

ADDING TODAY'S ONE LINE SERVICE RO'S TO YOUR DASHBOARD

Follow the steps below to create a visual report graphic showing the current day's One Line Service RO's.

Start by clicking on the Dominion VUE logo. From the home page, select an existing Dashboard by clicking on the far-right caret next to Unassigned Reports (or the current Dashboard name), or create a new Dashboard by clicking [**New**] and entering a name and click [**Create**].

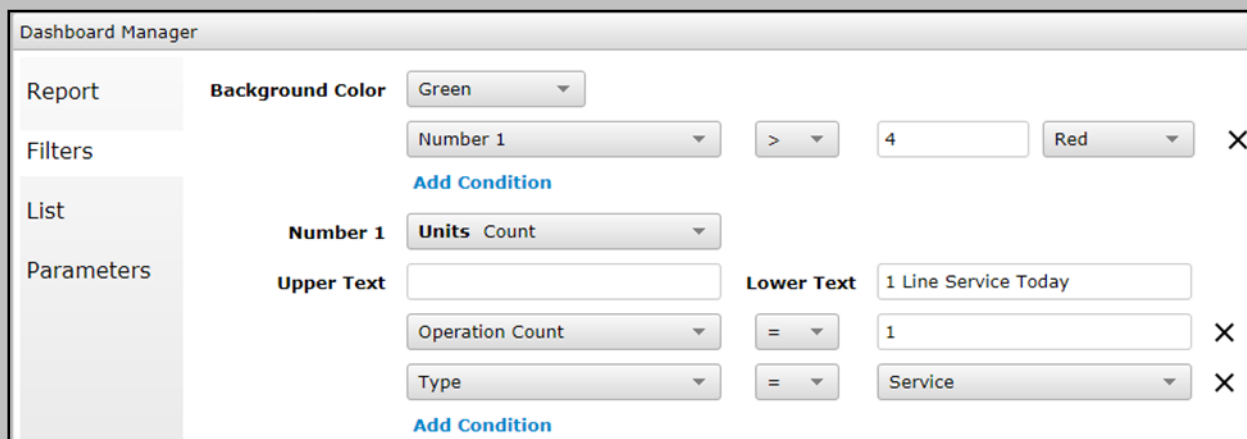
Click the [**Add Report**] button in the Action Ribbon.

ON THE REPORT TAB

1. **Report Basis** - Select [Service Repair Orders]
2. **Report Title** - "Today's 1 Line Service RO's"
3. **Default View** - Number

ON THE FILTERS TAB

1. Set **Background Color** - Green
2. Click [**Add Condition**]
3. Set [**Number 1**] [>] [4 or amount] [**Red**]
4. Specify **Number 1** as [**Units Percentage**]
5. Leave **Upper Text** Blank **Lower Text** "1 Line Service Today"
6. Click [**Add Condition**]
7. [**Operation Count**] [=] [1]
8. Click [**Add Condition**]
9. [**Type**] [=] [**Service**]



The screenshot shows the 'Dashboard Manager' window with the following configuration:

- Report:** Background Color: Green
- Filters:**
 - Number 1: Units Count > 4 (Red)
 - Operation Count: = 1
 - Type: = Service
- List:**
 - Upper Text: (Blank)
 - Lower Text: 1 Line Service Today
- Parameters:** (None)

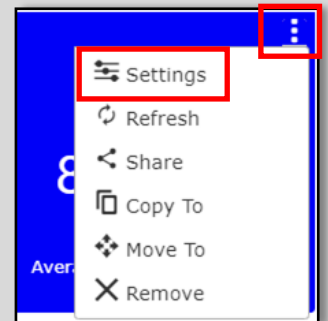
For Technical Support, please contact: 1.800.227.8187 or email dmssupport@dominiondms.com

ON THE PARAMETERS TAB

- | | |
|--|---|
| 1. Report Title [Today's 1 Line Service RO's] | 5. Based On [Open Date] |
| 2. Companies [Select Companies to include] | 6. Date Type [Preset Date Range] |
| 3. Advisor [All or select individual] | 7. Date Range [Today] |
| 4. Open Status [All] | |

Click **[Save]**

Each Dashboard may be edited by clicking on the three ellipses in the upper right corner and clicking on Settings. Contact Customer Support for details to create personalized Dashboards.



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