

Report Builder

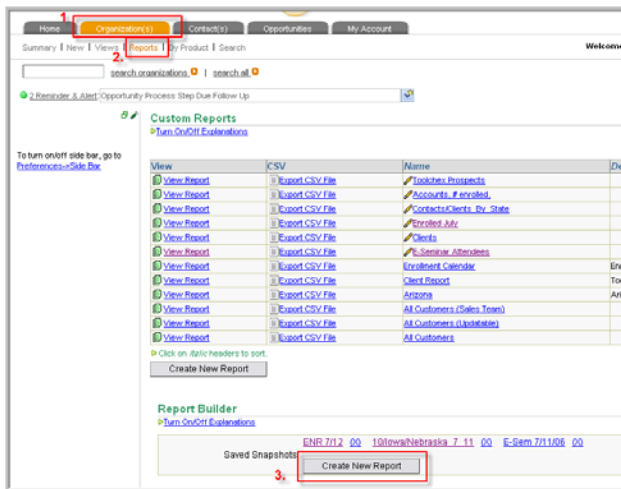
Use the Report builder to:

- Email Reports (1 time or on a regular schedule)
- Total/ Summary / Average for Custom fields

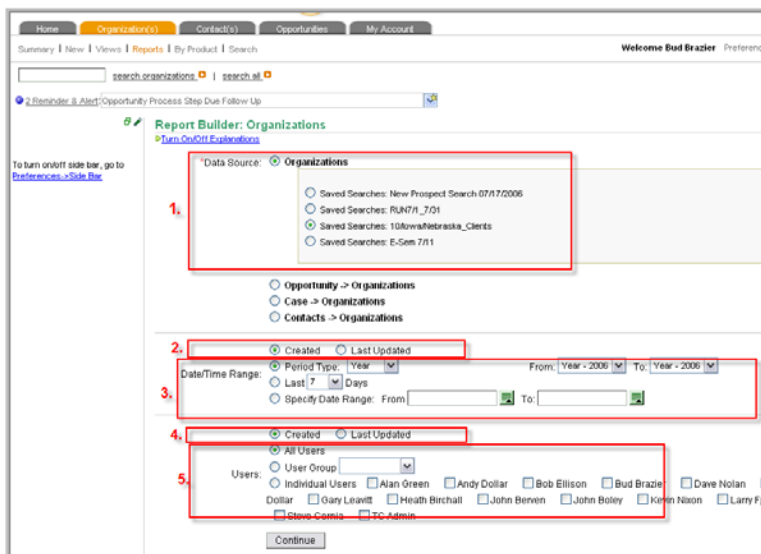
Associated Training Modules

1. Creating a Saved Search
2. Define Output format (also know as a Creating Views / Reports)

Create New Report Using Report Builder



1. Click the Organization tab
2. Click Reports
3. In the Report Builder Section, click “Create New Report”



1. Select the saved search that you would like to base your report on. If you do not see the report listed you may need to create a new “Saved Search”.
2. & 3. Date Time Range (Created vs. Last Updated): The Search Results can be limited to show the records that were Created or Last Update within a period of time
4. & 5. Users: The Search Results can also be limited to show records that were Created or Last Updated by selected users.

Defining the Output Format

Custom Reports (radio button & Dropdown)

Report Builder: Organizations
[Turn On/Off Explanations](#)

*Output Format: Custom Reports: Toolchex Prospects
 Report Table:
 Print Layout:

Order By:

- Toolchex Prospects
- Accounts, # enrolled,
- Contacts/Clients_By_State
- Enrolled July
- Clients
- E-Seminar Attendees
- Client
- Enrollment Calendar
- Client Report
- Arizona
- All Customers (Sales Team)
- All Customers (Updatable)
- All Customers

Submit Back

Custom Reports: The items in this dropdown are based on "Views." To change.

2. Report Table

Report Builder: Organizations
[Turn On/Off Explanations](#)

*Output Format: Custom Reports: Toolchex Prospects
 Report Table:
 Print Layout:

Group By:

summary:

Column	sum	Avg	max	min
Net Worth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
# of Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
# Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
# Techs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set-up Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
# Enrolled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set Up Fee-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin Fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select All

Submit Back

1. Group by: You must select at least 1 item from the drop down (recommend, category, create date or team lead) to have the Sum function work properly.
2. Check the boxes for the fields that you would like to have calculated.

3. Report Results

Report Builder

CREATE/IN_DATE	Organization Name	Category	Region	# Locations	# Techs	Enrollment Date	# Enrolled	Pay Date
	21st Century Equipment of Chad		10/Iowa/Nebraska		9	06/05/2003	9	
	Bancroft Implement Inc		10/Iowa/Nebraska		5	12/8/2003	5	
	Barker Implement & Motor Co In		10/Iowa/Nebraska		5	05/21/2004	5	
	Carville Real Power		10/Iowa/Nebraska		5	12/16/2003	5	
	Custer Implement Inc		10/Iowa/Nebraska			03/27/2006	5	
	Delering Brothers		10/Iowa/Nebraska					
	Ernie Williams, Ltd		10/Iowa/Nebraska		9	08/10/2005	9	
	Farmhaus - Grand Island		10/Iowa/Nebraska					
	Gerry Miller Implement Inc		10/Iowa/Nebraska		10	12/16/2003	10	
	Heller Implement		10/Iowa/Nebraska					
	Schneberg Implement Co- 3006		10/Iowa/Nebraska		3	11/28/2005	3	
	Sous-Lyon Implement Co- 15008		10/Iowa/Nebraska	1	5	07/12/2005	4	
	Sous-Lyon Implement Co- 2794		10/Iowa/Nebraska	1	4	07/12/2005	4	
	Ti-County Implement Inc- 3020		10/Iowa/Nebraska	3	20	07/17/2003	8	
	Van Van Equipment Inc- 2811		10/Iowa/Nebraska		13	12/16/2003	13	
	Van Van Equipment Inc- 3018		10/Iowa/Nebraska		8	12/16/2003	8	
	Windage Implement L.L.C- 15725		10/Iowa/Nebraska		6	07/15/2003	6	
	Windage Implement L.L.C- 3008		10/Iowa/Nebraska		4	07/15/2003	4	
2006-07	# Records: 90							Total 507.00

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Back To Summary Back To Report

1. Snapshot Name: Save Snapshot

Customize & Publish 2.

1. Save Snapshot: To access this report at a later date.
2. Customize & Publish: Select this option if you want to email the report.

Customize & Publish

The screenshot shows a web-based interface for customizing and publishing a report. At the top, there is a dropdown menu labeled "Customize & Publish". Below it, the "Name" field contains "Regional Sales report". The "desc:" field contains the text "This report shows the number of sales techs enrolled by region." The "Footer:" field contains the text "A message to the report recipients can go here." Below these fields, there are nine "Column Width" settings, each with a text input field and a percentage sign. At the bottom, there are two buttons: "Customize" and "Publish".

Publish



This link can be copied and pasted in to your email and sent as a link. You can see what the report will look like by copying and pasting the link in to your web browser. This page will soon have a link directly to the email center built in the application.