# VARCBase Practice Management

**Run Your Business Instead of It Running You! ™**

**Designed for QuickBooks ProAdvisors, Bookkeepers, Small Business Consultants, CPA/Accountants, and IT Managed Service Providers.**

## Contents



# VARCBase Practice Management

# USER GUIDE

## Welcome

VARCBase Practice Management is a very powerful Practice Management system and CRM enabling you to enter client data and your business services to manage your business more easily and effectively.

VARCBase Practice Management can:

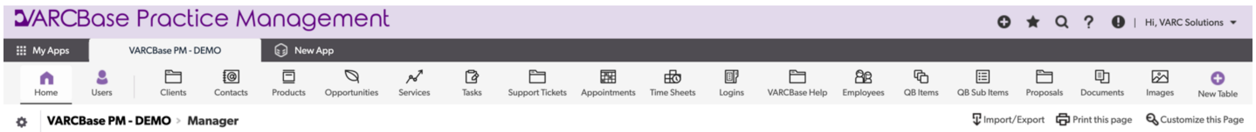
- **Empower your Sales Staff** - Give your salespeople a system that keeps them up to date on who to call, when to call, and why they are making the call, i.e., initial sales call, follow-up call, or schedule an appointment, etc.
- **Access Client Data** - Track your clients and prospects from first contact with your firm. Then, track the QuickBooks version and all of the add-on services you'll quote or provide them. You'll have all of their information at your fingertips.
- **Track New Prospects** - What products do they need?  What additional services will they need in the future, etc.?
- **Record Firm Data** - Create, track, and update information essential to the smooth functioning of your firm; i.e., that phone number or link you keep losing.
- **Record Login Data** - Track & access client login/password data from anywhere, anytime, and protect this information using roles and permissions.
- **Track Client Tasks** - Track ongoing activities being performed by your firm, such as bookkeeping tasks, support calls, onsite visits, etc.
- **Track Billable Time** - Track billable time for you and your employees, including onsite client visits, support calls, consulting and training calls, etc., and import timesheets into QuickBooks.

VARCBase Practice Management allows you to see daily activity even while you or your staff are working offsite, which also helps with accountability.

Notes are date/time stamped with the recorder's name and are logged for a permanent record. Activities for that day/week/month easily retrievable. The status of proposals, activities, and appointments are also easy to see. VARCBase Practice Management allows you to enter client passwords and access them from any location (home, office, client location, on the road).

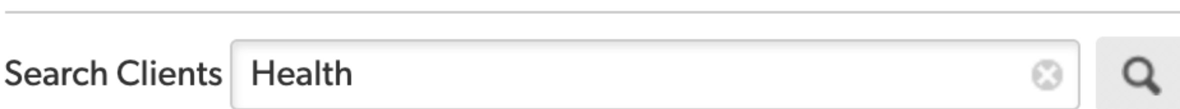
## Dashboard

The Dashboard provides access to all of the system's functions, and is the first screen you see after logging in. The Dashboard home page and listed tables are customizable for each Role. The color scheme or style is also customizable for your company.




User **Roles** include Owner/Manager, Client Support, Office Staff, and Sales. Dashboards can be customized to fit your company's needs.

The **Home** page provides a search bar for quick access to clients or logins. Just type in the first few letters of a customer's name and click the search button to find clients beginning with those letters. Type the client's whole name to narrow your search.




Clients contains 'Health': 11 Clients

| Status | Business Name | Billing Contact | Billing Phone | Billing E-Mail |
|---|---|---|---|---|
| Client | Axctrwu Care Health | Dean Bohan | (291) 951-5500 | sstrait@pdll.net |
| Client | Central Health Care | Diana Carter | (215) 910-9200 | rese@angeyinagreup.cem |
| Client | Family Healthcare Services | Rhonda Mobley | (215) 922-2242 | Rhonda@familyhealthservices |
| Client | Health Claimxc Pluxc | William Green | (409) 995-5055 | kim@opeekkeepergiry.cem |
| Client | Home Healthcare | Moore | (215) 422-2290 | moore@homehealthcare.com |
| Client | Hwurizwun Health | Bruce Guminey | (291) 252-0519 | kentsaydana@sopcgyeopay.net |
| Client | Hwuuxctwun Healthcare | Gutiererez | (125) 456-2990 | kenny@cheetahtranspertatien.net |
| Client | Intercede Health | Arnold Heller | (215) 456-9200 | jhh@fyewtrend.com |

VARCBase Practice Management includes 3 standard dashboards:

The **Manager Dashboard** provides an overview of the whole company. It gives the owner or business leader a list of new clients, upcoming appointments, and clients that need a check-in call, as well as charts to represent clients by version or product, and the real-time status of support tickets. The dashboard also includes quick access buttons to create new entries and access other helpful information.

The **Sales Dashboard** includes reports helpful for sales and high-touch client communications, such as Weekly – Follow-Up With New Clients, Weekly – Over 90 Day Calls, and an Appointment Calendar. The Weekly - Follow-Up With New Clients report shows clients with a status of “New Client” to help check in during the early stages of working with a new client. The Weekly - Over 90 Day Calls report sets VARCBase Practice Management apart from other CRMs. It lists clients that have not been seen in 45 days and have not been talked to in the last 75 days. The purpose is to make sure each client is touched or called at least every 90 days.

The Sales Dashboard also includes a client search box to make finding a particular client easy, and quick access buttons to create new entries and access other helpful information.

The **Support Dashboard** shows My Open Tickets, My Open Tasks, My Appointments, and Upcoming Appointments, as well as a Support Graph showing each technician and their status, and a list of all open tasks to be completed. The “My” reports are filtered for the particular user currently logged in.

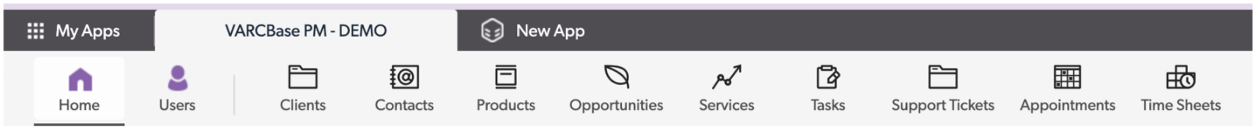
The Support Dashboard also includes a client search box to make finding a particular client easy, a client Logins search box, and quick access buttons to create new entries and access other helpful information.

## Menu Bar

The Menu Bar allows you to easily Add records, show Favorite reports, Search records, access Help, and view Alerts.

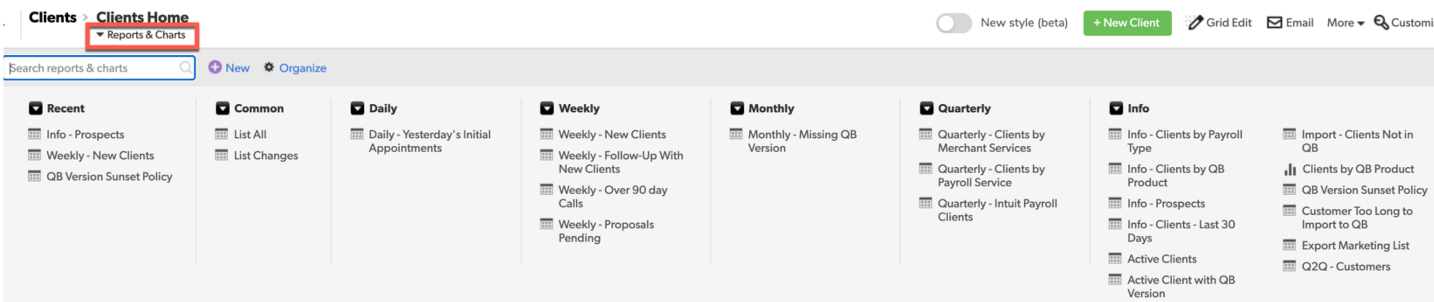

## Tabs

Tabs guide you through your business operations, providing direct access to Clients, Contacts, Logins, Services, Tasks, Support, Appointments, Employees, and Time Sheets.




## Reports

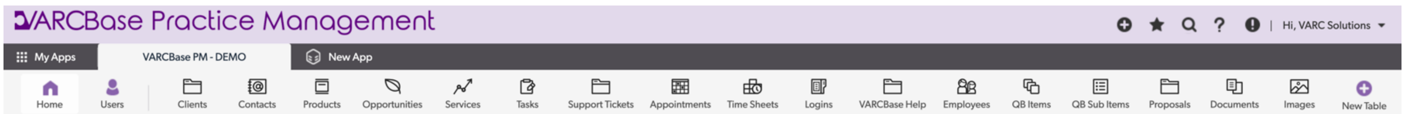
Under each Tab is a list of pre-defined reports. Reports can be edited to meet your needs, and additional reports are easy to create.



## Tabs Overview

VARCBase Practice Management includes tabs across the top of the screen for the various information and activities you'll be managing in your business. The system is scalable to include additional tabs as your business grows or diversifies. The following is an overview of standard tabs.

### Clients, Contacts, Products, Opportunities, Services, Tasks, Support Tickets, Appointments, Timesheets, Logins, VARCBase Help, Employees




1. **CLIENTS** tracks relevant data related to your clients, such as business name, primary billing contact info, address, and referral source. This is also where new client or prospect records are created.

2. **CONTACTS** tracks additional contacts related to your clients. For example, you might add the president, office manager, or CPA for a given client as an additional contact. When adding a contact, you'll first select the related client. Or, if you add a contact directly from a Client record, the related client will be filled in for you.

3. **PRODUCTS** are where you list the products or services your firm provides. For example, if you are a QuickBooks reseller, you might have a product for QuickBooks Premier, Enterprise, or Online. If you provide Consulting services, you might have a Product for the type of consulting you provide. If you provide software integrations, you might have a product for the software application you integrate.

4. **OPPORTUNITIES** represent the work being proposed to your clients and prospects. Opportunities help you track the sales status, such as Open - New, Open-Quoted, Closed - Won, or Closed - Lost. This makes it easy to see a list of open or closed opportunities, or won vs lost opportunities.

5. **SERVICES** represent the work being done and invoiced to your clients. For example, if you won an opportunity to provide consulting to your client, you would add a service record to invoice them for consulting work within that won opportunity.

6. **TASKS** captures your recurring or ad-hoc activities for a client, the assigned to, period, and date due.

7. **SUPPORT TICKETS** monitors client support tickets or incidents. Keep track of important information like when the ticket was called in, what the issue is, who it's assigned to, and the status. Log timesheets against Support tickets for future billing.

8. **APPOINTMENTS** are used for scheduling time for you and your employees. Calendar reports give you visibility to meetings for today, this week, and this month.

9. **TIMESHEETS** track time spent by you or your employees working on a particular ticket or task. Employees can add their time along with their billable or non-billable status. You can also import timesheets into QuickBooks for payroll or client invoicing.

   Employees can also add timesheets while reviewing support tickets and tasks. At the bottom of a support ticket or task, click '**Add Time Sheet**' to create a new time sheet.

10. **LOGINS** securely stores passwords needed to access you clients data files, online accounts, remote computers, bank records, or other services. Add as many logins per client as needed.

11. **VARCBase Help** allows you to request help, enhancements, or customizations to your VARCBase Practice Management application. Adding a help entry notifies our staff of your request.

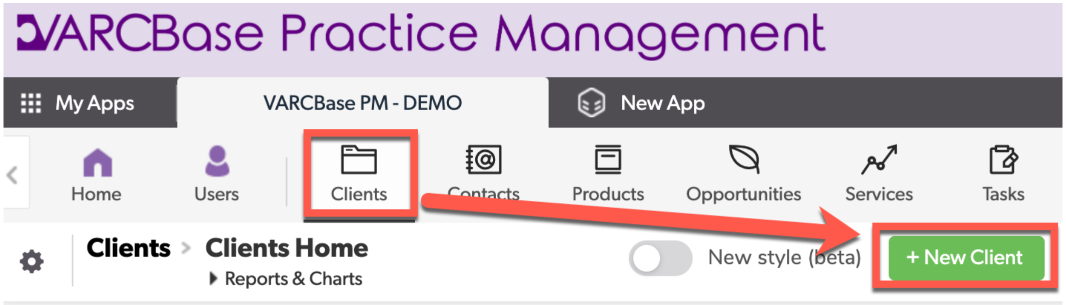
12. **EMPLOYEES** is a place to enter and manage the employees or contractors working in your business, and those employees that are assigned to support tickets, appointments, and timesheets.

## Using VARCBase Practice Management

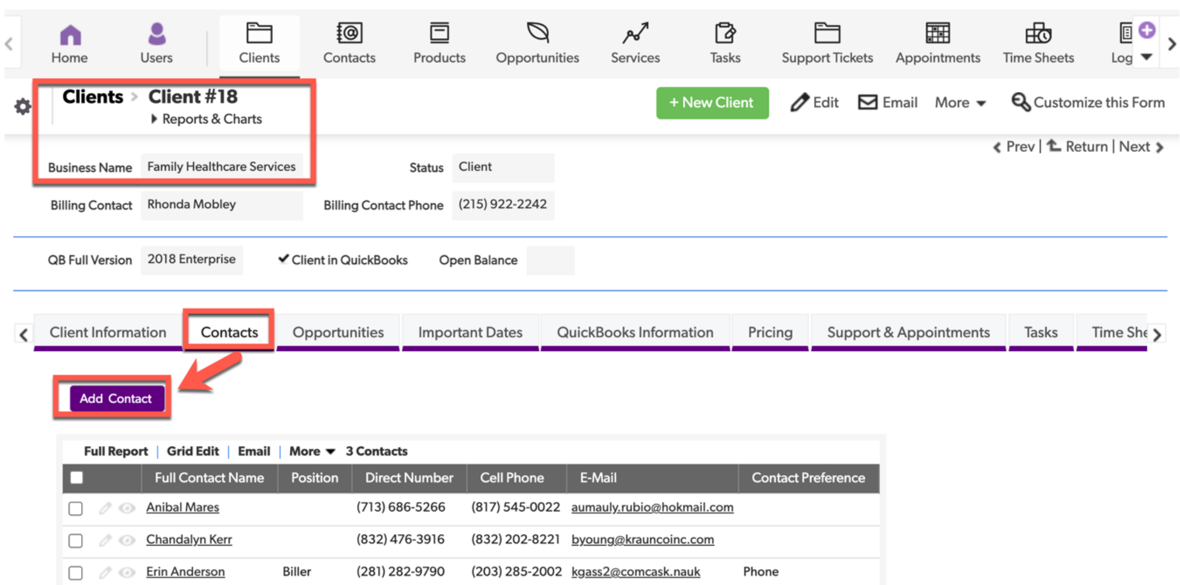
Let's explore the day-to-day use of the system, such as creating new clients, tracking sales opportunities, and supporting clients with appointments, support tickets, tasks, and keeping track of your time.

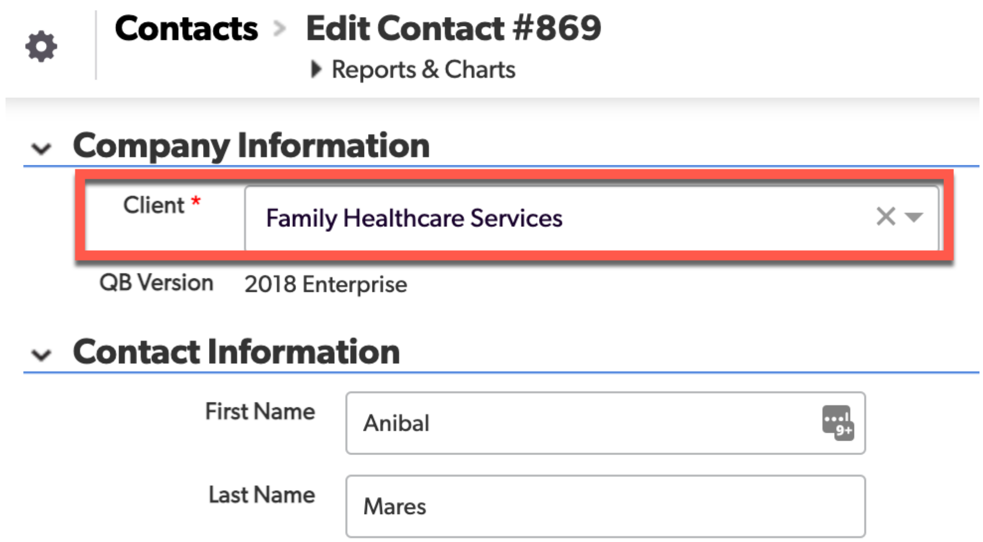
## Add New Record (Two Ways)

1. For each Tab, you can add new entries by clicking the Tab name, then click the New… button.




2. In many cases, it's better to add a new record from a record you want the new record related to. For example, to add a Contact related to an existing Client, first open the Client record, then go to the Tab within the form, and click the Add button. VARCBase Practice Management automatically makes the association between the records to keep things organized.



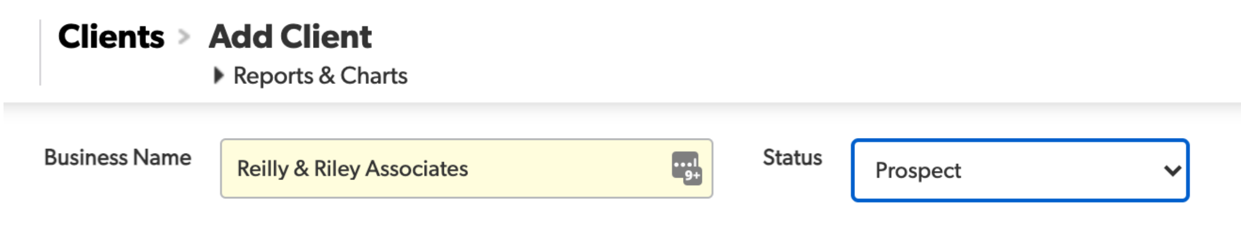



## Add A New Client

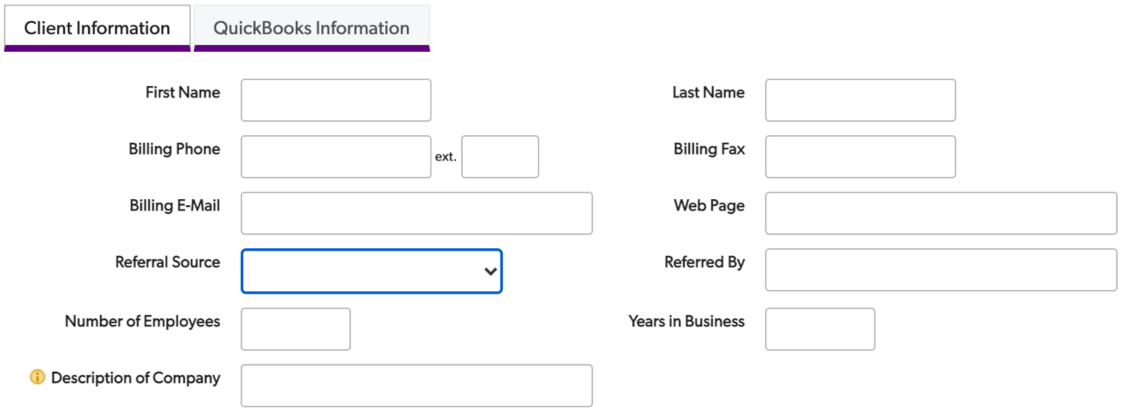
Clients are the people or businesses that you sell product to or perform services for. For each client, you can track relevant information such as business name, primary billing contact info, address, and referral source.

1. From the **CLIENTS Tab**, click **New Client**. This opens the **Add Client** screen, where you can enter relevant client details.


2. Enter a **Business Name** and select a **Status**, such as Prospect, New Client, Etc. The status is used to filter various reports for better organization.

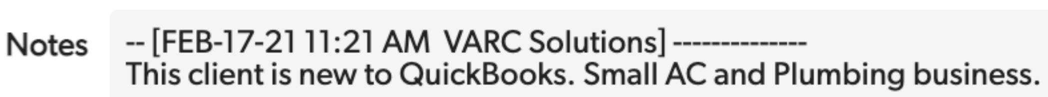


3. In the **Client Information** tab, enter contact, phone, email, and other relevant information.

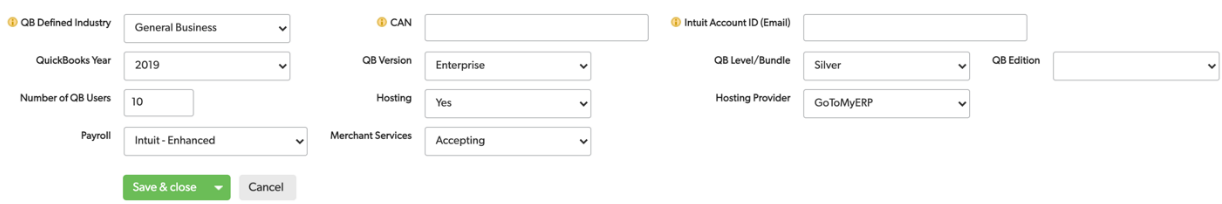



4. Below **Addresses and Notes**, enter the Physical and/or Mailing address for the client. Check **Mailing Same as Physical** to copy the **Physical** address to the **Mailing** address.

5. Use **Notes** to enter additional information not captured in an another field. This field can be updated at any time. Be aware that once this data is saved, the logged entry can't be deleted or changed. Notes are date/time stamped along with the user who entered the note. If you consistently need another field for specific information, submit a Help request.




6. The **QuickBooks Information** tab tracks important information about the QuickBooks software your client uses.

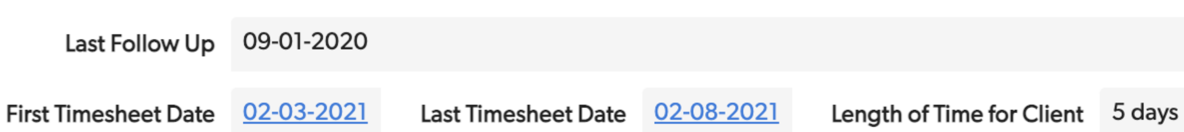



- The **QB Defined Industry** is a drop-down list of industries the client may be in, and may be different than the QB Edition. For example, a client may be in the Retail industry, but could be using the General Business edition of QuickBooks.
- **CAN** is the customer account number with Intuit.

- **Intuit Account ID (Email)** is the primary intuit account login email for the client.
- **QuickBooks Year** is the release year of the intuit product.
- **QB Version** is the Intuit product used by the client.
- **QB Level/Bundle** is the level or bundle of the Intuit product used, such as Gold, Platinum, etc.
- **QB Edition** is the QuickBooks industry-specific edition being used.
- **Number of Users** corresponds to the number of licenses the user has.
- **Hosting** is a Yes or No entry to indicate if the client uses a hosted (aka Cloud) version of the desktop QuickBooks software.
- **Hosting Provider** tracks the hosting provider if the client is using QuickBooks hosting.
- The **Payroll** field tracks the payroll service the client is using.
- The **Merchant Services** field tracks whether your client accepts cards for payment and/or where they are at in the approval process.

After you **Save & Close** the **Add Client** window, additional tabs are used to track additional information and ongoing work with the client.

7. The **Important Dates** tab conveniently displays the date of your last follow-up call, first timesheet, and last timesheet. As you use VARCBase Practice Management, these dates will automatically populate.

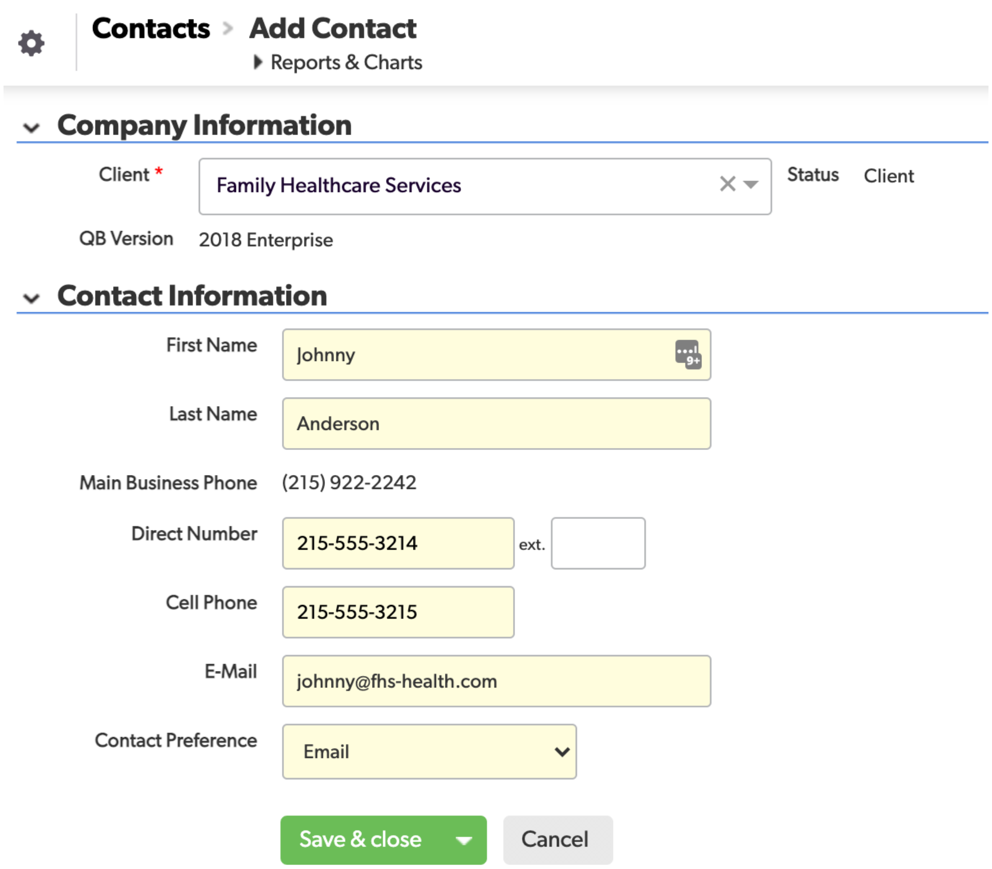


## Add a New Contact

Contacts are the people within a particular company you work with or need to communicate with. You might have one or many contacts at a given company. For example, you might add the Accounts Payable person for billing, the Owner or President for strategic conversations, a project manager for specific work projects, or even the company's internal bookkeeper, accountant, or CPA.

You can add a contact directly to the Contacts table, or open the client record and add a contact from there.

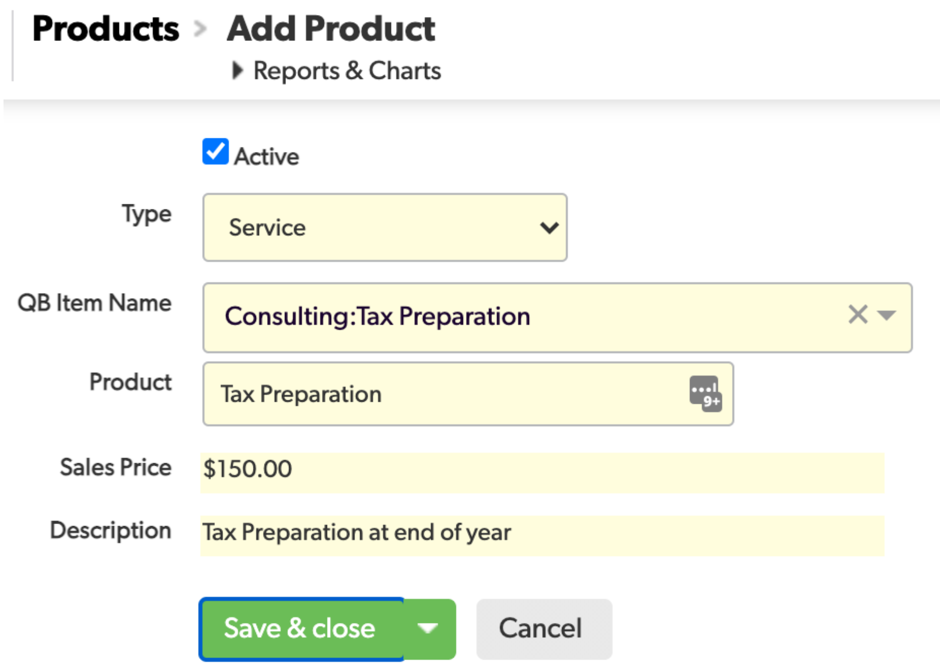
1. From the **Contacts Tab**, click **New Contact**. This opens the **Add Contact** screen, where you can enter relevant contact details. Or, open a client record from the **Clients** tab, click on the **Contacts** tab within the form, and click **Add Contact**.



### Add a New Product

Products are the products or services your firm provides. For example, if you are a QuickBooks reseller, you might have a product for QuickBooks Premier, Enterprise, or Online. If you provide Consulting services, you might have a Product for the type of consulting you provide, such as Bookkeeping, IT Consulting, or Tax Prep. If you provide software integrations, you might have a product for the software application you integrate, such as TSheets, Avalara, or SharePoint.

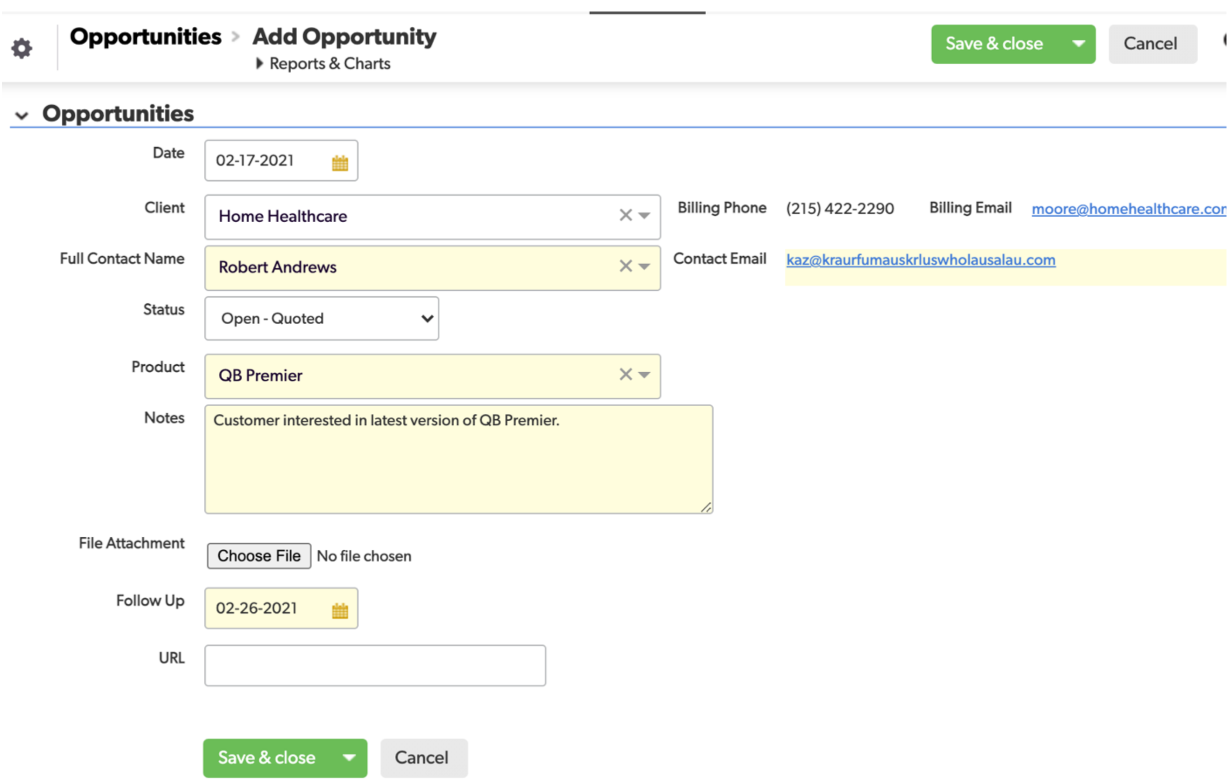
1. From the **Products Tab**, click **New Product**. This opens the **Add Product** screen, where you can enter relevant product details.



## Add a New Opportunity

Opportunities represent the work being quoted to your clients and prospects. Opportunities help you track the sales status, such as Open - New, Open-Quoted, Closed - Won, or Closed - Lost. This makes it easy to see a list of open or closed opportunities, or won vs lost opportunities.

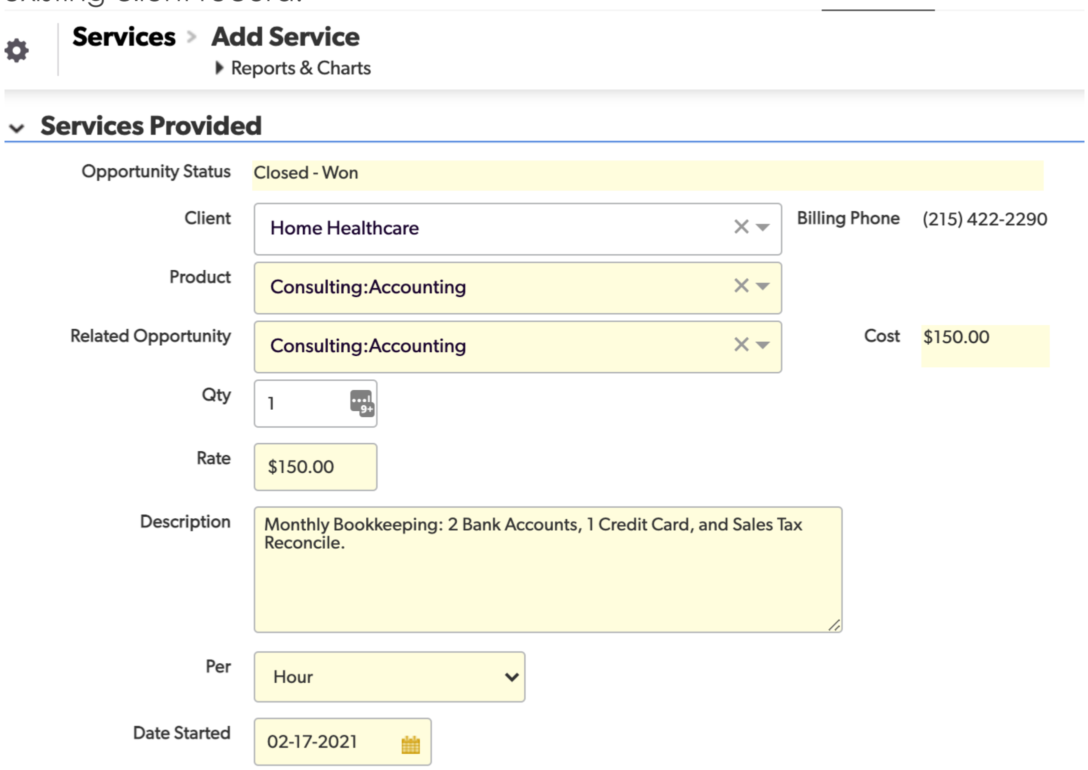
1. From the **Opportunities Tab**, click **New Opportunity**. This opens the **Add Opportunity** screen, where you can enter relevant opportunity details. Or, add an opportunity from an existing client record.



## Add a New Service

Services represent the work being done and invoiced to your clients. For example, if you won an opportunity to provide consulting to your client, you would add a service record to invoice them for consulting work within that won opportunity.

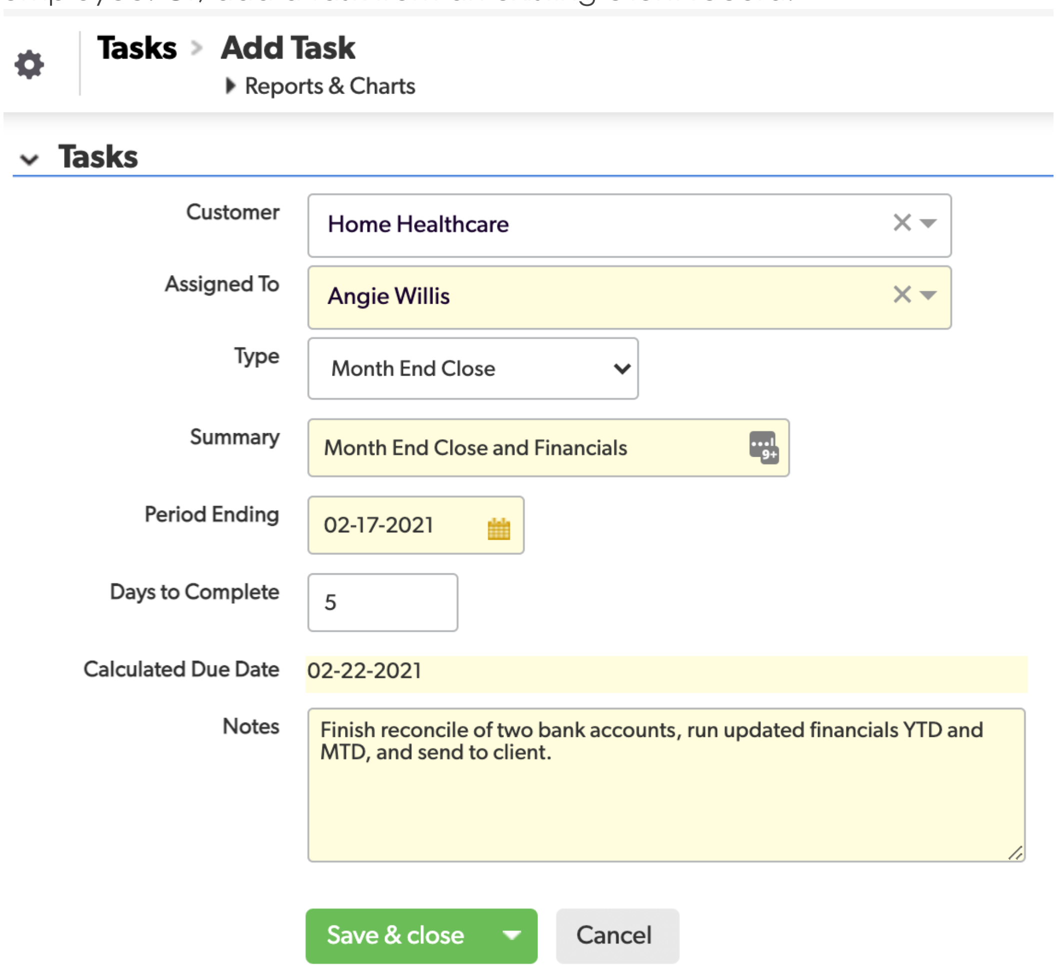
1. From the **Services Tab**, click **New Service**. This opens the **Add Service** screen, where you can enter relevant service details. Or, add a service from an existing client record.



## Add a New Task

Tasks capture your recurring or ad-hoc activities for a client, the assigned to, period, and date due. For example, you can use tasks to capture routine or even recurring bookkeeping activities such as a bank reconciliation. With status fields to track completed status and completion date, you can easily report on open or even past-due tasks.

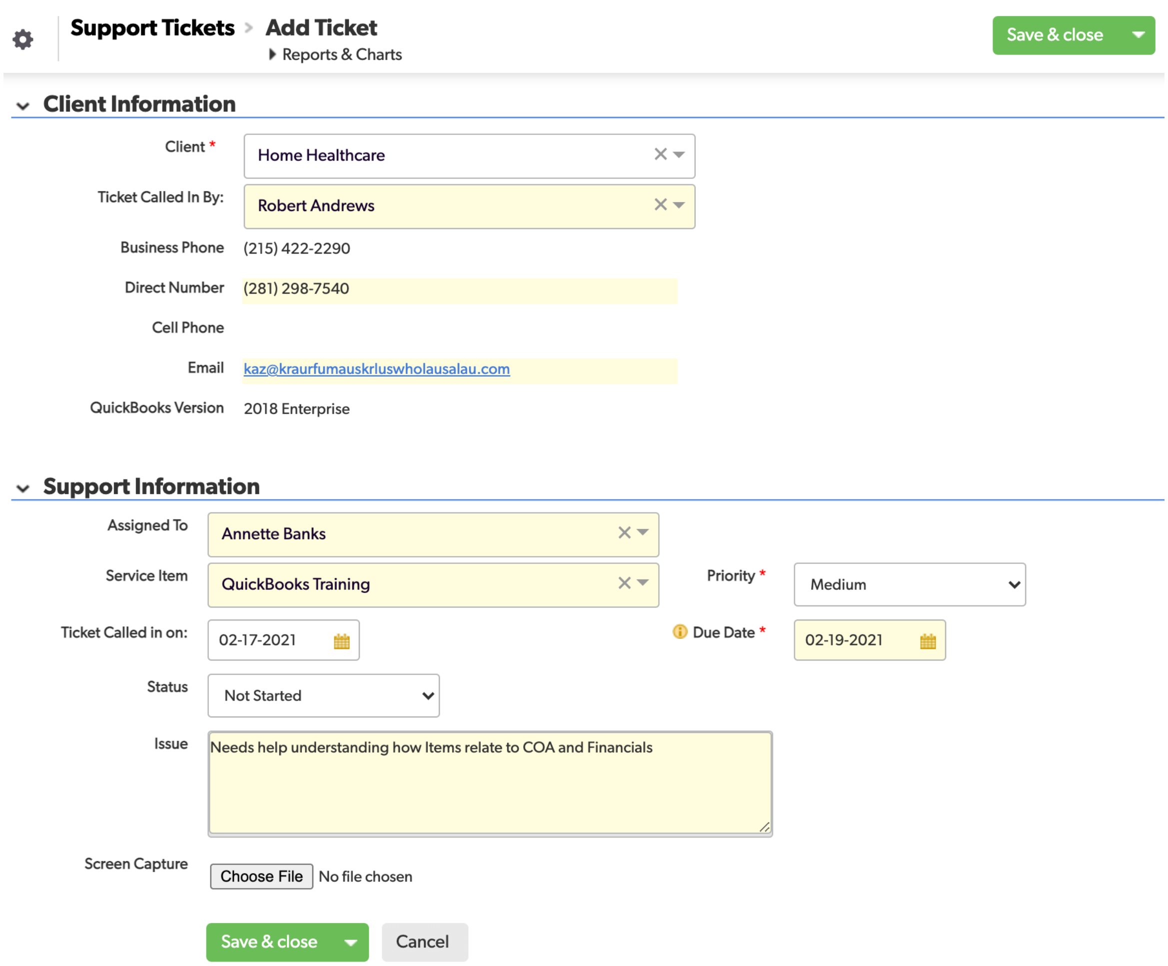
1. From the **Tasks Tab**, click **New Task**. This opens the **Add Task** screen, where you can enter relevant task details, and assign to yourself or another employee. Or, add a task from an existing client record.



## Add a New Support Ticket

Support tickets keep track of important "break/fix" incidents for your clients. Use support tickets to capture information like call in date, issue description, assigned to, and status. Log timesheets against the tickets for future billing.

1. From the **Support Tickets Tab**, click **New Support Ticket**. This opens the **Add Support Ticket** screen, where you can enter relevant ticket details, and assign to yourself or another employee. Or, add a Support Ticket from an existing client record. After you select a client, contact details will automatically appear for the clients phone and email address.

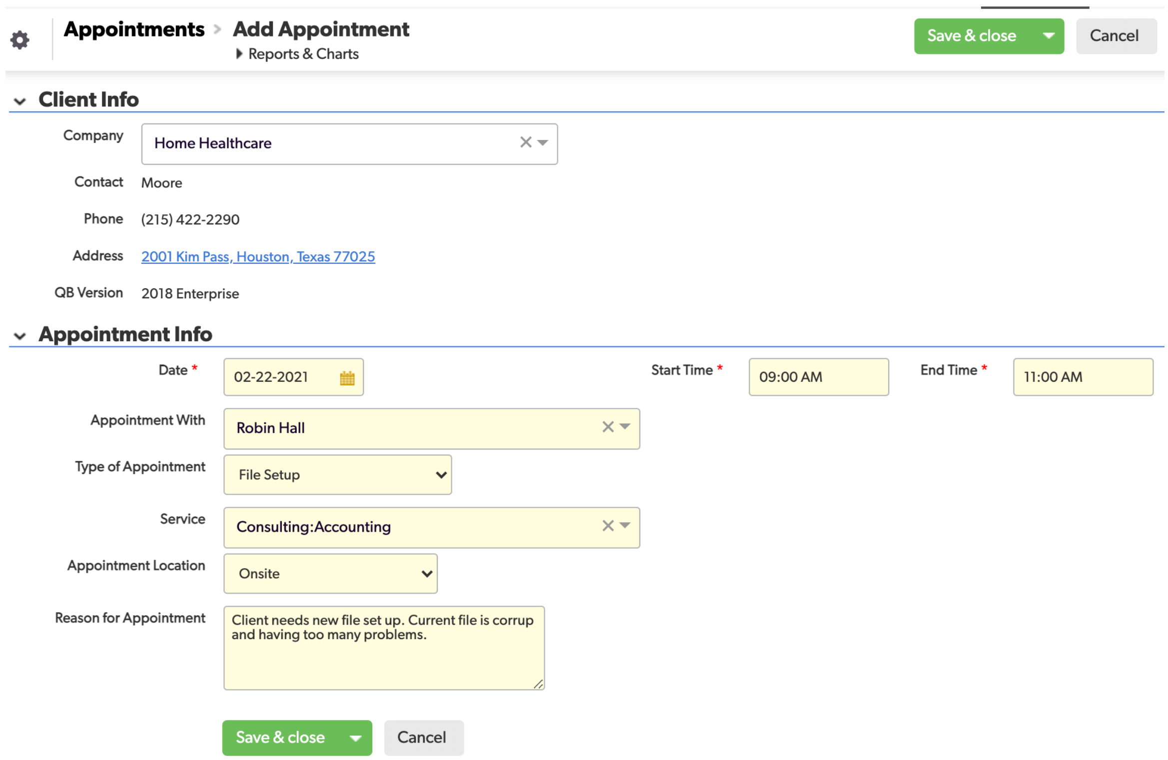



2. Select a ticket **Service Item** to help track and organize your work.
3. Assign a **Priority** to help prioritize work across all your clients.
4. Assign a desired Due Date, describe the issue, and if applicable, upload a picture or document as an attachment.

## Add a New Appointment

Appointments are used to schedule time for you and your employees. Use built-in reports to see upcoming appointments and appointments this month.

1. From the **Appointments Tab**, click **New Appointment**. This opens the **Add Appointment** screen, where you can enter relevant appointment details for yourself or another employee. Or, add an appointment from an existing client record.



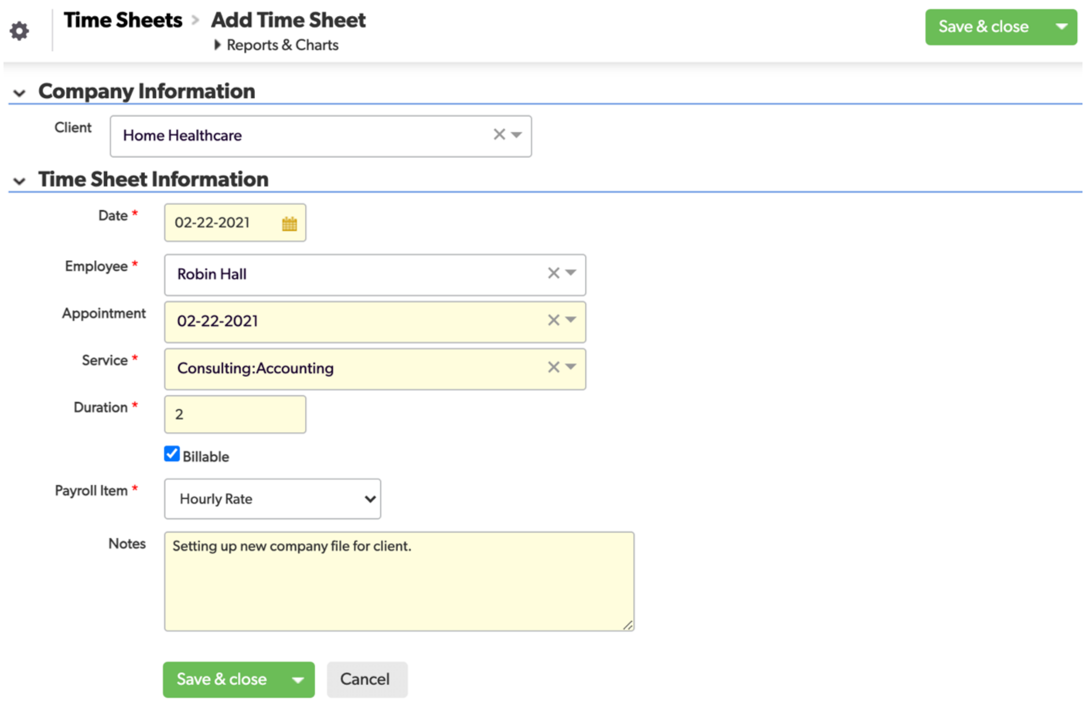

2. Enter the appointment **Date**, **Start Time**, **End Time**, and the employee the appointment is assigned to.

3. Enter the **Type of Appointment**, **Service**, **Location**, and **Reason for the Appointment**.

## Add a New Time Sheet

Track the time you or your employees spend on a particular task, appointment, or support ticket. Depending on the assignments in a given week, your employee might have one or more timesheets. There is no limit to the number of timesheets you can track. The key is to track the employee, client, and type of work in enough detail so you can pay employees appropriately for their time and invoice clients later for the work.

1. From the **Time Sheet Tab**, click **New Time Sheet**. This opens the **Add Time Sheet** screen, where you can enter relevant timesheet details for yourself or another employee.




2. If the timesheet is for a particular client, select a **Client** from the list.

3. Enter the Employee and work Date.

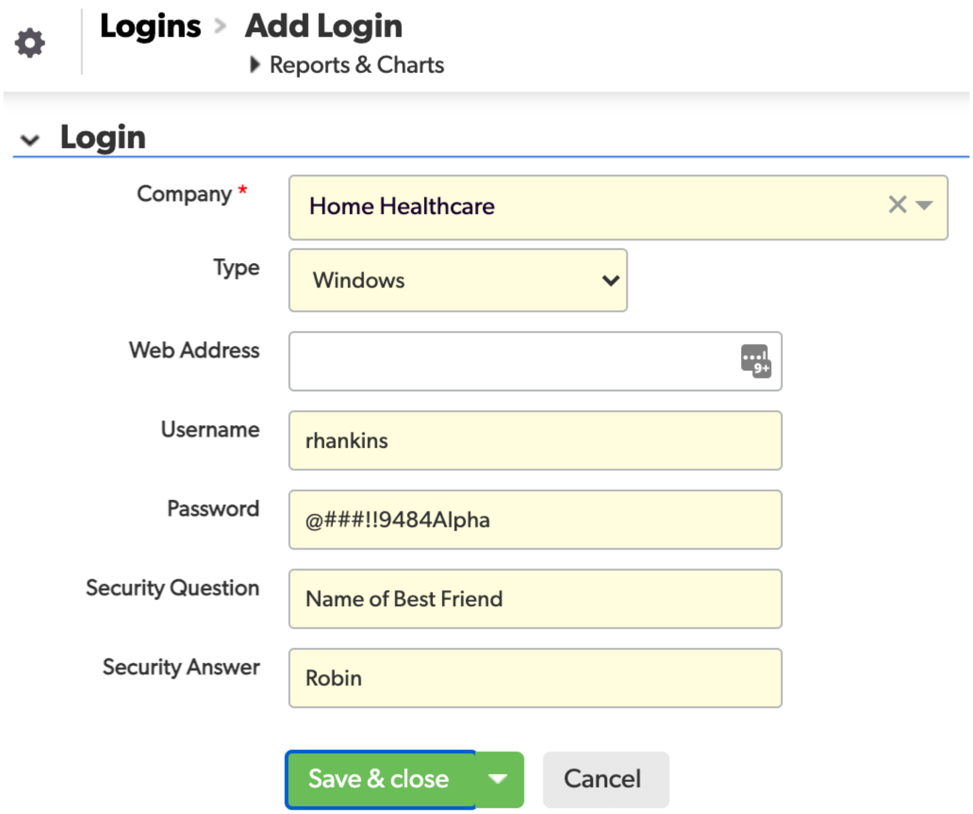
4. Enter the Service being performed, Duration, Billable status, Payroll Item, and Notes. Time can be entered as hours (1:00) or minutes (0:59).

5. Enter notes that will help you recall later what the work was about. This can also help if your client has a billing question later.

## Add a New Login

Logins capture key information needed to support your clients. For example, with your clients bank information, you can view or download statements needed to reconcile bank accounts without client intervention.

1. From the **Logins Tab**, click **New Login**. This opens the **Add Login** screen, where you can enter relevant client login details.




2. Select the client you want to record a login for. The red asterisk indicates this is a required field.

3. Select a **Type** from the drop-down list, such as Bank logins, EFTPS, Windows, etc. You can create multiple login records for each client, to track all the ones you need.

4. For each login, enter applicable information such as website address, Username, Password, and any security questions.

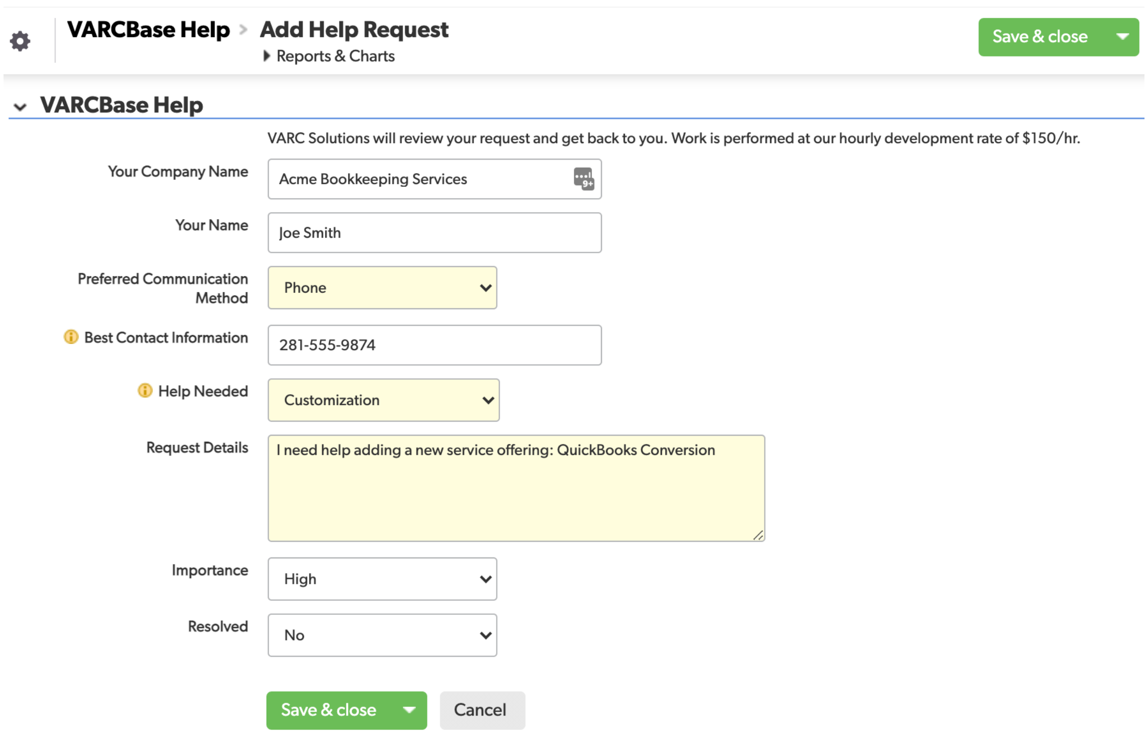
## Add a New VARCBase Help Request

Sometimes you're going to need some help. Maybe you just have a question or need some additional training. Or based on your evolving business, you may need more involved enhancements or customizations.

VARC Solutions offers paid support on an hourly basis (billed in 15 minute increments), and most issues can be resolved in less than an hour.

Just submit a help request and our team will respond, usually within 1 business day.

1. From the **VARCBase Help Tab**, click **New Help Request**. This opens the **Add Help Request** screen, where you can add a new request.



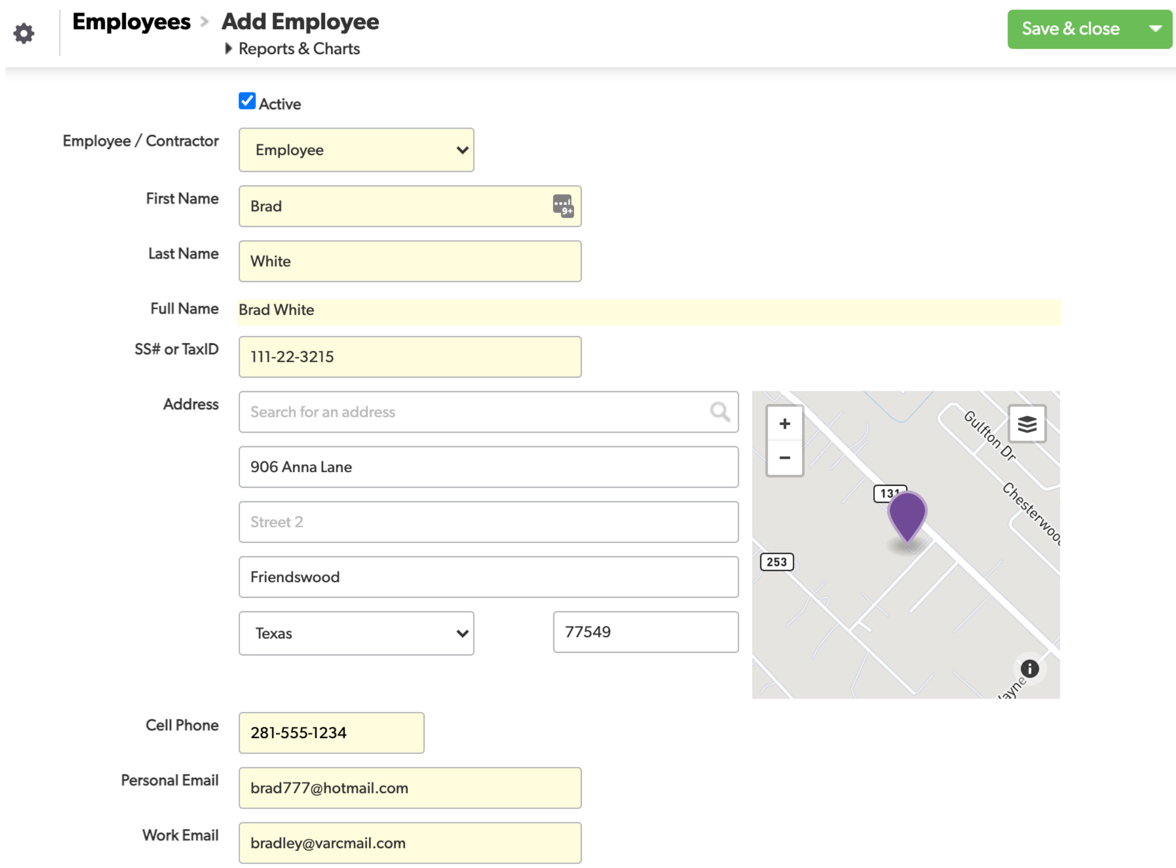

2. Enter other help request details, along with the best way to reach you and the importance.

## Add a New Employee

Employees are the people assigned to support tickets, appointments, and time sheets. Enter and manage the employees or contractors working in your business as needed.

Note: While it's more efficient to have everyone in and using the system, not all employees will need access to VARCBase Practice Management. You can add an employee to assign to various tasks, and manage their assignments for them if you want.

1. From the **Employees Tab**, click **New Employee**. This opens the **Add Employee** screen, where you can add a new employee or contractor.




2. Enter other employee details as needed for employee tracking.

# Reports

VARCBase Practice Management includes built-in reports for each list or activity area. Reports can be customized as needed, and new reports can be created. You'll find that much of this can be done on your own, but VARC Solutions is available to customize or build additional reports on an hourly development basis.

## Client Reports

Within the **Clients** tab, VARCBase PM categorizes reports as Daily, Weekly, Monthly, Quarterly, and Info (aka As-Needed) to help organize your work.

### Daily Reports

Daily reports keep you up to date with open sales opportunities and Yesterday's client first appointments to see if the client is happy.

- Open Sales Opportunities
- Yesterday's Initial Appointments

**Clients** > **Open Sales Opportunities**
Reports & Charts

New style (beta) | + New Client | Favorite | Grid Edit | Email | More

Search these clients

Colored Rows are past the follow up date

**11 Clients** — **Status** is not *'Inactive'* AND ...

| Business Name | Billing Contact | Billing Phone | Billing E-Mail | # of Open Opportunities | Last Follow Up | Next Contact |
|---|---|---|---|---|---|---|
| Business Consultants | Jonny Cash | (225) 555-7878 | johncash@businessconsultants.com | 2 | 12-01-2020 | 01-15-2021 |
| GoToCo, LLC | Dave Edwards | (555) 412-6914 x112 | edwardsd@gotoco.com | 2 | 09-01-2020 | 01-05-2021 |
| 415 -Demo - Feb 2020 | Kathy Abbassi | (281) 555-1234 | AbbassiK@415Group.com | 1 | 10-01-2020 | 03-05-2021 |
| A/C Services | Jerry Baldwin | (215) 425-0125 | Jerry@acservices.com | 1 | 12-01-2020 | 04-17-2021 |
| Aardvark Transatlantic, Ltd | Sonny Bailey | (215) 995-9596 | sonnybailey@aardvark.com | 1 | 12-01-2020 | 05-08-2021 |
| ABC Appliances | Cindy Johnson | (281) 412-6522 | cindy@ abcappliances.com | 1 | 12-01-2020 | 06-30-2021 |
| Able Bookkeepers | Sue Morgan | (555) 894-8888 x154 | susan@ablebooks.com | 1 | 10-01-2020 | 07-05-2021 |
| Brakes and More | Chad Morgan | (215) 555-0929 | Chadmorgan@barakesandmore | 1 | 12-01-2020 | |
| Home Healthcare | Moore | (215) 422-2290 | moore@homehealthcare.com | 1 | 12-01-2020 | 08-06-2021 |
| Ladder Supply Company, Inc | Suzy Arrow | (215) 926-2449 | Suzy@laddersupply.com | 1 | 09-01-2020 | 09-30-2021 |
| Luxury Living | James Abad | (415) 652-5061 | JamesA@luxliving.com | 1 | 10-01-2020 | 12-31-2021 |
| TOT | | | | 13 | | |

### Weekly Reports

Weekly reports keep you in contact with clients, by showing who needs a follow-up call or visit, thank you card, or personal note.

Clients listed as New Clients have had one appointment, but have not been followed up with yet.  We recommend only changing the client status from New Client to Client after you've started work and have checked in with them to ensure things are going well.

- New Clients
- Follow-up with New Clients
- Over 90 day Calls

### Monthly Reports

Monthly reports are good for catching missing information, and to keep on top of clients that might have an older version of QuickBooks that is soon to sunset (ie, lose support from Intuit if the software is over 3 years old). These reports can also be used as good sales opportunities to check in on additional work or needs the client may have.

- Missing QB Version
- QB Version Sunset Policy

### Quarterly Reports

Quarterly reports also help you stay on top of timely updates that require more lead time, such as renewing or switching a payroll service or credit card merchant account. These reports create an actionable list for targeted marketing campaigns.

- Clients by Merchant Services
- Clients by Payroll Service
- Intuit Payroll Clients

### Info Reports

Informational reports show you which clients you've touched in the last 30 days, and help visualize your clients by QuickBooks Product, Type, etc.

- Clients by Payroll Type
- Clients by QB Product
- Clients by QB Product (Graph)
- Clients – Last 30 Days
- Active Clients
- Active Clients with QB Version
- Client Map
- Clients by Version/Year
- Export – Marketing List

## Login Reports

The Login Reports include **Logins by Client** and **Logins by Type**.  It's also easy to search or filter the login reports for a particular client or type, for quick access to just what you need.

## Task Reports

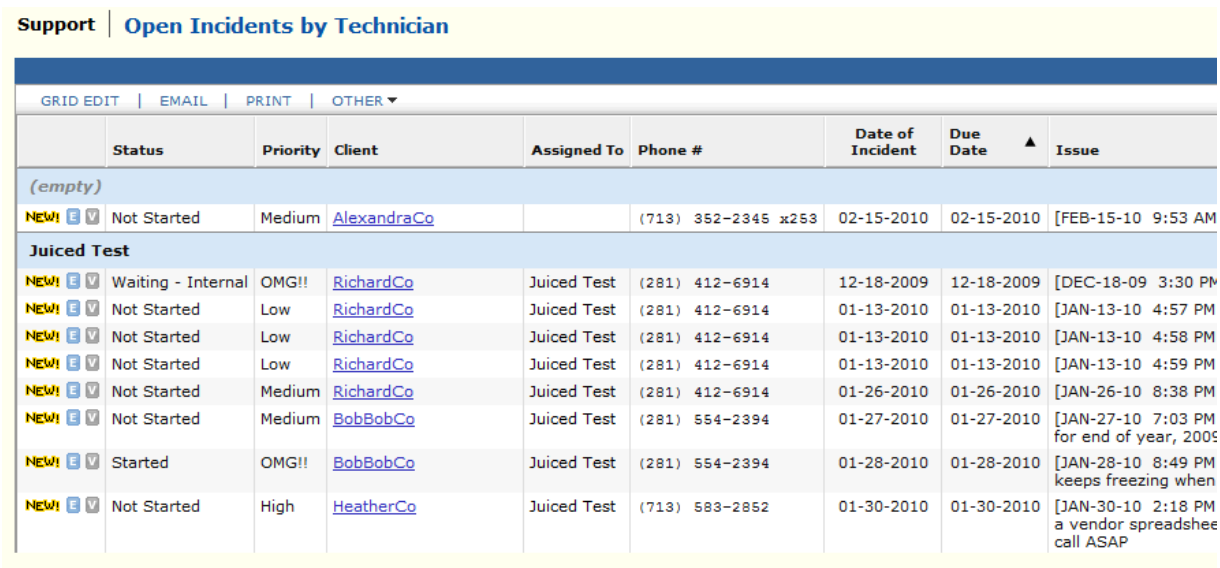
The Tasks tab has one standard report: **Activities to be Completed**.

This report lists the Client, Type, Period Ending, Due Date, etc.  All past due activities are displayed in pink for increased visibility.

## Support Ticket Reports

Support Ticket reports help you stay on top of open tickets, and visualize the types of work your employees are doing.

- Open Incidents by Technician
- Incident Graph – Technician
- Incident Graph – Technician & Status
- Incidents Graph – Status



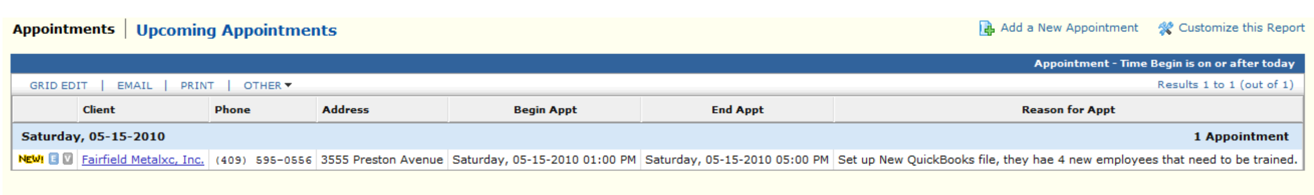
Support | Open Incidents by Technician

GRID EDIT | EMAIL | PRINT | OTHER

| | Status | Priority | Client | Assigned To | Phone # | Date of Incident | Due Date | Issue |
|---|---|---|---|---|---|---|---|---|
| (empty) | | | | | | | | |
| NEW! | Not Started | Medium | AlexandraCo | | (713) 352-2345 x253 | 02-15-2010 | 02-15-2010 | [FEB-15-10 9:53 AM |
| Juiced Test | | | | | | | | |
| NEW! | Waiting - Internal | OMG!! | RichardCo | Juiced Test | (281) 412-6914 | 12-18-2009 | 12-18-2009 | [DEC-18-09 3:30 PM |
| NEW! | Not Started | Low | RichardCo | Juiced Test | (281) 412-6914 | 01-13-2010 | 01-13-2010 | [JAN-13-10 4:57 PM |
| NEW! | Not Started | Low | RichardCo | Juiced Test | (281) 412-6914 | 01-13-2010 | 01-13-2010 | [JAN-13-10 4:58 PM |
| NEW! | Not Started | Low | RichardCo | Juiced Test | (281) 412-6914 | 01-13-2010 | 01-13-2010 | [JAN-13-10 4:59 PM |
| NEW! | Not Started | Medium | RichardCo | Juiced Test | (281) 412-6914 | 01-26-2010 | 01-26-2010 | [JAN-26-10 8:38 PM |
| NEW! | Not Started | Medium | BobBobCo | Juiced Test | (281) 554-2394 | 01-27-2010 | 01-27-2010 | [JAN-27-10 7:03 PM for end of year, 2009 |
| NEW! | Started | OMG!! | BobBobCo | Juiced Test | (281) 554-2394 | 01-28-2010 | 01-28-2010 | [JAN-28-10 8:49 PM keeps freezing when |
| NEW! | Not Started | High | HeatherCo | Juiced Test | (713) 583-2852 | 01-30-2010 | 01-30-2010 | [JAN-30-10 2:18 PM a vendor spreadshee call ASAP |

## Appointments Reports

For appointments, the most important report is **Upcoming Appointments** to help you know what's coming up soon.



Appointments | Upcoming Appointments — Add a New Appointment — Customize this Report

Appointment - Time Begin is on or after today

GRID EDIT | EMAIL | PRINT | OTHER — Results 1 to 1 (out of 1)

| | Client | Phone | Address | Begin Appt | End Appt | Reason for Appt |
|---|---|---|---|---|---|---|
| Saturday, 05-15-2010 | | | | | | 1 Appointment |
| NEW! | Fairfield Metalxc, Inc. | (409) 595-0556 | 3555 Preston Avenue | Saturday, 05-15-2010 01:00 PM | Saturday, 05-15-2010 05:00 PM | Set up New QuickBooks file, they hae 4 new employees that need to be trained. |

## Customizing Reports

VARCBase Practice Management reports are easy to customize. You can sort, group, filter, and summarize information easily.

Each tab or table includes fields that may or not currently display on a given report. Reports can be customized to see additional fields (columns) or unneeded fields can be removed from a report.

Report customizations can be made once for a given purpose or saved for use again later.

VARC Solutions is available on an hourly basis for training or to customize/build additional reports as needed.