How to Save a Custom Report Guide

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

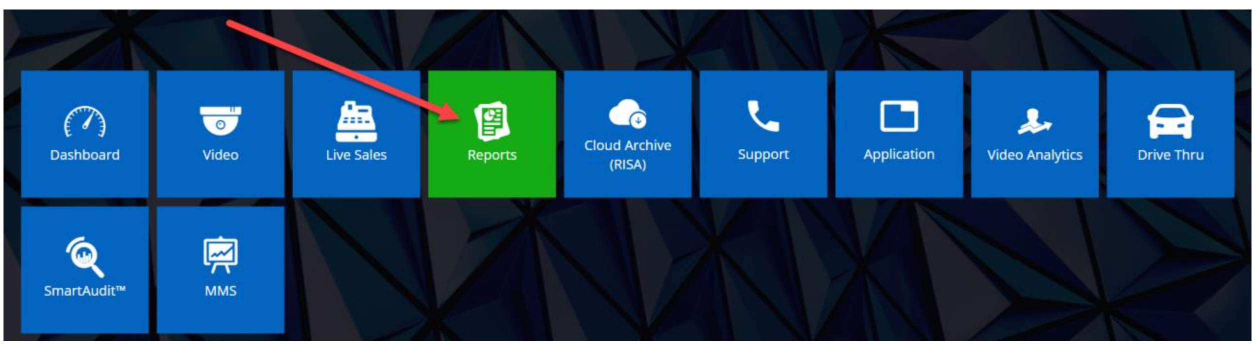
Content

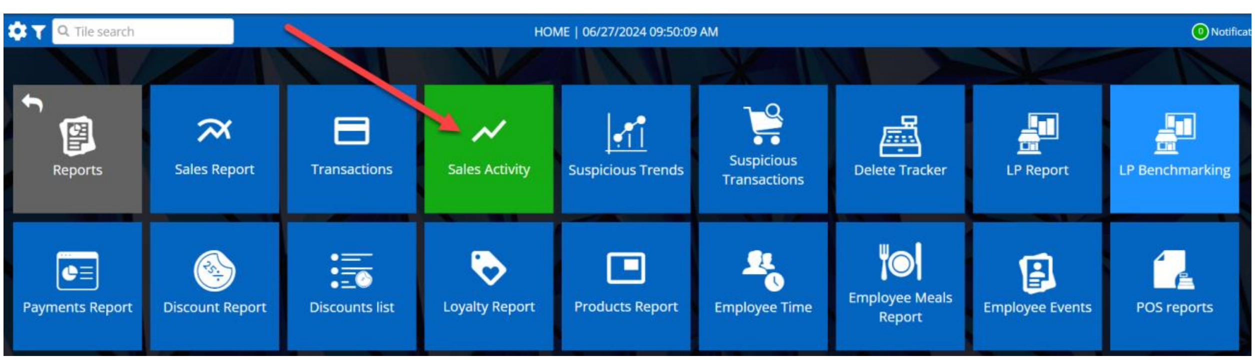
In this guide, you will learn:

- How to Create a Custom Report
- How to Access Your Custom Report

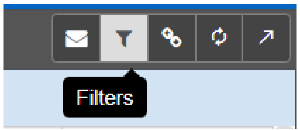
How to Create a Custom Report

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

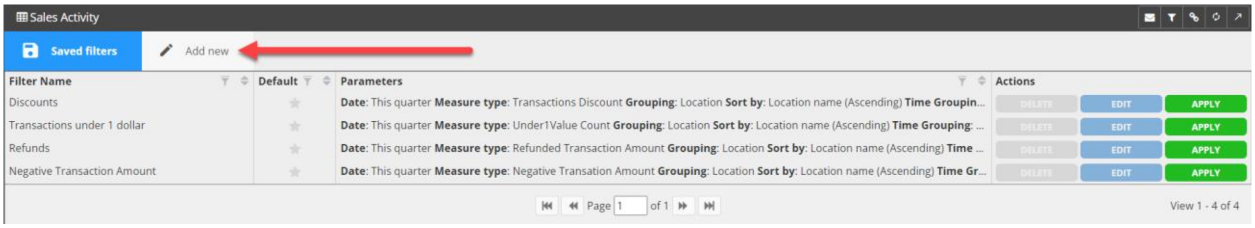




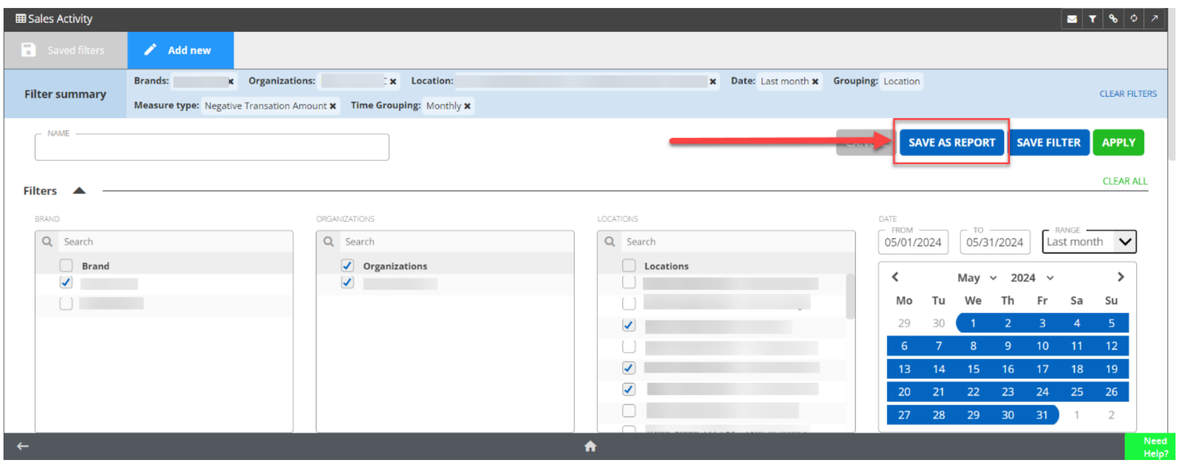
Next, click the **Filter** button in the top-right corner of the screen to filter the reports.

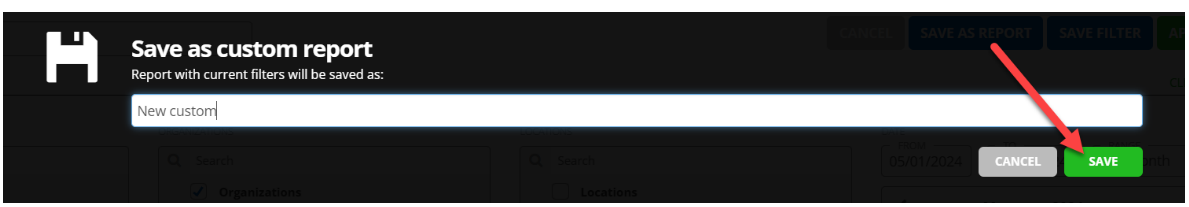


Click the **Add new** tab to create a custom filter.



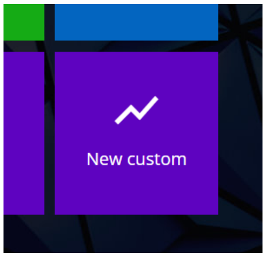
Fill out your desired criteria, then click **Save As Report**, name your new report, and click **Save**.





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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