

How to Save a Custom Report Guide

DTiQ's **Custom Report** option allows you to save your filtered reports as easily accessible tiles.

Content

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- How to Access Your Custom Report

How to Create a Custom Report

To create a **Custom Report**, go to any existing report (e.g. **Sales** Activity) from the **Reports** tile.



Next, click the **Filter** button in the top-right corner of the screen to filter the reports.



Click the **Add new** tab to create a custom filter.

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Saved filters	🔪 Add nev	v 🔶 🗕					
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Transactions under 1 dollar		*	Date: This quarter Measure type: Under1Value Count Grouping: Location Sort by: Location name (Ascending) Time Grouping:		EDIT		APPLY
Refunds		*	Date: This quarter Measure type: Refunded Transaction Amount Grouping: Location Sort by: Location name (Ascending) Time		EDIT		APPLY
Negative Transaction Amour	nt	*	Date: This quarter Measure type: Negative Transation Amount Grouping: Location Sort by: Location name (Ascending) Time Gr		EDIT		APPLY
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Fill out your desired criteria, then click **Save As Report**, name your new report, and click **Save**.



How to Access Your Custom Report

On the **Home Screen**, you can quickly access that report from the **Reports** tile. Customized reports are marked purple. To schedule this report to be emailed to you, please see our Auto-Delivery Guide.



For additional information or questions please contact DTiQ Support at support@dtiq.com or your Customer Experience Team at csr@dtiq.com.



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