

How to Make a Quick Report

Market: House, Senate

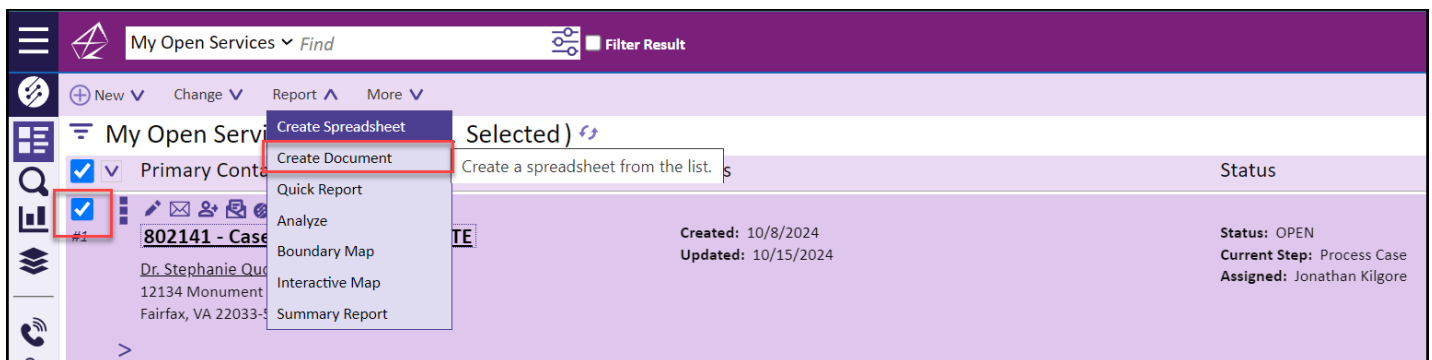
Description: This guide provides instructions on how to make a Quick Report. This document uses the Print Summary Quick Report as an example and demonstrates how to run it.

[Creating the Print Summary Report](#)

[Running the Print Summary Quick Report](#)

Creating the Print Summary Report

1. Navigate to **Services** → **My Open Services** view. Select a service record by clicking the box next to the service name.
2. Select **Report** → **Create Document**.



3. In the **Create Word Document of Services** window, choose the following options:
 1. In the **Select Columns** area → All Columns
 2. In the **Document Settings** area, Style → Separate Table.

Create Word Document of Services [X]

Columns and Document Layout Quick Report

Document Name
Services_20230804135351.docx

Print Rows
 All Rows 1 Selected Rows

Select Columns

- Contact
- Service Type
- Status
- Assigned To
- owner Email Address
- Queued To
- Step Name
- Service ID
- Address
- Opened

[]

[]

Document Settings

Title
Services

Sub-title

Style
Separate Table

Orientation
Portrait

Paper Size
8 1/2 x 11 (standard)

Margins

4. Navigate to the top tabs and click **Quick Report**.

Create Word Document of Services

Columns and Document Layout **Quick Report**

5. Name the Quick Report and assign to appropriate Users or Groups. Then click **Save as Quick Report**.

Create Word Document of Services [X]

Columns and Document Layout **Quick Report**

Quick Report Name
Print Summary

Bella Strom X Jonathan Kilgore X Joy Betaharon X



Assign User

LDSI Trainers X

Assign Group

Save as Quick Report Create Close

Running the Print Summary Quick Report

1. Select either  next to the record in the services list, or  next to the **Actions** button, and select **Quick Report**.
2. In the **Quick Report** window, select the **Quick Reports** tab, click into the **Report Name** dropdown to select your Quick Report and click **Create**.
3. Save the file and open.