

## How to Make a Quick Report

**Market:** House, Senate

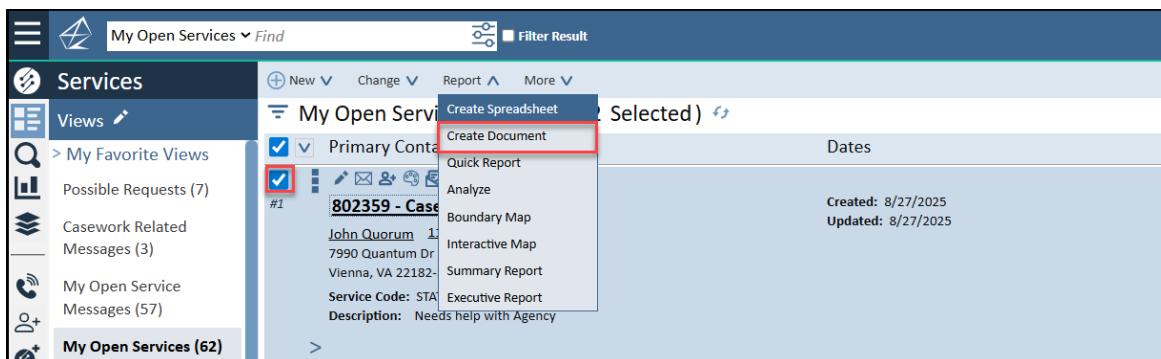
**Description:** This guide provides instructions on how to make a Quick Report. This document uses the Print Summary Quick Report as an example and demonstrates how to run it.

[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 **Document Settings**  
 Service Type  
 Status  
 Assigned To  
 Owner Email Address  
 Queued To  
 Step Name  
 Service ID  
 Address  
 Opened  
 Due  
 Step Due  
 Completed  
 Started

*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

Assign User 

Jonathan Kilgore  Joy Betaharon 

Assign Group 

LDSI Trainers 

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.