

Advanced Reporting

Business Goals

Learn how to use reports to get key data out of your system

Build some of the most common reports

Technical Objectives

Understand each part of the Options window for Reports

Learn how to avoid some of the common pitfalls when making reports

Understand when it's time to copy to Excel

Time

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

Report

Job Salesperson	Number of Jobs by Job Creation Date
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: 2/8/2017

Measure: Number of Jobs by Job Creation Date

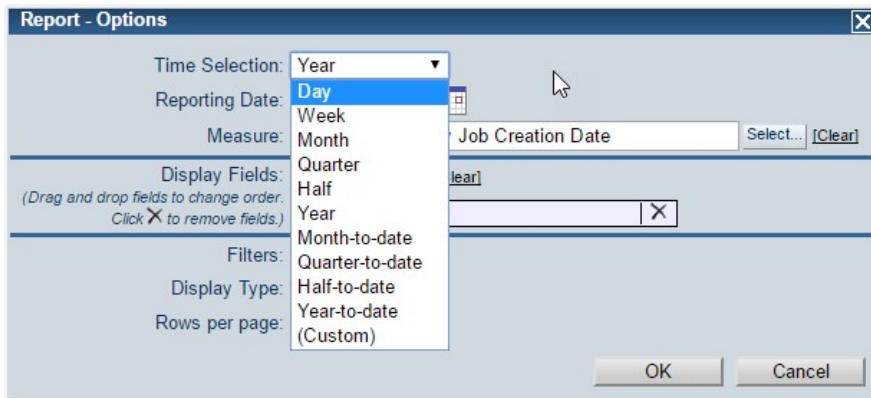
Display Fields: Job Salesperson

Filters: Add Filter...

Display Type: Table
Rows per page: 30

OK Cancel

Time Selections are mostly intuitive ...



...but saved reports always return to Today

Report - Options [X]

Time Selection: Month ▾

Reporting Date: 2/8/2016 [Calendar Icon]

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.)

Job Salesperson [X]

Filters: [Add Filter...]

Display Type: Table ▾

Rows per page: 30

[OK] [Cancel]

If you want exact dates, choose Custom

Report - Options

Time Selection: (Custom) ▼

Reporting Date: 1/1/2017 To 1/31/2017

Measure: Number of Jobs by Job Creation Date

Display Fields:

(Drag and drop fields to change order.
Click X to remove fields.)

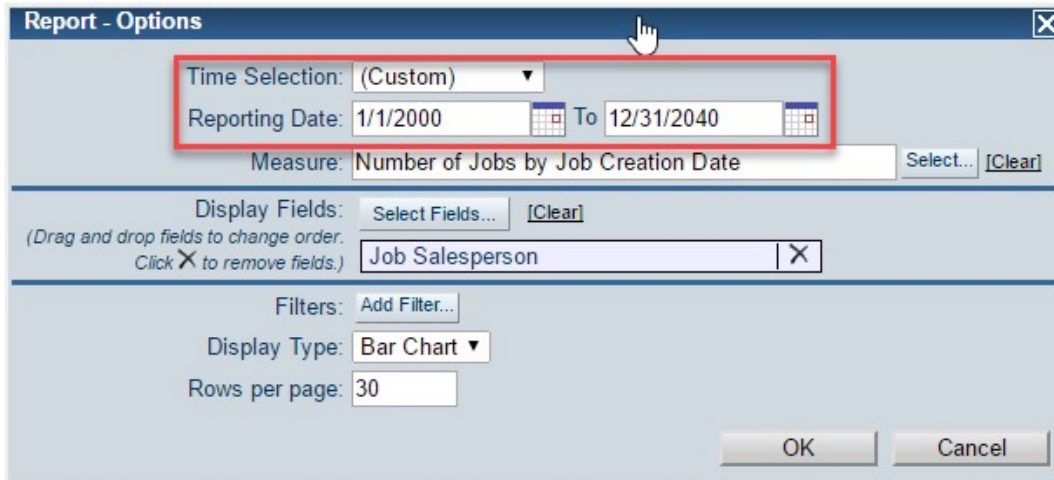
Job Salesperson | X

Filters:

Display Type: Table ▼

Rows per page: 30

Trick for (All)



The image shows a 'Report - Options' dialog box with a red rectangular highlight around the 'Time Selection' and 'Reporting Date' fields. A mouse cursor is pointing at the top center of the dialog box.

Report - Options [X]

Time Selection: (Custom) ▾

Reporting Date: 1/1/2000 [calendar] To 12/31/2040 [calendar]

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.) Job Salesperson [X]

Filters: [Add Filter...]

Display Type: Bar Chart ▾

Rows per page: 30

[OK] [Cancel]

Display Fields: Jobs by ...

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

Report

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: 2/8/2017
Measure: Number of Jobs by Job Creation Date

Display Fields: Job Salesperson

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

OK Cancel

Changing Display Fields

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
Bob	2
Emma	5
Eric	7
Jason	7
Jeff	3
Lisa	2
Nota	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

Display Fields: Job Salesperson

Filters: Add Filter...

Display Type: Table

Rows per page: 30

OK Cancel

Account | Quote | Sales Lead | Job | Calendar | Purchasing | Inve

Report

Options... Reports Save Report... New Report...

Year: 2017

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

Display Fields: Year, Month

Filters: Add Filter...

Display Type: Table

Rows per page: 30

OK Cancel

Adding one more field ...

Report

Options...	Reports	Save Report...	New Report...
Year: 2017			
First Prev Page 1 of 2 Next Last (Rows 1 to 30 of 36)			
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

More Detail = More Rows

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

Report

Options... Reports Save Report... New Report...

Year: 2017

First | Prev | Page 1 of 2 | Next | Last (Rows 1 to 30 of 40)

Job Salesperson	Job Name	Job Phase Name	Number of Jobs by Job Creation Date
	*292 Reserve A	(None)	1
	212 Elm - unit 103	(None)	1
	Beau Jones	(None)	1
	Friday Jones	(None)	1
	Harold Handy	(None)	1
	Jacob Gurasco	(None)	1
	Samira Montes	(None)	1
Bob	Max Moritz	(None)	1
Bob	Max Moritz	Kitchen	1
Bob	Max Moritz	Master Bath	1
Bob	Ruupa Sanderson	(None)	1
Emma	Charles Webb	(None)	1
Emma	Colleen Fulton	(None)	1
Emma	Daniel Munoz	(None)	1
Emma	Sally Shimanski	(None)	1
Emma	Smelton Jones	(None)	1
Eric	Bobby Knight	(None)	1
Eric	Cookie Monster	(None)	1

Select Report Fields

Use the (+/-) buttons to expand the tree. Click on a field name to add it to the report. Drag and drop fields to change the order. Click on the X to remove a field.

- Time
- Job
 - Job Name (in use)
 - Job Status
 - Job Creation Date
 - Job Salesperson (in use)
 - Process
 - Job Notes
 - First Activity Date
 - Last Activity Date
 - Store Location
 - Standard Job #
 - Division (Inactive)
 - Customer Type (Inactive)
 - Job Number (Inactive)
 - Throughput
 - Next Scheduled Activity
 - Job Address
 - Activities
- Account
- Quote
- Job Activity
- Job Phase
 - Job Phase Name (in use)
 - Activities
- Job Forms

Selected Fields

Job Salesperson	X
Job Name	X
Job Phase Name	X

OK Cancel

A Job by any other name



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

Report

Job Salesperson	Job Name	Process	Number of Jobs by Job Creation Date
	*292 Reserve A	Job	1
	212 Elm - unit 103	Job	1
	Beau Jones	Sales Lead	1
	Friday Jones	Sales Lead	1
	Harold Handy	Job	1
	Jacob Gurasco	Sales Lead	1
	Samira Montes	Sales Lead	1
Bob	Max Moritz	Job	1
Bob	Ruupa Sanderson	Job	1
Emma	Charles Webb	Job	1
Emma	Colleen Fulton	Job	1
Emma	Daniel Munoz	Job	1
Emma	Sally Shimanski	Job	1
Emma	Smelton Jones	Job	1
Eric	Bobby Knight	Sales Lead	1
Eric	Cookie Monster	Sales Lead	1
Eric	Gene Schlessinger	Sales Lead	1
Eric	Howard Duck	Sales Lead	1
Eric	Jeremiah Smith	Sales Lead	1
Eric	Sally Jones	Sales Lead	1
Eric	Sam Smith	Sales Lead	1
Jason	Jerrie Underwood	Sales Lead	1

Report - Options

Time Selection: Year
Reporting Date: 2/10/2017
Measure: Number of Jobs by Job Creation Date

Select Fields...
Display Fields:
Job Salesperson
Job Name
Process

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

OK Cancel

Account

Job

Process = Job

Job

Process = Sales Lead

Phase

Phase

Activities

Forms

Files

Activities

Forms

Files

Activities

Forms

Filters

Report - Options

Time Selection: Year
Reporting Date: 2/10/2017
Measure: Number of Jobs by Job Creation Date

Display Fields:
Job Salesperson
Job Name
Process

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

OK Cancel

Filter Report Data

Filter Type:
Account Field
Quote Field
Process
Job Field
Job Issue
Account Issue
Job Activity Status
Activity
Form

The process is:
one of not one of
Process
Sales Lead
Job

OK Cancel

Filtered Results

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

Report

Options... Reports ▼ Save Report... New Report...

Year: 2017

Filters: The process is Job

Job Salesperson ↑	Job Name	Process	Number of Jobs by Job Creation Date
	*292 Reserve A	Job	1
	212 Elm - unit 103	Job	1
	Harold Handy	Job	1
Bob	Max Moritz	Job	1
Bob	Ruupa Sanderson	Job	1
Emma	Charles Webb	Job	1
Emma	Colleen Fulton	Job	1
Emma	Daniel Munoz	Job	1
Emma	Sally Shimanski	Job	1
Emma	Smelton Jones	Job	1
Lisa	Alison Holmes	Job	1
Lisa	Roy Halee	Job	1
Nora	Jessica Cooper	Job	1

(Rows 1 to 13 of 13)

Filters Are Powerful and Complex

Filter Report Data

Filter Type

- Account Field
- Quote Field
- Process
- Job Field
- Job Issue
- Account Issue
- Job Activity Status
- Activity
- Form

Find Jobs having

At least one (check all that apply)

- Activity Type
- Job Sold!
- Template
- Fabrication

start date

any no date

occurs after

Any time

[] day(s) ago

[] day(s) from today

[]

and before

Any time

[] day(s) ago

[] day(s) from today

[]

status is

any one of not one of

- Status Name
- Auto-Schedule
- Estimate
- Confirmed
- Canceled

OK Cancel

Measure

Report - Options [X]

Time Selection: Year [v]
Reporting Date: 2/8/2017 [calendar]
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.)
Job Salesperson [X]

Filters: [Add Filter...]
Display Type: Table [v]
Rows per page: 30

Edit Measure [X]

Subject Area
 Quote
 Job
 Job Activity
 Purchase Order
 Job Form

Measure: Number of Jobs [v]
by Time Field: Job Creation Date [v]

[OK] [Cancel]

Report Examples

Job Report: Totaling Throughput

Job Settings

Process: All Sales Lead Job

Job Custom Fields: New Job Custom Field... Assign Fields To Process...

Name	Sequence ↑	Data Type	Description	Status
Store Location	1	List of values		Active
Standard Job #	2	Auto-number		Active
Division	3	List of values		Inactive
Customer Type	4	List of values		Inactive
Job Number	5	Text		Inactive
Throughput	6	Currency		Active

(Rows 1 to 6 of 6)

Report

Options... Reports ▼ Save Report... New Report...

Year: 2017

Filters: The process is Job

Month ↑	Total Throughput by Last Install in Job Date
January	\$19,453.00
February	\$25,568.00
March	\$11,345.00
April	
May	
June	

(Rows 1 to 6 of 6)

Report - Options

Time Selection: Year

Reporting Date: 2/13/2017

Measure: Total Throughput by Last Install in Job Date [Select...] [Clear]

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

Add Filter...

Filters: The process is Job [Edit] X

Display Type: Table

Rows per page: 30

OK Cancel

Choose Your Measure

Edit Measure [X]

Subject Area

- Quote
- Job
- Job Activity
- Purchase Order
- Job Form

Measure: Total Throughput

by Time Field: Install Date

- First in Job
- Last in Job

OK Cancel

Edit Measure [X]

Subject Area

- Quote
- Job
- Job Activity
- Purchase Order
- Job Form

Measure: Total Throughput

by Time Field: Number of Jobs

- Last in Job

OK Cancel

Only want completed Installs?

Report

Month ↑	Total Throughput by Last Install in Job Date
January	\$19,453.00
February	\$15,025.00

Report - Options [X]

Time Selection: Year-to-date [v] ←

Reporting Date: 2/13/2017 [calendar]

Measure: Total Throughput by Last Install in Job Date [Select...] [Clear]

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

Add Filter...

Filters: The process is Job [Edit] [X]

Display Type: Table [v]

Rows per page: 30

[OK] [Cancel]

Job Form Reports

Example: Square Feet Installed

Totaling a Form Field

The screenshot shows the 'Edit Measure' dialog box with the following configuration:

- Subject Area:** Job Form
- Form Template:** Countertop Details
- Measure:** Total Countertop Details - Sqft
- by Time Field:** Install Date
- Time Field Options:** First in Job, Last in Job, First in Phase, Last in Phase

Red arrows point to the 'Job Form' radio button, the 'Countertop Details' dropdown, and the 'Total Countertop Details - Sqft' dropdown.

Buttons: OK, Cancel

Example: Square Feet Installed

Report

Options...	Reports ▼	Save Report...	New Report...
Year-to-date: 2/13/2017			
Filters: The process is Job			
Month ↑	Total Countertop Details - Sqft by Last Install in Job Date		
January			535.0
February			351.0

Report - Options [X]

Time Selection: Year-to-date ▼
Reporting Date: 2/13/2017 [Calendar]
Measure: Total Countertop Details - Sqft by Last Install in Job [Select...] [Clear]

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

Add Filter...
Filters: The process is Job [Edit] [X]
Display Type: Table ▼
Rows per page: 30

[OK] [Cancel]

+Jobs for a sanity check

Report

Options...	Reports ▼	Save Report...	New Report...
Year-to-date: 2/13/2017			
Filters: The process is Job			
Month ↑	Job Name	Total Countertop Details - Sqft by Last Install in Job Date	
January	Alison Holmes	132.0	
January	Colleen Fulton	42.0	
January	Don Johnson	163.0	
January	Harold Handy	66.0	
January	Ruupa Sanderson	64.0	
January	Silas Gabriel	68.0	
February	Alana's building	78.0	
February	Barry Newcomb	65.0	
February	Jeff Cotes	72.0	
February	Sally Shimanski	58.0	
February	Sally Zurich	78.0	
(Rows 1 to 11 of 11)			

+Jobs +Room for an even better sanity check!

Report

Month ↑	Job Name	Countertop Details - Room type	Total Countertop Details - Sqft by Last Install in Job Date
January	Alison Holmes		
January	Alison Holmes	Kitchen	132.0
January	Colleen Fulton	Bath	42.0
January	Don Johnson	Kitchen	98.0
January	Don Johnson	Master bath	65.0
January	Harold Handy	Kitchen	66.0
January	Ruupa Sanderson	Kitchen	64.0
January	Silas Gabriel	Kitchen	68.0
February	Alana's building	Kitchen	78.0
February	Barry Newcomb	Kitchen	65.0
February	Jeff Cotes	Kitchen	72.0
February	Sally Shimanski		
February	Sally Shimanski	Kitchen	58.0
February	Sally Zurich	Kitchen	78.0

(Rows 1 to 14 of 14)

WARNING: Form missing? Job not included!

Report

Month ↑	Job Name	Total Throughput by Last Install in Job Date
January	Alison Holmes	\$3,225.00
January	Colleen Fulton	\$2,103.00
January	Don Johnson	\$2,100.00
January	Harold Handy	\$3,115.00
January	Mike Bibby	\$23,000.00
January	Ruupa Sanderson	\$5,133.00
January	Silas Gabriel	\$5,877.00
January	Silas Tester	
February	Alana's building	\$3,788.00

Job Report - Throughput

Report

Month ↑	Job Name	Total Countertop Details - Sqft by Last Install in Job Date
January	Alison Holmes	132.0
January	Colleen Fulton	42.0
January	Don Johnson	163.0
January	Harold Handy	66.0
January	Ruupa Sanderson	64.0
January	Silas Gabriel	68.0
February	Alana's building	78.0

Job Form Report – Sq Ft

Last Install in Phase

Report

Options... Reports Save Report... New Report...

Year-to-date: 2/13/2017
Filters: The process is Job

Month ↑	Total Countertop Details - Sqft by Last Install in Phase Date
January	575.0
February	351.0

Edit Measure

Subject Area

- Quote
- Job
- Job Activity
- Purchase Order
- Job Form

Form Template: Countertop Details

Measure: Total Countertop Details - Sqft

by Time Field: Install Date

- First in Job
- Last in Job
- First in Phase
- Last in Phase

OK Cancel

Report - Options

Time Selection: Year-to-date

Reporting Date: 2/13/2017

Measure: Total Countertop Details - Sqft by Last Install in Ph [Select...] [Clear]

Display Fields: [Select Fields...] [Clear]

Month

Add Filter...

Filters: The process is Job [Edit] [X]

Display Type: Table

Rows per page: 30

OK Cancel

A Phase can be complete before the Job is

Report

Month ↑	Job Name	Job Phase Name	Total Countertop Details - Sqft by Last Install in Phase Date
January	Alison Holmes	(None)	132.0
January	Colleen Fulton	(None)	42.0
January	Don Johnson	(None)	163.0
January	Harold Handy	(None)	66.0
January	Ruupa Sanderson	(None)	64.0
January	Silas Gabriel	(None)	68.0
January	Willy Hayes	Phase 1 - Deck	40.0
February	Alana's building	(None)	78.0
February	Barry Newcomb	(None)	65.0
February	Jeff Cotes	(None)	72.0
February	Sally Shimanski	(None)	58.0
February	Sally Zurich	(None)	78.0

(Rows 1 to 12 of 12)

Activities and Forms with same Phase ...

Activity	Phase	Status	Start Date ↑	Sched
Template	Phase 1 - Deck	Complete	1/3/2017	
Fabrication	Phase 1 - Deck	Complete	1/6/2017	1:00
Install	Phase 1 - Deck	Complete	1/10/2017	8:00
Invoice	Phase 1 - Deck	Complete	1/11/2017	8:00
Template	Phase 2 - Kitchen and Laundry	Complete	2/3/2017	8:00
Fabrication	Phase 2 - Kitchen and Laundry	Estimate	☀ 2/13/2017	10:4
Install	Phase 2 - Kitchen and Laundry	Estimate	2/16/2017	12:3
Invoice	Phase 2 - Kitchen and Laundry	Auto-Schedule	2/17/2017	8:00
Template	Phase 3 - Master Bath	Estimate	2/24/2017	
Fabrication	Phase 3 - Master Bath	Auto-Schedule	3/1/2017	1:00
Install	Phase 3 - Master Bath	Auto-Schedule	3/3/2017	8:00
Invoice	Phase 3 - Master Bath	Auto-Schedule	3/6/2017	8:00

Countertop Details Phase: Phase 1 - Deck

Room type:
Patio

Material: Granite	Color: Arctic Pearl	Sqft: 40	Edge: Bevel
Sink type:	Sink Model:	Sink in stock:	Faucet info:

Notes:

Countertop Details Phase: Phase 2 - Kitchen and Laundry

Room type:
Kitchen

Material: Granite	Color: Luna Pearl	Sqft: 79	Edge: Cove Dupont
Sink type: Dropin	Sink Model: jk456	Sink in stock: yes	Faucet info: 2

Notes:
Note cutout for trash

Activity Report

Examples: Overdue activities, activities without dates, etc.

Activity Reports

Report

Activity Type ↑	Number of Job Activities by Activity Date
Job Sold	4
Collect Deposit	2
Template	116
Fabrication	133
Install	154
Invoice	130
Repair	1
Phone call	1
Plumbing	1

New Sales Lead Created

Activity Type	Number of Job Activities by Activity Date
Walk-In	
Call-In	
Outbound Cold Call	
Phone Call / Email Follow U	
Followup Email	
Job In QB	

(Rows 1 to 16 of 16)

Edit Measure
Subject Area:
 Quote
 Job
 Job Activity
 Purchase Order
 Job Form
Measure: Number of Job Activities
by Time Field: Activity Date
OK Cancel

Report - Options
Time Selection: Year
Reporting Date: 2/13/2017
Measure: Number of Job Activities by Activity Date
Display Fields: Activity Type
Filters: Add Filter...
Display Type: Table
Rows per page: 300
OK Cancel

Add a filter to show only certain activity types

Report

Options... Reports Save Report... New Report...

Year: 2017
Filters: Activity Type is Template, Install

Activity Type	Number of Job Activities by Activity Date
Template	116
Install	154

Report - Options

Time Selection: Year
Reporting Date: 2/13/2017
Measure: Number of Job Activities by Activity Date

Display Fields: Activity Type

Filters: Activity Type is Template, Install

Display Type: Table
Rows per page: 300

Filter Report Data

Filter Type:

- Account Field
- Quote Field
- Process
- Job Field
- Job Issue
- Account Issue
- Job Activity Status
- Activity
- Form

Activity Fields:

Activity Type

is is not one of the following (check all that apply):

- Value
- Job Sold!
- Template
- Fabrication
- Install
- Invoice
- Repair
- Phone call
- Finish (cabinets)

OK Cancel

Add another filter to show only completed

Report

Options... Reports Save Report... New Report...

Year: 2017
Filters: Activity Type is Template, Install
Activity Status is Complete

Activity Type ↑	Number of Job Activities by Activity Date
Template	53
Install	22

Report - Options

Time Selection: Year
Reporting Date: 2/13/2017
Measure: Number of Job Activities by Activity Date
Display Fields: Activity Type

Filter Report Data

Filter Type: Activity
Activity Fields: Complete

Filters: Activity Type is Template, Install
Activity Status is Complete

Display Type: Table
Rows per page: 300



Example: Overdue Activities

Report

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	2/10/2017	Jason	1
Dave Lydon	Template	Confirmed	2/10/2017	Marco	1
Breda's kitchen	Template	Estimate	2/10/2017	Norm	1
Jacob Gurasco	Walk-In	Estimate	2/9/2017	Eric	1
Giovanni	Phone Call / Email Follow Up	Confirmed	4/28/2016	Jeff	1

Overdue activities (Options)

Report - Options [X]

Time Selection: (Custom) [v]
Reporting Date: 1/13/2000 [calendar] To 1/31/2035 [calendar]
Measure: Number of Job Activities by Job Creation Date [Select...] [Clear]

[Select Fields...] [Clear]

Display Fields:
*(Drag and drop fields to change order.
Click X to remove fields.)*

Job Name	X
Activity Type	X
Activity Status	X
Activity Date	X
Assigned To	X

[Add Filter...]


Filters:
Activity Status is not Canceled, Complete [Edit] X
Activity Date occurs at least 1 day(s) ago [Edit] X

Display Type: Table [v]
Rows per page: 30

[OK] [Cancel]

Related: Activities without Dates

Report - Options [X]

Time Selection: (Custom) [v]
Reporting Date: 1/13/2000 [calendar] To 1/31/2035 [calendar] 
Measure: Number of Job Activities by Job Creation Date [Select...] [Clear]

Select Fields... [Clear]

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

Job Name	X
Activity Type	X
Activity Status	X
Activity Date	X
Assigned To	X

Add Filter...

Filters:

Activity Status is not Canceled, Complete	[Edit]	X
Activity Date is empty	[Edit]	X

Display Type: Table [v]
Rows per page: 30

OK Cancel

Yellow flag

Report

Options...	Reports ▾	Save Report...	New Report...		
Date: 1/13/2000 - 1/31/2035					
Filters: Activity Status is not Canceled, Complete Activity Date is empty					
First Prev Page 1 of 3 Next Last (Rows 1 to 30 of 86)					
Job Name	Activity Type	Activity Status	Activity Date ↓	Assigned To	Number of Job Activities by Job Creation Date
Xavier Furman	Template	Auto-Schedule		Norm	1
Timothy's kitchen	Job In QB	Estimate		Clare	1
Timothy's kitchen	Install	Auto-Schedule			1
Thiago's kitchen	Job In QB	Estimate			1
test silas	Template	Auto-Schedule			1
Rosalie's kitchen	Template	Auto-Schedule			1
Richard Roser	Invoice	Auto-Schedule			1
Richard Roser	Install	Auto-Schedule			1
Richard Roser	Fabrication	Auto-Schedule			1
Richard Roser	Template	Estimate			1
Peggy	Template	Auto-Schedule		Norm, Marco	1
Patrick's Kitchen	Job In QB	Estimate			1
Patrick's Kitchen	Template	Auto-Schedule			1
Patricia's kitchen	Job In QB	Estimate		Clare	1
Max Moritz	Invoice	Auto-Schedule			1
Max Moritz	Install	Auto-Schedule			1
Max Moritz	Fabrication	Auto-Schedule			1
Max Moritz	Template	Estimate			1
Martin's kitchen	Job In QB	Estimate		Clare	1
Maria's kitchen	Job In QB	Estimate		Clare	1
Maria's kitchen	Followup Email	Auto-Schedule			1

Related: Activities with Material

Job Report with Phases

Report

Account Name	Job Name	Job Phase Name	Last Install in Phase Date ↑	Last Install in Phase Status	Number of Job Activities by Last Install in Phase Date
Zander Contracting	Willy Hayes	Phase 1 - Deck	1/10/2017	Complete	1
Zander Contracting	Mike Bibby	(None)	1/26/2017	Complete	10
Zander Contracting	Barry Newcomb	(None)	2/13/2017	Estimate	1
Zander Contracting	Sally Zurich	(None)	2/13/2017	Confirmed	2
Zander Contracting	Willy Hayes	Phase 2 - Kitchen and Laundry	2/16/2017	Estimate	1
Zander Contracting	Wayne Richmond	(None)	2/17/2017	Estimate	1
Zander Contracting	Lisa's Kitchen	(None)	3/1/2017	Estimate	1
Zander Contracting	Willy Hayes	Phase 3 - Master Bath	3/3/2017	Auto-Schedule	1
Zander Contracting	Bob Lee	(None)	3/24/2017	Confirmed	1

(Rows 1 to 9 of 9)

Job Report with Phases (Options)

Report - Options [X]

Time Selection: Year [v]
Reporting Date: 2/13/2017 [calendar]
Measure: Number of Job Activities by Last Install in Phase D [Select...] [Clear]

Select Fields... [Clear]

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

Account Name	X
Job Name	X
Job Phase Name	X
Last Install in Phase Date	X
Last Install in Phase Status	X

Add Filter...

Filters:
Activity Type is Install [Edit] X
Account Name is Zander Contracting [Edit] X

Display Type: Table [v]
Rows per page: 50

OK Cancel

Show only incomplete phases

Report

Account Name	Job Name	Job Phase Name	Last Install in Phase Date ↑	Number of Job Activities by Last Install in Phase Date
Zander Contracting	Barry Newcomb	(None)	2/13/2017	1
Zander Contracting	Sally Zurich	(None)	2/13/2017	1
Zander Contracting	Willy Hayes	Phase 2 - Kitchen and Laundry	2/16/2017	1
Zander Contracting	Wayne Richmond	(None)	2/17/2017	1
Zander Contracting	Lisa's Kitchen	(None)	3/1/2017	1
Zander Contracting	Willy Hayes	Phase 3 - Master Bath	3/3/2017	1
Zander Contracting	Bob Lee	(None)	3/24/2017	1

(Rows 1 to 7 of 7)

Straightforward with Activity filter

Report - Options

Time Selection: Year
Reporting Date: 2/13/2017
Measure: Number of Job Activities by Last Install in Phase D [Select...] [Clear]

Select Fields... [Clear]

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

Account Name	X
Job Name	X
Job Phase Name	X
Last Install in Phase Date	X

Add Filter...

Filters:

Activity Type is Install	[Edit]	X
Activity Status is not Canceled, Complete	[Edit]	X
Account Name is Zander Contracting	[Edit]	X

Display Type: Table

Filter Report Data

Filter Type:


- Account Field
- Quote Field
- Process
- Job Field
- Job Issue
- Account Issue
- Job Activity Status
- Activity
- Form

Activity Fields:

Activity Status: is is not one of the following (check all that apply):

<input checked="" type="checkbox"/> Value
<input type="checkbox"/> Auto-Schedule
<input type="checkbox"/> Estimate
<input type="checkbox"/> Confirmed
<input checked="" type="checkbox"/> Canceled
<input checked="" type="checkbox"/> Complete
<input type="checkbox"/> In Progress

Cancel



Jobs to Clean Up (as of 2/13/2017)

Report

Options... Reports Save Report... New Report...							
Date: 1/1/2000 - 12/31/2040							
Filters: Job Status is Active							
Job Creation Date occurs before 12/31/2016							
First Prev Page 1 of 3 Next Last (Rows 1 to 50 of 118)							
Job Name	Process	Job Creation Date	Last Activity Date	Next Sched. Activity Date	Next Sched. Activity Type	Next Sched. Activity Status	Number of Jobs by Job Creation Date
*212 Elm - center unit	Job	6/7/2016			Template	Estimate	1
Lonetta Bakerson	Job	3/10/2016	2/13/2017		Template	Estimate	1
Giovanni	Job	3/8/2013	3/27/2017	4/28/2016	Phone Call / Email Follow Up	Confirmed	1
Breda's kitchen	Job	5/18/2016	3/14/2017	2/10/2017	Template	Estimate	1
Dave Lydon	Job	2/18/2015	3/3/2017	2/10/2017	Template	Confirmed	1
Alana's building	Job	6/24/2016	2/13/2017	2/13/2017	Invoice	Estimate	1
Barry Newcomb	Job	10/24/2009	2/14/2017	2/13/2017	Install	Estimate	1
Bob Lee	Job	2/8/2010	3/27/2017	2/13/2017	Template	Estimate	1
Conner Dre	Job	3/13/2008	2/15/2017	2/13/2017	Install	Confirmed	1
Gus's kitchen	Job	12/7/2016	2/21/2017	2/13/2017	Template	Estimate	1
Jeff Cotes	Job	3/13/2008	2/14/2017	2/13/2017	Install	Confirmed	1
Joey Austin's Kitchen	Job	10/30/2014	3/2/2017	2/13/2017	Template	Confirmed	1
Katerina's kitchen	Job	12/7/2016	2/21/2017	2/13/2017	Template	Estimate	1
Mike Jones	Job	6/8/2006	2/24/2017	2/13/2017	Fabrication	In Progress	1
Nola's kitchen	Job	2/11/2016	3/9/2017	2/13/2017	Fabrication	Estimate	1
Sally Zurich	Job	11/12/2004	2/14/2017	2/13/2017	Install	Confirmed	1
Willy Hayes	Job	3/5/2008	3/6/2017	2/13/2017	Fabrication	Estimate	1
512 Maple ST	Job	6/8/2016	2/22/2017	2/14/2017	Template	Confirmed	1
Cheryl's kitchen	Job	4/22/2015	3/10/2017	2/14/2017	Fabrication	Estimate	1
Cory Smith	Job	7/18/2016	2/22/2017	2/14/2017	Template	Confirmed	1
Eddie's kitchen	Job	1/20/2015	2/15/2017	2/14/2017	Install	Confirmed	1

Jobs to Clean Up (Options)

Report - Options [X]

Time Selection: (Custom) [v]
Reporting Date: 1/1/2000 [calendar] To 12/31/2040 [calendar]
Measure: Number of Jobs by Job Creation Date [Select...] [Clear]

Select Fields... [Clear]

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

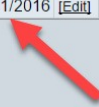
Job Name	X
Process	X
Job Creation Date	X
Last Activity Date	X
Next Sched. Activity Date	X
Next Sched. Activity Type	X
Next Sched. Activity Status	X

Add Filter...

Filters:
Job Status is Active [Edit] X
Job Creation Date occurs before 12/31/2016 [Edit] X

Display Type: Table [v]
Rows per page: 50

OK Cancel



Job Activity Status Filter

Report - Options

Time Selection: (Custom)

Reporting Date: 1/13/2000 To 1/31/2040

Measure: Number of Job Activities by Job Creation Date

Select Fields: [Clear]

Field	Remove
Job Name	X
Process	X
Job Creation Date	X
Last Activity Date	X
Next Sched. Activity Date	X
Next Sched. Activity Type	X
Next Sched. Activity Status	X

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

Add Filter...

Filters:

- Job Status is Active [Edit] X
- Job Creation Date occurs before 12/31/2016 [Edit] X
- At least one Template activity is not Canceled or Complete [Edit] X

Display Type: Table

Rows per page: 30

OK Cancel

Filter Report Data

Filter Type:

- Account Field
- Quote Field
- Process
- Job Field
- Job Issue
- Account Issue
- Job Activity Status
- Activity
- Form

Find Jobs having: At least one (check all that apply)

<input checked="" type="checkbox"/> Activity Type
<input type="checkbox"/> Job Sold!
<input checked="" type="checkbox"/> Template
<input type="checkbox"/> Fabrication

start date: any no date

occurs after:

- Any time
- [] day(s) ago
- [] day(s) from today
- []

and before:

- Any time
- [] day(s) ago
- [] day(s) from today
- []

status is:

- any
- one of
- not one of

<input checked="" type="checkbox"/> Status Name
<input type="checkbox"/> Auto-Schedule
<input type="checkbox"/> Estimate
<input type="checkbox"/> Confirmed
<input checked="" type="checkbox"/> Canceled

OK Cancel

EE Quotes – Conversion_Reports

Only one answer at a time ...

Report

Options...	Reports ▼	Save Report...	New Report...
Year-to-date: 2/14/2017			
Filters: The process is Job			
Month ↑	Total Countertop Details - Sqft by Last Install in Job Date		
January	535.0		
February	821.0		

Report

Options...	Reports ▼	Save Report...	New Report...
Year-to-date: 2/14/2017			
Filters: The process is Job			
Month ↑	Total Throughput by Last Install in Job Date		
January	\$19,453.00		
February	\$15,025.00		

Export more data

Report

Options...	Reports ▼	Save Report...	New Report...	
Year-to-date: 2/14/2017				
Filters: The process is Job				
Job Name ↑	Standard Job #	Job Salesperson	Throughput	Total Countertop Details - Sqft by Last Install in Job Date
Alana's building	S3238	Emma	\$3,788.00	78.0
Alison Holmes	S3294	Lisa	\$3,225.00	132.0
Barry Newcomb	S3066	Lisa	\$2,875.00	65.0
Colleen Fulton	S3293	Emma	\$2,103.00	42.0
Conner Dre	S3061	Rob		207.0
Don Johnson	S3009	Rob		163.0
Eddie's kitchen	S3168	Bob		100.0
Harold Handy	S3291		\$3,115.00	66.0
Jeff Cotes	S3060	Emma		72.0
Ruupa Sanderson	S3292	Bob	\$5,133.00	64.0
Sally Shimanski	S3295	Emma	\$4,587.00	58.0
Sally Zurich	S3002	Norm	\$3,775.00	78.0
Silas Gabriel	S3178	Bob	\$5,877.00	68.0
Timothy's kitchen	S3165	Bob		163.0

(Rows 1 to 14 of 14)

Security

Edit Role					
Remnants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Thresholds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Count	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reports	
Read	<input type="checkbox"/>
Report	<input checked="" type="checkbox"/>

Product

