



Customized Reports

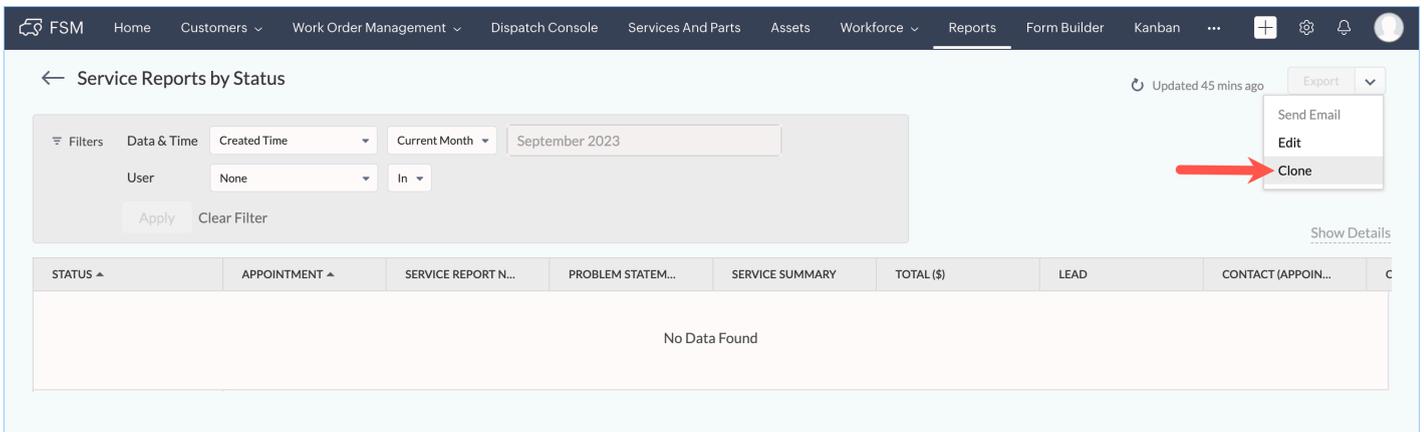
As editing the [Standard reports](#) is not permitted, you have the option to clone these reports and tailor them to meet your specific needs.

Create a Customized Report

Permission Required: Create of [Reports](#)

To create a customized report:

1. Select the **Reports** menu.
2. Click on a report you want to clone to create the customized report.
3. Select **Clone** from the dropdown button in the top right corner.



4. [Customize](#) the Columns, Row Groups, Column Groups, or Aggregate Columns and click **Save**.

The newly created report will be listed under **Custom Reports**.

Custom Reports

REPORT NAME	DESCRIPTION	LAST ACCESSED
All Requested Service b...	Summary of all the Services provided to the Contacts	50 min ago
All Requested Service	Summary of all the Services provided to the Contacts	51 min ago
Service Reports by Status	List of Service Reports based on their current status.	Yesterday

Within a folder, you cannot have duplicate report names. To change the report name, click the **Edit** [✎] icon next to the report name.

← All Requested Service ✎

Cancel Save

SERVICE (SERVICE LINE ...)	STATUS	SERVICE LINE ITEM...	DESCRIPTION	LIST PRICE (\$)	UNIT	QUANTITY
No Data Found						

In the *Report Details* popup, change the **Report Name** and click **Save**.

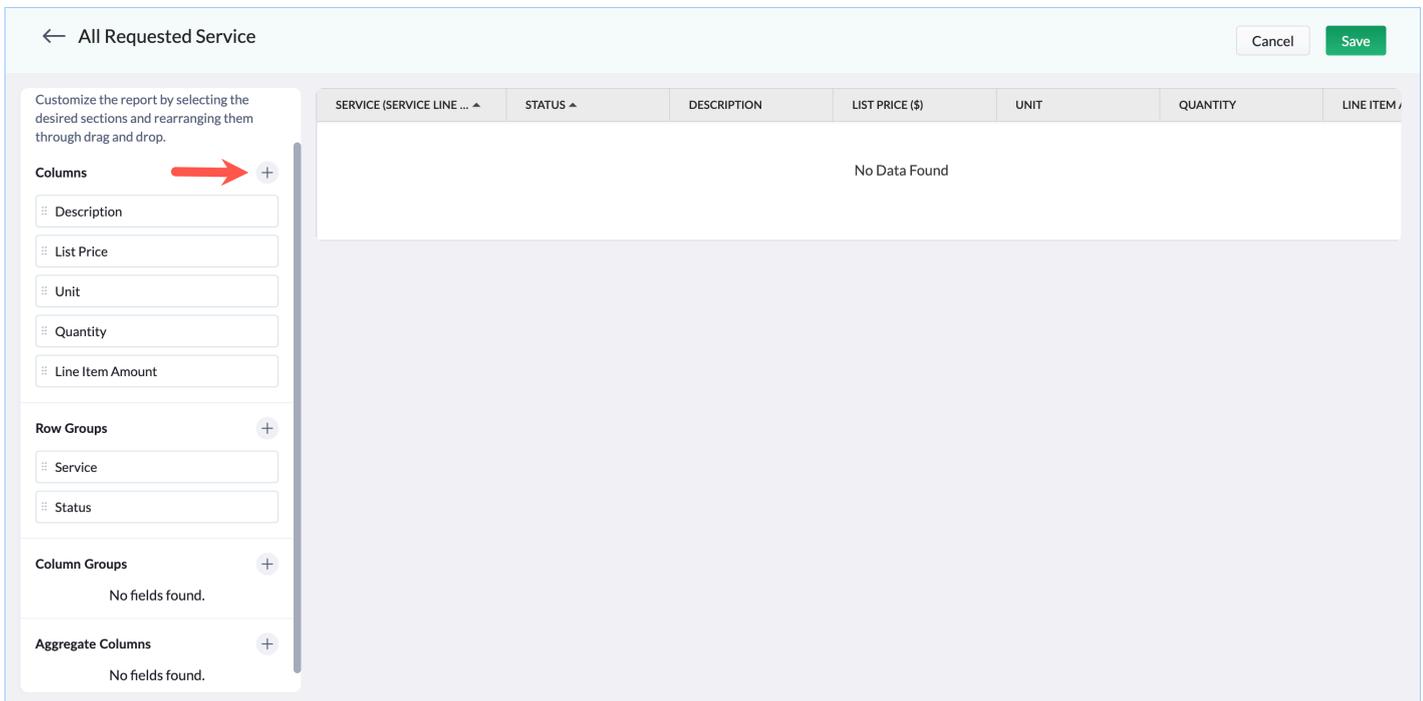
Report Details

Report Name

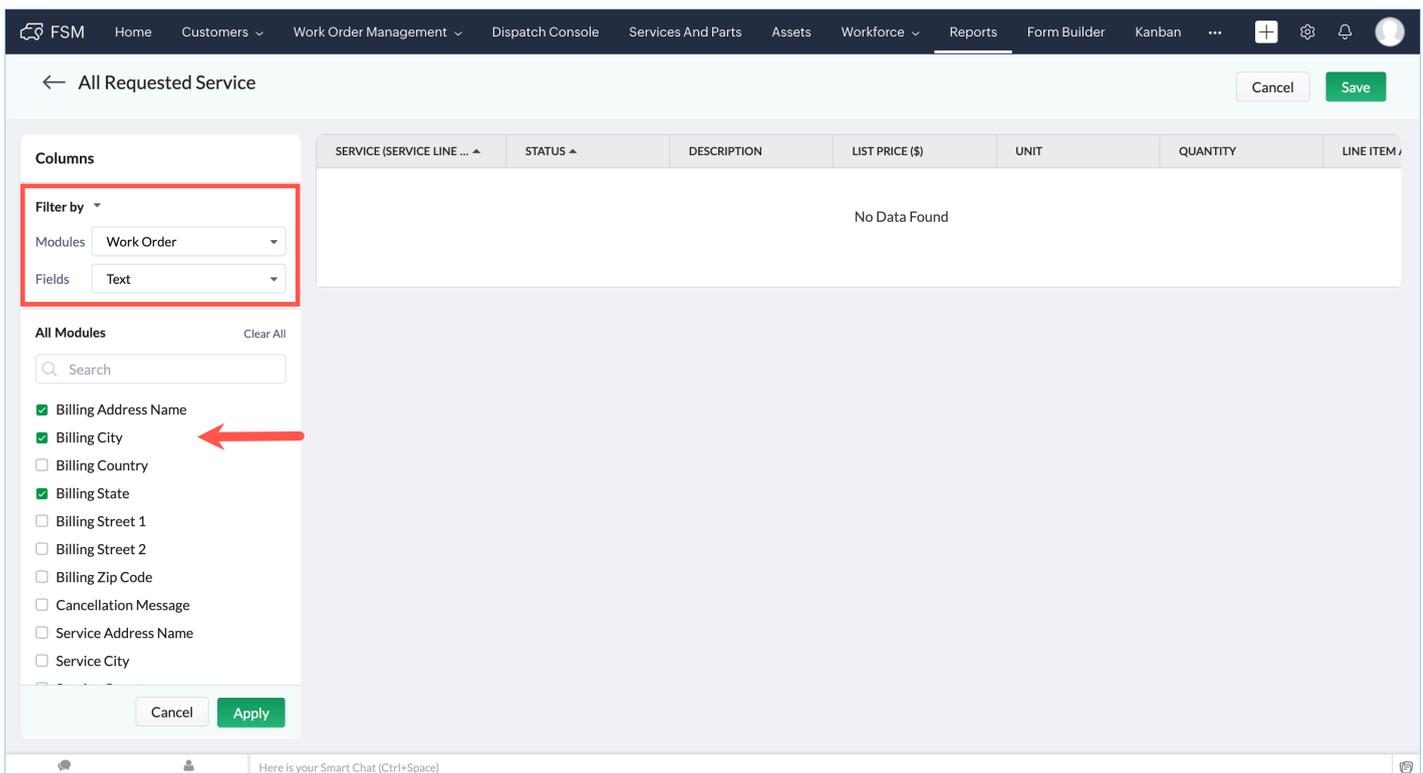
Description

Customize the Report

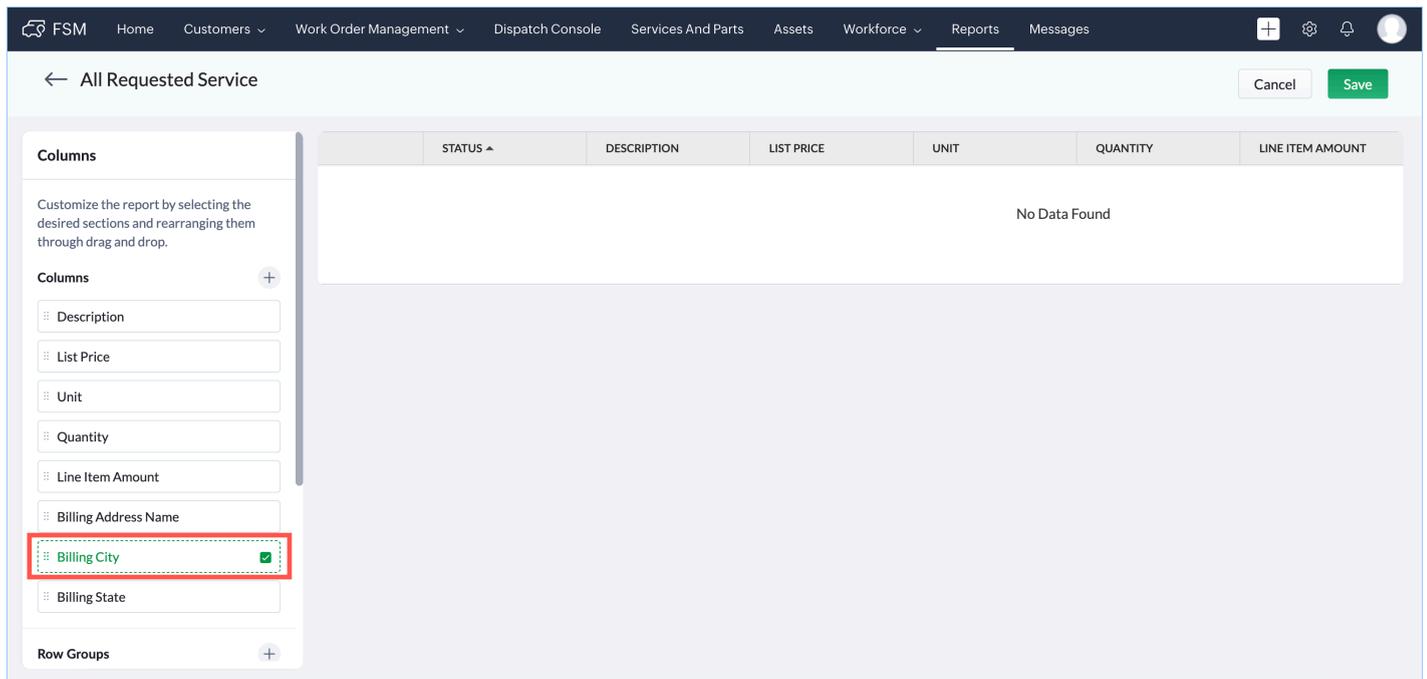
1. Click + for the element (Columns, Row Groups, Column Groups, or Aggregate Columns) you want to add to the report.



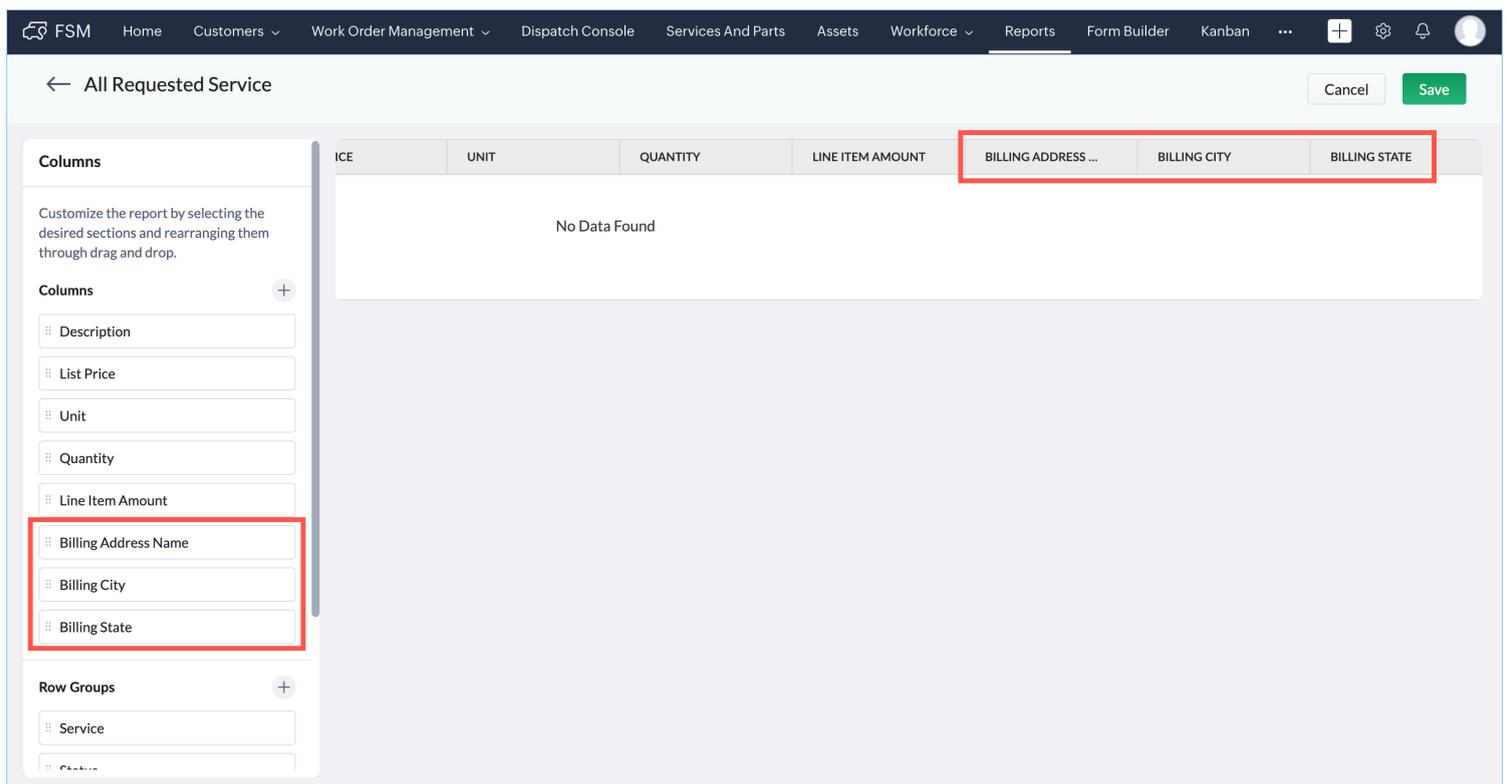
2. Select the fields or attributes you want to add to your report and click **Apply**.
You can filter these by modules or data type. The existing fields or attributes in the report will be selected. Uncheck the ones you want to remove.



You can reorder the fields or attributes. Hover over a field or attribute and click on  to drag and drop it.



The selected fields or attributes will be added to the report.

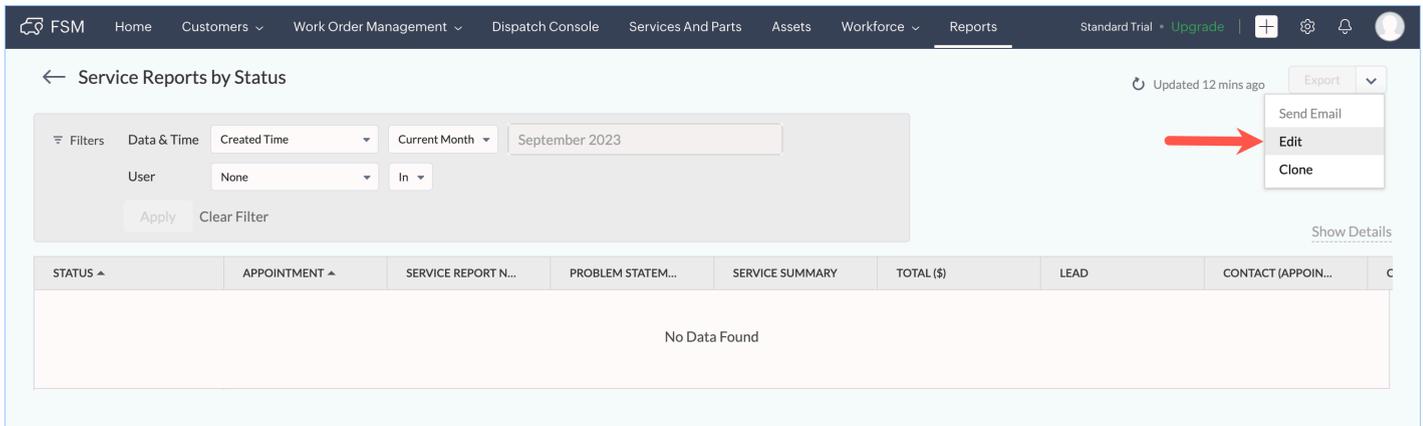


Edit a Customized Report

 **Permission Required:** Edit of [Reports](#)

To edit a customized report:

1. Select the **Reports** menu.
2. From the **Custom Reports** folder, click on a report you want to edit.
3. Select **Edit** from the dropdown button in the top right corner.



4. Make the necessary edits and click **Save**.

Delete a Customized Report

Permission Required: Delete of [Reports](#)

To delete a customized report:

1. Select the **Reports** menu.
2. Hover over the customized report you want to delete and, under **More options** [...], select **Delete**.
3. Click **Yes** in the confirmation message.

Points to remember

- In a report, you can add a maximum of 30 columns.
- In a report, you can add a maximum of three groupings, row-wise and column-wise combined.
- In a report, you can add a maximum of four aggregate columns.
- Customized reports are supported only in the editions Standard and above. In the Standard edition, you can add five reports per module and a total of 15 reports. In the Professional edition, you can add ten reports per module and a total of 30 reports.