

# **Customized Reports**

As editing the <u>Standard reports</u> is not permitted, you have the option to clone these reports and tailor them to meet your specific needs.

## **Create a Customized Report**

(i) **Permission Required**: Create of <u>Reports</u>

To create a customized report:

- 1. Select the **Reports** menu.
- 2. Click on a report you want to clone to create the customized report.
- 3. Select **Clone** from the dropdown button in the top right corner.

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$\leftarrow$ Servi	ice Reports	by Status									<b>Č</b> Updated 4	5 mins ag	Exp	ort 🗸
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STATUS 🔺		APPOINTMENT	SERVIC	E REPORT N	PROBLE	EM STATEM	SERVICE SUMM	ARY T	'OTAL (\$)	LEAD		CONTA	CT (APPOIN	
						No Data	a Found							

4. <u>Customize</u> the Columns, Row Groups, Column Groups, or Aggregate Columns and click **Save**.

The newly created report will be listed under **Custom Reports**.

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Folders	Custom Reports		Q Search Custom Reports
All Reports	REPORT NAME	DESCRIPTION	LAST ACCESSED
Request Reports	All Requested Service b	Summary of all the Services provided to the Contacts	50 min ago
Estimate Reports	All Requested Service	Summary of all the Services provided to the Contacts	51 min ago
Work Order Reports	Service Reports by Status	List of Service Reports based on their current status.	Yesterday
Service Appointment			
Service and Part Repo			
Contact/Company Re			
Other Reports			
Custom Reports			

Within a folder, you cannot have duplicate report names. To change the report name, click the **Edit** [/] icon next to the report name.

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Columns		SERVICE (SERVICE LINE 4	STATUS 🔺	SERVICE LIN	ie item 🔺	DESCRIPTION	1	LIST PRICE (\$)	UNIT		QUANTITY
Customize the report by select desired sections and rearranging through drag and drop.	ting the ing them						No Data Four	nd			
Columns	+										
Uuantity											
Line Item Amount											

In the *Report Details* popup, change the **Report Name** and click **Save**.

Report Details	
Report Name	All Requested Service by Contact
Description	Summary of all the Services provided to the Contacts
	Cancel Save

#### **Customize the Report**

1. Click + for the element (Columns, Row Groups, Column Groups, or Aggregate Columns) you want to add to the report.

← All Requested Service						Cancel	Save
Customize the report by selecting the desired sections and rearranging them through drag and drop.	SERVICE (SERVICE LINE A	STATUS 🔺	DESCRIPTION	LIST PRICE (\$)	UNIT	QUANTITY	LINE ITEM
Columns +				No Data Found			
Description							
ii List Price							
" Unit							
ii Quantity							
ii Line Item Amount							
Row Groups +							
# Service							
ii Status							
Column Groups +							
No fields found.							
Aggregate Columns +							
No fields found.							

2. Select the fields or attributes you want to add to your report and click **Apply**.

You can filter these by modules or data type. The existing fields or attributes in the report will be selected. Uncheck the ones you want to remove.

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← Al	l Requeste	ed Service										Cancel	Save
Columns				SERVICE (SERVICE LINE 4	STATUS 🔺	DESC	RIPTION	LIST PRICE (\$)		UNIT	QUAN	ΤΙΤΥ	LINE ITEM /
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<ul> <li>Billing</li> <li>Billing</li> <li>Billing</li> </ul>	Country State												
Billing Billing Billing Billing	Street 1 Street 2 Zin Code												
Cancel	llation Messa Address Na	ge me											
Service	e City Can	cel Apply											
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You can reorder the fields or attributes. Hover over a field or attribute and click on <sup>ii</sup> to drag and drop it.

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$\leftarrow$ All Requested Service							Cancel Save
Columns		STATUS 🔺	DESCRIPTION	LIST PRICE	UNIT	QUANTITY	LINE ITEM AMOUNT
Customize the report by selecting the desired sections and rearranging them through drag and drop.					No Data	Found	
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# Unit							
II Quantity							
III Line Item Amount	1						
Billing Address Name     Billing City	1						
Billing State	1						
Row Groups +							

The selected fields or attributes will be added to the report.

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Columns	ICE	UNIT	QUANTITY	LINE ITEM AMOUNT	BILLING ADDRESS	BILLING CITY	BILLING STATE
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Row Groups +							
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## **Edit a Customized Report**

(i) **Permission Required**: Edit of <u>Reports</u>

To edit a customized report:

- 1. Select the **Reports** menu.
- 2. From the **Custom Reports** folder, click on a report you want to edit.
- 3. Select **Edit** from the dropdown button in the top right corner.

	ce Reports	by Status					Updated 12 min	s ago Export Send Email
∓ Filters	Data & Time	Created Time	Current Month 👻 Sep	tember 2023				Edit
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4. Make the necessary edits and click Save.

#### **Delete a Customized Report**

(i) **Permission Required**: Delete of <u>Reports</u>

To delete a customized report:

- 1. Select the **Reports** menu.
- 2. Hover over the customized report you want to delete and, under More options [...], select Delete.
- 3. Click **Yes** in the confirmation message.

#### (i) Points to remember

- In a report, you can add a maximum of 30 columns.
- In a report, you can add a maximum of three groupings, row-wise and column-wise combined.
- In a report, you can add a maximum of four aggregate columns.
- Customized reports are supported only in the editions Standard and above. In the Standard edition, you can add five reports per module and a total of 15 reports. In the Professional edition, you can add ten reports per module and a total of 30 reports.