

Report Builder

v 1.0



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Report Builder

You may use the report builder to create custom reports using different report fields, filters, sort orders, and options.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

CUSTOM REPORTS

Click on the **Reports** button under the Accounting Menu on the left menu of the page.



Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.



Report Builder Documentation



CREATE NEW REPORT

Click on the **Reports** button under the Accounting Menu on the left menu of the page.



Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.

Rep	orts			BUAD A REPORT
	Explained Unit Surtrawy Contraver List Surts Contraver List Systematical Tempi Contraver Surtering Contraver Surtering Suremany Contraver Stread Search	Pould Factor 1 Fac	Action housing continuer Actions Actions Merries Merries Actions Actions Merries Meries Merri	Conclusion Register Altin - Gale and Street Name Color Concerner Stating (all Provider Stating (all P
14	Aufe Pergunders Juan Pergender Ling	D meeting meeting		
		Banking Divolt Linity manipulation Contemportan Banking Contemportan Banking Contemportan		
		Becarting Orders Recording Collect Lini Recording Collect Convoltations Builds; Charge Results		

Click on **Create a New Report** in the My Report section of the Company Reports page.

My Reports		
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📱 y-a-r-test		
🖥 Z1		
ZZZ		

The Report Designer screen will open up to the Query section.

Next, **Name the Report** that is going to be created on the top Right of this page.



Report N	Jame Report Name		
Query Option	s Sharing		
ADD FIELD			Report Fields
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY
		* Your search returned no results *	
			Report Filters
FILTER	CONDITION	DEFAULT VALUE	PRIORITY
		* Your search returned no results *	
			Sort Order
FIELD		SORT	PRIORITY
		* Your search returned no results *	

This is where the reports are created. You can enter the desired Report Fields, Filter, and Sort Order to build a custom Report.

Report Fields

ADDING A REPORT FIELD

Report Desig	gner		10
Report I	Name Report Name		
Query Option	ns Sharing		
ADD FIELD			Report Fields
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY
		* Your search returned no results *	
			Report Filters
FILTER	CONDITION	DEFAULT VALUE	PRIORITY
		* Your search returned no results *	
			Sort Orde
FIELD		SORT	PRIORITY
		* Your search returned no results *	
			CANCEL IMPORT SAVE

To Add a Report Field Click on the **Add Button** above the Report Field Section on the Report Designer screen.

The Add Field screen will open.





Click and highlight the desired field, then click **Add Field Button** or double the desired field.

Note: Only one field can be added at a time.

The added fields will show up in the Report Designer screen.

REMOVING A REPORT FIELD

To Remove a Report Field, highlight the field that is to be removed and Click the **Remove Button** The Field will be removed from the Report Designer screens and will no longer be part of the report.

EDITING A REPORT FIELD

To Edit a Report Field, highlight the field that is to be edited and Click the Edit Button

The Edit Field Properties screen will open



FieldTitle	First Name
Optional Format	(none) ·
	Allow Text Wrap
	You can organize your report into groups and subgroups by group name. Choose
	the same group for fields you want on the same level:

The Edit Field Properties screen allows:

- Field Titles
- Optional Formats
- Allows Text Wraps
- Subgroup Headers

Make edits to the Edit Field Properties screen and press OK.

MOVING A REPORT FIELD UP

To move a Report Field Up, highlight the field that is to be moved and Click on the Move Up Button.

The Field will be moved up one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.

MOVING A REPORT FIELD DOWN

To move a Report Field Down, highlight the field that is to be moved and Click the **Move Down**

Button

The Field will be moved down one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.

Report Filters



ADDING A REPORT FILTER

To Add a Report Filter Click on the **Add Button** above the Report Filter sections on the Report Designer screen.

Report Desig	gner		C >
Report N	Name Report Name		
Query Option	s Sharing		
ADD FIELD			Report Fields
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY
		* Your search returned no results *	
			Report Filters
FILTER	CONDITION	DEFAULT VALUE	PRIORITY
		* Your search returned no results *	
			Sort Order
FIELD	50	RT	PRIORITY
		* Your search returned no results *	
			CANCEL

The Add Filter screen will open.

	Filter is read-only to shared users.	
Fi	Hd First Name	۲
Conditi	on equals	•
Default Val	ue	

Click the arrow to scroll to the desired Field

Click the arrow to scroll to the desired Filter condition. Enter a default value if needed.

Click **OK**

The added fields will show up in the Report Designer screen.

REMOVING A REPORT FILTER

To Remove a Report Filter, highlight the filter that is to be removed and Click the **Remove Button** The Filter will be removed from the Report Designer screens and will no longer be part of the report.



EDITING A REPORT FILTER

To Edit a Report Filter, highlight the filter that is to be edited and Click the **Edit Button**

The Edit Filter screen will open.

	Filter is read-only to shared users.	
F	eld First Name	8
Condi	tion equals	
Default Va	lue	

The Edit Filter screen allows you to edit the Filter information:

Click the arrow to scroll to the desired Field.

Click the arrow to scroll to the desired Filter condition. Enter a default value if needed.

Click **OK**

The Edited filter will show up in the Filter Section of the Report Designer screen.

MOVING A REPORT FILTER UP

To move a Report Filter Up, highlight the field that is to be moved and Click the **Move Up Button**

The Filter will be moved up one space in the Report Designer screen.

Note: The order of Report filter in the Report Designer screen is the same order they will appear in the report.

Moving a Report Filter Down

To move a Report Filter Down, highlight the field that is to be moved and Click the **Move Down Button**

The Filter will be moved down one space in the Report Designer screen.

Note: The order of Report filters in the Report Designer screen is the same order they will appear in the report.



Report Sort Order

ADDING A REPORT SORT ORDER

To Add a Report Sort Order Click the **Add Button** above the Report Sort Order section on the Report Designer Screen.

Report Desig	gner		1
Report I	Name Report Name		
Query Option	ns Sharing		
ADD FIELD			Report Fields
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY
		* Your search returned no results *	
			Report Filters
FILTER	CONDITION	DEFAULT VALUE	PRIORITY
		* Your search returned no results *	
			Sort Orde
FIELD		SORT	PRIORITY
		* Your search returned no results *	- Opphalose
			CANCEL IMPORT SAVE

The Add Sort Order screen will open.



Click the arrow to scroll to the desired Sort by Field.

Click the arrow to scroll to the desired Sort. Click \mathbf{OK}

The added Report Sort Order will show up in the Report Designer screen.

REMOVING A REPORT FILTER

To Remove a Report Sort Order, highlight the field that is to be removed and Click the **Remove Button**

The Sort Order will be removed from the Report Designer screens and will no longer be part of the report.



EDITING A REPORT SORT ORDER

The Edit Sort Order screen allows you to edit the Sort information in a report.

To Edit a Report Sort Order, highlight the field that is to be edited in the Report Designer Screen,

Click the **Edit Button**



The Edit Sort Order screen will open.

Click the arrow to scroll to the desired Sort by Field

Click the arrow to scroll to the desired Sort Click \mathbf{OK}

The Edited Report Sort Order will show up in the Report Designer screen.

MOVING A REPORT SORT ORDER UP

To move a Report Sort Order Up, highlight the field that is to be moved and Click the **Move Up Button.**

The Sort Order will be moved up one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.

MOVING A REPORT SORT ORDER DOWN

To move a Report Sort Order Down, highlight the field that is to be moved and Click the **Move Down**

Button.

The Sort Order will be moved down one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.



REPORT OPTIONS

In the Report Designer Screen the Report can be refined under the Options Tab.

Report Name	fest Report	
uery Options Sha	aring	
Display Detail as	Single Row (Default)	•
Return a maximum	500 rows	-
of	Group Fields as Headers	
	Display RecordCount on SubGroups	

The Options Tab allows you to:

- Display Details in a variety of Rows and Columns
- Group Fields as Headers
- Display RecordCount on Sub Groups

CREATING THE FINISHED REPORT

When all of the sections are completed with the desired Report fields, Filters, Order Sorts, and Options on the Report

Designer Screen Click **SAVE** and the Report will be generated.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

COPY EXISTING REPORT

You can Copy an existing report under a different Report Name and Edit it to build a new report.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.





Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.

Reports				BULD A MIRORY
Contrast Contrast Contrast Contrast Contrast	 Benny Control of the second seco	Book make() make()	 Acto Tracking Continues Actor Tracking Actor Tracking Actor Tracking Networks Actor	Counter Reports All - Counter Count and Count Counter Counter Described to Teachership
ilia Ado fing Ano fing		testing testing Districtly testing Districtly Testing Districtly Testing Districtly Distring Distring Districtly Distring Distrin		

Click **Report that is to be Copied** in the My Report section of the Company Reports page.

My Reports		
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📱 y-a-r-test		
🗗 Z1		
ZZZ		

The Report will be generated and the Report Screen will open.



Secure https://v	Slive4.exigo.com/admin6/v2018.	1.24.6/cc2295	0b1289493fa3eaf1d761977	4de/Report/ViewRej	port?reporti	d=91&isTempla
iew Report						
forgein dates Printed: 26.01.20 Total Rows: 500	TB 18 12:28:44-06:00					
ORDER DATE	FULL NAME	CUSTO	HER ID COUNTRY	LAST ORDER DATE		×
23.11.2009	Atest Smith	10014	United States	(null)		
16.12.2009	Atest Smith	10014	United States	(null)		
01.01.2010	Lance Smith	10007	United States	20.11.2013		
06.04,2010	William Northcutt	10000	United States	23.09.2016		
06.04.2010	William Northcutt	10000	United States	23.09.2016		
07.04.2010	William Northcutt	10000	United States	23.09.2016		
25.04.2010	William Northcutt	10000	United States	23.09.2016		
	William Northcutt	10000	United States	23.09.2016		
25.04.2010	Randy Smith	10035	United States	05.03.2013		
25.04.2010 04.05.2010	Randy Smith		United States	05.03.2013		
	Rendy Smith	10035	United States			
04.05.2010			United States	07.11.2013		
04.05.2010	Rendy Smith			07.11.2013 18.06.2015		

To Copy the Report Click the **Copy Report Button**

The Report Designer Screen will open with the words "Copy of (and the Report name)" in the report name section of the screen.

eport Designer						
Report Name forgein dat	les TB					
riepart Hume	in the second se					
uery Options Sharing						
obery options snaking						
ADD FIELD				Re	eport	Fields
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY			
Crder Date	Order		1 ~		Edit	L .:
Eull Name	Customer		2 •		Edit	L.,
Customer ID	Customer		3 🔺		Edit	i
Country	Customer		4 🔺	-	Edit	ŧ.,
Last Order date	Customer Stats		5 🔺	*	Edit	I.,
ADD FILTER				Re	eport f	Filters
FILTER COND	DITION DEFA	ULT VALUE			PRIOR	ſΓY
(Algebra) Sheen		rch returned no results *				

Edits can be made from the Report Designer Screen or an exact Copy can be made and saved.

Click on **Save** and a New Copy of an existing report or a new Edited Report will be Generated.

IMPORT REPORTS, SHARED, AND TEMPLATES



You can Import an existing report, shared reports and templates into the Report Designer Screen to Edit or build on an existing report.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.



Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.

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Bonniel Lodger Reis Litters Customers Customer Litt Sermeny Customer Litt Sermeny Customer Litt (Misuetticet Design	Product: Freedowt IV Bank of Datable Product Press List Extended Product Press List Present Press	Action tracking: Outlanses Action Tracking Action Mannese Action Tracking Vendors Action Tracking	Control Reports Adv: Ord such have have Control Constrol Making Lax Execution div Task Report
Contractor Surgitary Contractor Accounting Surgitary Contractor Direct Surgits	Product Sales Salesary By Marchan Product Sales Salesary I Rein Product Sales	Automa Disensity	
Vendors Vendors Vendors	Top Product Sectors of Top Product Sector Instity Card, Report Institute to Sector Report	Time Dick Trac Card Report by Lowe	
Simplayee	Dates by Meriti by Date Report Octors with Othered Milling/Dagging Address Research Others Researd		
Employee Sectors Evaluation (Detail) Unit Provident Unit Charge Artholy Unit Charge Artholy Unit Lage Artholy	Programment Standmarker für Tryllen Onderer Programment Standmarker Onderer Programment Stand Season ACHP Frankling Damakin Name Frankling	API Log API Log API Log API Log API Sensions Propert	
Auto Perspanders Auto Perspanders Log	E meetary meetary		
	Ethility Ethility Length Insurantian Control Property Environ Control Court Court		
	Becarring Orders Researces Order Ltd Researces Order Call Researces Order Cancellations Reich Organization		

Click on **Create a New Report** in the My Report section of the Company Reports page.

My Reports			
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📰 y-a-r-test			
📕 Z1			
zzz			

The Report Designer screen will open up to the Query section.



eport Desig	Jilei		C :
Report I	Name Report Name		
Query Option	ns Sharing		
ADD FIELD			Report Field:
FIELD	TABLE	SUB GROUP LEVEL	PRIORITY
		* Your search returned no results *	
			Report Filter
FILTER	CONDITION	DEFAULT VALUE	PRIORITY
		* Your search returned no results *	1
			Sort Orde
FIELD		SORT	PRIORITY
		* Your search returned no results *	5
			CANCEL IMPORT SAV

Next, **Name the Report** that is going to be imported on the top Right of this page.

Click the **Import Button**

The Choose to Import From Screen will open Highlight the desired report or template, and click OK The reports, shared reports, or templates will be imported into the Report Designer Screen. Click **Save** and the report will be generated.

SHARING A REPORT

You can share a report with different users.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.



REPORT	GROUP	
	My Reports	IMPORT
~dsdsdsd	My Reports	IMPORT
dsdsd	My Reports	IMPORT
000	My Reports	IMPORT
ere	My Reports	IMPORT
SSS	My Reports	IMPORT
WS	My Reports	IMPORT
wwwsss	My Reports	IMPORT
www	My Reports	IMPORT
z1	My Reports	IMPORT
zop	My Reports	IMPORT
222	My Reports	IMPORT
O9uytd	My Reports	IMPORT
???	My Reports	IMPORT
???	My Reports	IMPORT
test] Customer List (Detail) 1 Col	My Reports	IMPORT
test] Customer List (Detail) 2 Cols	My Reports	IMPORT
test] Customer List (Detail) 3 Cols	My Reports	IMPORT
test] Customer List (Detail) Default	My Reports	IMPORT
Taeth Cuctomor Carlore With Tatale	Mu Dopato	11 10 10 10

Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.

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Securit Administration of the hardware of the	Post Post	 Action Sections Substances Substances Action Heading Vestors Action Heading Action Packing Action Packing Take Cash Packing Take Cash Packing Logio Halaya Pageat	C Carlos Report Al 21: O de 50 Than Marc Cola Gaudia de 19 (19) Readin de 19 Tals Report
liter Loge Arbity	D mentary		
Auto Pergeonders Auto Pergeonder Ling	and meeting		
	Barrierg Direct Lenger Investedner Union Presa Invest-Cereit Card Usinger		
	Becarriag Onlines Researces Colors Lini Researces Online Convertinitions India Charge Results		

Click on **Create a New Report** in the My Report section of the Company Reports page.

My Reports		
📰 w1		
📰 y-a-r-test		
📅 Z1		
zzz		



The Report Designer screen will open up to the Query section.

ort Name		
		Report Field
SUB	GROUP LEVEL	PRIORITY
	* Your search returned no results *	
		Report Filte
DNDITION	DEFAULT VALUE	PRIORITY
	* Your search returned no results *	
		Sort Ord
SORT		PRIORITY
	* Your search returned no results *	
	ONDITION	* Your search returned no results * oxomion

In the Report Designer Screen the Report can be shared clicking the Sharing Tab.

Report	Name Test newer			
Query Optio	ns Sharing			
ADD USER	N			Users
USER	FIRST NAME	LAST NAME	PRIVILEGE	
		* Your search returned no results *		

ADDING USERS TO SHARED REPORTS

Click **Add** in the Sharing Tab in the Report Designer Screen.

The Add user Screen will open up.



USER	
AA2239	
AAATest	
AAExigov5	
AAExigov6	
adf	
adffdsf41	
alan	
AnnW	
API_EUser	

Highlight the user that is going to share the report.

Click Add User

The User will be added to the Sharing Tab Screen in the Report Designer Screen.

REMOVING USERS FROM SHARED REPORTS

Report Name	Test newer			
Query Options Si	harting			
				Users
ADD USER				Users
USER	FIRST NAME	LAST NAME	PRIVILEGE	
Contractor and			Run Only	EDIT

Highlight the user that is going to be removed from the Sharing Tab Screen.

Click the **Remove Button**

The User will be removed from the Sharing Tab Screen.



EDITING USERS IN SHARED REPORTS

Report Name	Test newer			
Query Options St	haring			
				Users
ADD USER				03013
USER	FIRST NAME	LAST HAME	PRIVILEGE	

Highlight the user that is going to be edited from the Sharing Tab Screen.

Click the **Edit Button**

The Permission Edit Screen will open.

Use	r Setup		::	×
ei	User / Privilege	AA2239 Run Only		•
		CANCEL	SAVE CHAN	GES

Click in the circle next to:

- Run only (users can only run reports changes cannot be made to shared report)
- Run and Modify (users can run and make changes to shared reports)

Click **OK** and the shared report will be edited.

Exporting Data from a Report

You can export data report to an Excel file.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.





Next, click **Build a Report** in the Report Builder section of the Accounting Reports page



Click **Report that is to be Exported** in the My Report section of the Company Reports page.

Reports		
My Reports		
📰 w1		
y-a-r-test		
📰 Z1		
ZZZ		
CREATE A NEW REPORT		

The screen will open up to the generated report.



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liew Report					
forgein dates Printed: 26.01.201 Total Rows:500	TB 18 12:28:44-06:00				
ORDER DATE	FULL NAME	CUSTO	IER ID COUNTRY	LAST ORDER DATE	
23.11.2009	Atest Smith	10014	United States	(null)	- 11
16.12.2009	Atest Smith	10014	United States	(null)	- 5
01.01.2010	Lance Smith	10007	United States	20.11.2013	
06.04,2010	William Northcutt	10000	United States	23.09.2016	
06.04.2010	William Northcutt	10080	United States	23.09.2016	
07.04.2010	William Northcutt	10000	United States	23.09.2016	
25.04.2010	William Northcutt	10000	United States	23.09.2016	
25.04.2010	William Northcutt	10000	United States	23.09.2016	
04.05.2010	Randy Smith	10035	United States	05.03.2013	
05.05.2010	Rendy Smith	10035	United States	05.03.2013	
05.05.2010	Michael And Heather Smith	10038	United States	07.11.2013	
	Mike Smith	10041	United States	18.06.2015	
05.05.2010	(HINA STRIDT				

In the Report screen the Report can be exported be clicking the **Export to Excel Button**.

The computer will give a prompt to open or save the file.

Note: It is better to save the file first, and then open it at a later time.

Click the **Save Button** and the file will be exported to excel.

REMOVING A REPORT

You can remove a report from the system

Click on the **Reports Button** under the Accounting Menu on the left menu of the page.



Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.



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Conserved Lodger News Internet Constructions Constructions Constructions Constructions Constructions Constructions Constructions Constructions Constructions	Product Final-ci Uil Bank & Deallin Product Proc Lill Extended Process Data Process Reserve Tables	Action Tracking Continues Action Tracking Actions Similarly Action Tracking Action Tracking Action Tracking	Construin, Separate Altr.: Out earns Of 20 heart frame Cruste Constructions (Mark Envelope Ref Total Report
Continue Accounting Summary Continues Ereal Search	Product Sales Southeasy By Interdiction Product Sales Summary	Survey .	
vendors vendors vendors()	Hum Payment Summing Tap Printed Sales Dates for Second Sales	Time Dick Trime Card Report by Lown	
Vecator Lot Details	Dates by search ing these Report Dates by Martin by Date Report Colors with Othered Milling/Dispace Address	Expire History Expire History Report.	
Employee Secremary Employee Secremary Environment Event Event	Baratar Dollary Began Pagenaint Stantmary Na Type Dollar Fragment Stantmary Online Internation Collect Interded Database Neuro Fordt	API Log API Log API Sensitive Prepare	
Auto Responders	D memory memory		
	Banking Divid Lenger meanumer Drivers Pressa Inverte Credit, Card Voruge		
	Becarring Onters Resource; Onter Care/Interse Rec: Universe Results		

Click on **Report that is to be Removed** in the My Report section of the Company Reports page.

My Reports			
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📑 z1			
zzz			

The screen will open up to the generated report.

Secure https://v	ilive4.exigo.com/admin6/v2018.	1.24.6/cc2295	0b1289493fa3ea/1d761977	/4de/Report/ViewReport?reportId=91&	isTemplat
lew Report					
Total Rows 500	8 12:28:44 -06:00				
ORDER DATE	FULL NAME		HER ID COUNTRY	LAST ORDER DATE	-
23.11.2009	Atest Smith	10014	United States	(null)	
16.12.2009	Atest Smith	10014	United States	(null)	
01.01.2010	Lance Smith	10007	United States	20.11.2013	
06.04,2010	William Northcutt	10000	United States	23.09.2016	
06.04.2010	William Northcutt	10000	United States	23.09.2016	
07.04.2010	William Northcutt	10000	United States	23.09.2016	
25.04.2010	William Northcutt	10000	United States	23.09.2016	
	William Northcutt	10000	United States	23.09.2016	
25.04.2010		10035	United States	05.03.2013	
25.04.2010 04.05.2010	Randy Smith	10030			
	Randy Smith Rendy Smith	10035	United States	05.03.2013	
04.05.2010		10035	United States United States	05.03.2013 07.11.2013	
04.05.2010 05.05.2010	Rendy Smith	10035			

In the Report screen the Report can be removed be clicking the **Edit Report Button**.



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port Designer						
Report Name forgein dat	es TB					
State of the second sec						
ery Options Sharing						
ADD FIELD				Re	port Fi	elds
FIELD	TABLE	SUB GROUP LEVEL	PRICRUTY			
Crder Date	Order		1 🔦		Edit	
🛄 Full Name	Customer		2 🔺		Edit	i
Customer ID	Customer		3 🔺		Edit	
Country	Customer		4 .		Edit	i
Cast Order date	Customer Stats		5 🔺		Edit	I
ADD FILTER				Rep	ort Fi	ters
FILTER CONC	ITTOM DEFI	AULT VALUE			PROBIT	

The Report Designer screen will open up to the Query section.

To Delete the Report click the **Delete Button** in Report Designer.

Click **OK** and the Report will be removed from the system