Knowledge Base Article

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Article ID: **4244**
Subject: **How to Use Pro Gold Reports**
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Applies to: **Pro Gold i2 2.xx, 3.xx**

Summary: Pro Gold includes numerous reports for use by the user. Most of the reports found in Pro Gold are located in the reports menu and are divided into categories corresponding to the main Pro Gold menus. The best way to figure out what data the reports show is by browsing through and running the different reports in Pro Gold.

Procedure:

Step 1: Log into Pro Gold.
Step 2: From any of the main tabs, select the "**Reports"** icon.
Step 3: The categories that the reports are organized into are listed along the upper right side of the reports menu.
    a. Receivables: includes reports pertaining to invoicing and accounts receivable and credit memos.
    b. Contact: includes reports pertaining to contacts and relocation.
       i. 2.xx Users: the report category is called **Prospect**.
    c. Accounting: includes reports on the General Journal and Income Statements (a.k.a. Profit & Loss).
    d. Banking: includes reports on bank account balances, checks, and deposits.
    e. Property: includes reports on listing, pending, and closed properties and agent production.
    f. Payables: includes reports on vendors and bills.
    g. Payroll: includes reports on w2 employees and agent 1099.
    h. Favorites: includes commonly used reports that have been added to Favorites for easy access.
Step 4: Click on a report category to select it and the reports included in the category will appear in a list on the left side of the screen.
Step 5: Click on a report to highlight it and view the report options.
    a. Report Description: shows the summary, criteria that can selected, and the information that is contained in the selected report.
    b. Date Range: appears in the upper right corner and allows a date range to be selected/entered.
    c. Criteria Selected: appears at the bottom of the screen and allows specific options to be selected.
Step 6: Once the report options are selected, click "**Preview**" to view the report.
    a. Note: To make the report bigger for viewing, maximize the report screen and click once in the center of the report to zoom in.
    b. To print the report from the preview screen, select the "**P**" key on the keyboard and the Print box will appear.
Step 7: Select the "**ESC**" (escape) key on your keyboard to close the report and return to the Reports Menu.
Step 8: Click the "**Done**" button to close the Reports Menu and return to the main menu.

Additional Information: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

  http://secured.progoldi2.com/webcast.aspx

•   The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Keywords: Reports, Run Report, Categories, Print, Preview, Receivables, Contact, Accounting, Banking, Property, Payables, Payroll, Favorites, 4244