



RAPID ESTIMATOR HOME EDITION

Working with Reports

This tutorial is going to show you how to use a report, customize a report and emailing a report to a client.

CHOOSING A REPORT

- Once you have created an estimate and selected a contract, you are now ready to choose a report. Make sure your estimate is open and click on the 'Report' tab.
- The first four options are dropdown menus giving you several different reports you can choose from.
- The first dropdown menu is the 'Price Reports Menu'. These reports are used to send to a client showing your client a detailed view of your estimate.
- The second dropdown menu consist of reports used for your own record and should not be used for client use.
- The third dropdown menu is a list of summary reports
- The fourth dropdown list consist of material reports.

PREVIEWING A REPORT

- After selecting a report and if you had previously chosen to use a contract, a window will pop up asking which contract you are going to use, make sure you mark the box next to the correct contract. NOTE: You can check and use more than one contract.
- Select the 'Preview' option when finished. If you did not choose a contract the report will automatically load when chosen.
- Once you have the report that works for you, select 'Save Report as PDF'. Or you can choose to 'Upload and Email'.

CUSTOMIZING A REPORT

- You can minimize the amount of information shown on a report by using the 'Customize Standard Report' option located in the 'Reports' tab.
- Select a report from the 'Report Title' column
- In the 'Price Report' box uncheck any of the options you do not want to show on the report.
- In the far-left column choose if you would like a Grand total to show and/or a Phase total to show
- In the middle left column are additional options you can choose from
- The bottom-left you will need to choose the format of your report. **Standard** will put grids in your report. **Simple** will show text only, no grids.

- When you have finished selecting all your options, click the 'Print/Preview' located at the top of this box.
- Once you have finished with customizing your report you can 'Save as PDF' or 'Email Report'

EMAILING A REPORT

- To email the estimate, cover page and contract to a client simply choose the 'Upload and Email' option located in the 'Report' tab.

cward@sdsinow.com