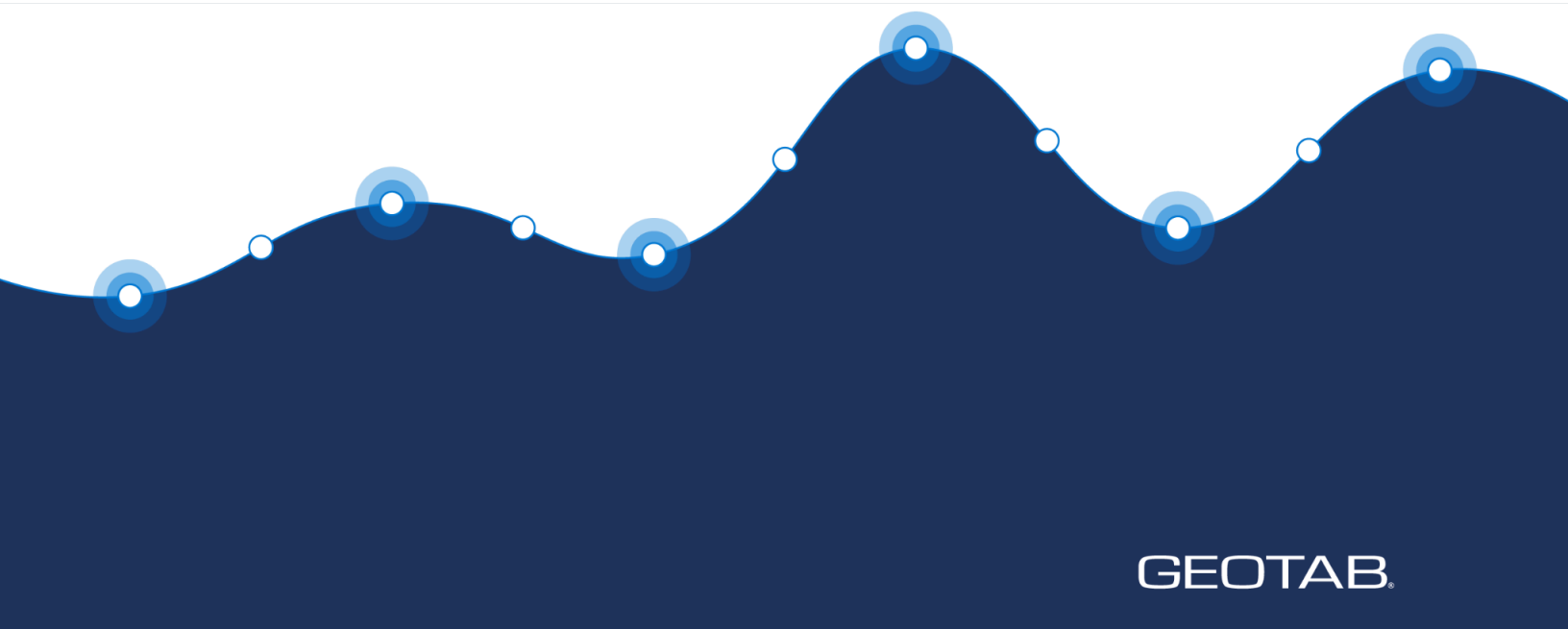


# Installer Partner Community - Creating Reports

## User Guide

July 2022



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# Introduction

Geotab Authorized Installers use the **Partner Community** to manage Work Orders assigned to them by Geotab. The **Reports** function in the Community is a powerful tool that allows installers to generate various reports to show the installation progress.

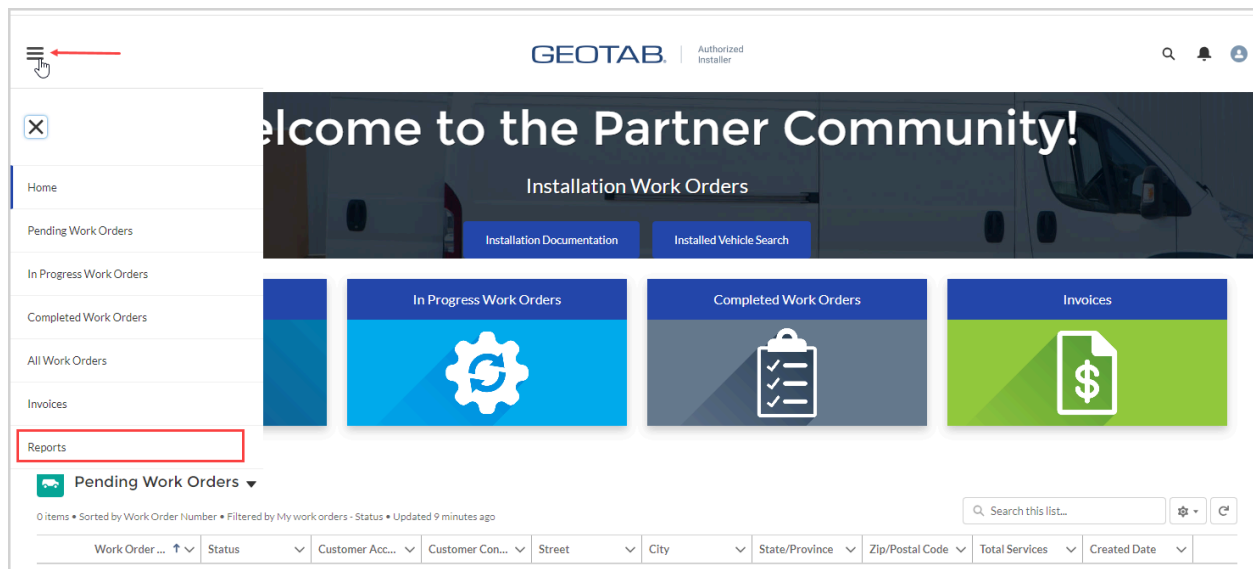
The link to Geotab Partner Community is <https://geotab.force.com/FSL2/s/>. The Geotab Field Services team creates Partner Community credentials for Authorized installers.

If you have any questions about accessing the **Partner Community** or about the functionality of the **Reports**, contact [fieldservicecoordinators@geotab.com](mailto:fieldservicecoordinators@geotab.com).

## Creating a Report in Partner Community

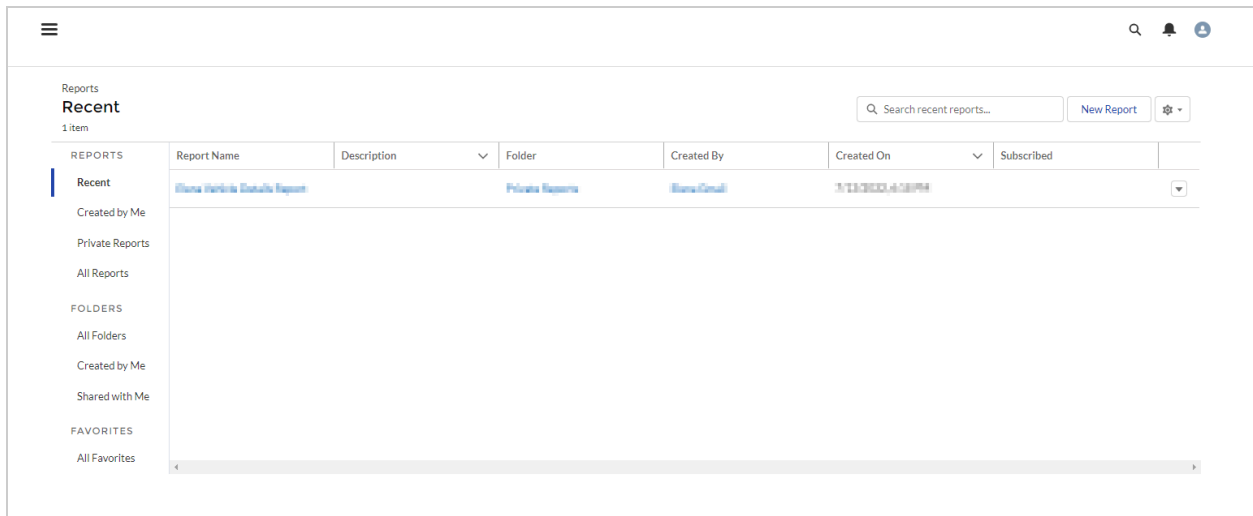
### Accessing the Report page

When you log in to **Partner Community**, you can access **Reports** by clicking the menu icon at the top left of the screen.



### Report page

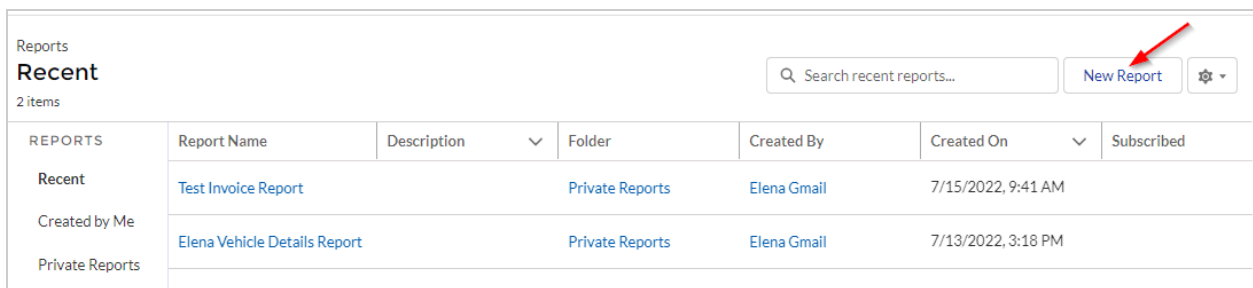
The **Report** page allows you to create new reports, and view and modify previously created reports. By default, the **Report** page shows your recent reports.



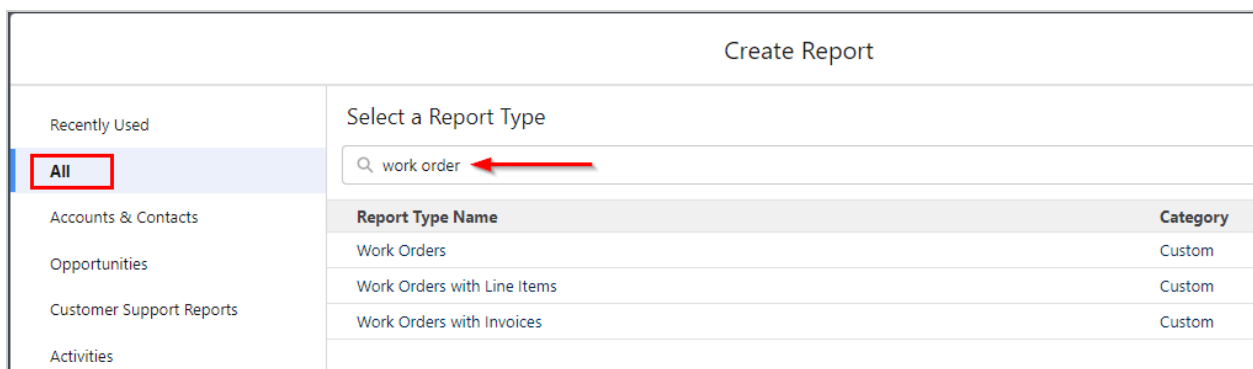
## Creating a new report

To create a new report, do the following:

1. Select **New Report**



2. Select **ALL** in the left menu and enter “**work order**” in the search bar. You will see all available Work Order report types.



3. Select a **Report Type** that is related to the report you want to create. In the **Details** window that appears click **Start Report**.

Select a Report Type

work order

Report Type Name	Category
Work Orders	Custom
Work Orders with Line Items	Custom
Work Orders with Invoices	Custom

Details

**Work Orders with Line Items**  
Custom Report Type

Start Report

Details
Fields (91)

4. Enable the **Update Preview Automatically** option.

Got Feedback?

Add Chart

Save & Run

Save

Close

Run

Update Preview Automatically

5. Define what you want to see in the report.

In the **Outline** section, select the columns you want to see and define grouping (if you want the records to be grouped).

In the **Filters** section, set up the filters for your report.

6. Start from **Filters**:
  - a. Leave the filter **Show Me** set to **My work orders**.
  - b. Set **Contact Customer By** to **All time**.
  - c. If you want to create a report for a specific work order, add the filter for **Work order Number** and set it to **equal** to the work order number.
  - d. If you want to create a report for a specific date range, add the filter for one of the available dates.

REPORT

ER WO Report
Work Orders with Line Items

Outline
Filters

Add filter...

Show Me  
All work orders

Contact Customer By  
All Time

Filter by Contact Customer By

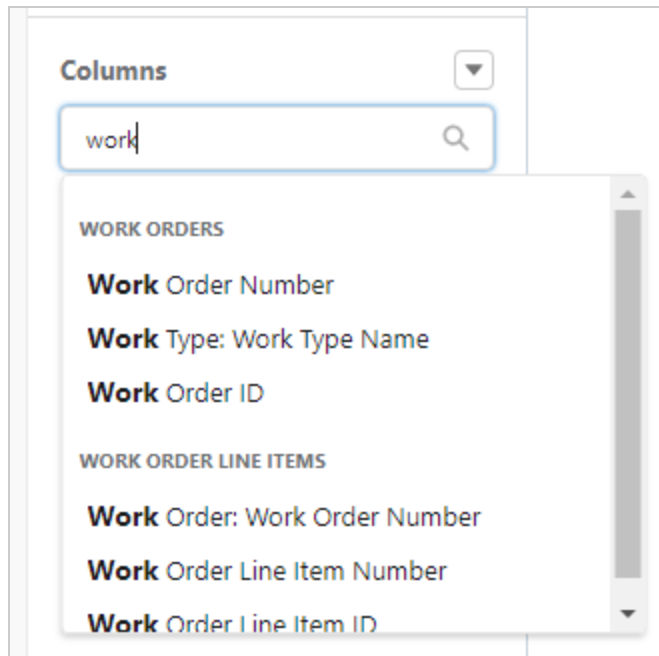
Date  
Contact Customer By

Range  
All Time

Customize

Cancel Apply

- Go to **Outline** and click **Columns** to select what field you want in your report. To narrow down your selection, type the name of the field:



- Continue with column selection and watch how the report draft is getting built on the screen. Add grouping if required.

Previewing a limited number of records. Run the report to see everything.

Work Order Number	Serial Number	Vehicle Name	VIN	Install Date
00004248 (1)	G96421022360	ER CAR 7	-	5/26/2022 1:17 PM
Subtotal				
00004249 (1)	-	-	-	-
Subtotal				
00004250 (10)	G96421022360	TEST	-	5/18/2022 2:33 PM
	G96421022360	test	-	5/26/2022 1:17 PM
	G996211845EE	kti	-	4/14/2022 1:07 PM
	G96421022360	ER CAR 6	-	5/26/2022 2:45 PM
	G96421022360	Er gmail 1	-	6/13/2022 8:04 PM
	G996211845EE	ER Test 2	1J8HR48M68C523565	5/5/2022 1:32 PM
	G96421022360	test	-	5/26/2022 1:17 PM
	G96421022360	ER CAR 6	-	5/26/2022 2:45 PM
	G96421022360	ER CAR 05	2HKRM4H57EH127633	5/26/2022 2:58 PM
	G996211845EE	ER-02	1J8HR48M68C523565	4/14/2022 12:44 PM
Subtotal				

- Once everything is done, click **Save & Run**. Give your report a name and description. Leave **Private Reports** selected in the **Folder** field. Click **Save**.

Save Report

\* Report Name

ER\_WO\_Report

Report Unique Name ⓘ

ER\_WO\_Report\_i1e

Report Description

Folder


Private Reports


Select Folder

Cancel

Save

10. The report appears on the screen:


 Report: Work Orders with Line Items  
**ER WO Report**






 This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.


Total Records  
**6,665**

<input type="checkbox"/> Work Order Number ↑ ▾	Serial Number ▾	Vehicle Name ▾	VIN ▾	Install Date ▾
<input type="checkbox"/> 00004248 (1)	G96421022360	ER CAR 7	-	5/26/2022 1:17 PM
Subtotal				
<input type="checkbox"/> 00004249 (1)	-	-	-	-
Subtotal				
<input type="checkbox"/> 00004250 (10)	G96421022360	TEST	-	5/18/2022 2:33 PM
	G96421022360	test	-	5/26/2022 1:17 PM
	G996211845EE	kti	-	4/14/2022 1:07 PM
	G96421022360	ER CAR 6	-	5/26/2022 2:45 PM
	G96421022360	Er gmail 1	-	6/13/2022 8:04 PM
	G996211845EE	ER Test 2	1J8HR48M68C523565	5/5/2022 1:32 PM
	G96421022360	test	-	5/26/2022 1:17 PM

11. To export the report, click the arrow button next to **Edit** and then select **Export**:

 Report: Work Orders with Line Items  
**ER WO Report**

 Add Chart     ▾

 This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records  
**6,665**

<input type="checkbox"/> Work Order Number ↑ ▾	Serial Number ▾	Vehicle Name ▾	VIN ▾	Install Date ▾
<input type="checkbox"/> 00004248 (1)	G96421022360	ER CAR 7	-	5/26/2022 1:17 PM
Subtotal				
<input type="checkbox"/> 00004249 (1)	-	-	-	-
Subtotal				
<input type="checkbox"/> 00004250 (10)	G96421022360	TEST	-	5/18/2022 2:33 PM
	G96421022360	test	-	5/26/2022 1:17 PM
	G996211845FF	kti	-	4/14/2022 1:07 PM

Save As

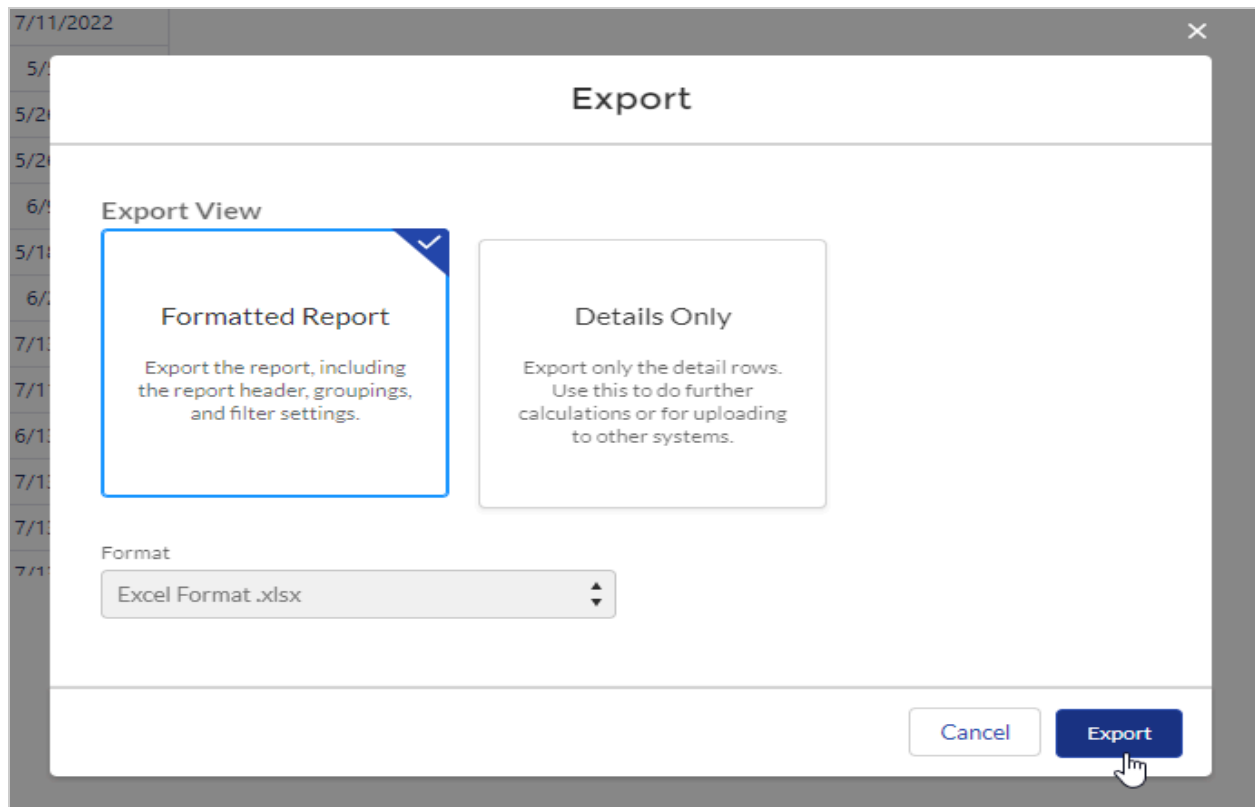
Save

**Export**

Delete



12. Select the **Export View** and **Format**. Click **Export**.



13. You can find the saved report in your **Recent**, **Created by Me** and **Private Reports** folders for future use.

Reports					
Private Reports					
3 items					
REPORTS	Report Name	Description	Folder	Created By	Created On
Recent	Elena Vehicle Details Report		Private Reports	Elena Gmail	7/13/2022, 6:18 PM
Created by Me	ER WO Report		Private Reports	Elena Gmail	7/15/2022, 9:22 PM
Private Reports	Test Invoice Report		Private Reports	Elena Gmail	7/15/2022, 12:41 PM
All Reports					