

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.

<input checked="" type="checkbox"/>	Primary Contact	Service	Status
<input checked="" type="checkbox"/>	Description: Ms. Turner requires help with an issue with USCIS.		
<input checked="" type="checkbox"/>	Casework - USCIS	ID# 801785	Status: OPEN
	Quorum, Jane Francis	Created: 5/23/2023	Assigned: Joy Betaharon
	8519 Queen Elizabeth Blvd.	Updated: 5/23/2023	
	Annandale, VA 22003	Alert: 5/26/2023	
	Service Code: USCIS--U.S. Citizenship and Immigration Services USCIS		
	Description: Needs help with USCIS		

2. Select **Report** → **Create Document**.

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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_20230804135351.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
 ☐

All

None

Document Settings

Title

Services

Sub-title

Style

Separate Table

Orientation

Portrait

Paper Size

8 1/2 x 11 (standard)

Margins

Save as Quick Report

Create

Close

- Navigate to the top tabs and click **Quick Report**.

Create Word Document of Services

Columns and Document Layout

Quick Report

- 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

Bella Strom

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 **Merge Services** button, and select **Quick Report**.
2. In the **Quick Report** window, select **Print Summary** Report and click **Create**.
3. Save the file and open.