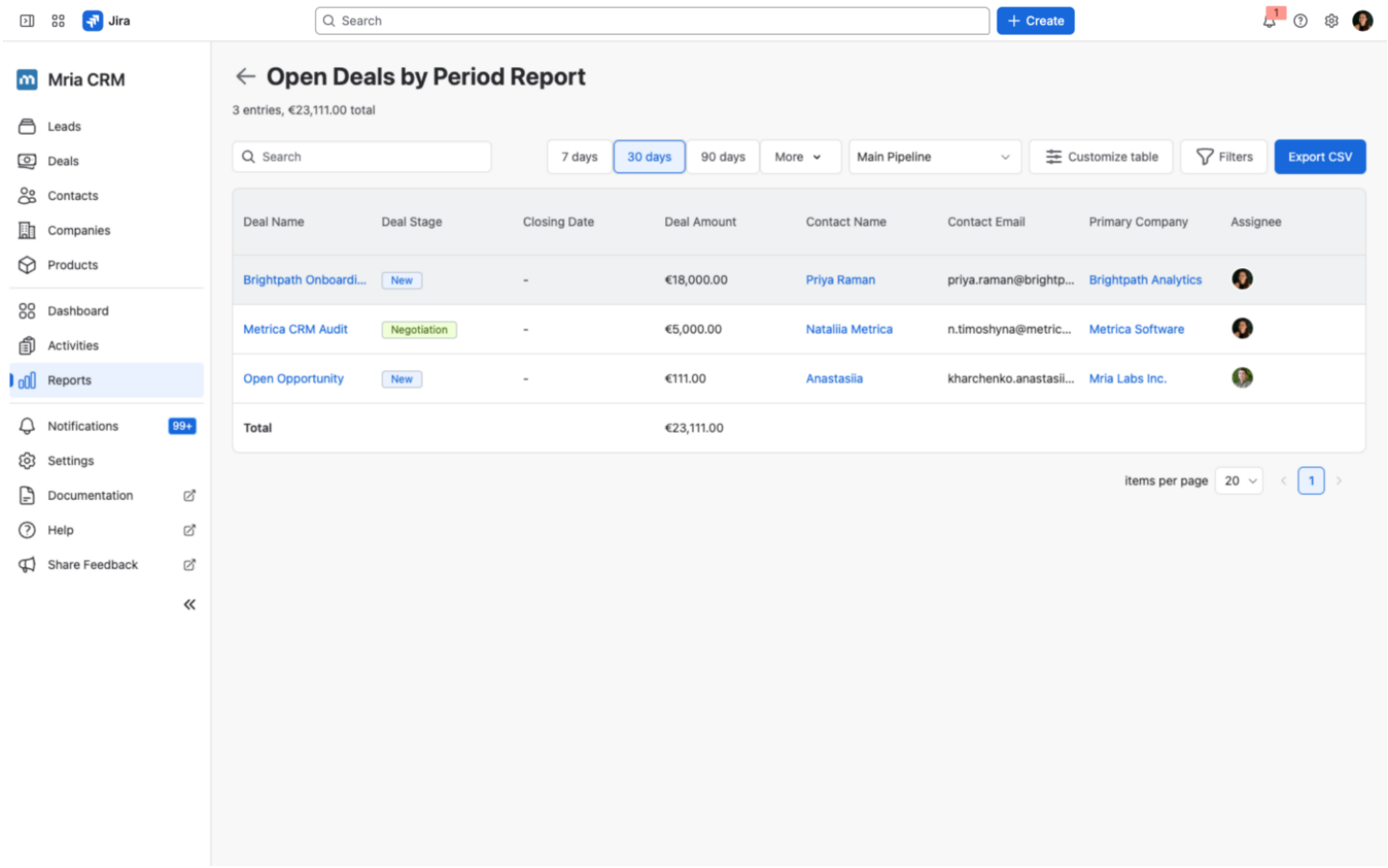
Includes:

- Deal name and stage
- Closing date
- Deal amount
- Contact and company details
- Assignee

Best used for:

- Tracking results over time
- Monitoring recent sales activity

Open Deals by Period



Lists Deals that are **not closed**, filtered by **Created date**.

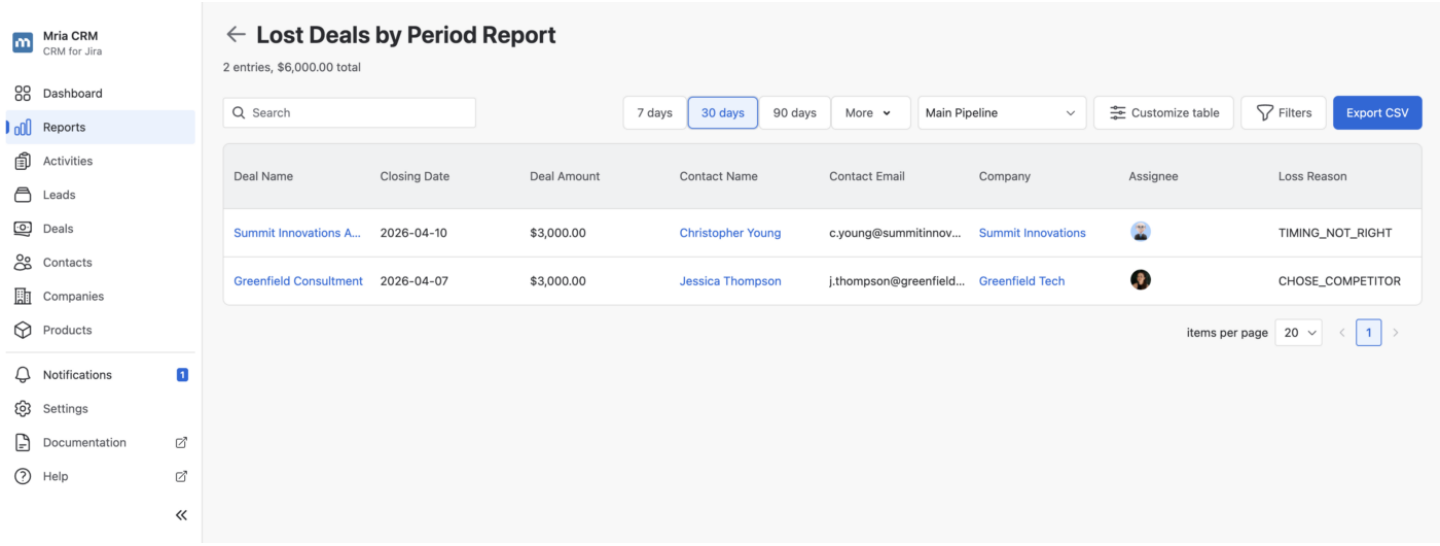
Includes:

- Deal name and stage
- Deal amount
- Contact and company details
- Assignee

Best used for:

- Reviewing active pipeline
- Tracking newly created opportunities

Lost Deals by Period



Shows Deals that were **closed as Lost**, based on **Closing date**.

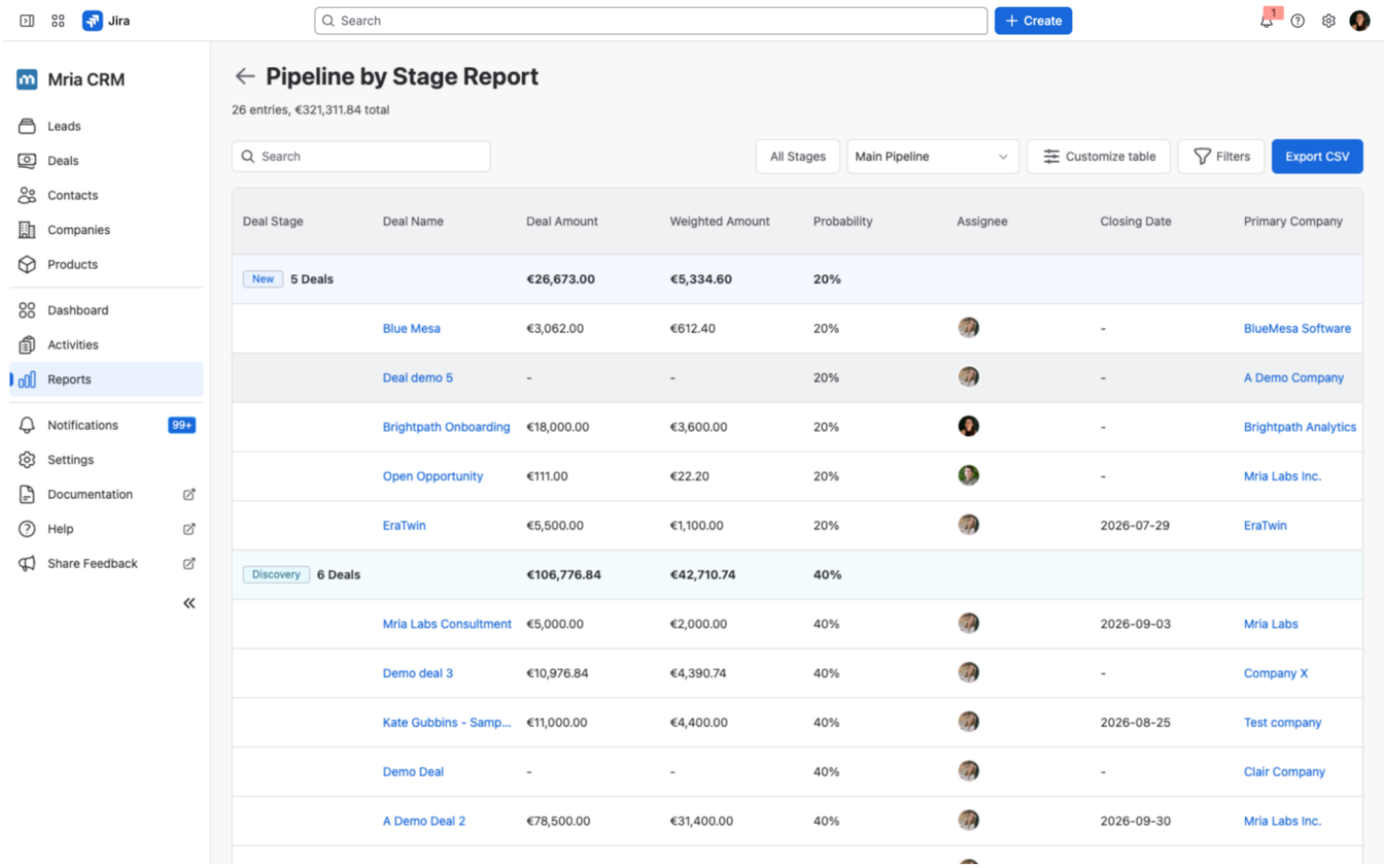
Includes:

- Deal name
- Closing date
- Deal amount
- Contact and company details
- Assignee
- Loss reason

Best used for:

- Analyzing lost opportunities
- Identifying common loss patterns

Pipeline by Stage



Shows **open Deals grouped by Deal Stage**, with weighted forecasting. Each stage group has a subtotal row, and a grand **Total** row summarizes the whole pipeline.

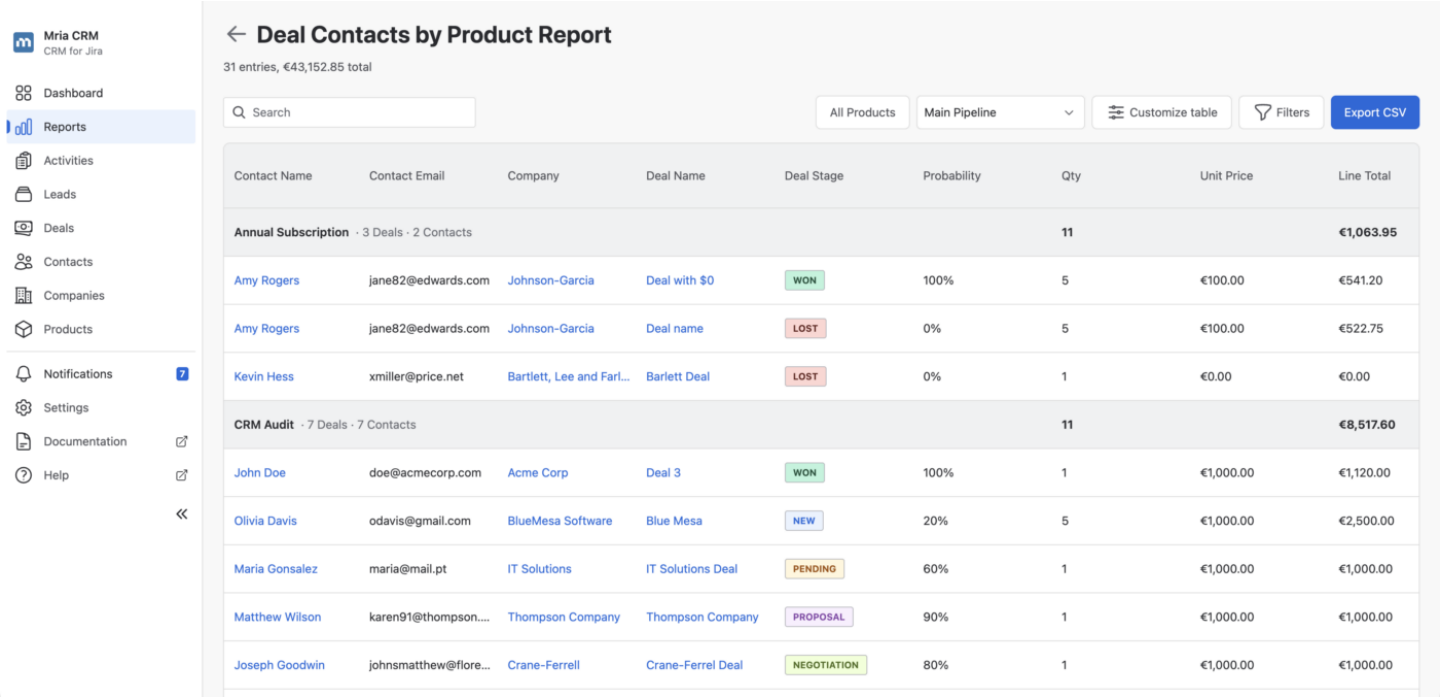
Includes:

- Deal stage (grouping) and deal name
- Deal amount
- **Weighted amount** (Deal amount × Probability) — the probability-adjusted forecast
- Probability (shown per Deal; stage subtotals use an amount-weighted average)
- Assignee
- Closing date
- Company
- Optional: Contact Type and Company Type, via Customize table

Best used for:

- Forecasting pipeline value by stage
- Seeing where value is concentrated across stages
- Reviewing a weighted, probability-adjusted forecast

Deal Contacts by Product



Lists **Deals and their Contacts grouped by Product**, with contact emails for outreach. Each product group shows the number of **Deals** and **Contacts** linked to it, along with quantity and line totals.

Includes:

- Contact name and email
- Company
- Deal name, stage, and probability
- Quantity, Unit price, and Line total (per product line)
- Optional columns via **Customize table**: contact role / title / phone, company details, deal type / source / tags, product category, SKU, unit type, discount, VAT, and more

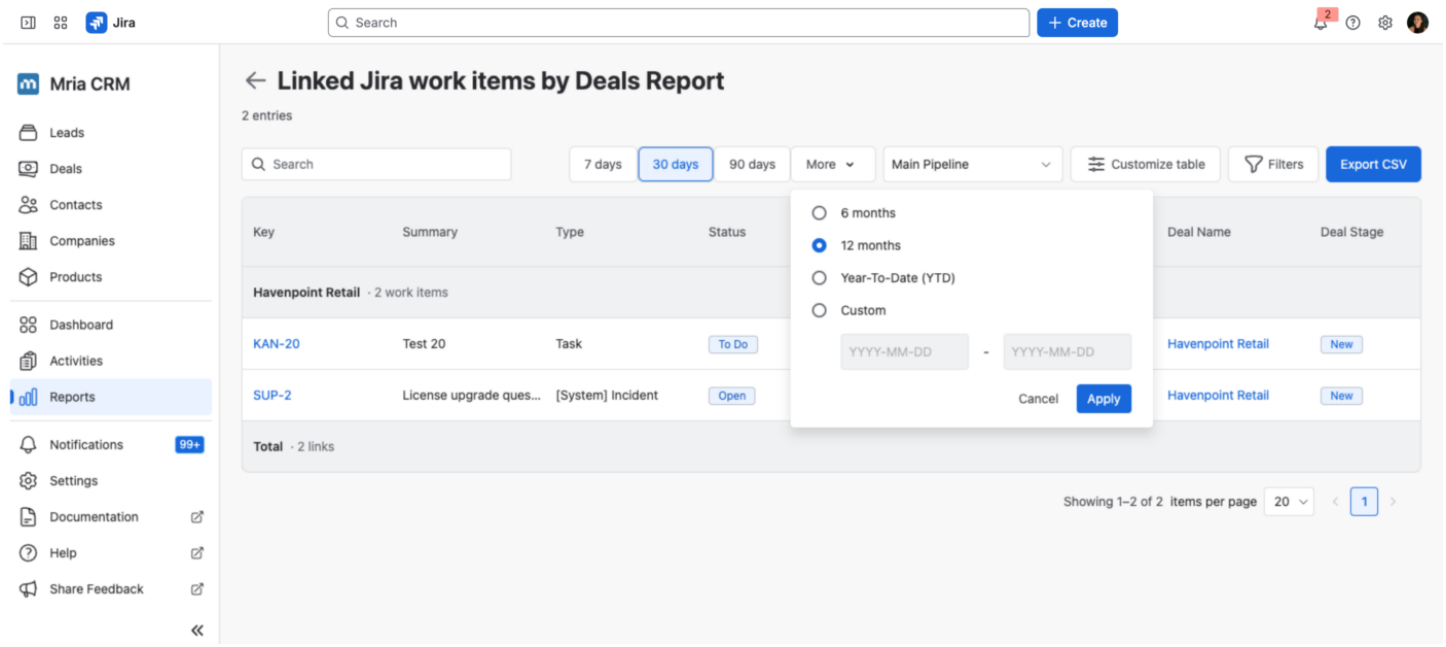
Best used for:

- Seeing which Contacts and Deals are associated with each Product

- Product-level outreach — contact emails are included for follow-up
- Understanding product demand across the pipeline

> In the **CSV export**, **Product** is always the first column, regardless of which columns are visible in the table.

Linked Jira work items by Deals



Lists the Jira work items linked to your Deals, grouped by Deal. Each group shows how many work items it holds, and the report ends with a total number of links.

Includes:

- Work item **Key**, **Summary** and **Type**
- **Status** and **Work Item Assignee** — read live from Jira
- **Due Date** of the work item
- **Deal Name** and **Deal Stage**

Best used for:

- Seeing what delivery work actually sits behind a deal, without opening each Deal in turn
- Spotting Deals late in the pipeline whose linked work is still open

- Handing a delivery picture to someone who works in Jira rather than in the CRM

> **What the CSV export leaves out**
> The export contains the work item **Key**, plus **Deal Name**, **Deal Stage** and **Deal Amount**, followed by a total row.
> The work item's **summary**, **type**, **status**, **assignee** and **due date** are shown in the report but not exported: Jira requires each work item's details to be fetched one at a time, and doing that for a large report would time out. To get those fields in a file, take the **Key** column into Jira and export from there.

Linking work items to Deals is covered on Jira Integration and Deals.

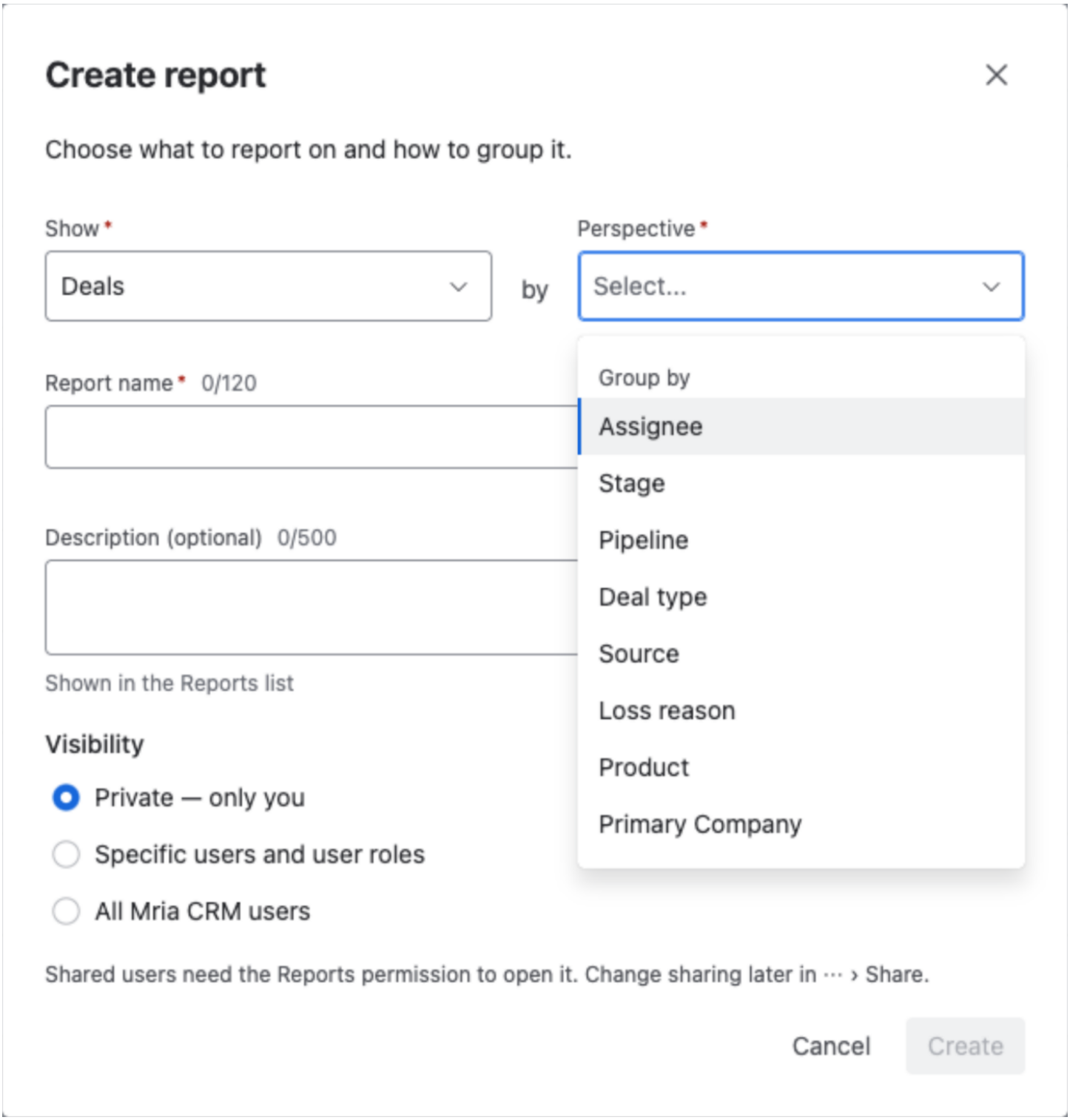
Custom Reports

Build your own report the way the standard ones are built: one kind of record, seen from one perspective. A custom report opens on the same page as the standard reports, with the same toolbar, grouped rows, Total row and Export CSV — and you choose its columns, filters and who can open it.

Custom reports follow the standard ones in the Reports list. The **Author** column says Mria CRM for a standard report and names the owner of a custom one.

Creating a report

1. On Reports, click **+ Create report**.
2. Pick what to **Show** — Deals, Leads, Contacts, Companies or Products — and the **Perspective** to see it by. Both are required, and neither has a default.
3. Adjust the **Report name** (up to 120 characters, pre-filled as *<Records> by <Perspective>*) and add a **Description** (up to 500) — it is shown in the Reports list.
4. Choose the **Visibility** and click **Create**.



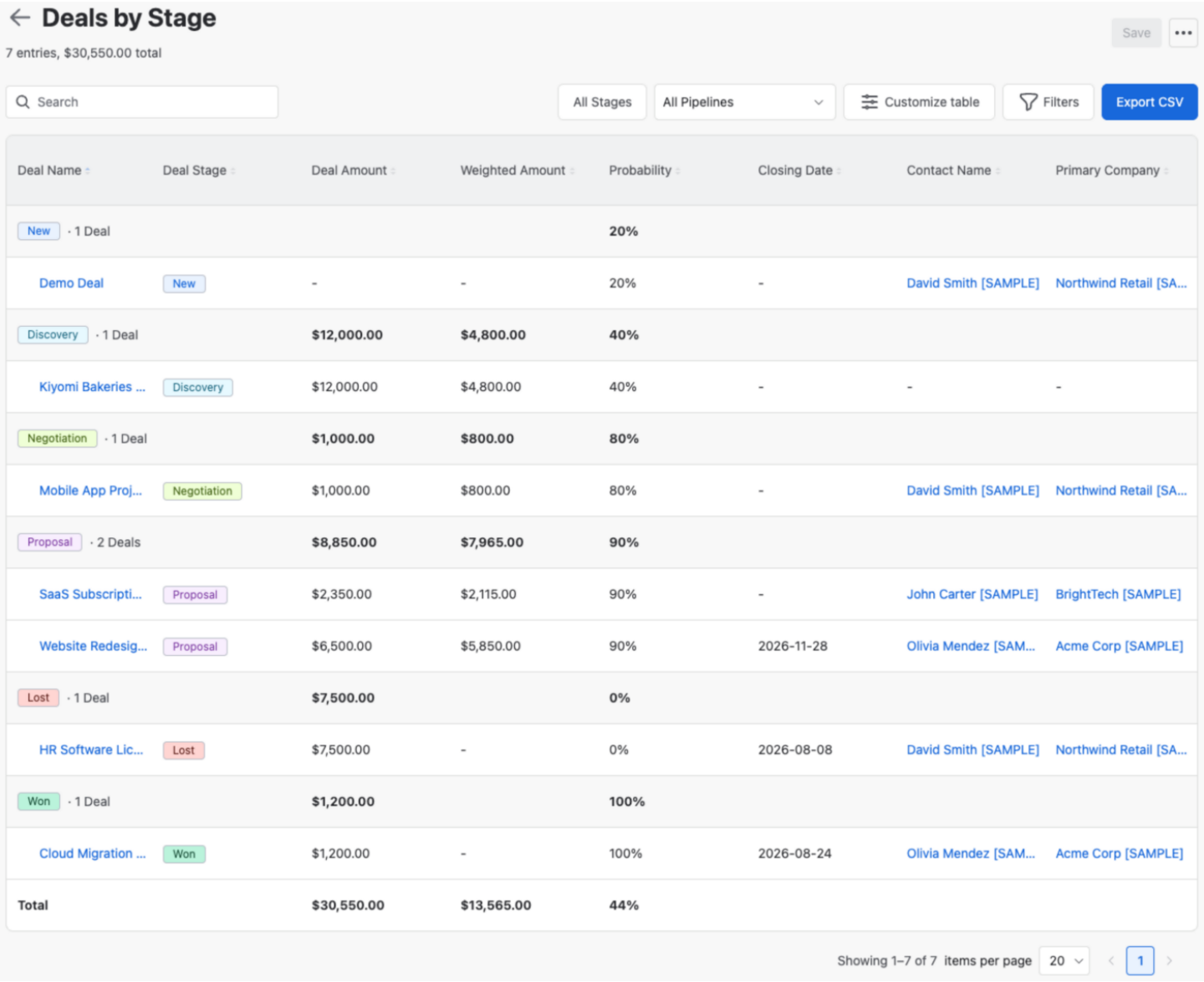
The perspectives depend on what the report shows, and include your Dropdown custom fields. The **Perspective** list groups them under **Group by** and **Period**. For Deals they are:

Kind	Perspectives

Groups	Assignee · Stage · Pipeline · Deal type · Source · Loss reason · Product · Primary Company · Primary Contact · Company country · Tag
Periods	Period (Closing date) · Period (Created) · Period (Closed at) · Period (Last activity date)

What a report shows and its perspective are fixed once it is created. For a different view, create another report — or duplicate this one and change everything else.

The report page



- **Group perspectives** show a group row per value with its count and sums, the records under it, and a Total row. The selector next to Search — *All Stages* here — narrows the report to one value.

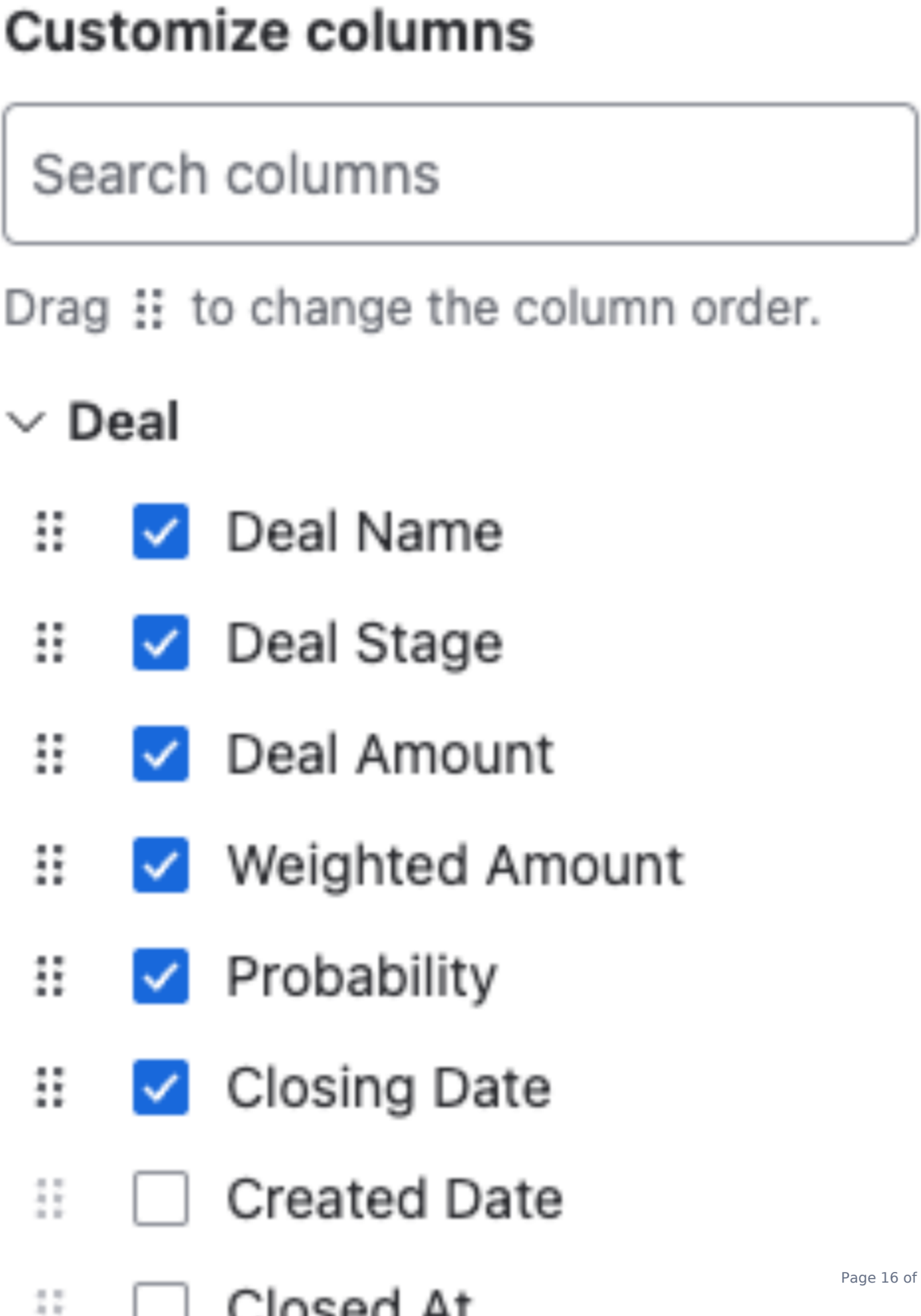
- **Period perspectives** show a flat table filtered by that date, with the same 7 / 30 / 90 days and More presets as the standard reports, and a Total row.
- Deal reports have the pipeline selector, including All Pipelines.
- The header counts the entries and totals the amount column of the report.

Probability in group and Total rows

A group's probability is weighted by amount — its weighted amount divided by its amount — exactly as in Pipeline by Stage. Won and Lost Deals have no weighted amount, as everywhere in Mria CRM, so a closed group shows the amount-weighted average of its Deals' own probabilities, never above 100%. The Total row divides the weighted amount of the open Deals by the amount of all Deals in the report.

Choosing and ordering columns

Customize table lists the columns in sections: the record itself, its custom fields, every related record — for Deals: Contact, Company, Products and Linked Jira work items — and Activity.


Customize columns
Search columns
Drag to change the column order.
Deal
Deal Name
Deal Stage
Deal Amount
Weighted Amount
Probability
Closing Date
Created Date
Closed At

- Search columns across all sections at once.
- Drag ⠿ to change the column order. From the keyboard: Space to pick a column up, the arrow keys to move it, Space to drop, Escape to cancel. The table and the CSV export both follow this order.
- Up to 40 columns — the counter shows how many are used. **Reset to default** restores the starting set.
- **Per line** fields — a Product line, a linked work item — switch the report to one row per line, as in Deal Contacts by Product. A message under the toolbar says so, the entry count then counts lines, and Deal-level amounts repeat on every line. Two per-line sections can't be combined: the other one's fields are disabled, and hovering one says why.

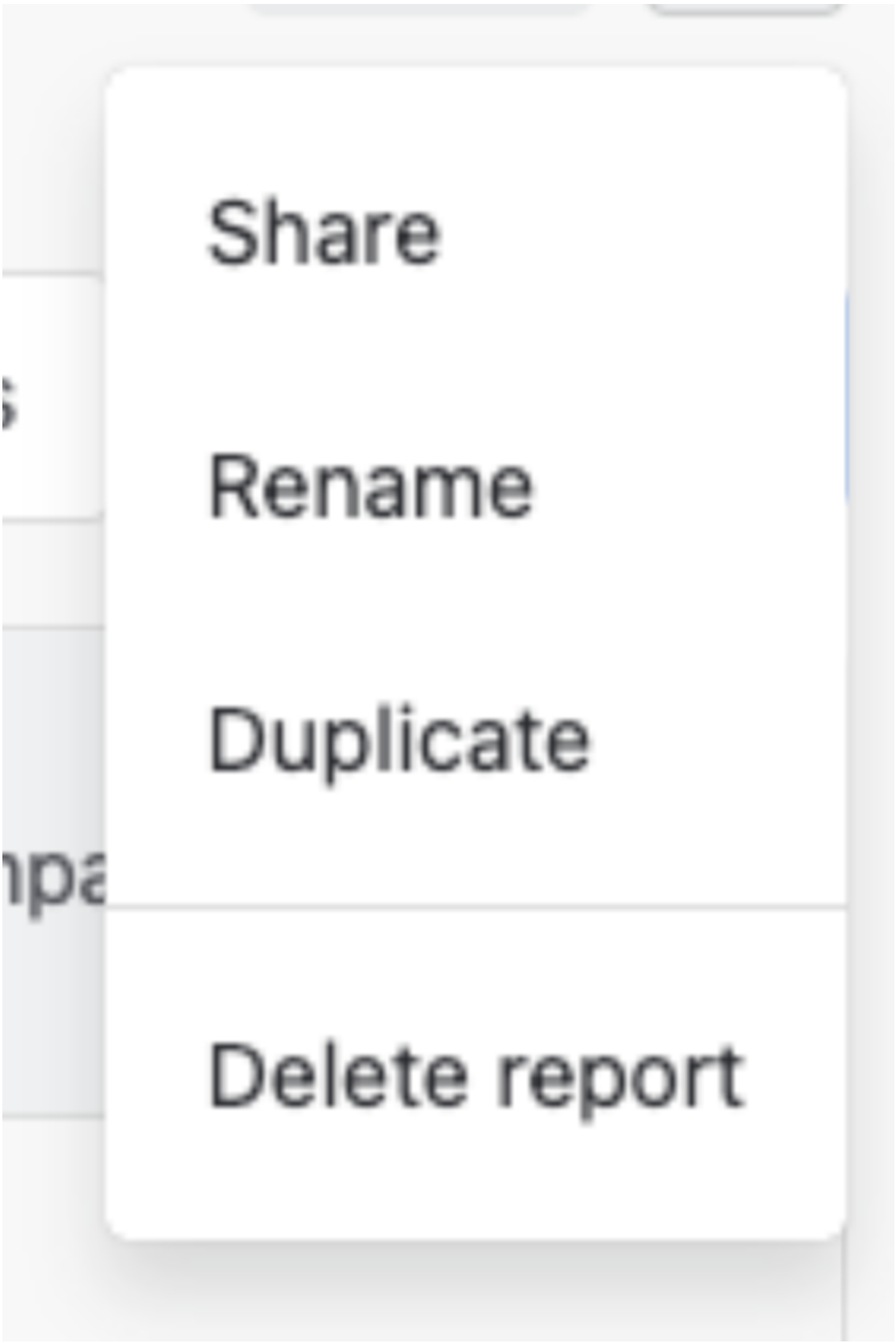
Filters

Filters holds the same filters as the record list, plus Pipeline stage and Probability for Deals, and a **Columns in this report** section with one filter per related-record column you added. Those column filters apply as soon as you change them.

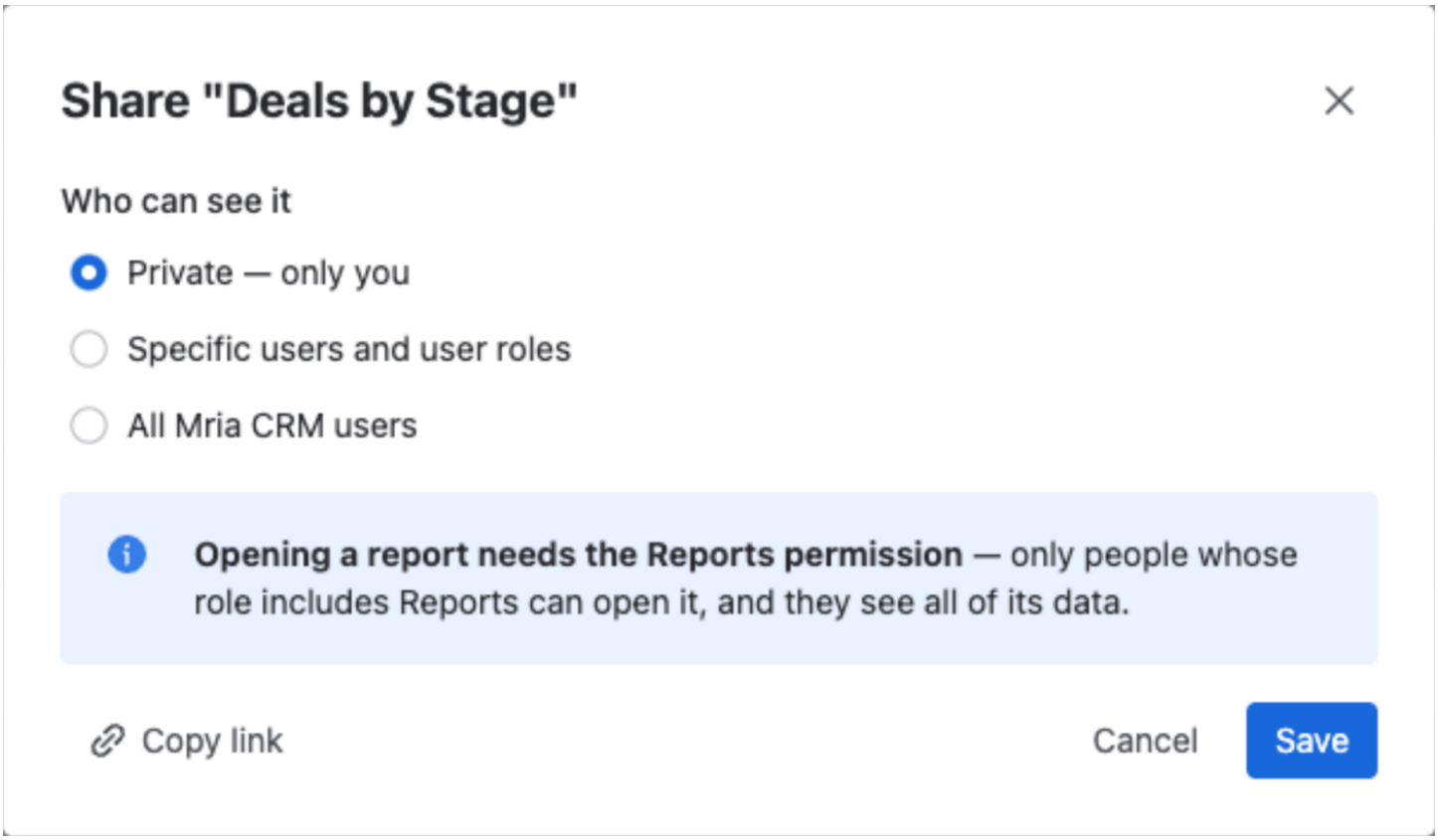


Saving, sharing and managing

- **Save** turns blue when the report differs from its saved state and saves the columns, their order, sorting, filters, the perspective selection and the date preset. Leaving with unsaved changes asks first.
- The **⋯** menu next to Save holds Share, Rename, Duplicate and Delete report. In the Reports list, the row's ⋯ menu adds Open and Edit.
- **Duplicate** creates a copy named *(copy)* and opens it.
- **Delete report** warns that the report will be deleted for everyone it is shared with, and can't be undone.


Share
Rename
Duplicate
Delete report

Who can open and edit it



Visibility	Who sees the report
Private — only you	The owner.
Specific users and user roles	The users and the members of the roles you pick. Tick *Let selected users and user roles edit* to let them save, rename, share and delete it too.
All Mria CRM users	Everyone whose role includes Reports.

- Administrators can always edit shared reports.
- Everyone else gets Open and Duplicate. They can change filters and columns while they look, but their changes are not saved to the report.
- **Copy link** copies a direct link to the report.
- Opening any report needs the Reports permission, and custom reports follow the same rule as the standard ones (see the note at the top of this page): whoever can open the report sees all of its data.

A site holds up to 200 custom reports, and each user can own up to 50. **Export CSV** works as on every report and names the file after the report.