Modules · Reports

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docs/modules/reports.md

Reports

Tenant reporting for CRM metrics.

Access

- View: permission `view.reports`
- Export: permission `export.reports`
- Routes: `reports.index`, `reports.export` (`GET /reports/export/{type}`)
- Controller: `App\Http\Controllers\ReportController`

Sales role includes view + export by default.

UI

Reports in the CRM sidebar opens the reports index. Filters and available charts/tables depend on the current `ReportController` implementation and Blade views under `resources/views/reports/`.

Exports

Export endpoints are throttled (see route middleware `throttle:30,1` on export). Use exports for offline analysis; prefer CSV imports/exports modules for bulk record movement.

Operational notes

- All report data is **company-scoped** via tenancy.
- Heavy exports should be run off-peak; consider queueing in a future iteration if files grow large (**Recommended** enhancement).

Related

- Modules overview
- End-user manual