

Service History Report

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The *Service History* report provides a comprehensive overview of all service activity for sites associated with an account. By specifying a time-frame, detailed work order data and site-specific totals are displayed. This layout allows for an easy comparison of service volume and costs across all locations linked to the account.

The screenshot shows the 'SERVICE HISTORY' report configuration interface. At the top, there are buttons for 'NEW', 'UPDATE', 'SAVE AS', 'RUN REPORT', and 'RUN AS EXCEL'. Below these is a table for parameters:

PARAMETER	VALUE
Account ID *	22502
Start Date *	06/24/2023
End Date *	08/24/2024
Charge Code	

A red arrow points from the 'RUN REPORT' button to the report output below. The report is titled 'Service History' and is on 'Page 1 of 1'. It displays the following information:

Account ID: 22502, Start Date: 06/24/2023, End Date: 08/24/2024

SCHEDULED DATE	WO #	TYPE	WORKFLOW	WO CHARGES	GROSS QTY	NO CHARGE QTY	QTY	RATE	AMOUNT
Account Id 22502 BETTER TOWER SERVICES									
22502001	603 E CLAYTON STREET DAYTON, TX77535								
7/24/23	6160478	Scheduled	RO_DUMPRET	ROHAUL	1.00	0.00	1.00	0.00	0.00
7/24/23	6160478	Scheduled	RO_DUMPRET	ROLFTONS	0.00	0.00	0.00	0.00	0.00
Total					1.00	0.00	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	1.00	\$ 0.00	\$ 0.00

Katie Raterink - 05/20/2026 3:49 PM

Report Parameters

Parameters are the specific criteria required to run a report, ensuring the system pulls only the specific data you need for your analysis.

SERVICE HISTORY REPORTS > STANDARD REPORTS > ACCOUNT

SAVED TEMPLATE

PARAMETER	VALUE
Account ID *	
Start Date *	
End Date *	
Charge Code	

Parameter	Value
Account ID <i>Required</i>	Filters the report to the account matching the Account ID entered.
Start Date <i>Required</i>	Filters the report to only pull service history for the account requested on or after the date entered.
End Date <i>Required</i>	Filters the report to only pull service history for the account requested before or on the date entered.
Charge Code	Filters the report to only pull the service history for the account requested for a specific charge code.

Run the Report

Follow these simple steps to run the Service History report for a given account.

- Enter the required report parameters:
 - The **Account ID** of the account the report is for.
 - The **Start Date** and **End Date** to define a time frame for the report to collect service history data from.
- Enter additional parameters to fine-tune the report:
 - Select a **Charge Code** to restrict the report's data collection to the selected charge code's service history.
- Choose preferred output method by clicking one of the buttons:
 - Run Report:** Displays the results immediately in a new browser tab.
 - Run as Excel:** Exports the report directly into an Excel file for offline viewing and analysis.
- Create a **Saved Template** for faster use later.
 - After all parameters are set, click on the **Save As** button at the top of the screen.
 - Enter a **Name** for the template and click **Save**.
 - The option to make the template available to other users is provided by checking the **Public Access** check box. Otherwise, if left unchecked, the report is only available to the user account it was created under.

Understand the Report

Below is a sample report followed by a detailed breakdown of the data in the report.

Service History

Account ID: 22502, Start Date: 06/24/2023, End Date: 08/24/2024

SCHEDULED DATE	WO #	TYPE	WORKFLOW	WO CHARGES	GROSS QTY	NO CHARGE QTY	QTY	RATE	AMOUNT
Account Id 22502 BETTER TOWER SERVICES									
22502001 603 E CLAYTON STREET DAYTON, TX77535									
7/24/23	6160478	Scheduled	RO_DUMPRET	ROHAUL	1.00	0.00	1.00	0.00	0.00
7/24/23	6160478	Scheduled	RO_DUMPRET	ROLFTONS	0.00	0.00	0.00	0.00	0.00
Total					1.00	0.00	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	1.00	\$ 0.00	\$ 0.00

Header / Footer

Displays your selected parameter values and the **Account Name** linked to the Account ID. Page numbers are also located at the top of every page. For audit purposes, the bottom of each page includes the name of the user who generated the report and a precise generation timestamp.

Report Body

The data in the report is broken up by Site. The **Site ID** and **Site Address** are displayed prior to the breakdown of services for that site. Totals are given by site and for all sites (Grand Total).

Column	Description
Scheduled Date	The scheduled date from the work order.
WO#	The Work Order Number the service history data is associated with.
Type	The type of service rendered for the workflow.
Workflow	The work type that was performed for the service on the date listed.
WO Charges	The charge(s) that the service included.
Gross QTY	The quantity that was used and chargeable for the service.
No Charge QTY	The quantity that was used and not chargeable for the service.
QTY	The quantity used for/by the service.
Rate	The rate that is associated with the QTY.
Amount	The amount received for the service. This is calculated as QTY x Rate.

Grand Total	The totals calculated for each of the QTY, Rate and Amount columns.
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Permissions

Permission ID	Permission Name
155	Standard Account / Report
