

Edit A Report

System Reports cannot be edited.

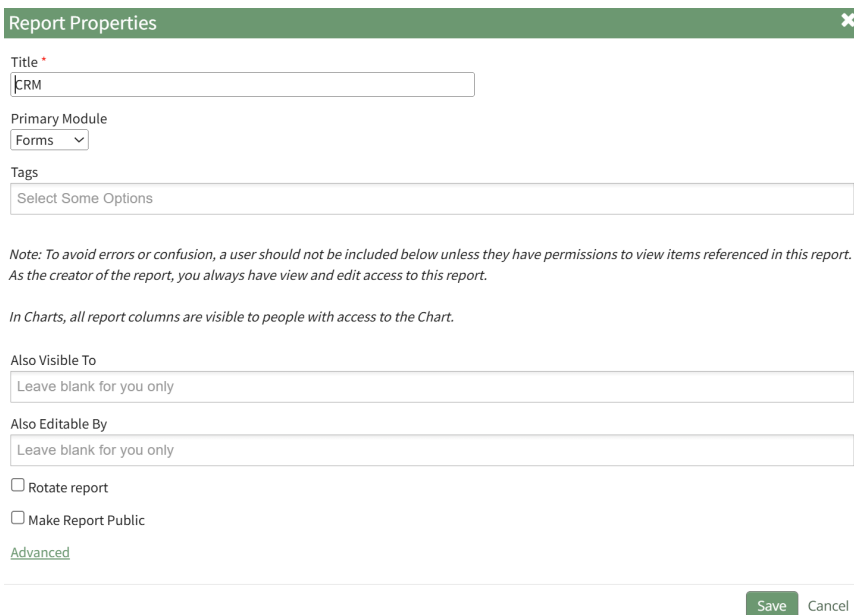
To edit a report, go to the Custom Reports Tab of the Manage Reports Page in the Reports Module. Select the three-dot icon to the right of the Report Title opening the context menu.



The screenshot shows the 'Manage Reports' page with two tabs: 'Custom Reports' and 'System Reports'. A 'New Report' button is visible. Below is a table with columns 'Title' and 'Primary Module'. A context menu is open over the 'CRM' report, listing options: View Report, Run Report, Copy Report, Report Wizard, Download Report, Report Properties (highlighted), and Delete Report.

Title	Primary Module
CRM	Forms
Join Our Team - Initiated Via	
Join Our Team - Status	
Join Our Team - Status (Not Closed)	
Sales Information Request - Contact Reason	
Sales Information Request - Find Method	
Sales Information Request - Initiated Via	
Sales Information Request - Status	Forms
Sales Information Request - Status (Not Closed)	Forms

Select "Report Properties" opening the Report Properties Modal.



The 'Report Properties' modal contains the following fields and options:

- Title: CRM
- Primary Module: Forms
- Tags: Select Some Options
- Also Visible To: Leave blank for you only
- Also Editable By: Leave blank for you only
- Rotate report
- Make Report Public
- Advanced
- Save Cancel

Note: To avoid errors or confusion, a user should not be included below unless they have permissions to view items referenced in this report. As the creator of the report, you always have view and edit access to this report.

In Charts, all report columns are visible to people with access to the Chart.

Refer to the New Report Modal Comments Table for an explanation of Edit Report Modal inputs.

New Report Modal Comments	
Input	Comments
Title	Input a title for the new report (a required field).
Primary Module	Select the primary module from a dropdown menu with the following options: Assets, Dispatch, Forms, Meetings, and People.
Tags	Select open, restrictive, or permissive tags as desired.
Also Visible To	<p>A dropdown menu includes the options: People I Supervise, All Eligible Accounts, Certification Roles and Individual People.</p> <div style="border: 1px solid #00aaff; background-color: #e0f2f7; padding: 10px; margin-top: 10px;"> <p>To avoid errors or confusion, a user should not be included below unless they have permissions to view items referenced in this report.</p> </div>
Also Editable By	
Rotate Report Checkbox	When the Rotate Report Checkbox is selected, the information in the rows of the first column become the column headers. (The x and y axis are switched.)
Make Report Public Checkbox	When the Make Report Public Checkbox is selected, the modal expands to include a textbox for the Link Path. The URL for the report will be <code>https://[subdomainname].kastrack.com/reports/view-report[LinkPath]</code>
Advanced Options	
Report SQL	Clicking the "Advanced" link opens a Report SQL textbox, an input area for writing SQL queries that can define the data the report will show.

Select the "Save" button after making your desired changes and you'll return to the Custom Reports Table.

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