

How to Make a Quick Report

Market: House, Senate

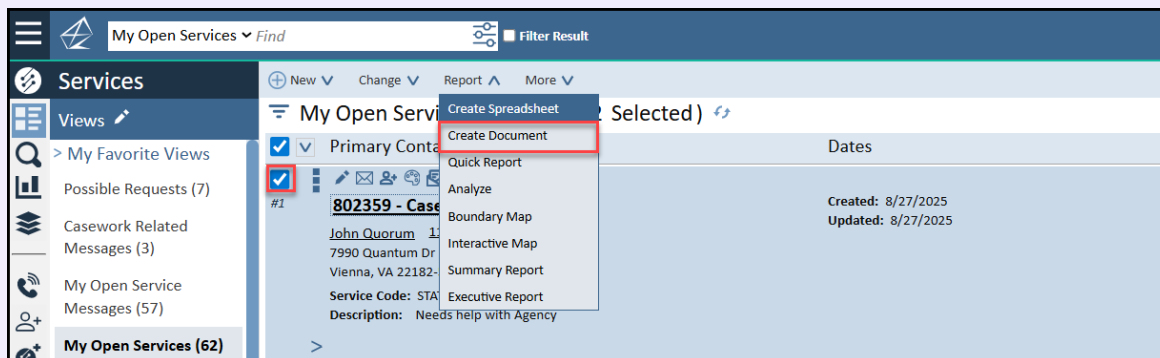
Description: This guide provides instructions on how to make a Quick Report. This document uses the Print Summary Quick Report as an example and demonstrates how to run it.

[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. In the menu options, 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

All None

- ☒ 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 "Print Summary" 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

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 Workflow Report** window, click into the **Report Format** dropdown to select your Quick Report and click **Run Report**.
3. Save the file and open.