

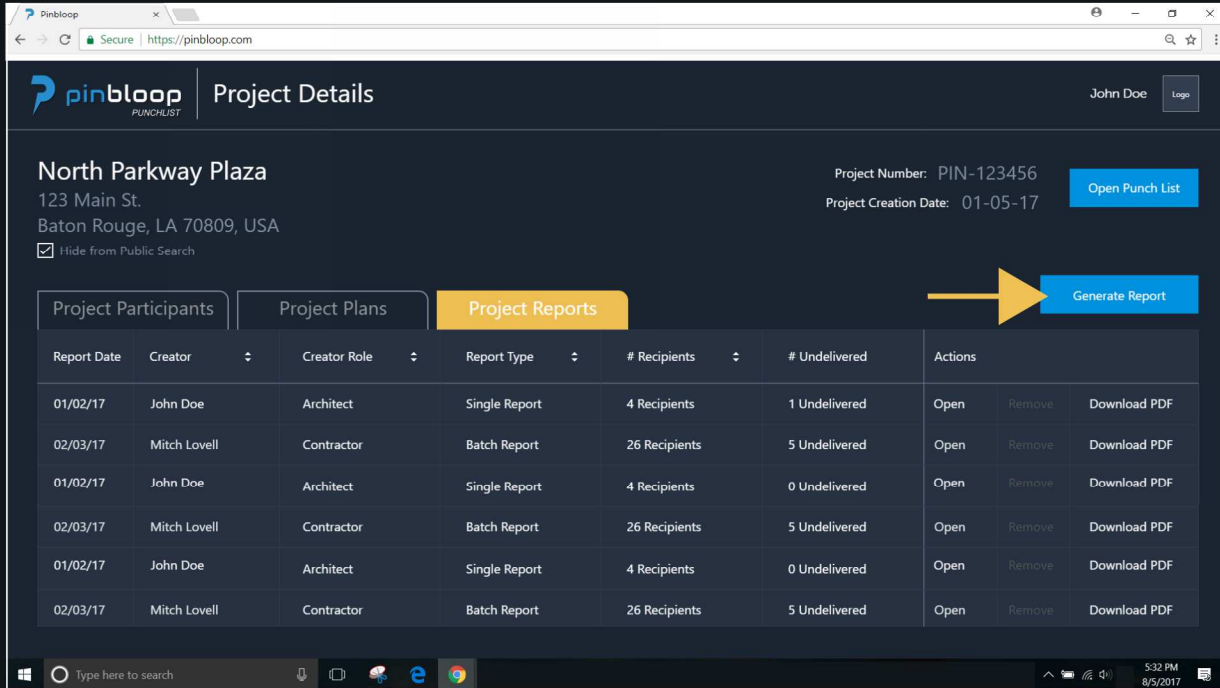
# How To PDF Guide - Web App

## Generate Project Reports

Batch Reports i.e. \*General Contractor to Sub-Contractors\*

### Step 1:

Navigate to the Project Reports tab and Click on "Generate Report"

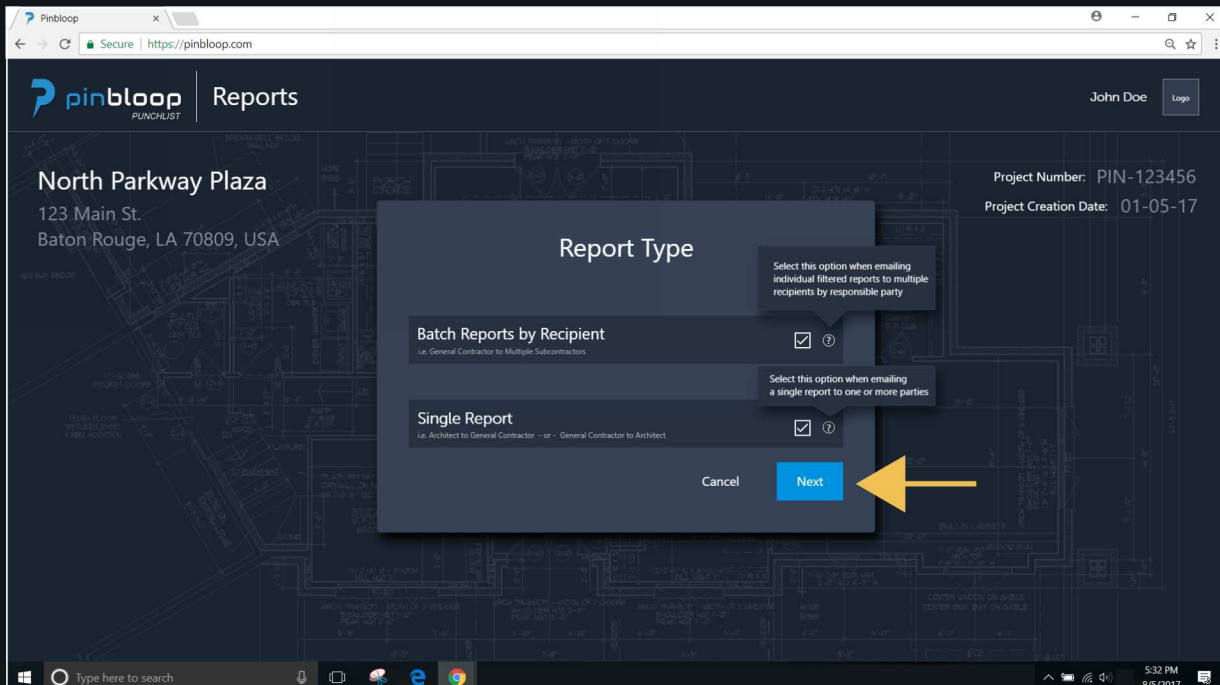


The screenshot shows the Pinbloop web application interface. The page title is "Project Details" for "North Parkway Plaza" (123 Main St., Baton Rouge, LA 70809, USA). The project number is PIN-123456 and the creation date is 01-05-17. The "Project Reports" tab is selected, and a yellow arrow points to the "Generate Report" button. Below the tab is a table of reports:

Report Date	Creator	Creator Role	Report Type	# Recipients	# Undelivered	Actions
01/02/17	John Doe	Architect	Single Report	4 Recipients	1 Undelivered	Open Remove Download PDF
02/03/17	Mitch Lovell	Contractor	Batch Report	26 Recipients	5 Undelivered	Open Remove Download PDF
01/02/17	John Doe	Architect	Single Report	4 Recipients	0 Undelivered	Open Remove Download PDF
02/03/17	Mitch Lovell	Contractor	Batch Report	26 Recipients	5 Undelivered	Open Remove Download PDF
01/02/17	John Doe	Architect	Single Report	4 Recipients	0 Undelivered	Open Remove Download PDF
02/03/17	Mitch Lovell	Contractor	Batch Report	26 Recipients	5 Undelivered	Open Remove Download PDF

### Step 2:

Select Report Type "Batch" using the check boxes and Click "Next"



The screenshot shows the Pinbloop "Reports" page for the same project. A "Report Type" dialog box is open, allowing selection between "Batch Reports by Recipient" and "Single Report". Both options are checked. A yellow arrow points to the "Next" button.

**Report Type**

- Batch Reports by Recipient**  
i.e. General Contractor to Multiple Sub-contractors  
Select this option when emailing individual filtered reports to multiple recipients by responsible party
- Single Report**  
i.e. Architect to General Contractor - or - General Contractor to Architect  
Select this option when emailing a single report to one or more parties

Cancel **Next**

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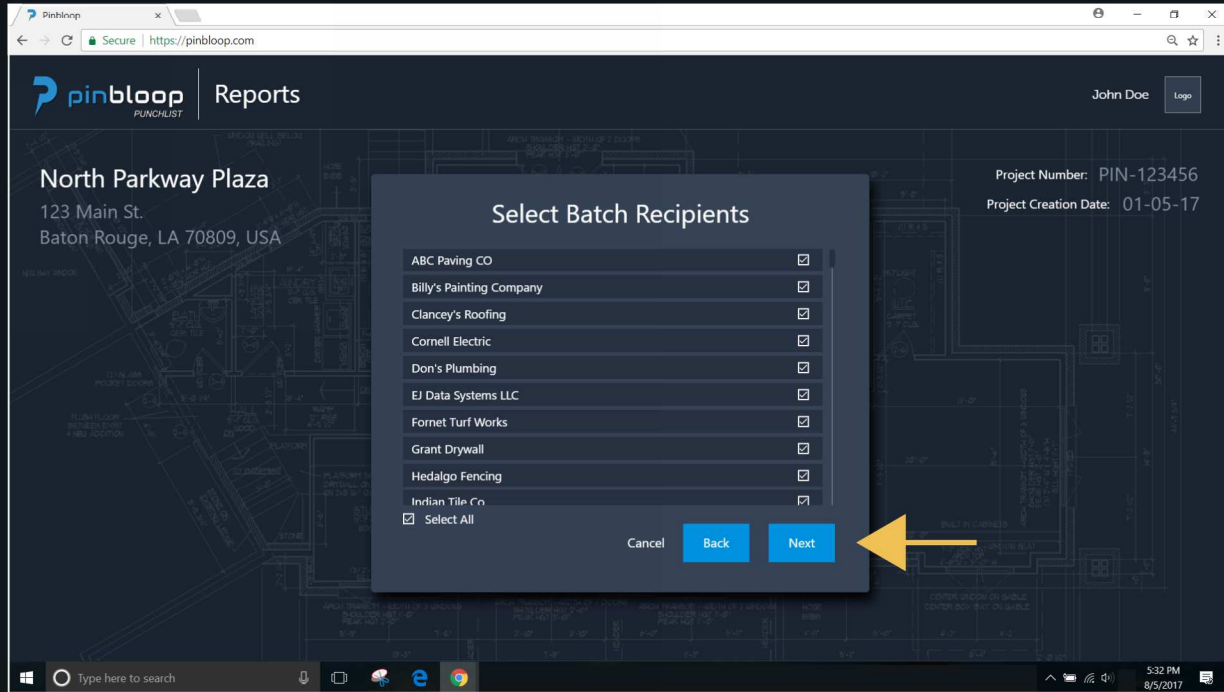
## Generate Project Reports

Batch Reports i.e. "General Contractor to Sub-Contractors"

### Step 3:

Select the Recipients you wish to receive a report, and click Next.

Recipients will receive a report with only the items they have been assigned to.

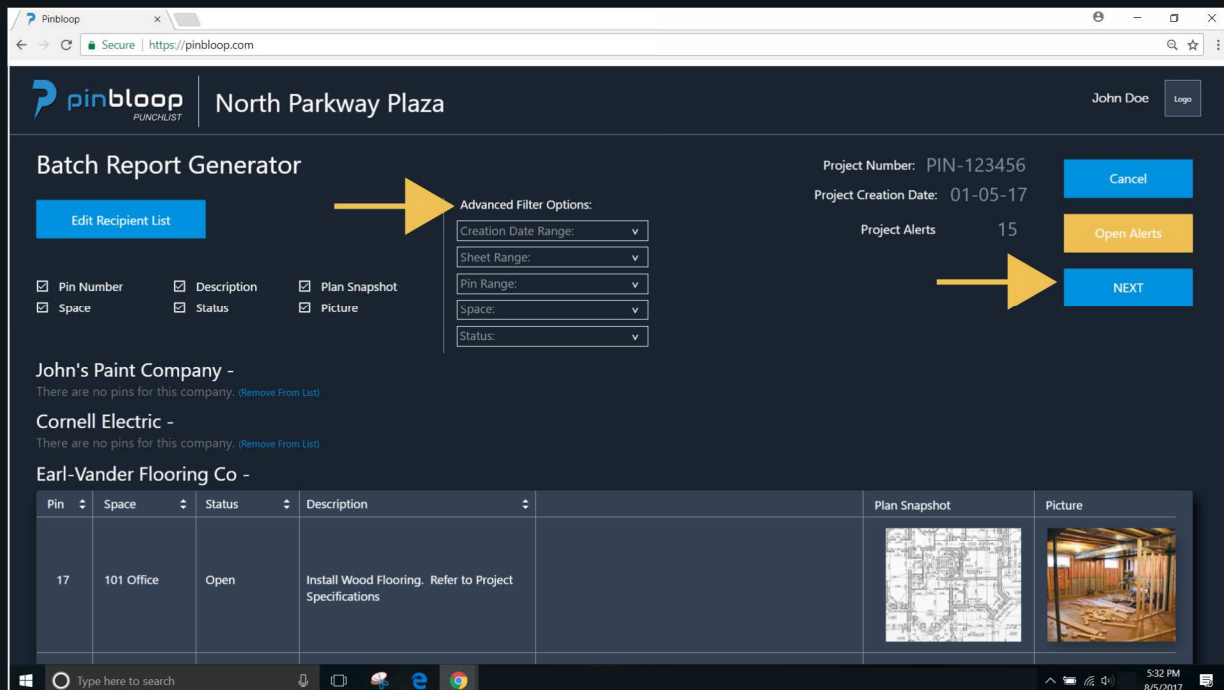


### Step 4:

Filter using advanced filter options and check boxes, then click Next.

Project Alerts can be Opened here.

Recipients can be removed here.



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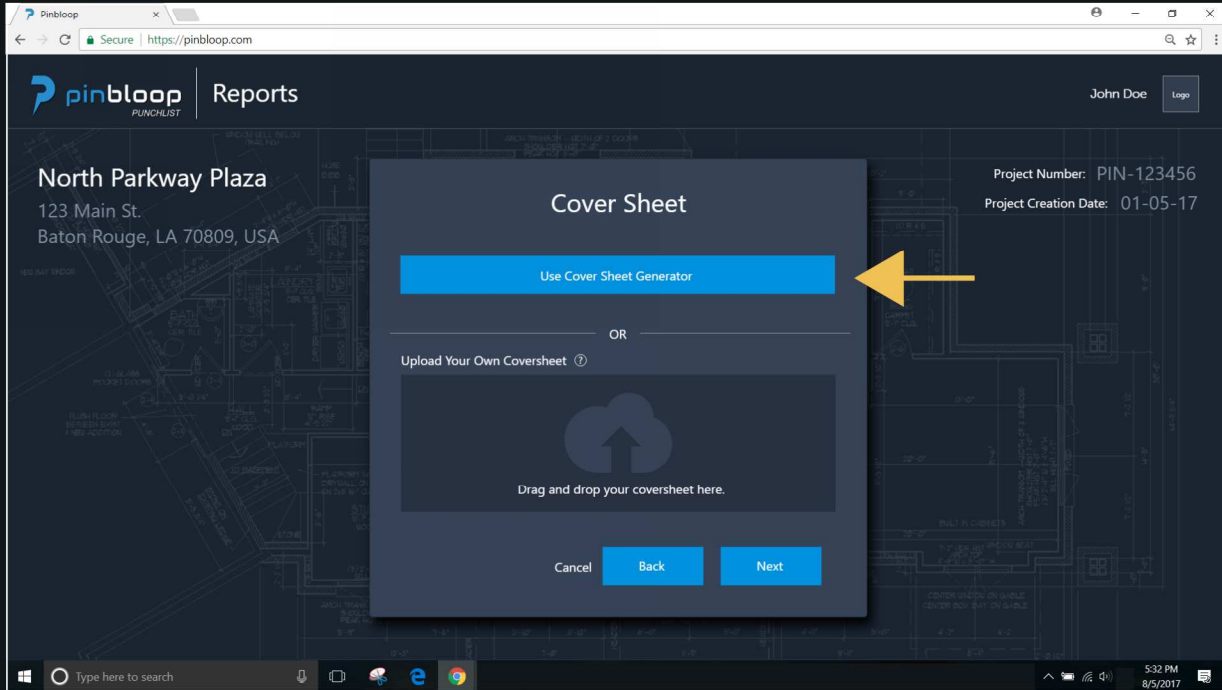
## Generate Project Reports

Batch Reports i.e. "General Contractor to Sub-Contractors"

### Step 5:

#### Select Use Cover Sheet Generator or Upload your own Coversheet

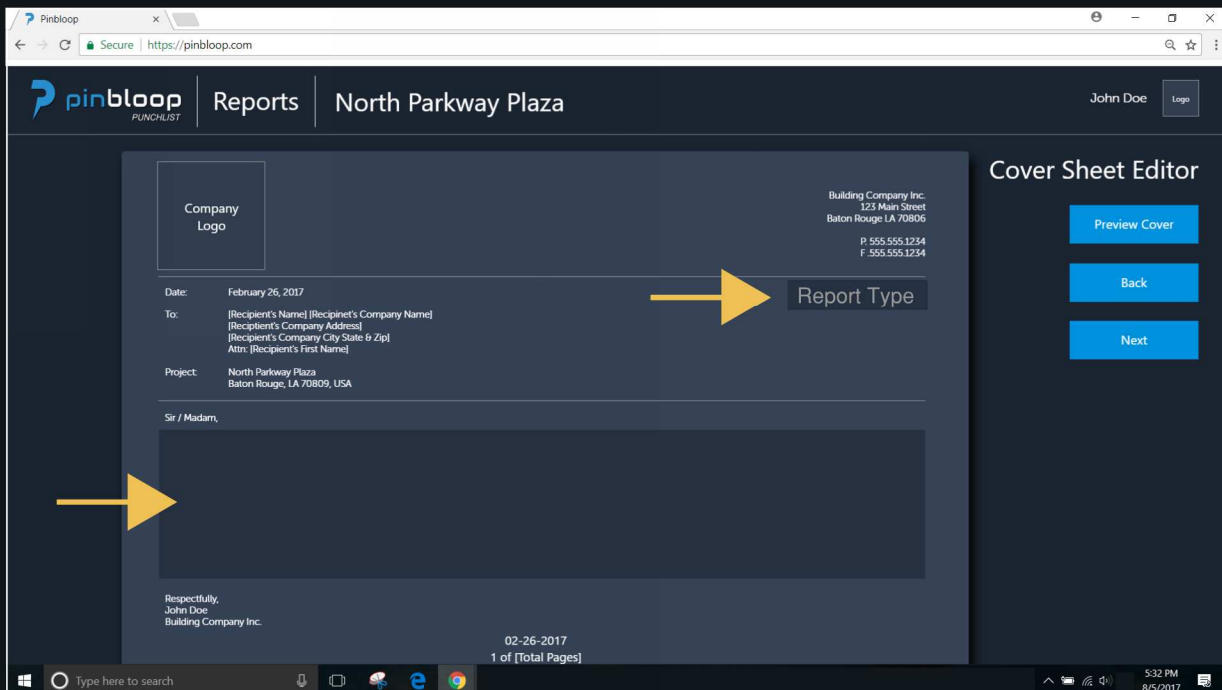
Cover Sheet Generator will create an instant cover sheet for your project. All project information will be automatically generated for you. Upload your own Cover Sheet if you need to.



### Step 6:

#### Enter text in the available field and click Next.

User can Preview Cover Sheet before continuing.



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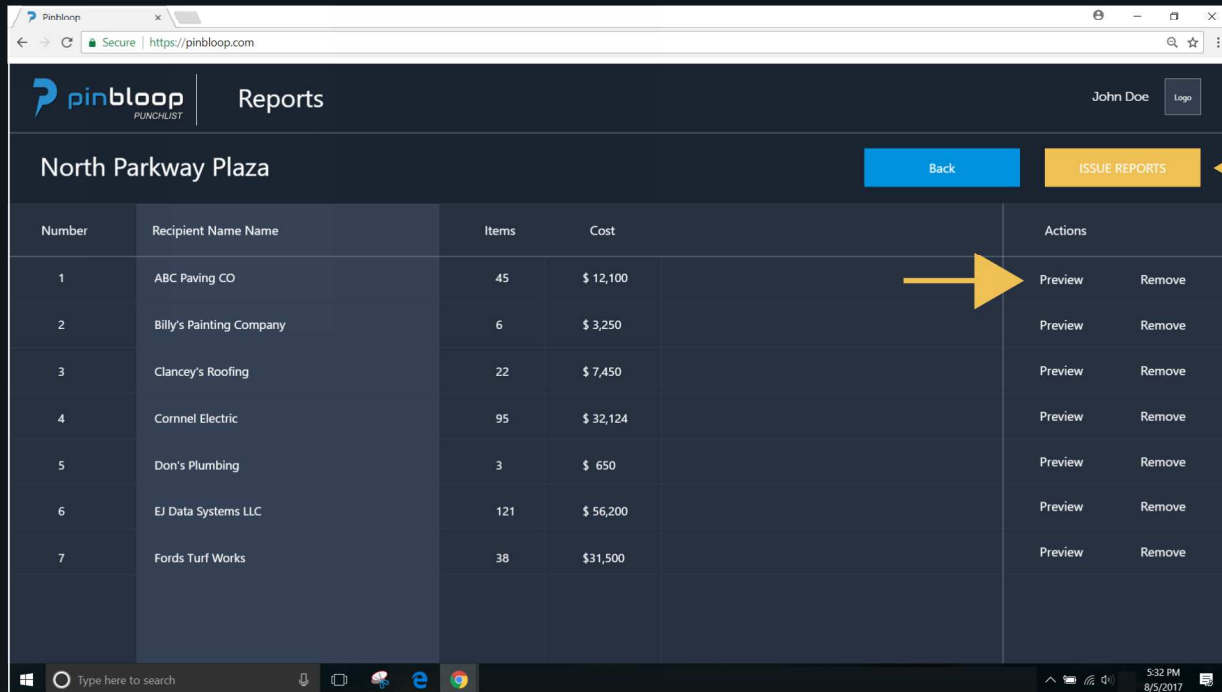
## Generate Project Reports

Batch Reports i.e. \*General Contractor to Sub-Contractors\*

### Step 7:

#### Confirm Recipients and click Issue Reports.

Select Preview to view the Report prior to issuing the report.



North Parkway Plaza

Number	Recipient Name Name	Items	Cost	Actions
1	ABC Paving CO	45	\$ 12,100	Preview Remove
2	Billy's Painting Company	6	\$ 3,250	Preview Remove
3	Clancey's Roofing	22	\$ 7,450	Preview Remove
4	Cornel Electric	95	\$ 32,124	Preview Remove
5	Don's Plumbing	3	\$ 650	Preview Remove
6	EJ Data Systems LLC	121	\$ 56,200	Preview Remove
7	Fords Turf Works	38	\$31,500	Preview Remove

### Step 8:

Reports are generated by the system and are automatically sent to each recipient via their email address. A link is provided for each recipient to download a PDF of the report.

Reports that are issued are available to view or download in the Project Details page under the Reports Tab.

