

BIG HAIRY DOG FEATURE OF THE MONTH



THE INDUSTRY LEADER IN
RETAIL PRO SALES & SUPPORT

HOW TO CREATE A CUSTOM REPORT FILTER

Version 8

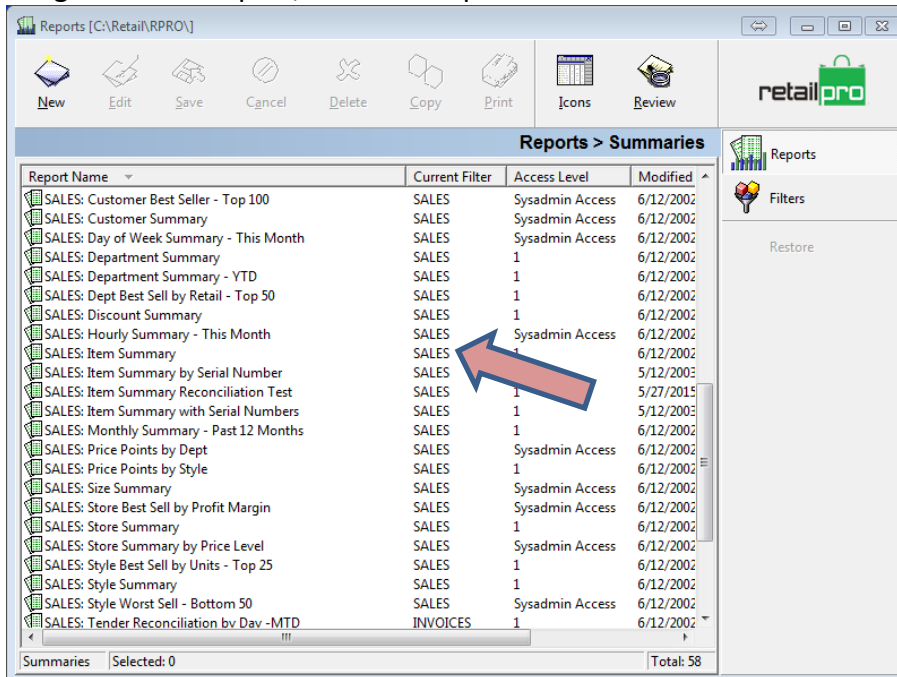
https://youtu.be/dO_Oiuwehxw

In Retail Pro Version 8 you can create custom report filters and assign them to reports, eliminating the need to change filters for reports that are regularly ran for the same criteria. After assigning a custom filter to a report, the filter can be changed at time of running the report.

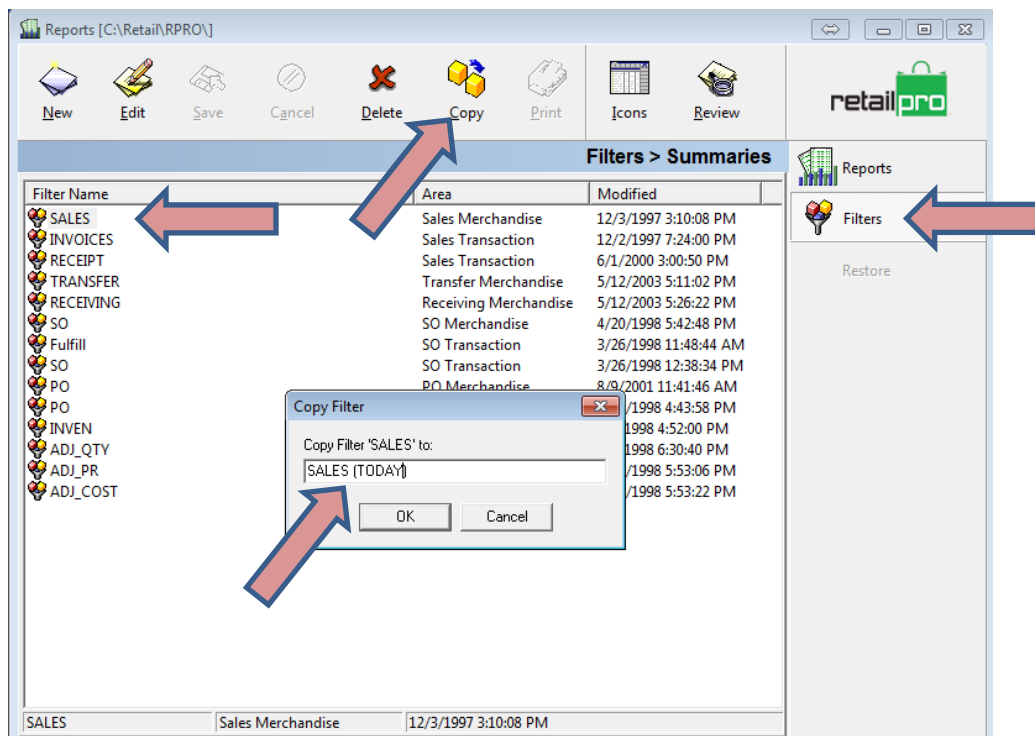
Our example below will demonstrate how to create a custom filter for a 'SALES: Item Summary' report for a date range of 'today'. We will copy the current filter, edit the copied filter, save as a new filter name, and assign the custom filter to the report.

It is important that the filter is copied and saved as a new filter. If this is not done, and the current filter is edited and saved, it will apply to all reports using the filter as its current filter.

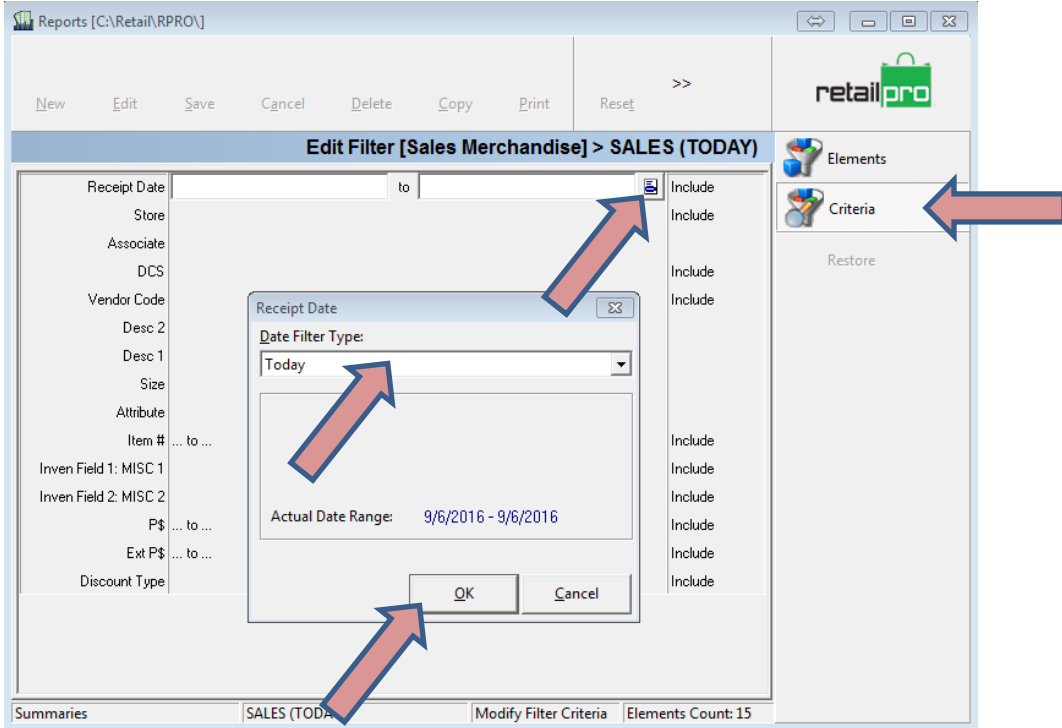
1. Starting from the main screen in Reports, select Summaries. Note the Current Filter that is assigned to the report, in our example it is SALES:



2. Next, select Filters from below the Retail Pro button on the right side, highlight the filter that you are going to copy, then select Copy from the top menu and name the copied filter, then click OK:



- Highlight your new Filter and select Edit from the top menu, then Criteria from the right side. Click on the 'Range Box' and enter the Date Filter Type and select OK and Save:



- Finally, select Reports from the right side menu, highlight the Item Summary report and click Edit. Click options from the right side menu and select the new filter from the dropdown box for Filter. Select Save from the top menu.

