

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

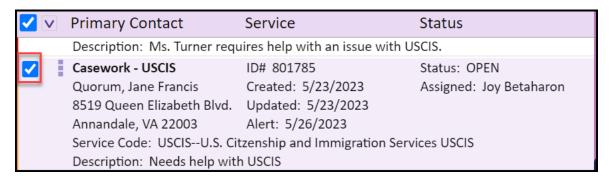
Summary Quick Report as an example and demonstrates how to run it.

Creating the Print Summary Report

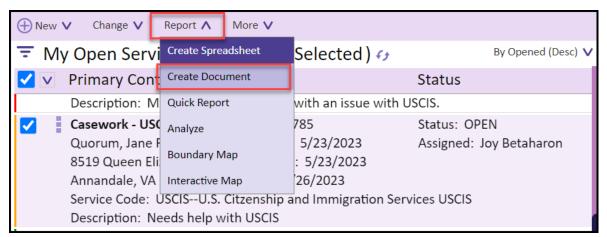
Running the Print Summary Quick Report

Creating the Print Summary Report

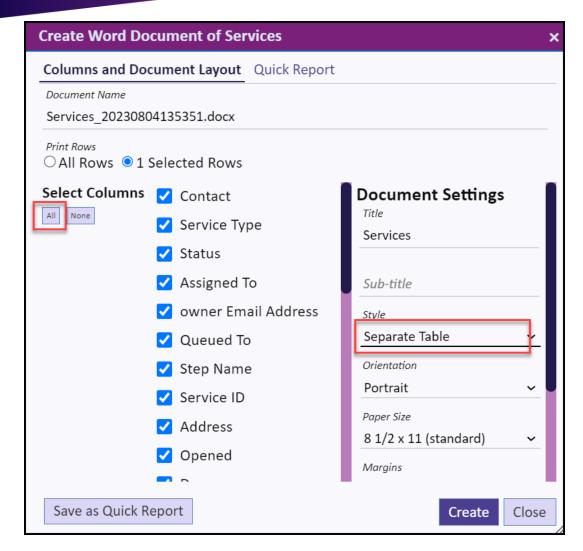
 Navigate to Services → My Open Services view. Select a service record by clicking the box next to the service name.



2. Select Report → Create Document.



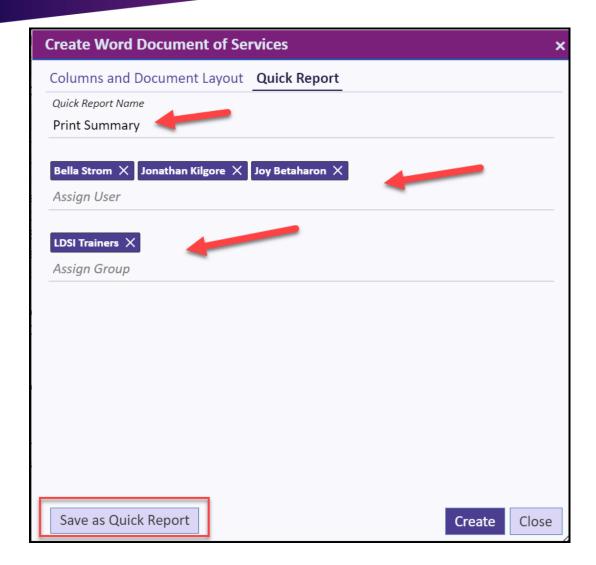
- 3. In the Create Word Document of Services window, choose the following options:
 - 1. In the **Select Columns** area →All Columns
 - 2. In the **Document Settings** area, Style → Separate Table.



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



5. Name the Quick Report and assign to appropriate Users or Groups. Then click **Save as Quick Report**.



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.