Reporting Overview

Business Goals
Demystify the report menu
Understand what reports are for and when to use them

Technical Objectives
Understand how reports are structured
Understand what reports can do through various examples
Jobs by Salesperson, Sq Ft Installed by Month, Activities by Day of Week, Total Allocated Product, Overdue Activities, Completed Installs, Installs by Phase
Learn how to create the simplest reports

I won't bite …

Making a Good Report is Hard

Reports are hard to master …they're very flexible and powerful, but that makes them more complex to understand and learn

Don't hesitate to call us for help – but remember that it sometimes takes us a while to figure out difficult reports, too!

?

Account

Job

Phase

- Activities
- Forms
- Files

Phase

- Activities
- Forms

Job

- Activities
- Forms
- Files

Account

Job

Phase

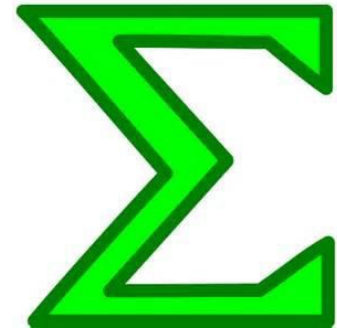Activities | Forms | Files

Phase

Activities | Forms

Job

Activities | Forms | Files

Every report either Counts or Adds

Even if you're just trying to get a list, the report still has to count something – but it's normal to have a report where each row has a count of 1.

While working on a report, always ask yourself,

"What am I counting or adding?"

Report

Job Name	Job Salesperson ↑	Number of Jobs by Job Creation Date
Beau Jones		1
Jacob Gurasco		1
Jessica Cooper	Nora	1

Week: 2/6/2017 - 2/12/2017

Options... | Reports ▾ | Save Report... | New Report...

Basic Examples

Jobs by Salesperson

Report

Options... | Reports ▾ | Save Report... | New Report...

Year: 2017

Job Salesperson ↑	Number of Jobs by Job Creation Date
	7
Bob	2
Emma	5
Eric	7
Jason	7
Jeff	3
Lisa	2
Nora	3

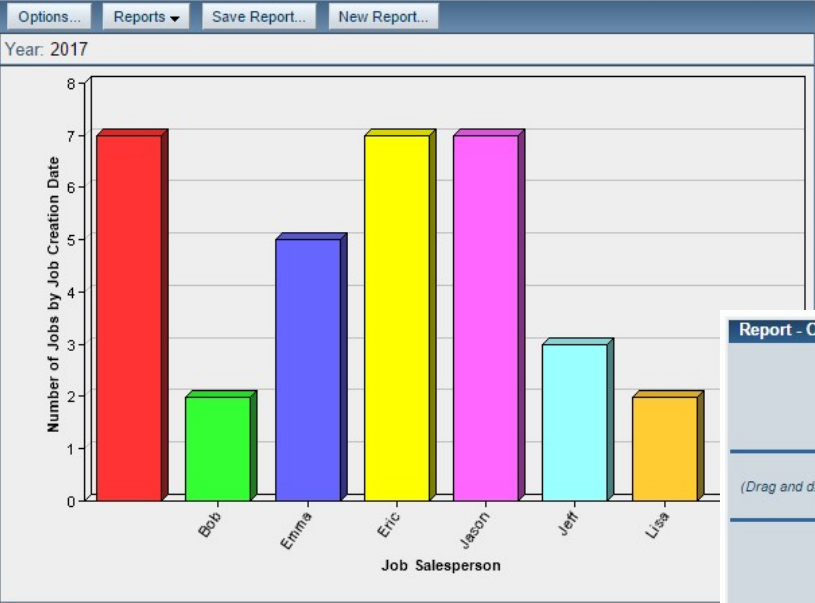(Rows 1 to 8 of 8)

Jobs by Salesperson

Account | Quote | Sales Lead | Job | Calendar | Purchasing | Inventory | Report

Report

| Options... | Reports ▾ | Save Report... | New Report... |

Year: 2017

Job Salesperson ↑	Number of Jobs by Job Creation Date
	7
Bob	2
Emma	5
Eric	7
Jason	7
Jeff	3
Lisa	2
Nora	3

(Rows 1 to 8 of 8)

Report - Options

Time Selection: Year ▾

Reporting Date: 2/9/2017

Measure: Number of Jobs by Job Creation Date   Select... [Clear]

Display Fields: Select Fields... [Clear]
(Drag and drop fields to change order.
Click ✕ to remove fields.)   Job Salesperson [✕]

Filters: Add Filter...

Display Type: Table ▾

Rows per page: 30

| OK | Cancel |

Jobs by Salesperson (bar chart)

Report

Options... | Reports ▾ | Save Report... | New Report...

Year: 2017

Jobs by Salesperson (bar chart)

Jobs by Month

Report

Options... | Reports ▾ | Save Report... | New Report...

Year: 2017

Year ↑	Month	Number of Jobs by Job Creation Date
2017	January	31
2017	February	5

Jobs by Month

Year ↑	Month	Number of Jobs by Job Creation Date
2017	January	31
2017	February	5

Report - Options

Time Selection:	Year ▼
Reporting Date:	2/9/2017
Measure:	Number of Jobs by Job Creation Date Select... [Clear]

Display Fields: Select Fields... [Clear]
(Drag and drop fields to change order. Click X to remove fields.)

| Year | X |
| Month | X |

Filters:	Add Filter...
Display Type:	Table ▼
Rows per page:	30

OK   Cancel
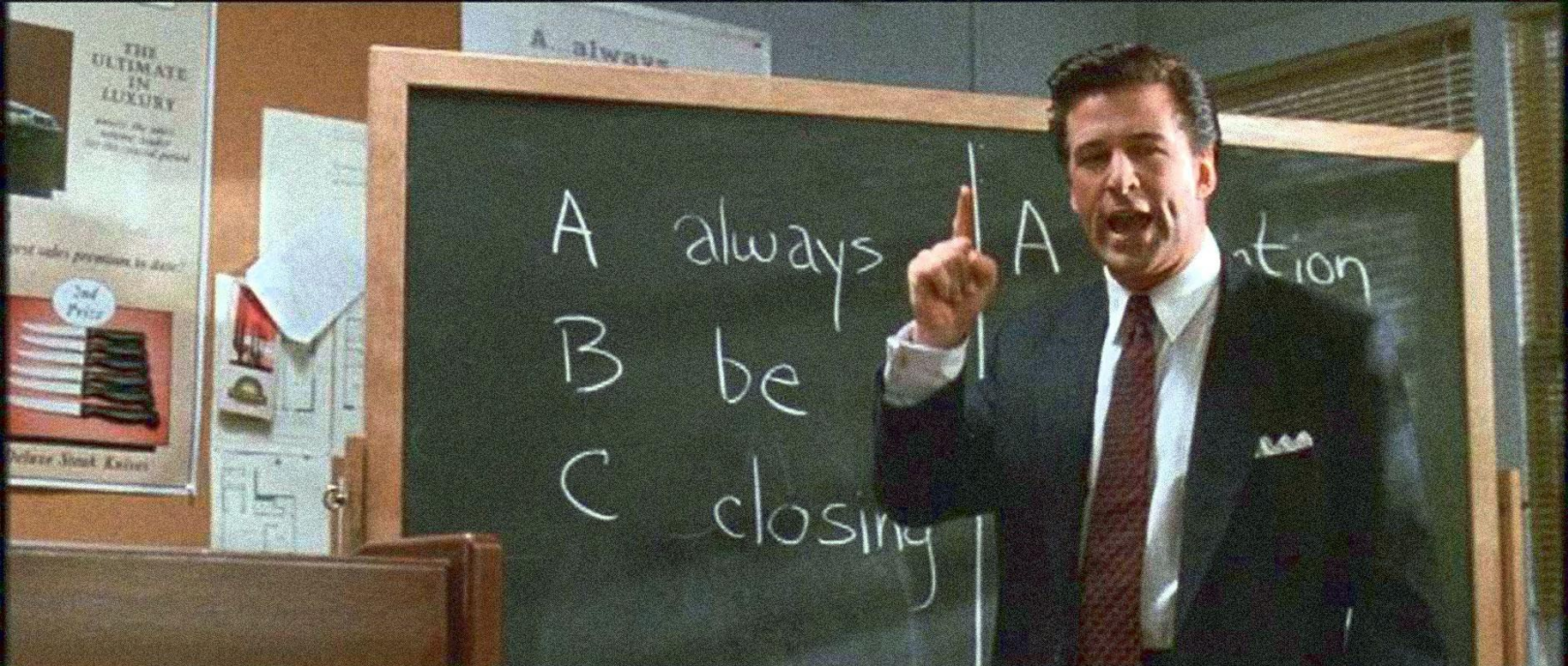
Possibilities

Square Feet Installed

Report

| Options... | Reports ▾ | Save Report... | New Report... |

Year: 2017

Year	Month ↑	Total Countertop Details - Sqft by Last Install in Job Date
2017	January	527.0
2017	February	4,204.0
2017	March	4,346.0
2017	April	433.0

Projected

Report

| Options... | Reports ▾ | Save Report... | New Report... |

Year: 2017
Filters: Each Install activity is Canceled or Complete
At least one Install activity is Complete

Year	Month ↑	Total Countertop Details - Sqft by Last Install in Job Date
2017	January	527.0
2017	February	208.0

Completed

Overdue Activities

Report

| Options... | Reports ▾ | Save Report... | New Report... |

Date: 1/13/2000 - 1/31/2035
Filters: Activity Status is not Canceled, Complete
Activity Date occurs at least 1 day(s) ago

Job Name	Activity Type	Activity Status	Activity Date ↓	Assigned To	Number of Job Activities by Job Creation Date
Gene Schlessinger	Phone Call / Email Follow Up	Confirmed	2/7/2017	Jason	1
Dave Lydon	Template	Confirmed	2/7/2017	Marco	1
Breda's kitchen	Template	Estimate	2/7/2017	Norm	1
Jacob Gurasco	Walk-In	Estimate	2/6/2017	Eric	1
Giovanni	Phone Call / Email Follow Up	Confirmed	4/25/2016	Jeff	1

Installs by Phase

Report

Year: 2017
Filters: Activity Type is Install
Activity Status is not Canceled, Complete

Account Name	Job Name	Job Phase Name	Last Install in Phase Date ↑	Number of Job Activities by Last Install in Phase Date
Lowe's #620	Jeff Cotes	(None)	2/8/2017	1
Zander Contracting	Barry Newcomb	(None)	2/8/2017	1
Zander Contracting	Sally Zurich	(None)	2/8/2017	1
Acme Builders	Eddie's kitchen	(None)	2/9/2017	1
Home Depot #150	Timothy's kitchen	(None)	2/9/2017	1
Max Construction	Conner Dre	(None)	2/9/2017	2
Home Depot #150	Cyra's Kitchen	(None)	2/10/2017	1
Home Depot #150	Daniel's kitchen	(None)	2/13/2017	1
Zander Contracting	Wayne Richmond	(None)	2/13/2017	
Zander Contracting	Willy Hayes	Phase 1 - Kitchen and Laundry	2/13/2017	1
ABC Builders, Inc.	Denise Turner	(None)	2/14/2017	2
Home Depot #150	Leanna's kitchen	Kitchen	2/14/2017	1
Texas Kitchens	Ann's kitchen	(None)	2/14/2017	1
ABC Builders, Inc.	Gus's kitchen	(None)	2/15/2017	1
Best Kitchens, Inc.	Smelton Jones	(None)	2/15/2017	1
Gene's Kitchen	Gene's Kitchen	(None)	2/15/2017	1
Home Depot #150	Clare Goode	(None)	2/15/2017	1
Katerina & Phil Jackson	Katerina's kitchen	(None)	2/15/2017	1
Lowe's #272	Sal Maglie	(None)	2/15/2017	1
ABC Builders, Inc.	Cory Smith	(None)	2/16/2017	1
Home Depot #150	512 Maple ST	(None)	2/16/2017	1
Home Depot #150	Reynaldo's kitchen	(None)	2/16/2017	1
Texas Kitchens	James Mooney	(None)	2/16/2017	1
Lowe's #620	Eric Smith	(None)	2/17/2017	1
Lowe's #620	Robert Cole	(None)	2/17/2017	1
Home Depot #150	Kathleen's	(None)	2/20/2017	3
Home Depot #150	Leanna's kitchen	bathrooms	2/20/2017	1
Lowe's #620	Mike Jones	(None)	2/20/2017	1
Texas Kitchens	Patricia Russo	(None)	2/20/2017	1
ABC Builders, Inc.	Eileen's kitchen	(None)	2/21/2017	1
ABC Builders, Inc.	The Bradbury Building	Main house	2/21/2017	1
Acme Builders	Rick Martindale	(None)	2/21/2017	1
Home Depot #150	Antonio's Teodoro	(None)	2/21/2017	1
Home Depot #150	Xavier Furman	(None)	2/22/2017	1
Texas Kitchens	Lydia Lorenz	(None)	2/22/2017	1
Zander Contracting	Willy Hayes	Phase 2 - Master Bath	2/22/2017	1

Total Allocated Product

Account | Quote | Sales Lead | Job | Calendar | Purchasing | Inventory | Report | Ad

Report

Options... | Reports ▾ | Save Report... | New Report...

Year: 2017

Allocated Product ↑	Unit	Total Allocated Product Quantity by Activity Date
Blanco Faucet	Each	1.0
Blanco Sink	Each	13.0
Cambria	Sq. ft.	320.8331
Corian	Each	10.5
Corian® Sink	Each	2.0
Granite	Sq. ft.	4,621.8458
Silestone_old	Each	4.5
Test	Sq. ft.	100.0

(Rows 1 to 8 of 8)

Any report is
Only as Good as Your Data

It's important to do a sanity check on your data

Jobs by Salesperson

Report

Options... | Reports ▾ | Save Report... | New Report...

Year: 2017

Job Salesperson ↑	Number of Jobs by Job Creation Date
	7
Bob	2
Emma	5
Eric	7
Jason	7
Jeff	3
Lisa	2
Nora	3

(Rows 1 to 8 of 8)

Sanity Check: Add More Detail

| Job Salesperson ↑	Job Name	Number of Jobs by Job Creation Date
	*292 Reserve A	1
	212 Elm - unit 103	1
	Beau Jones	1
	Friday Jones	1
	Harold Handy	1
	Jacob Gurasco	1
	Samira Montes	1
Bob	Max Moritz	1
Bob	Ruupa Sanderson	1
Emma	Charles Webb	1
Emma	Colleen Fulton	1
Emma	Daniel Munoz	1
Emma	Sally Shimanski	1
Emma	Smelton Jones	1

Jobs by Salesperson +Jobs

Getting Started

Can create simplest reports with ⌐New_…
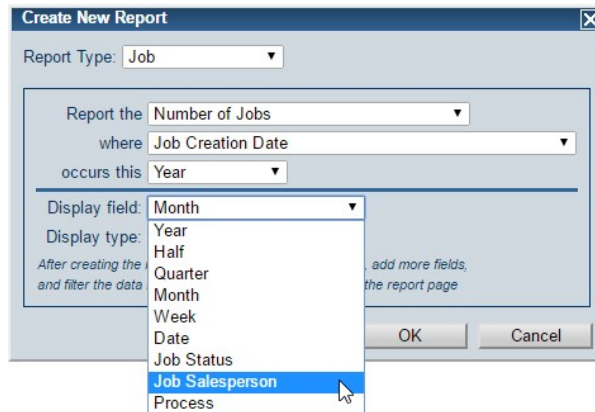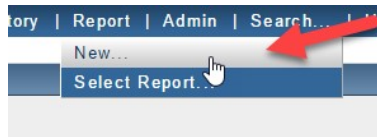
…but usually need to click Options
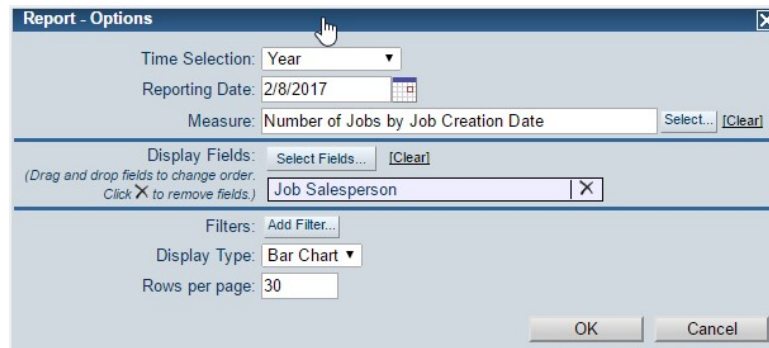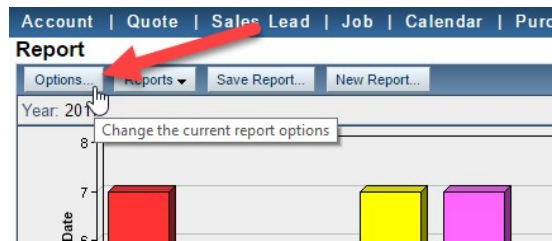
Quick Walkthrough

Exercise: Jobs by Account

Try to create a report that counts the number of jobs created this year by each of your Accounts