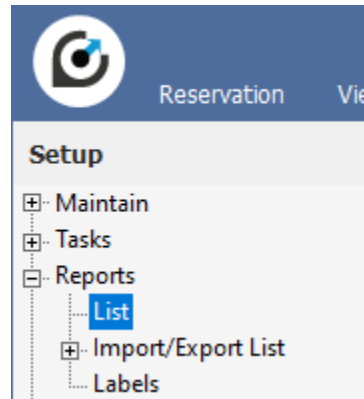


Tech Tip Tuesday— September 26, 2023

Report Categories

Having trouble finding that report you only run once a year? Do you have a series of reports you run weekly, monthly, or for a specific function? With report categories, you can quickly and easily categorize any of the lengthy list of Livery Coach reports for fast and easy access.

To create a category and put that report in the category, simply navigate to Setup->Reports->List.



Once there, select the report you want and click Edit.

From there, simply pick the category you want to assign to the report—there is a drop-down so you can select an existing category (if any have already been set up), or you can create a new category by simply typing what you want it to be in the field.

If you want to assign the report to more than one category, simply enter a comma between the category names, but make sure there are NO SPACES before or after the comma separator.

Note that assigning a category does not remove the report from the full list of reports—it just adds one (or more) label(s) to the report so you can more easily find and use it. When complete, click OK.

Edit Reports [X]

General Assign To

Name: Vehicle Revenue with Additional Charges.rpt

Description: Vehicle Revenue with Additional Charges - Archived

Comment: Vehicle Revenue with Additional Charges - Archived

Criteria: From/To Date

Used In:

Category: Monthly,David

Enter multiple report categories by separating the categories with a comma, but with NO SPACES on either side of the comma.
Example: Category 1,Category 2

Get Default

Option

Occasion Company Name Group Name

Vendor Name Contact Name

Account Name / Number Occasion

✓ Ok ⏹ Cancel

Now there will be tabs that say "Monthly" and "David" where you can find these reports.

Reports List [X]

All		Monthly	David
Description			Report File
Vehicle Type Revenue Summary - Archived			Ut_vehdtype_Archive.rpt