Name Reports

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

The Name Reports option provides the ability to generate a report of Names 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 Name Reports.

Generating Name Reports

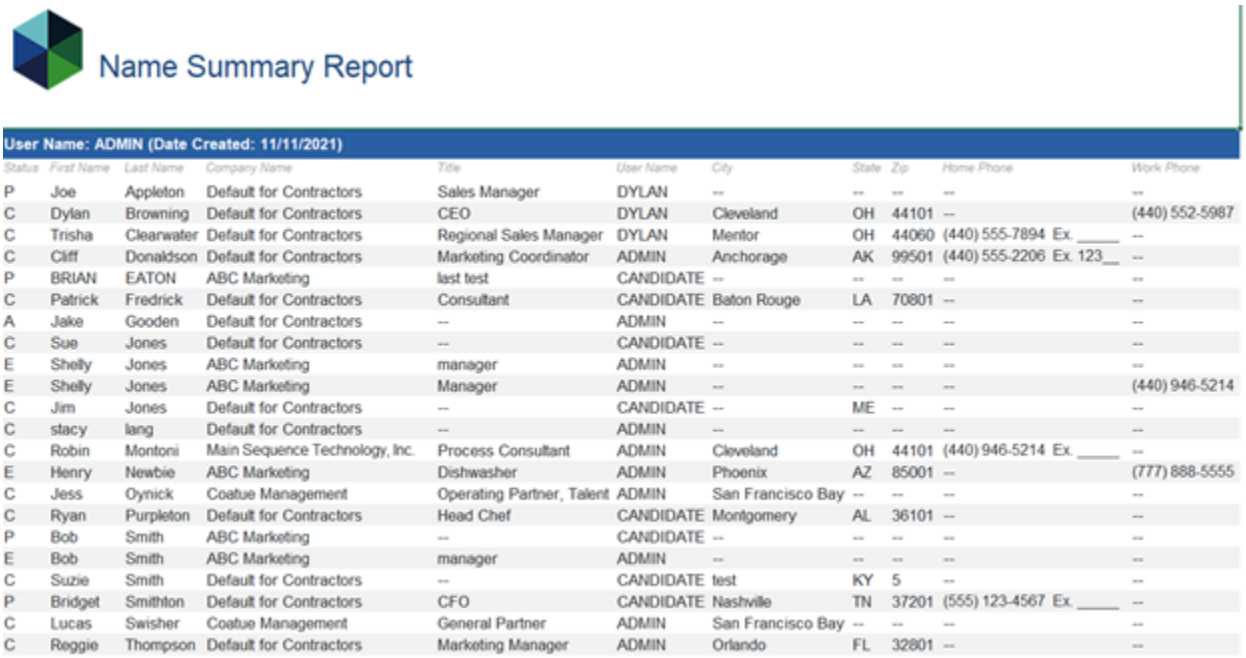
1. Click on “Reports” in the main menu.
2. Select “Name Reports.”
3. Choose the desired report: Summary, Detail, or a Custom report created by a PCR system administrator.
4. Choose between Rollup or Date Entered as your preferred criteria.
5. For the Summary or Detail report, specify whether you want 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).

Name Summary Report

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

- Status
- First Name
- Last Name
- Company Name

- Title
- User Name
- City
- State
- Zip Code
- Home Phone
- Work Phone



Name Summary Report

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

Status	First Name	Last Name	Company Name	Title	User Name	City	State	Zip	Home Phone	Work Phone
P	Joe	Appleton	Default for Contractors	Sales Manager	DYLAN	--	--	--	--	--
C	Dylan	Browning	Default for Contractors	CEO	DYLAN	Cleveland	OH	44101	--	(440) 552-5987
C	Trisha	Clearwater	Default for Contractors	Regional Sales Manager	DYLAN	Mentor	OH	44060	(440) 555-7894 Ex. ____	--
C	Cliff	Donaldson	Default for Contractors	Marketing Coordinator	ADMIN	Anchorage	AK	99501	(440) 555-2206 Ex. 123__	--
P	BRIAN	EATON	ABC Marketing	last test	CANDIDATE	--	--	--	--	--
C	Patrick	Fredrick	Default for Contractors	Consultant	CANDIDATE	Baton Rouge	LA	70801	--	--
A	Jake	Gooden	Default for Contractors	--	ADMIN	--	--	--	--	--
C	Sue	Jones	Default for Contractors	--	CANDIDATE	--	--	--	--	--
E	Shelly	Jones	ABC Marketing	manager	ADMIN	--	--	--	--	--
E	Shelly	Jones	ABC Marketing	Manager	ADMIN	--	--	--	--	(440) 946-5214
C	Jim	Jones	Default for Contractors	--	CANDIDATE	--	ME	--	--	--
C	stacy	lang	Default for Contractors	--	ADMIN	--	--	--	--	--
C	Robin	Montoni	Main Sequence Technology, Inc.	Process Consultant	ADMIN	Cleveland	OH	44101	(440) 946-5214 Ex. ____	--
E	Henry	Newbie	ABC Marketing	Dishwasher	ADMIN	Phoenix	AZ	85001	--	(777) 888-5555
C	Jess	Oynick	Coatue Management	Operating Partner, Talent	ADMIN	San Francisco Bay	--	--	--	--
C	Ryan	Purpleton	Default for Contractors	Head Chef	CANDIDATE	Montgomery	AL	36101	--	--
P	Bob	Smith	ABC Marketing	--	CANDIDATE	--	--	--	--	--
E	Bob	Smith	ABC Marketing	manager	ADMIN	--	--	--	--	--
C	Suzie	Smith	Default for Contractors	--	CANDIDATE	test	KY	5	--	--
P	Bridget	Smithton	Default for Contractors	CFO	CANDIDATE	Nashville	TN	37201	(555) 123-4567 Ex. ____	--
C	Lucas	Swisher	Coatue Management	General Partner	ADMIN	San Francisco Bay	--	--	--	--
C	Reggie	Thompson	Default for Contractors	Marketing Manager	ADMIN	Orlando	FL	32801	--	--

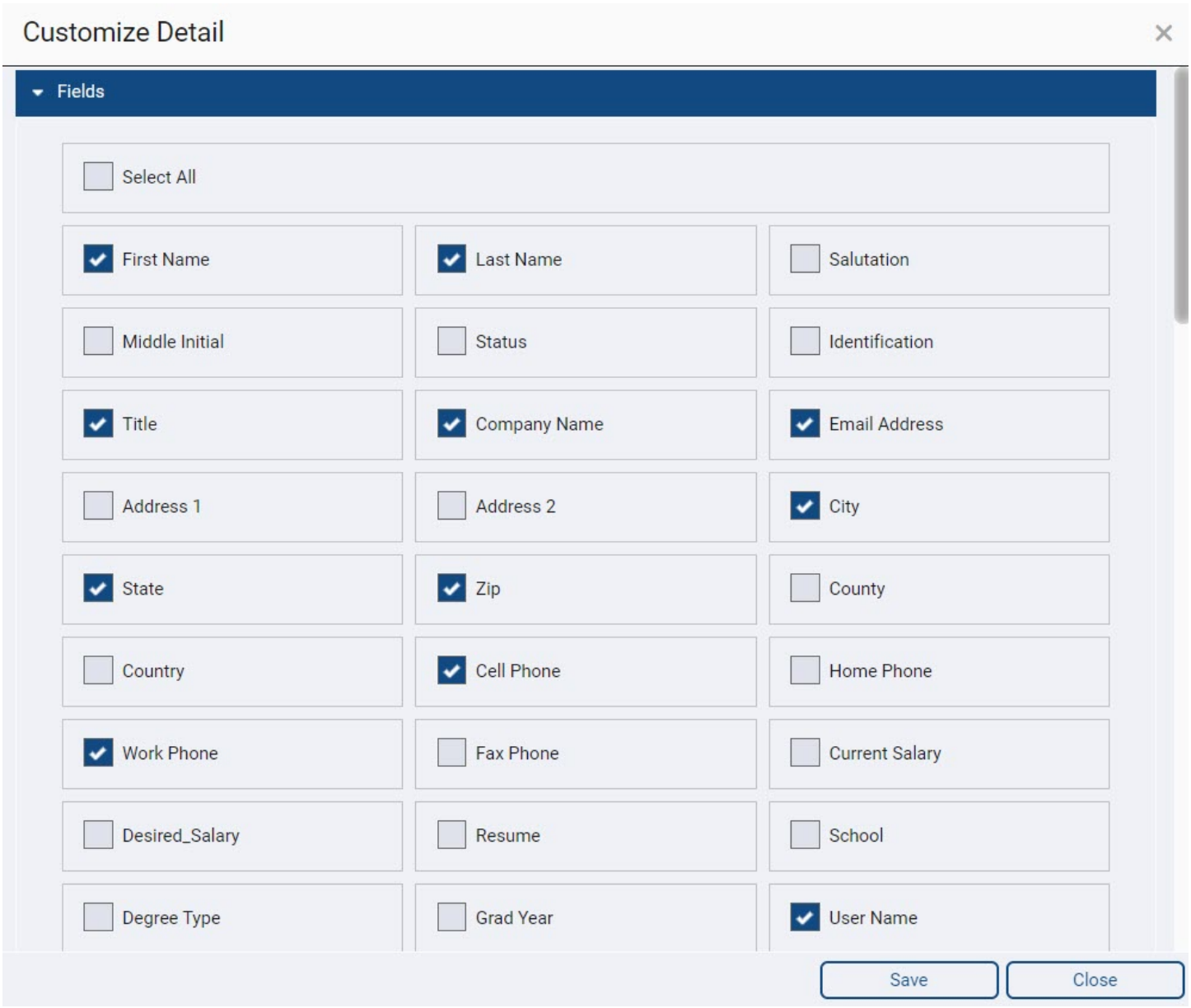
Name Detail Report

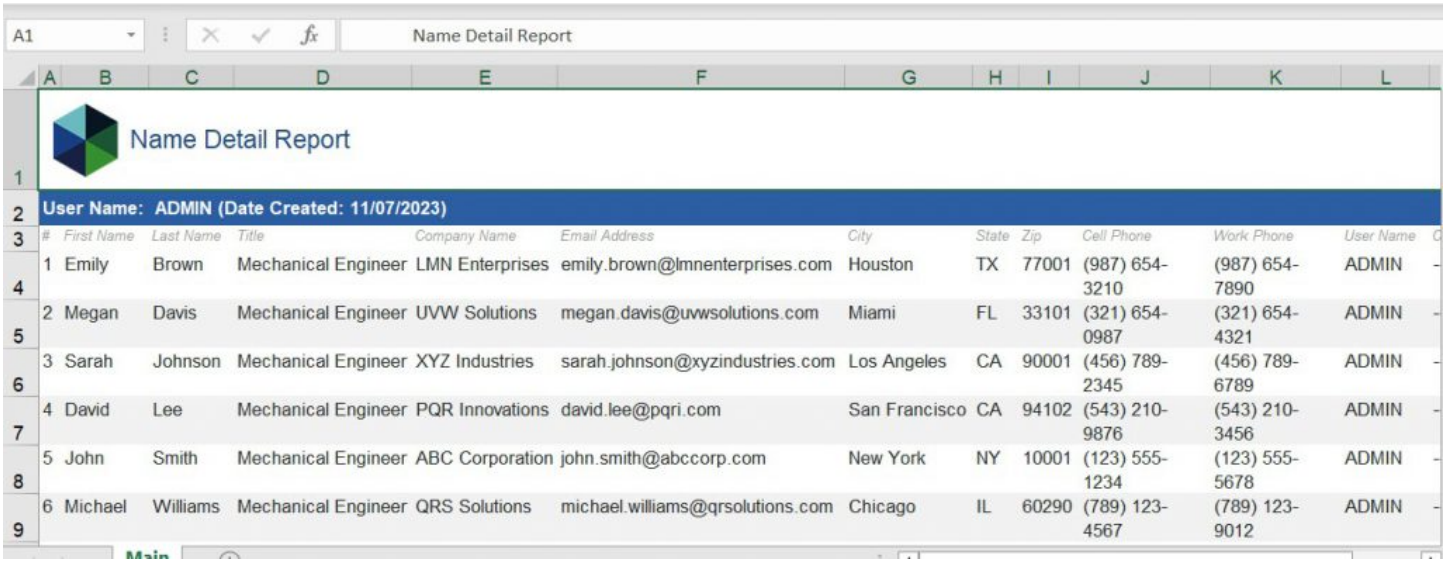
The Name Detail Report provides you with the flexibility to customize its content by allowing you to choose between Predefined and Custom Name Fields that you can either display or hide. Additionally, you have the option to incorporate the text from Notes, Resume, Summary, and Keywords as part of the report. These selections also determine the fields to include when using the "Print" option on a Name record.

To configure the Detail report, an administrator can follow these steps:

1. Click on “Reports” in the main menu.
2. Select “Name Reports.”

3. Select "Detail Report".
4. Click on ‘Customize Detail’ in the Action menu of the Name Detail Report.
5. Check the fields to include.
6. Click Save.





Name Detail Report

User Name: ADMIN (Date Created: 11/07/2023)

#	First Name	Last Name	Title	Company Name	Email Address	City	State	Zip	Cell Phone	Work Phone	User Name
1	Emily	Brown	Mechanical Engineer	LMN Enterprises	emily.brown@lmnenterprises.com	Houston	TX	77001	(987) 654-3210	(987) 654-7890	ADMIN
2	Megan	Davis	Mechanical Engineer	UVW Solutions	megan.davis@uvwsolutions.com	Miami	FL	33101	(321) 654-0987	(321) 654-4321	ADMIN
3	Sarah	Johnson	Mechanical Engineer	XYZ Industries	sarah.johnson@xyzindustries.com	Los Angeles	CA	90001	(456) 789-2345	(456) 789-6789	ADMIN
4	David	Lee	Mechanical Engineer	PQR Innovations	david.lee@pqri.com	San Francisco	CA	94102	(543) 210-9876	(543) 210-3456	ADMIN
5	John	Smith	Mechanical Engineer	ABC Corporation	john.smith@abccorp.com	New York	NY	10001	(123) 555-1234	(123) 555-5678	ADMIN
6	Michael	Williams	Mechanical Engineer	QRS Solutions	michael.williams@qrsolutions.com	Chicago	IL	60290	(789) 123-4567	(789) 123-9012	ADMIN



Name Detail Report

User Name: ADMIN (Date Created: 11/07/2023)

Record 1 of 1

First Name	Last Name	Title	Company Name
Sarah	Johnson	Mechanical Engineer	XYZ Industries
Email Address	**City**	**State**	**Zip**
sarah.johnson@xyzindustries.com	Los Angeles	CA	90001
Cell Phone	**Work Phone**	**User Name**	
(456) 789-2345	(456) 789-6789	ADMIN	