Company Reports

Standard Reports · https://learnpcr.pcrecruiter.net/site/docs/reports/company-reports/

The Company Reports option provides the ability to generate a report for Companies based on Rollup List or Date Entered. Available report options include: Summary, Detail, and custom versions created by a System Administrator.

Click here to learn about Custom Company Reports.

Generating Company Reports

1. Click on "Reports" in the main menu.
2. Select "Company Reports."
3. Choose the desired report: Summary, Detail, or a Custom report created by a PCR system administrator.
4. Choose between Rollup or Date Entered as your preferred criteria.
5. For the Summary or Detail report, specify whether you want to include all activities or just the 5 most recent activities.
6. Click on the action menu and select your preferred export format (please note that the ability to export other than PDF View Mode depends on your Export Reports security).

Company Summary Report

The Company Summary Report includes the following fields (Please note that this list cannot be modified):

- Status
- Company Name
- Phone
- Fax
- Industry Code

- City
- State
- Zip Code
- Number of Employees



Company Summary Report

User Name: ADMIN (Date Created: 11/11/2021)

Status	Company Name	Phone	Fax	Industry Code	City	State	Zip	No Of Employees
Client	ABC Construction	(440) 123-753	--	Construction	--	--	--	300
Client	ABC Marketing	(555) 123-4567	--	Marketing	Willoughby	OH	44124	50
Client	Ackworth Construction, LLC	(555) 996-3216	--	Construction	Minneapolis	MN	55442	5
Vendor	Christopher Morgan	--	--	--	--	--	--	20
Client	Coatue Management	--	--	Executive	San Francisco Bay	--	--	5
Vendor	Coatue Management	--	--	--	Menlo Park	--	--	7
Default	Default for Contractors		--	--	--	--	123	0
Client	Genera Vox, Inc.	(558) 554-7979	--	VOIP	Cleveland	OH	44101	750
Client	Main Sequence Technology	(440) 946-5214	--	SAAS	Willoughby	OH	44094	1523
	Main Sequence Technology, Inc.	--	--	SAAS	Cleveland	OH	44101	50
	Maxwell-Edison Medical	(440) 946-5214	--	Medical	Willoughby	OH	44094	20
	Royal Enchantment Events	--	--	Events	--	--	--	10

Company Detail Report

The Company Detail Report offers flexibility in its content, allowing you to include a combination of both Predefined and Custom Company Fields. To customize the report according to your preferences, simply click on 'Customize Detail' in the Action menu of the Company Detail Report. It's important to mention that the configuration you specify for the Detail report will also determine the format when using the 'Print' function from a Company record.

Company Detail Report

User Name: ADMIN (Date Created: 11/11/2021)

#	Company Name	Phone	Address 1	Address 2	City	State	Industry
1	ABC Construction	(440) 123-7533	--	--	--	--	Construction
2	ABC Marketing	(555) 123-4567	1234 Main Street	Building B	Willoughby	OH	Marketing
3	Ackworth Construction, LLC	(555) 996-3216	--	--	Minneapolis	MN	Construction
4	Christopher Morgan	--	--	--	--	--	--
5	Coatue Management	--	--	--	San Francisco Bay	--	Executive
6	Coatue Management	--	--	--	Menlo Park	--	--
7	Default for Contractors	123	--	--	--	--	--
8	Genera Vox, Inc.	(558) 554-7979	123 Trial Lane	--	Cleveland	OH	VOIP
9	Main Sequence Technology	(440) 946-5214	4420 Sherwin Rd	--	Willoughby	OH	SAAS
10	Main Sequence Technology, Inc.	--	--	--	Cleveland	OH	SAAS
11	Maxwell-Edison Medical	(440) 946-5214	4420 Sherwin Road	--	Willoughby	OH	Medical
12	New company	--	--	--	--	--	--
13	Royal Enchantment Events	--	--	--	--	--	Events