# Chapter 6 Reports

Commit tracks and records your business activity and transactions as they occur. All this information is stored in the database, where you can view it from the Commit application, or generate customized reports. The Commit Reports generate and print customized lists, graphs, and shipping labels of your contacts, sales opportunities, products and services rendered and their charges, and various other business transactions.
This chapter describes the following:

- Report categories and their structure
- How to generate and print reports
- How to filter report data
- How to edit the pre-designed report formats

## 6.1 Commit Reports

All the Commit reports are generated and edited through the Reports window, which you can open by clicking **Reports** ( ) in the **General** or **Finance** icon groups in the left icons bar.
Figure 6-1 below displays the Reports window.

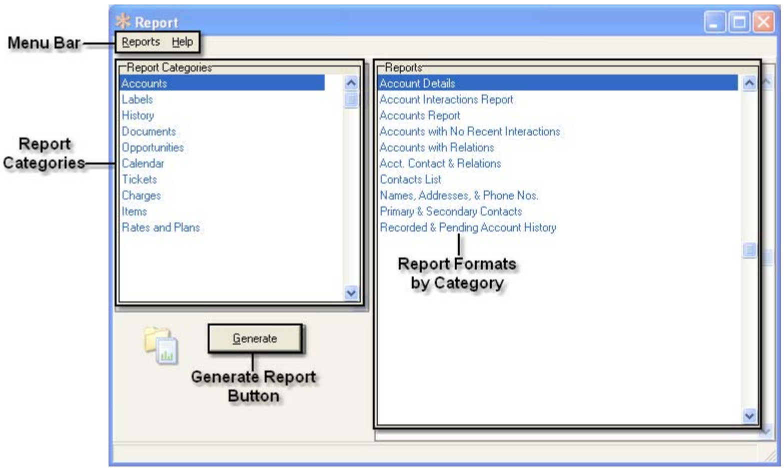


**Figure 6-1: Reports Window**

The window includes the following components:

| Area | Description |
|---|---|
| **Menu Bar** | Menu bar includes two report commands: Edit and Generate |
| **Report Categories** | List of report categories based on the Commit data windows |
| **Report Formats** | List of specific reports relating to the selected category |
| **Generate Button** | Click button to generate the selected report |

### 6.1.1 Report Categories

The report formats are divided into categories that reflect the data in the various Commit modules and stored in the database. Each category includes a series of specific pre-designed report formats that present the data in the module. The table below describes the categories of pre-designed reports included in the Commit system:

| Category | Description |
|---|---|
| **Accounts** | Reports that list accounts and related information |
| **Labels** | Standard Avery and custom shipping and mailing labels |
| **History** | Recorded and pending interactions and events |
| **Documents** | Attached documents and files |
| **Opportunities** | Lists and charts of opportunities, their probability, and their outcome |
| **Calendar** | Lists past and pending scheduled appointments and tasks |
| **Tickets** | Service call tickets listed by various criteria |
| **Charges** | Customer charge reports and invoices |
| **Items** | Lists of items and prices |
| **Rates and Plans** | Employee labor rates, service level agreements, and service plans |

### 6.1.2 Report Format

Each Commit report category includes a series of pre-designed report formats, which can filter the total content of Commit data and present it in a readable and usable format. Every report is composed of a report header and various components that differentiate the different reports. An example report is displayed below in Figure 6-2.

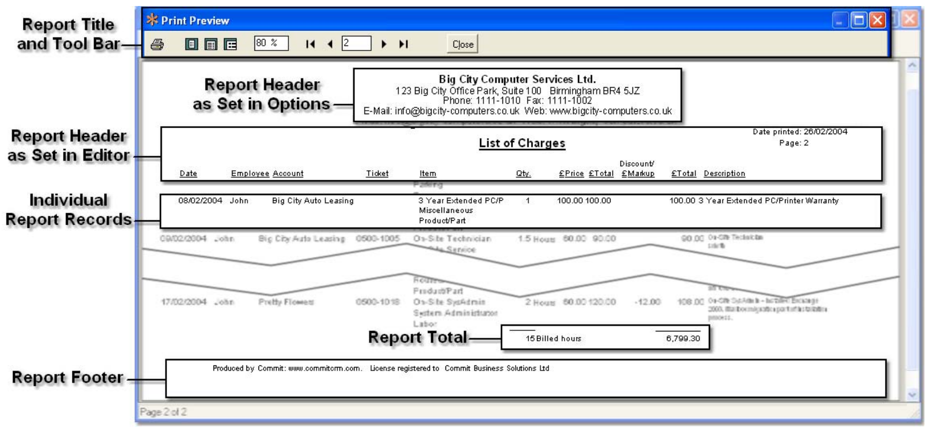


**Figure 6-2: Sample Report Format**

All the Commit reports have a similar structure, as described below:

| Component | Description |
|---|---|
| **Title and Tool Bars** | The title bar indicates that the report is in print preview. The tool bar includes button to print the report, set zoom level, and which page of the report is displayed. |
| **Header as Set in Commit Options** | General report header as defined in the Commit Options window, Reports page (see section 6.3.1). It may include your company's name, address, phone numbers, and other information. |
| **Header as Set in Report Editor** | Header of the specific report format as defined in the Report Editor (see section 0). |
| **Individual Records** | The primary content of the report is the record information it displays, depending on the report's format. Reports with graphs or charts show a graphic chart with a legend. |
| **Report Total or Summary** | If the report counts or itemizes amounts, a report total appears at the bottom of each page or at the end of the report. |
| **Footer** | Each report format may have a custom footer (just like the header). |
| **Report Title and Summary** | Each report format can have an additional title area, above the header, and summary, below the footer. |

## 6.2 Generating Reports

The Commit system includes a series of pre-designed report formats that you can use to quickly and easily generate charts, lists, and reports of customer transactions, ticket status, opportunity success rates, and other important business tracking information. This section instructs how to perform the following:

- **Generating a new report** involves selecting the report with the required information and generating.
- **Filtering report data** involves selecting the specific information the database that should appear in final report.

### 6.2.1 Generating a New Report

The procedure below instructs how to generate a basic, unfiltered report using one of the pre-designed reports included with the Commit system.

### Generating a Report

1. Log on to Commit.
2. Open the Reports window, as displayed in Figure 6-3 below, by selecting either the **Finance** or **General** icon groups in the left icons bar and clicking the **Reports** icon ().

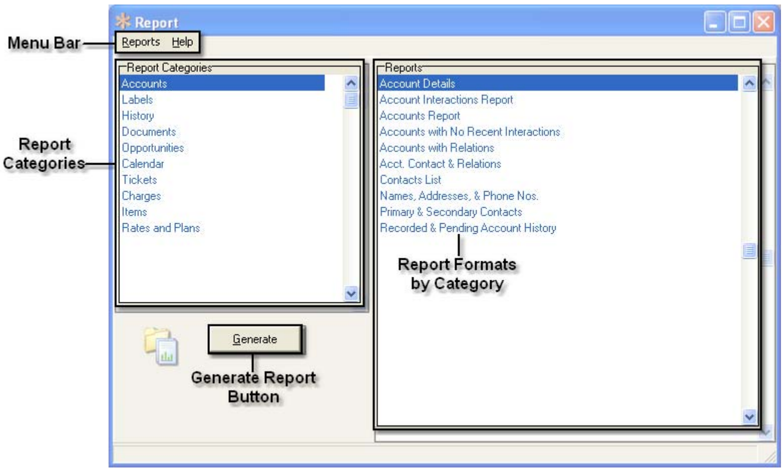


**Figure 6-3: Report Generator Window**

3. Select a category from the **Report Categories** pane, on the left side of the window, such as Accounts.
   The Reports pane, on the right side of the window, lists the pre-designed reports in the selected category.
4. Select a specific report format from the **Reports** pane, such as a Contacts List, which lists all the primary and secondary contact people in Accounts, including mailing addresses, telephone, and fax numbers.

5. Click **Generate**.
   The Generate Report dialog box appears, as displayed in Figure 6-4 below.

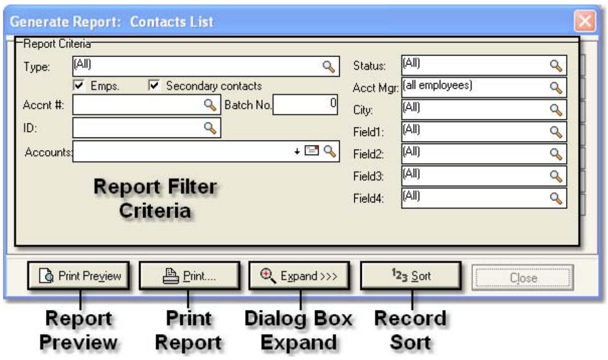


**Figure 6-4: Report Filtering Dialog Box**

This dialog box filters the report content according to the criteria you select. The title bar indicates the specific report format that is being filtered. From this dialog box, you can customize report data filtering and sorting, preview the reports, and print them.
The following steps provide a brief description of the report filtering and sorting options. It does not instruct how to filter report data, which is described in section 6.2.2, Filtering Report Data.

A. Click **Expand >>>**.
   The bottom of the dialog box expands, as displayed in Figure 6-5 below.

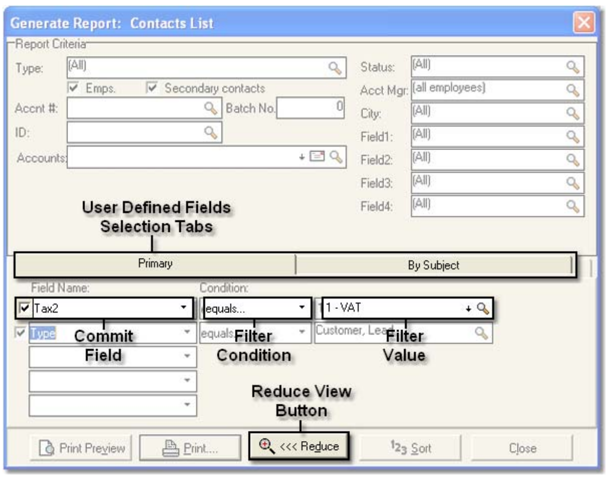


**Figure 6-5: Expanded Generate Report Dialog Box**

The expanded dialog box displays a column of drop-down lists for selecting Commit field names, filter conditions, and filtered field values.

B. Click **<<< Reduce** to reduce the dialog box.

6. Click **Print Preview**.
   A report preview window opens, as displayed in Figure 6-6 below.

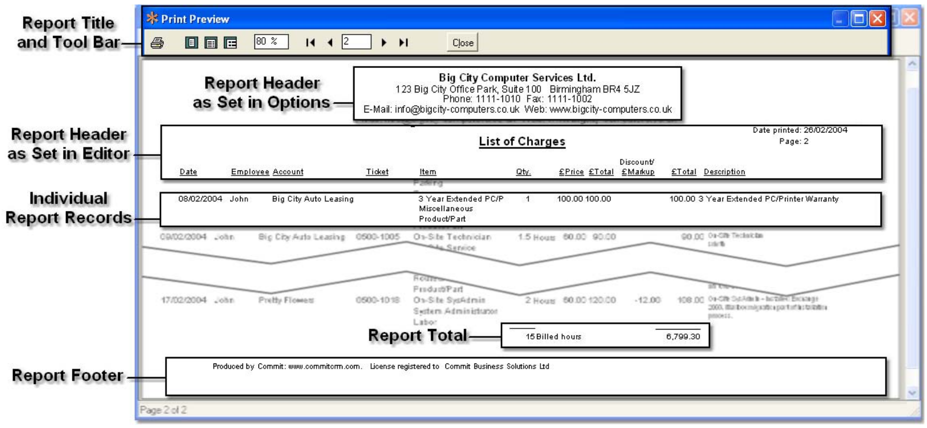


**Figure 6-6: Report Print Preview Window**

The Print Preview window shows how the report would appear on a printed page.

A. You can enlarge or reduce the page view by clicking one of the zoom buttons ( ) or by entering the view magnification (percent of normal size) in the percentage field (80 %).
B. You can browse through the report pages by clicking the browse buttons (2) or by entering the desired page number in the page number field.
C. You can print a copy of the report by clicking the **Print** button ( ).

# Chapter 7 Advanced Features

Commit includes powerful enhancements and tools that empower your business to achieve maximum productivity. The advanced features in this chapter cover a broad range of functions, controls, customization features, reporting and data management abilities, and maintenance utilities.
This chapter is divided into the following sections:

- **Tools:** The Tools menu in the main menu bar and in every module window includes powerful enhancements and tools. The menu is different in every context, including the tools that are relevant to the particular module.
- **Managing Users and Accounts:** Commit is a complete end-to-end service application that manages your business activity from all directions, from providing services to your customers, to tracking your employees, and scheduling and charging the services they provide. You can manage your employees and users from centralized locations in the application.
- **Customizing Commit:** In addition to the rich feature set already included in Commit, you can customize value lists to your needs, define fields, and even add new pages and fields to the user interface.
- **Document Manager:** Commit and its database integrate with Microsoft® Word® and Outlook® to create an efficient and versatile document and communication management system that leverages the strength and versatility of these applications, with the data management in Commit.
- **Message Center:** The Commit Message Center connects you and your employees with your outside contacts, the customers, business partners, and suppliers with whom you do business. The Message center integrates with the document management and report generator to enable you to communicate effectively.
- **Reports and Charges:** After you take care of your customers and render the products and services, you need to gather the data and charge your customers. The Commit Items, Charges and Reports modules integrate together to make customer billing easy, where you can define pricing policies, adjust charges, and design customized reports.
- **Table Management:** Most of the Commit modules display you business data in simple, easy to read tables. You can customize, filter, sort, count, and calculate the tables to display the information you need.
- **Commit Utilities:** Commit is a powerful application that is backed up by a powerful database. The Commit system includes a set of utilities that help you maintain the application and its database.

## 7.1 Managing Users and Accounts

Commit manages each employee, including the time he or she spends providing service, and it tracks the products and services you provide your customers. The system regards employees and customers as two different account groups, though it records some of their information together. This section relates to the information that is unique to each group. It covers the following issues:

- Activate employees and how Commit manages their activity
- User access privileges
- Shared customer interactions, messages, and updates
- Design of shipping and mailing labels

### 7.1.1 Active Employees and Users

Commit manages employees by scheduling their service calls and tracking their time. Every employee who currently provides billable service must be an active employee, regardless if they access and use Commit. For this reason, the system allows you to activate and deactivate employees at will, maximizing your user licenses. The procedure below instructs how to change an employee's status from Active to Inactive and back. Additionally, every user who logs on to Commit must be registered as an active employee, regardless if he/she provides billable service. For this reason, Commit allows several users to log on to the system under the same name.

#### Changing employee status

1. Log on to Commit and open the Employees window by clicking the **General** icons group and then the **Employees** icon ( ) in the left icons bar.
   The Employees window opens by default displaying the Employee page at the bottom half of the window, as displayed in Figure 7-1 below.

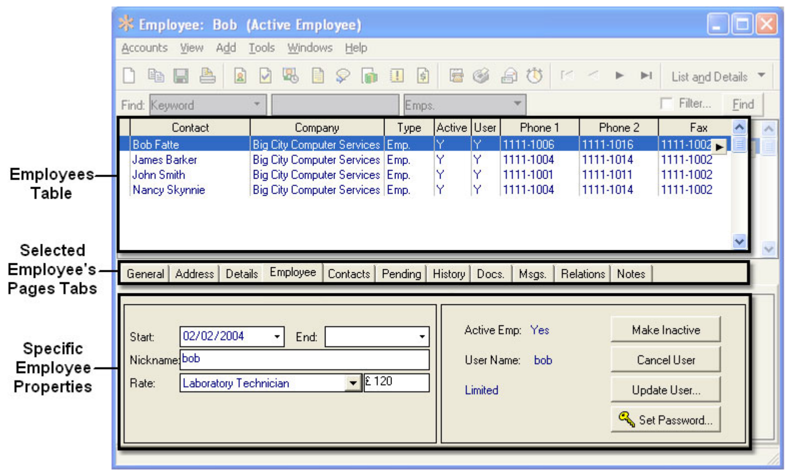


**Figure 7-1: Employees Window**

   The top half of the Employees window displays a list of all employees, active and inactive. Two columns in the list, Active and User, indicate the status of each employee, if he/she is active (his/her time and services are charged) and if he/she is a Commit user. Selecting an employee from this list displays that person's details in the bottom half of the window.
2. Select an employee from the list and click the **Employee** tab.

The bottom half of the window displays the employee's details. The left pane includes basic employment information, such as employment start date, end date, nickname, and labor rate.
The right pane displays employee activation and configuration buttons. Refer to chapter 5, Routine Operation, sections 5.1 and 5.2 for instructions how to create employee accounts.

3. To change the status of an existing employee, click Make Inactive if the employee is active or Make Active if the employee is inactive.
   A. If the employee is active, a confirmation message box appears asking if you want to make the employee inactive. If the employee is also a Commit user, a message box informs you.
      The employee is now inactive. You cannot send the employee messages, schedule tickets or appointments for him/her, or charge for services the employee provided.
   B. If the employee was inactive, the employee's *User Name* and *Configure User…* button appear in the right pane.
      If the active employee is also a Commit user, continue to the next section, 7.1.2, to assign him/her user privileges and a password.

**Note:** If the employee is active and you intend to charge for his/her services, verify that a labor rate is selected in the **Rate** field of the **Employee** page. Tickets that are serviced by that employee cannot be charged without a labor rate. See chapter 4, section 4.4.2.3, Registering Employees, for instructions how to assign a labor rate to an active employee.

## 7.1.2 User Privileges

Commit is a powerful application that tracks and collects sensitive information on your business. Any user can access data Commit from any computer on your network. For this reason, Commit includes powerful yet flexible user access privilege control features that enable you to give your users the exact level of access control they need to use the system effectively for their particular work, but prevents unauthorized users from accessing, tampering, or damaging your sensitive business data.
The procedures below instruct how to:

- Assign a pre-defined access privilege level to each employee
- Create and define custom user access privilege levels.

### 7.1.2.1 Assigning User Privileges

1. Open the employee's properties page and verify the employee is an active user, as described in section 7.1.1 above.
2. Click **Configure User**.
   The Configure User dialog box appears.
   The employee's nickname appears as the default *User Name*. You can change the name for the employee.
3. Click the down arrow (▼) in the **Privilege Group** field.
   A drop-down list of pre-configured access privilege groups appears, as displayed in Figure 7-2 below.

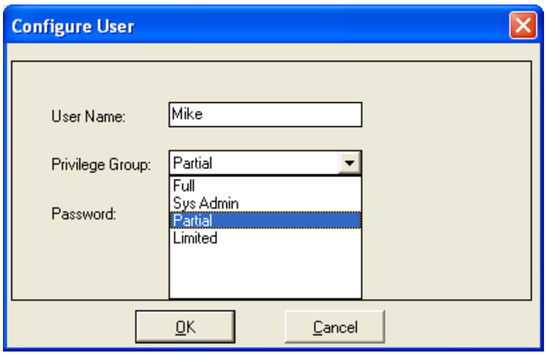


**Figure 7-2: User Access Privilege Groups**

Commit includes a set of four pre-configured user access privilege groups. For a complete description and instructions how to create and configure access privileges, continue to the following section, Defining User Privilege Groups.

4. Double click on one of the access privilege groups.
5. Click **Set Password**.
   The Change Password dialog box appears, which looks like the first time log-on window.
   A. Enter the employee's password in the **Password** field.
   B. Type the employee's password again in the **Confirm** field.
   C. Click **OK** to save the password and close the window.
6. The Configure User dialog box reappears.
   Click **OK**.
7. The Employees widow reappears, showing the employee and user status.

Continue to the next section for a detailed description of each user privilege group and instructions how to create and define user privileges.

#### 7.1.2.2 Defining User Privilege Groups

This section instructs how to define user privilege groups and the access they have to Commit.

1. Log on to Commit and go to the main menu.
2. Click the **File** menu -> **Users and Privileges** -> **Privileges…**
   The User Privileges window appears, as displayed in Figure 7-3 below.

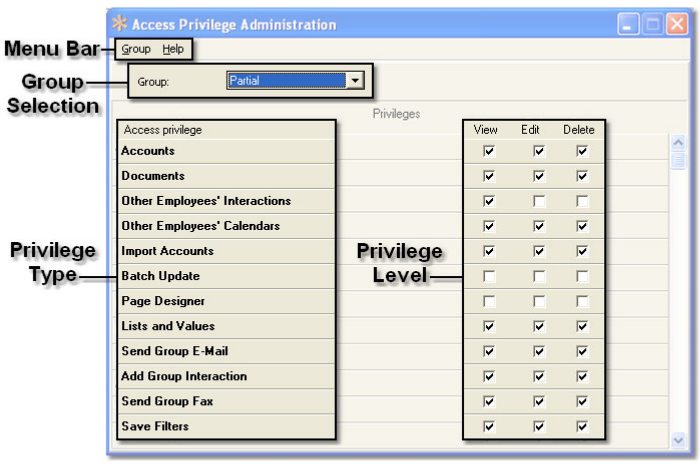

**Figure 7-3: User Privileges Window**

The User Privileges window displays the access privileges allowed each user privileges group.

3. Click the down arrow (▼) in the **Groups** field and select a user privilege group.
Commit includes four (4) pre-configured user privilege groups:

| Group | Description |
|---|---|
| **SysAdmin** | **System Administrators** have full access to all Commit modules and functions. They can create, delete, and assign privileges to other users. The privileges of this group cannot be changed.<br>The first user to log on to Commit after installation is assigned to this group, and at least one user must be it. A user in this group is the only one who can change his own user privileges, but other SysAdmins can change him once he is not in this group. |
| **Full** | Users in this group have full access to all modules and functions, except the ability to create and delete System Administrators or change privileges. |
| **Partial** | Users are allowed use of only the standard Commit functions for routine operation, such as creating customer accounts, opening opportunities and tickets, sending messages, and recording interactions, in addition to viewing group calendars, sending group E-Mails and faxes, charging customers, and other sales functions. They are restricted from accessing the data of other users, changing the interface, or other advanced features. |
| **Limited** | Users a allowed minimal access to perform only routine operations, such as opening and servicing tickets, sending messages, and recording interactions. They cannot view the work of other employees or charge for products and services. |

A. You can change the privileges of all the groups except SysAdmin.
Every privilege type has three privilege level check boxes:

| Group | Description |
|---|---|
| **View** | Allows the user to view the data in the selected module without being able to create or change any information. |
| **Edit** | Allows the user to create, view, and change records but cannot delete them |
| **Delete** | Users have full control of the records in the selected module. They can create new records as well as change or delete existing ones. |

Click each check box to allow or revoke a privilege type from the user group.

B. To save the user privilege changes, you must close the User Privileges window.

4. You can create and configure a new user privilege group by following the procedure below.
   A. Click the **Group** menu and select **New…**
      A *Create new user group* dialog box appears, as displayed in Figure 7-4 below.


**Figure 7-4: New User Group Dialog Box**

   B. Enter the name of the new user group and click **OK**.
   C. The *User Privileges* window reappears with the new user group selected in the *Group* field.
   D. All Commit access privileges are enabled by default.
      Click the check boxes next to each privilege type to disable it.
   E. To save the user privilege changes, you must close the User Privileges window.
   F. You can now assign users to the new user group. See section 7.1.2.1 for complete instructions.

### 7.1.3 Batch and Group Activity

Commit allows you to leverage your existing customer database and contacts list to the benefit of your marketing efforts. Through commit, you can send E-Mails and faxes, apply changes and updates, and record interactions to an entire group of accounts.

The topics in this section instruct how to perform these functions on a group of accounts that is filtered from the entire list of all accounts. The procedure below instructs how to perform a simple filter of the accounts list, which is usually necessary before any batch or group activity is performed.

## Filtering accounts

1. Log on to Commit and open the **Accounts** window.
2. Click the **Filter** button at the top of the window twice.
   The Configure Filter dialog box appears, as displayed in Figure 7-5 below.

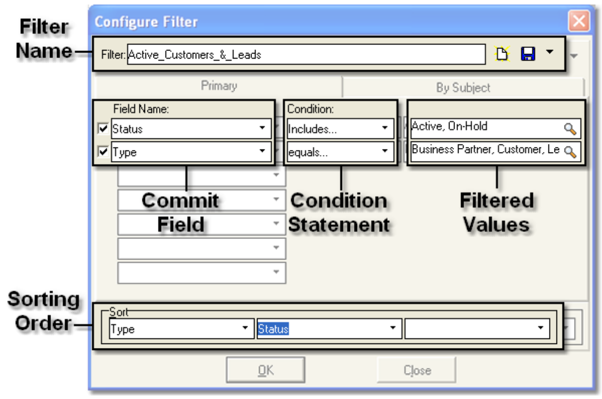


**Figure 7-5: Configure Filter Dialog Box**

3. Click the down arrow in the field under **Field Name**.
   A drop-down menu appears of all the *Account* fields, as displayed in Figure 7-6 below.

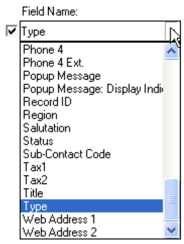


**Figure 7-6: Account Fields Drop-Down Menu**

   Select the field that will be filtered.
   For example, if you want to send a group E-Mail or fax to all customers and leads, click this field and select the **Type** field.
4. Click the field that appears to the right, under **Condition**.
   A drop-down menu of filter conditions appears, as displayed in below.

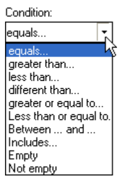


**Figure 7-7: Filter Conditions Drop-Down Menu**

   Select the filtering condition that is applied to the field.
   For example, if you want to select a specific value, select **equals…**, and if you want to select a particular date that is after a specified date, select greater **than…** in this field and the specified date in the next field.

5. Click the magnifying glass in the right-most field.
   A dialog box of values appears showing all the values registered in the field that you selected in step 3 above, as displayed in Figure 7-8 below.

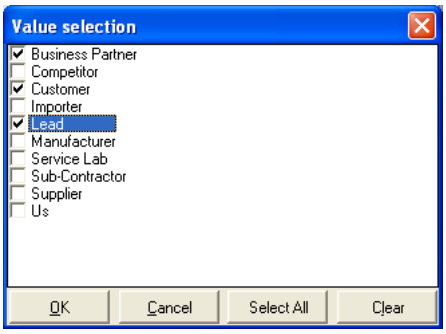


**Figure 7-8: Value Selection Dialog Box**

   Click the check boxes next to the values that you want to filter or filter out.
   For example, if you want to send a group E-Mail or fax to all customers and leads, click the **Customer** and **Lead** check boxes and then click **OK**.
6. Repeat steps 3 through 5 above to filter another Accounts field.
7. If you want to sort the list, got to the bottom of the *Configure Filter* dialog box.
   A. Click the left-most field under **Sort** to open a drop-down list of *Account* fields.
   B. Select the field by which the accounts will be sorted.
   C. Repeat steps A and B above if you want to perform secondary and tertiary sorts on the same list.
8. If you want to save the filter and sort criteria that you configured in this procedure, click the down arrow (▼) to the right of the **Filter** field.
   A. Select Save As from the drop-down menu.
      A filter name dialog box appears, as displayed in Figure 7-9 below.

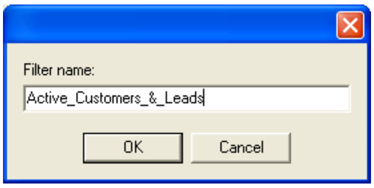


**Figure 7-9: Filter Name Dialog Box**

   B. Enter the filter name and click **OK**.
9. You can now perform the filtering by clicking **OK**.
   The *Accounts* window reappears with a list accounts that was filtered according to the above procedure.