

TaskMax Reporting

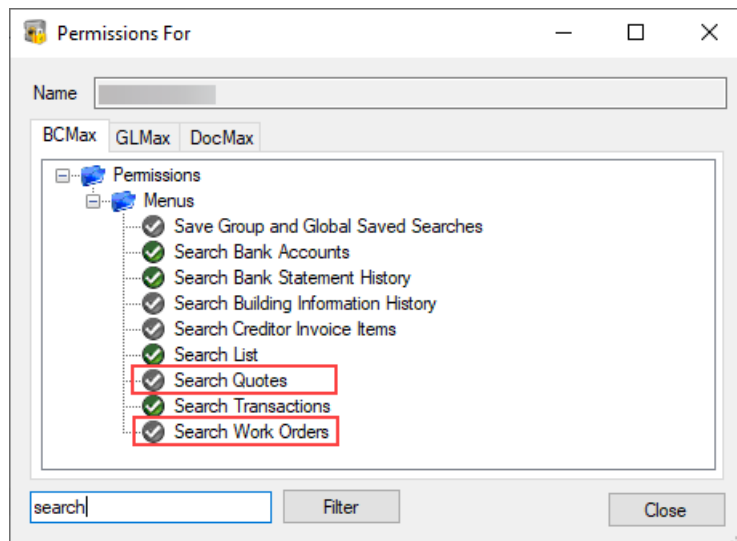
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This article covers the report options available in the TaskMax menu. In **TaskMax**, several report limits can be set for the creation of individual reports, which allows for PDF reports to be produced and can include detailed descriptions. The alternative and recommended options include **Search Work Orders** and **Search Quotes**.

Search Work Orders and Search Quotes can be used to find specific statuses, such as unfinalised work orders or outstanding quotes. Another example, searching by Contractor Industry (if populated from **Creditor Maintenance**), which can be used to analyse data and exported to Excel. Using these areas will also assist in keeping the [Dashboard's](#) for outstanding Work Orders and Quotes current.

Search Work Orders and Search Quotes | Security

To access the **Search Work Orders** and **Search Quotes**, the user must have permission set to 'Allow' under the 'Menus' category in [Security Setup](#).



Search Work Orders

Using Search Work Orders provides a search window that can be tailored to include relevant TaskMax fields of restriction, such as *Status* not equal to 'Finalised', to determine the number of outstanding work orders. Another example includes using the *Creditor Name* field to determine how many work orders

have been sent to a contractor.

The columns and sort order displays can also be helpful to include relevant information for the scenario required. These can also be saved for a [Saved Search](#), which will allow this to be used at a later time, and can be made available for a User or Group.

To select multiple fields in the Columns display area, click the first field, hold Ctrl, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

1. Search or select **Search Work Orders**.
2. Referring to the restriction fields, the *Current Building* will be the default restriction. Click + to add further fields of restriction. Click the - to remove any fields of restriction.
3. Refer to the *Advanced* area and apply any Columns and Sort Order preferences.
4. Click *Refresh* to view the results.
5. Click *Export* if this information should be available in Excel.

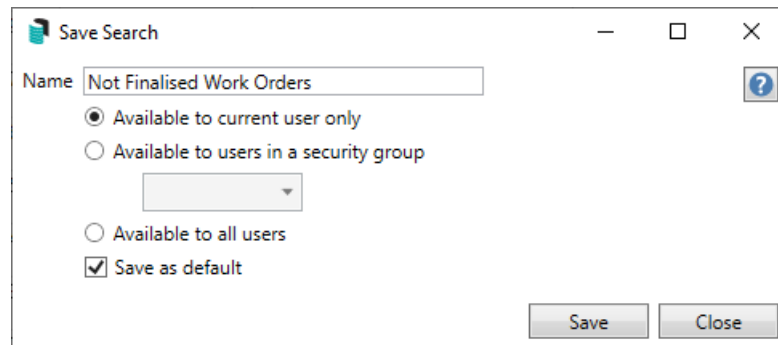
The screenshot shows the 'Work Orders' application window. At the top, there are buttons for 'Refresh' (4), 'Export' (5), and 'Advanced' (3). Below these are sections for 'Restrict To' (2), 'Available Columns', and 'Displayed Columns'. The 'Available Columns' list includes fields like 'Accepted Quote Amount', 'Accepted Quote Reference', 'Account Manager', 'Contact Home Phone', 'Contact Mobile', 'Contact Name', and 'Contact Preferred Method'. The 'Displayed Columns' list includes 'Date Entered', 'Start Date', 'Time Entered', 'Expense Code', 'Expense Name', 'Invoice Number', and 'OK to Pay'. Below these sections is a table with 21 records displayed. The table has columns: Building Number, Building Name, Reference, Status, Subject, Job Details, Creditor Name, and Service Fee. The records show various work orders with their respective statuses and details.

Building Number	Building Name	Reference	Status	Subject	Job Details	Creditor Name	Service Fee
		00003785	D-Issued	Need quote	Visit site and complete quote please.	REDLANDS COUNCIL- 53058	
		00003779	B-Quoting	quote	quotes		
		00003777	A-Incomplete	test	test work order this is a separate line	MISTY LERICHE	
		00003776	A-Incomplete	gdfgdf	dfgdfgdfg232323232	TOMMY GENNUSAS	
		00003775	B-Quoting	77	77		
		00003774	G-Cancelled	66	5656	JUAN KNUDTSON	
		00003773	D-Issued	4	4	PARIS KINNISON	
		00003772	D-Issued	3	3	TOMMY GENNUSAS	
		00003771	B-Quoting	quote2	sdfsd		
		00003770	B-Quoting	EMAIL QUOTE	email		
		00003769	G-Cancelled	gsfgf	fdgdfgdf	JUAN KNUDTSON	
		00003750	G-Cancelled	asbestos	asbestos	JUAN KNUDTSON	
		00003711	F-Periodic	Test Bi-Monthly	Set up for Bi-Monthly - first process	A CLEAN CITY	
		00003669	F-Periodic	test	test periodic - annaul clean pool area	JIM'S MOWING ASHBURTON	
		00003590	G-Cancelled	Work Order Cancellation	Work Order Cancellation	POOL BUSTERS	
		00003513	G-Cancelled	Clean Pool Weekly	Test for Space1 Test for Space 2	MANAGER	

6. Click *Save Search As* to save this saved search for later use.
7. Enter a *Name* for the saved search.
8. Select who should have access to this saved search. If assigned to the group, only the groups you are a member of are available.
9. Click *Save as default* if this should be the default view when opening the *Search Work Orders*

window.

10. Click *Save*.



Search Quotes

Using **Search Quotes** offers a search window that can be tailored to include relevant TaskMax fields of restriction, such as *Quote Deadline* date being within the last seven days to track what quotes have not been received. Another example includes using the *Quote Finalised* field to determine if quotes are finalised.

The columns and sort order displays can also be helpful to include relevant information for the scenario required. These can also be saved for a [Saved Search](#), which will allow this to be used at a later time, and can be made available for a User or Group.

To select multiple fields in the Columns display area, click the first field, hold Ctrl, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

1. Search or select **Search Quotes**.
2. Referring to the restriction fields, the *Current Building* will be a default of restriction. Click + to add further fields of restriction. Click the - to remove any fields of restriction.
3. Refer to the *Advanced* area and apply any Columns and Sort Order preferences.
4. Click *Refresh* to view the results.
5. Click *Export* if this information should be available in Excel.
6. Click *Save Search As* to save this saved search for later use.

Quotes

1 Refresh 2 Restrict To 3 Advanced 4 Current Building 5 Quote Status 6 Save Search As

Field	Condition	Value
Current Building		
Quote Status	is any of	
Deleted	is equal to	<input type="radio"/> Yes <input checked="" type="radio"/> No
Quote Deadline	is on	<input type="checkbox"/> Specific Dates <input type="text"/>
Quote Finalised	is equal to	<input type="radio"/> Yes <input type="radio"/> No

2 records displayed

Reference	Quote Status	Quote Number	Quote Due	Quote Deadline	Creditor Code	Creditor Name	Date Issued	Time Issued	Issued By	Method of Issue	Subject
00003701	D-Rejected	00000418	17/12/2022	19/12/2022	08200013	JUAN KNUDTSON	15/12/2022	10:16:14	Jessica.Carroll	Email	34534
00003701	C-Accepted	00000417	17/12/2022	19/12/2022	08200005	LEAH MILSAP	15/12/2022	10:16:07	Jessica.Carroll	Email	34534

Load/Delete Search Save Search 6 Save Search As Close

7. Enter a *Name* for the saved search.
8. Select who should have access to this saved search. If assigned to the group, only the groups you are a member of are available.
9. Click *Save as default* if this should be the default view when opening the **Search Work Quotes** window.
10. Click *Save*.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search* or click the red cross button to delete the *Saved Search*.
3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

Saved Searches | Edit a Saved Search

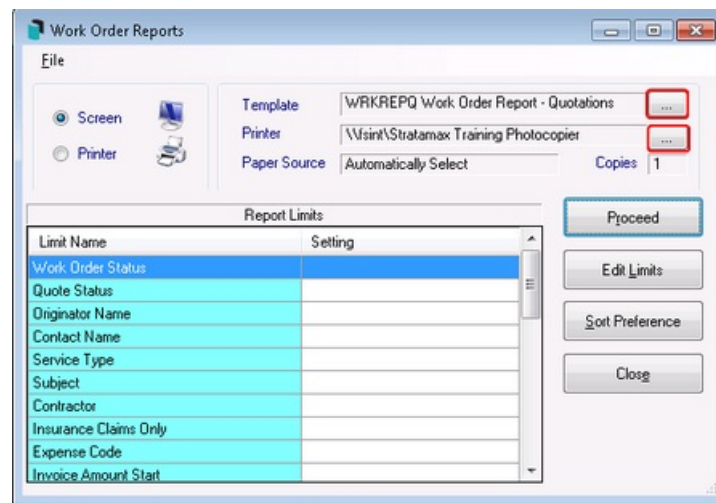
1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button.
3. Now make any required changes to the required fields, and optionally click the *Advance* button to configure the displayed columns and specific sort order.
4. Click the *Refresh* button to display and check the data.

- Click the *Save Search* button to save the applied changes.

Legacy Report Template Setup

These reports can be referred to if needed, and it is recommended to use **Search Work Orders** or **Search Quotes** for a faster, custom built report that can be added to a dashboard as outlined above.

- Open the **TaskMax** menu.
- Click *Reports > Reports*.
- Click the ellipsis [...] button to the right of the *Template* field.



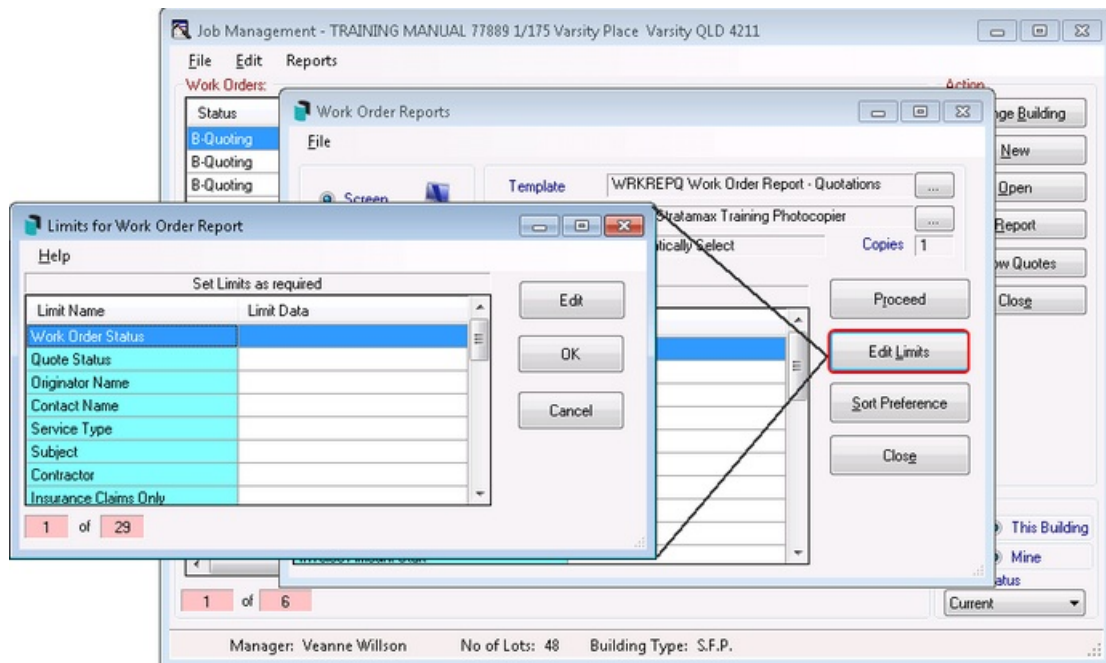
- Select the required report then click *Select as Global* and click *Close*.
 - WRKREPB Work Order Report – Brief:** Lists Date, Type, Building No., Status, Reference, Contractor, Subject.
 - WRKREBBD Work Order Report – Brief + Detail:** Lists as per above with Details of job.
 - WRKREPC Work Order Report – Contractors:** Lists Date, Reference, Contractor, Fax No., Subject, Building No., Building Address.
 - WRKREPBL Work Order Report – Building Name:** Lists Date, Type, Building Name, Building No., Status, Reference, Contractor, Subject and if it is an Insurance Claim.
 - WRKREPBS Work Order Report – One Per Page:** Lists all details of job, one per page.
 - WRKREPQ Work Order Report – Quotations:** Lists Request Date, Reference, Contractor, Fax No., Subject, Due Date, Building No., Building Address.
 - WRKREPBS Work Order Report – Brief:** Lists Building Name & No., Site Contact, Contractor, Subject, Order Ref, Quote Ref, Invoice No., Details of job.

Legacy Issued Work Orders Report

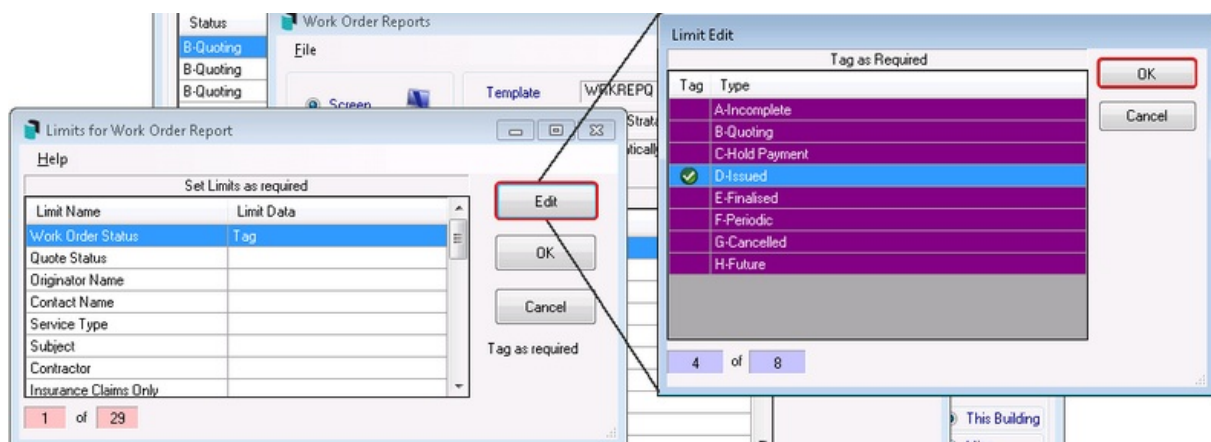
These reports can be referred to if needed, and template suggestions for this type of report are *WRKREPB* or *WRKREBBD*. It is recommended to use **Search Work Orders** or **Search Quotes** for a faster,

custom built report that can be added to a dashboard as outlined at the top of these instructions.

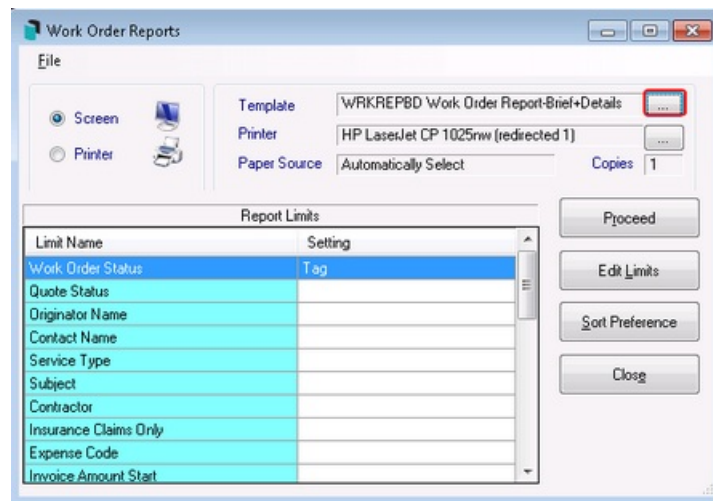
1. Open the **TaskMax** menu.
2. Click *Reports > Reports*.
3. In the *Reports* window, click *Edit Limits*.



4. In the *Limits for Work Order Report* window select *Work Order Status* and click *Edit*.



5. In the *Limit Edit* window tag *D-Issued* and click *OK*.
6. Double-click the *Date Issued Start* and enter date (i.e. start of month).
7. Double-click the *Date Issued Finish* and enter date (i.e. end of month).
8. Double-click the *Work Orders/Quotes* field and type 'W' to limit the report to work orders only.
9. Click *OK*.
10. Click the ellipsis [...] button to the right of the *Template* field. Select the required report then click *Select as Global* and click *Close*.

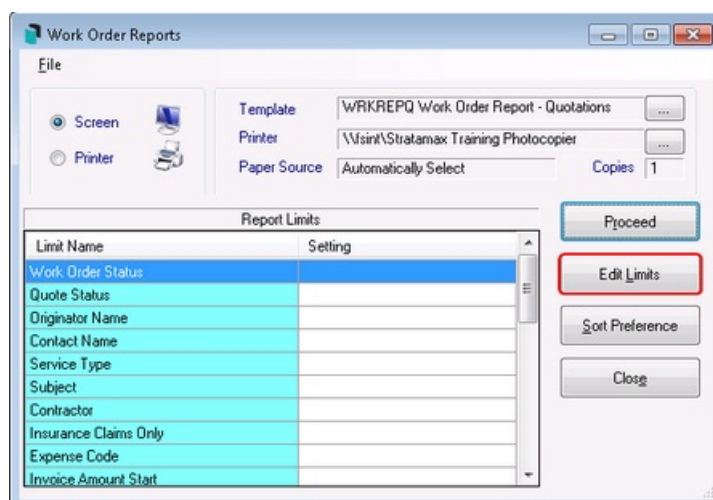


11. Click *Proceed*.

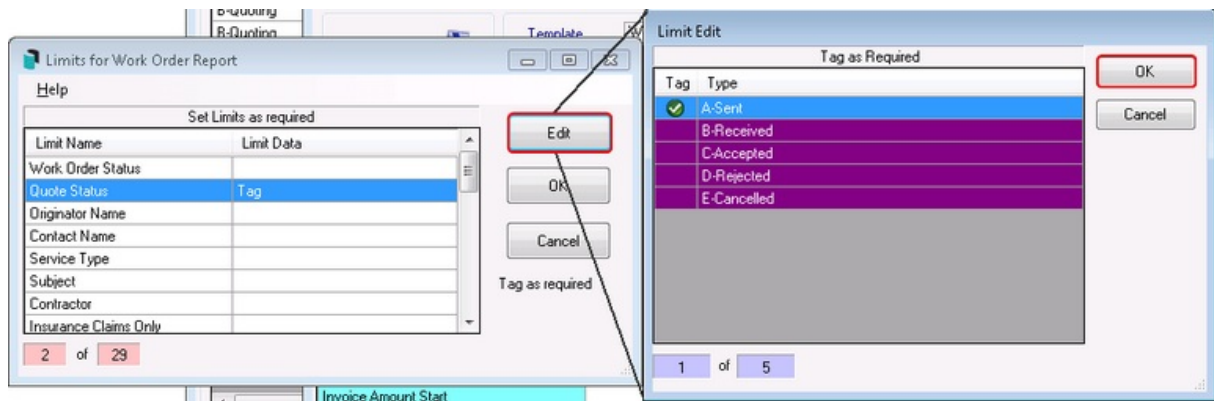
Legacy Quotes Not Received Report

This report will show all quotes sent and not yet received by the due date and can be followed up if required. Template suggestion for this type of report include (i.e. WRKREPQ) It is recommended to use ***Search Work Orders*** or ***Search Quotes*** for a faster, custom built report that can be added to a dashboard as outlined at the top of these instructions.

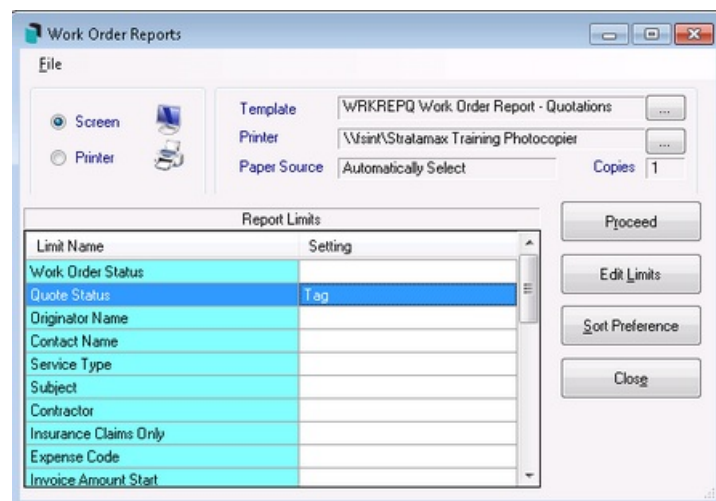
1. Open the ***TaskMax*** menu.
2. Click *Reports > Reports*.
3. In the *Reports* window, click *Edit Limits*.



4. Highlight *Quote Status* and click *Edit*.
5. Tag *A-Sent* then click *OK*.



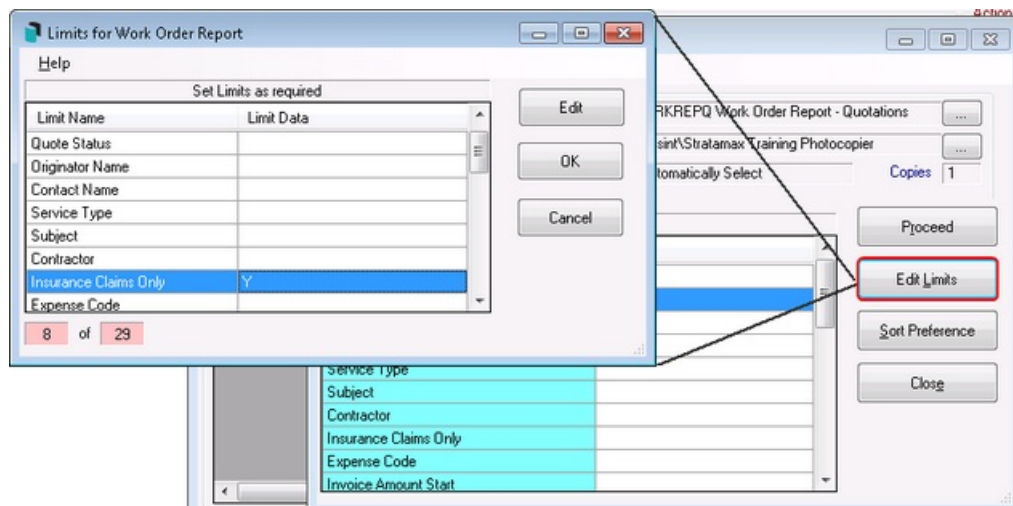
6. Double click the *Date Issued Start* and enter date (i.e. start of month).
7. Double click the *Date Issued Finish* and enter date (i.e. end of month).
8. Double-click the *Work Orders/Quotes* field and type 'Q' to limit the report to quotes only.
9. Click *OK*.
10. Click the ellipsis [...] button to the right of the *Template* field. Select the required report then click *Select as Global* and click *Close*.
11. Click *Proceed*.



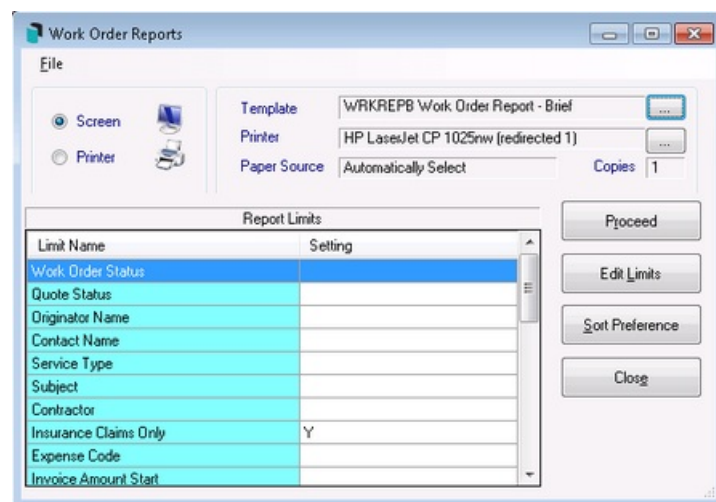
Legacy Not Finalised Work Orders Report

Similar reports can be run monthly to tidy up any jobs that have not yet been finalised. There may be requirements to print a report on a monthly basis to show jobs that were insurance claims. Template suggestion for this type of report is WRKREPB. It is recommended to use **Search Work Orders** or **Search Quotes** for a faster, custom built report that can be added to a dashboard as outlined at the top of these instructions.

1. Open the **TaskMax** menu.
2. Select *Reports*.
3. Click *Edit Limits*.
4. Double click inside the *Insurance Claims Only* field and enter Y click *OK*.



5. Double click the *Date Issued Start* and enter date (i.e. start of month).
6. Double click the *Date Issued Finish* and enter date (i.e. end of month).
7. Optionally, double-click the *Work Orders/Quotes* field and type either 'W' or 'Q' to limit the report to work orders or quotes only.
8. Click *OK*.
9. Click the ellipsis [...] button to the right of the *Template* field. Select the required report then click *Select as Global* and click *Close*.
10. Click *Proceed*.

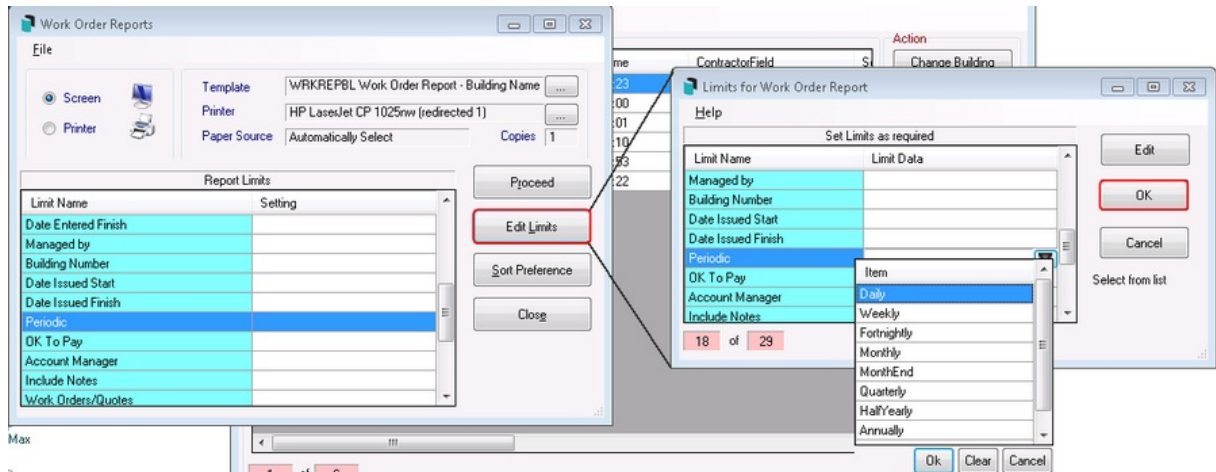


Periodic Work Orders Report

A report showing periodic work orders to be processed for the upcoming month may be beneficial. Template suggestion for this type of report is WRKREPBL. It is recommended to use **Search Work Orders** or **Search Quotes** for a faster, custom built report that can be added to a dashboard as outlined

at the top of these instructions.

1. Open the **TaskMax** menu.
2. Click *Reports > Reports*.
3. In the *Reports* window, click *Edit Limits*.
4. Double click the *Work Order Status* field and tag *F-Periodic*, click *OK*.



5. Double click the *Date Issued Start* and enter date (i.e. start of month).
6. Double click the *Date Issued Finish* and enter date (i.e. end of month).
7. Double-click the *Work Orders/Quotes* field and type 'W' to limit the report to work orders only.
8. Click *OK*.
9. Click the ellipsis [...] button to the right of the *Template* field. Select the required report then click *Select as Global* and click *Close*.
10. Click *Proceed*.

TaskMax Report Troubleshooting

A message may appear 'You have selected too many entries to report on' Either:

- Click *OK* to proceed and produce a partial report of the first 5000 entries.
- or
- Click *Cancel* to refine the report criteria and try again, which is recommended.
- Use **Search Work Orders** or **Search Quotes** to use a faster more efficient search in defining results that can be custom built. Instructions for this are available in the top of this article.