

How to Make a Quick Report

Market: House, Senate

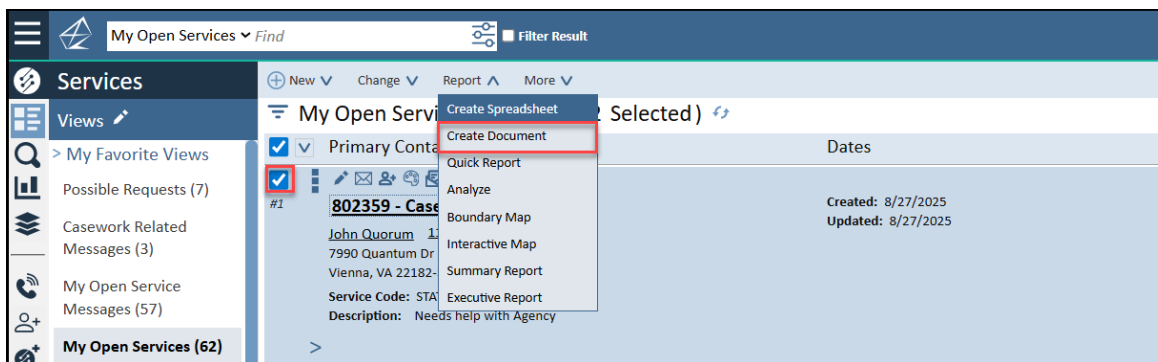
Description: This guide provides instructions on how to make a Quick Report. This document uses the Print Summary Quick Report as an example and demonstrates how to run it.

[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

Columns and Document Layout

Quick Report

Document Name

Services_20250828085611.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
 ☒ Due
 ☒ Step Due
 ☒ Completed
 ☒ Started

Document Settings

Title

Services

Sub-title

Style

Separate Table

Orientation

Portrait

Save as Quick Report

Create

Close

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

Columns and Document Layout Quick Report

Quick Report Name

Print Summary

Jonathan Kilgore Joy Betaharon

Assign User



LDSI Trainers

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.