

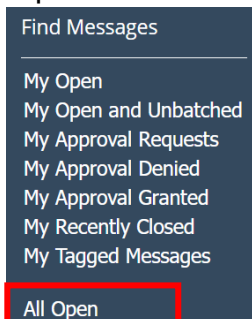
Creating Customized Reports in a Module

Market: Federal/State/Local, House, Senate

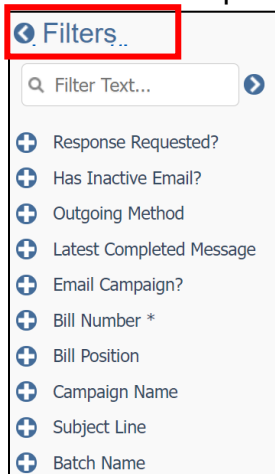
Description: These instructions teach users how to create reports using selected records within a module.

NOTE: Each module is unique and therefore, the options available may vary.

1. Navigate to the any module (except Home).
2. Within that module, use the link that takes you to the records you want to use for the reports. In this example only, we are viewing an office's all open messages.



3. Use the Filter options to further select the attributes needed.



4. Click the box shown below to select all records or click the rows to select specific records.

✉ All Open Messages (2,192 of 2,192 Records Selected) 🔄

☒ ☐
List Analyze Map
Change Send Print Report More
Sort: Date In / Date Created (Desc)

[Reply](#) [Change](#) [Batch Add](#) [Edit Contact](#) [Color](#) [No Response](#) [+Attachment](#) [+Affiliation](#) [+Service](#) [Swap Contact](#) [Reports](#) [Recent Activity](#) [Delete](#) (ID# 5008965)

☒ **+Opinion**
Mr. Timothy Quorum (Low)
 Status: Approved E-Mail
Date In: 1/3/2022
Modified: 1/3/2022 - 2:13pm
Issue: COVID19 - Covid19 issues
Comments: constituent is calling with concerns abo...
Assigned: Isabella Strom
Response: None
Salutation: FORMAL - Mr. Quorum

[Reply](#) [Change](#) [Batch Add](#) [Edit Contact](#) [Color](#) [No Response](#) [Approve](#) [+Affiliation](#) [+Service](#) [Swap Contact](#) [Reports](#) [Recent Activity](#) [Delete](#) (ID# 5008958)

☒ **+E-Mail**
Dr. Toby Quorum (Low)
 Status: On Hold E-Mail
Date In: 12/23/2021
Modified: 12/23/2021 - 1:11pm
Comments:
Assigned: Lori Zeoli
Response: None
Salutation: FORMAL - Dr. Quorum

5. Click **Report** and select an option.

☒ ☐
List Analyze Map
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☒ **+Opinion**
Mr. Timothy Quorum (Low)
 Message Summary
Message Summary (Wide)
Quick Reports
Archivist Report
Analyze Selected
Create Spreadsheet
Create Document
Boundary Map