

Service History Report

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The Service History Report provides a comprehensive overview of the service history for the sites associated with an account, within a specified time frame.

The screenshot shows the 'SERVICE HISTORY' report interface. At the top right, the breadcrumb 'REPORTS > STANDARD REPORTS > ACCOUNT' is visible. Below the header is a table with two columns: 'PARAMETER' and 'VALUE'. The 'Account ID' field is highlighted in green and contains the value '155'. The 'Start Date', 'End Date', and 'Charge Code' fields are empty. To the right of the table are two green buttons: 'RUN REPORT' and 'RUN AS EXCEL'.

Permissions

Permission ID	Permission Name
155	Standard Account / Report

Report Parameters

Parameter	Value
Account ID	Filters the report to the account matching the Account ID entered.
Start Date	Filters the report to only pull service history on or after the date entered.
End Date	Filters the report to only pull service history before or on the date entered.
Charge Code	Option to filter the service history to a specific charge code.

Run A Report

1. Enter the **Account ID** the report is for.
2. Enter a **Start Date** and **End Date** to define a time frame for the report to collect service history data from.
3. Select a **Charge Code** to restrict the report's data collection to the selected charge code's service history.
4. Select 'Run Report' or 'Run as Excel.'
 - *Run Report*: results of the generated report will display in a new window tab.
 - *Run as Excel*: results will be exported to Excel for the user to open and view.

Understand The Report

Service History

Account ID: 22502, Start Date: 06/24/2023, End Date: 08/24/2023

SCHEDULED DATE	WO #	TYPE	WORKFLOW	WO CHARGES	QTY	RATE	AMOUNT
Account Id 22502 BETTER TOWER SERVICES							
22502001	603 E CLAYTON STREET DAYTON, TX77535						
7/24/23	6160478	Scheduled	RO_DUMPRET	ROHAUL	1	0.00	0.00
7/24/23	6160478	Scheduled	RO_DUMPRET	ROLFTONS	0	0.00	0.00
Total					1.00	\$ 0.00	\$ 0.00
22502002	2700 BAY AREA BLVD HOUSTON, TX77058						
22502003	605 E CLAYTON STREET DAYTON, TX77535						
Grand Total					1.00	\$ 0.00	\$ 0.00

Column	Description
Scheduled Date	Displays the scheduled date from the work order.
WO#	Displays the Work Order Number the service history data is associated with.
Type	Displays the type of service rendered for the workflow.
Workflow	Displays the work type that was performed for the service on the date listed.
WO Charges	Identifies the charge(s) that the service included.
QTY	Indicates the quantity used for/by the service.
Rate	Identifies the rate that is associated with the QTY.
Amount	Displays the amount received for the service. This is calculated as QTY x Rate.
Grand Total	Calculates the total for each of the QTY, Rate and Amount columns.