

# **REPORTS DASHBOARD**

## **ADDITIONAL DASHBOARD ITEM OPTIONS**

**Reports Dashboard** is an application that graphically displays critical business information onto a dashboard which can be viewed in Realtime.

In **Reports Dashboard**, when <u>adding</u> or <u>editing</u> dashboard items, there are multiple options you can use to customize your dashboard report.

Access: Reports Dashboard Icon > Log In

The *Reports Dashboard* application will open.

### **DASHBOARD MENU OPTIONS**

- When adding or editing a dashboard, if you right click on a dashboard item *column header* or *title*, a *menu* with additional options will be displayed.
  - Note: Some of the options displayed in the right click menu are pertinent to the selected control type (dashboard item) and won't be available if a different control type (dashboard item) is selected.



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### SHOW OR HIDE DASHBOARD ITEM TITLE

1. Click on *Show Captions* on either the *Design Tab* or the *right click menu*.

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- 1. The *Show Caption* button on the *Ribbon* will become disabled ('whitish' in colour).
- 2. The *title* of the selected control type (dashboard item) will no longer be displayed.
  - Note: To display the title of the selected control type (dashboard item) again, repeat the previous step. The now enabled Show Caption button on the Ribbon will be 'bluish' in colour.

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### DUPLICATE A DASHBOARD ITEM

To duplicate a selected control type (dashboard item), click on
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• A duplicate of the selected control type (dashboard item) will be displayed.

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### **DELETE A DASHBOARD ITEM**

To delete a selected control type (dashboard item), click on
 *Delete* on either the *Home* tab or the *right click menu*.

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• The selected control type (dashboard item) will be deleted.

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### **CONVERT A CONTROL TYPE**

- 1. To change a selected control type (dashboard item), click on *Convert* 
  - To on either the Home tab or the right click menu.
- 2. A side menu will pop up, select the control type you wish to convert to.
  - In this image, *Chart* has been selected.

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- The control type (dashboard item) will be converted to the selected control type.
  - In this image, a *Chart* is now displayed.



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### **REMOVE DATA ITEMS FROM A DASHBOARD ITEM**

 To remove data items from a selected control type (dashboard item), click on *Remove Data Items* on either the *Home* tab or the *right click menu*.

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	Transactions (Sum) Σ New Column A	SPR001 SPR002 SUP001	Sprint Distributors Local Sprint Distributors International Buy Back Supplier		Clear Kaxing Ka	×15 ×12



• The data items of the selected control type (dashboard item) will be removed.

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# RENAME A DASHBOARD ITEM TITLE AND OR COLUMNS

• To edit the *title* and or *column names* of a selected control type (dashboard item), click on *Edit Names* on either the *Design* tab or *right click menu*.



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- The *Edit Names* screen will be displayed.
- Make the required changes.
- Click on Ok.

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- The changes will be saved.
  - In this image, the *title* of the selected control type (dashboard item *title*) has been changed from *Grid 1* to *Raw Data*.

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### **EDIT DASHBOARD ITEM FILTER**

• To add / edit column filters of a selected control type (dashboard item), click on *Edit Filter* on the *right click menu*.



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- The *Filter Editor* screen will be displayed.
- Click on the *red 'And'* text in the *Filter Editor*.

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• This will bring up a *drop-down menu* with options to change the current filter selections.



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								User	: JudithM 23/01/20	20 Version : 1.2.0.3	TEST ALPHA - JUDITH PC LOCAL

- Click on any one to make changes to the filter selection.
- In this image, *Not And* has been selected.

		A	P: Rec Outstanding To	o Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3
Change Interval	-	alt 🛙		Est Comert To • AB • Current To • AB • Current To • AB • Current To • • • Est Comert To • • • • Est Comert To • • • • Est Comert To • • • • • • • • • • • • • • • • • •
ave 🗍 Clone 🔷 Re	do 👻 Pivot Grid	Chart Sca Ch	tter Pies Gauges art	Cards Treemap Choropleth Geo Point Range Filter Bernents • 👫 Group Duplicate Delete 👬 Edit Rules Title 🔒 Parame
, His	tory			Filter Editor Dashboard
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			TON	×16K
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	Sparkline			· ·
	Argument			OK Cancel Apply
	ergument			
		*		
				User : JudithM 23/01/2020 Version : 1.2.0.3 TEST ALPHA - JUDITH PC LC

• Not Add instead of 'And' is now displayed in the Filter Editor.



at		AP: Rec Outstanding To T	rans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- 🗆 ×
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	↑ Account 12,	Account	Transacti	
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ab Account	1 Name L,	BUY001	NO NO	
ab Name	7	GAM001	×0	
Difference	Difference (Sum)	MET001	×0	,
0utstanding	7	PNP002	×0	
1.2 Transactions	Outstanding (Sum)	PRI001	×0	
	2 1 1 1 2	SPR001 SPR002	*156K *121K	×156 ×121
	Transactions (Sum) $\sum$	SUP001	N0	#121
	New Column	TON	×16K	×16
	Sparkline			
	Argument		OK Cancel Apply	
			User : JudithM 23/01/2020 Version : 1.2.0.3 TEST	

• In the *Filter Editor*, click on the *Action* button.

em New Report													
Rec Outstanding To Trans X													
Grid Tools													
me View Design													
Change Name	Undo • Redo • Pivot Grid	Chart So		es Gauges		Treemap Cho	ropleth Map Maps ♥	Filter Elements •	▲ Images ▼ ▲ Text Box ▲ Group	Duplicate	~	Convert To 👻 Remove Data Items Edit Rules	AB Currency Title Edit Colors Parameters
	listory				Filte						X		Dashboard
ita Source P: Rec Outstanding To Trans 💌	DATA ITEMS Columns	î			Not	t And 🔘 🔿							Ľ
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AP: Rec Outstanding To Tr	1 Account	_ 24	Ao	ount								Transac	tions (Sum)
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ab Name				/001 /001	_							×0 ×0	
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Transactions	Outstanding (Sum)	Σ		001								×O	
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	Transactions (Sum)	Σ		2002	_							×121K ×0	×12
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	Sparkline											Y	
	Argument								ок	ancel	Apply		
			_										

- A list of actions will be displayed.
- Select the required action.



			AP: Rec Outstandin	g To Trans - TEST ALPHA - JU	JUTTH PC LOCAL - REPOR	IS DASHBOARD V1.2.0.3			>
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4									
AP: Rec Outstanding To Trans 🛛 🗙									
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12 142 4X =	1 Account	12,	Raw Data	🚽 Add G				Transie	tions (Sum)
+ 🧕 AP: Rec Outstanding To Tr		1.44	BOX0001	_				×0	Jons (Julii)
ab Account	1 Name	12,	BUY001					×O	
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1.2 Transactions			SPR001					×156K	×15
	Transactions (Sum)	Σ	SPR002					×121K	×12
			SUP001	_				×0	
	New Column	A	TON	_				×16K	*1
	Sparkline							*	
	Argument					ок с	ancel Apply		

- The selected action will be displayed.
- Click on the *blue text* in brackets (these are the column titles).

3		A	2: Rec Outstanding To	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3		
stem New Report						
ports						
P: Rec Outstanding To Trans X						
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4 11	story			Filter Editor	1	Dashboard
Data Source	DATA ITEMS			Not And @ O	1	c
AP: Rec Outstanding To Trans •	Columns	1		- [Account] Begins with <enter a="" value=""> 💉 🕲</enter>		L
		1	Raw Data			ம் :
	† Account	12	Account		Transactions	
<ul> <li>AP: Rec Outstanding To Tr</li> </ul>	1 Name	1	BOX0001		×O	
ab Account	† Name	14	BUY001		×O	
ab Name		Σ	GAM001		×O	
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	Transactions (Sum)	Σ	SPR001 SPR002	Not StartsWith (Account), ?)	×156K ×121K	*15
	Transacuons (sum)	1	SUP001		×0	-12
	New Column	A	TON		×16K	×I
	Ivew Column	14				
	Sparkline					
				OK Cancel Apply		
	Argument					
				User : JudithM 23/01/2020 V		

- A list of titles will be displayed.
- Click on any of these titles to *change* the column that is being



filtered.

• In this image, the *Name* column has been selected.

		AP: Rec Outstandin	To Trans - TEST ALP	HA - JUDITH PC LOCA	L - REPORTS DASHB	OARD V1.2.0.3			- 0 ×
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System New Report Reports									
4									
AP: Rec Outstanding To Trans X									*
Grid Tools									
Home View Design									
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АН	istory		Filter Editor					x	Dashboard
Data Source	DATA ITEMS		Not And @ C						
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+ [] AP: Rec Outstanding To Tr		POY2001						*0	×0
ab Account	1 Name 1	24 BUY001	_					×O	×0
ab Name	Difference (Sum)	GAM001						×O	×0
1.2 Difference	Difference (Sum)	METOO A						×O	×0
12 Outstanding	Outstanding (Sum)	PNP002						×O	нO
Transactions	Outstanding (Sum)		_					×0	×0
	Transactions (Sum)	SPR001 SPR002	Not Starts	With [Account], ?]				*156K *121K	×156K ×121K
	Transacions (SUM)	SUP001	_					×121K	×121K
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						User : Judi	01M 23/01/202	u version : 1.2.0.3 TES	T ALPHA - JUDITH PC LOCAL

• In this image, the *Filter Editor* will now displays *Name* as its column filter instead of *Account*.

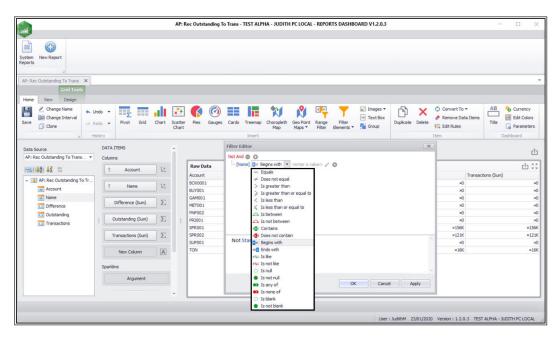
	AP: Rec Outstanding T	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3			- 🗆 X
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	icatter Pies Gauges Chart	Cards Treemap Choropleth Geo Point Range Filter Map Maps • Filter Elements • 11 Group	Dupicate Delete	Edit Rules	Title 🕞 Parameters
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AP: Rec Outstanding To Trans  Columns	]	Not And			c <sup>1</sup> ם
1 42 47 S 1 Account 12	Raw Data	[Name] Begins with <enter a="" value=""> /* (3)</enter>			也 53
+ I AP: Rec Outstanding To Tr	Account			Transacti	ons (Sum)
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Transactions (Sum)	SPR001 SPR002			×156K ×121K	×156K ×121K
Tarsocons (oun)	SUP001	Not StartsWith [Name], ?]	<u>^</u>	×0	×0
New Column A	TON			×16K	×16K
Sparkline					
Argument		OK Cancel	Apply		
		User :	JudithM 23/01/2020	Version: 1.2.0.3 TEST	ALPHA - JUDITH PC LOCAL



• Click on any one of the *green text*. (These are all the *methods* of filtering available in this data grid.)

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-		Cha	t	Map	Maps - Filter B	Elements 🔻 [ Group			Dashboard
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AP: Rec Outstanding To Trans •	Columns			Not And					
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1.2 Outstanding			PNP002					×0	=0
Transactions	Outstanding (Sum)	Σ	PRI001	1				×0	×0
			SPR001					×156K	×156K
	Transactions (Sum)	Σ	SPR002 SUP001	Not StartsWith (Name)	2			×121K ×0	×121K ×0
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• A pop up menu will display a list of the filter *method options* for the selected column.





- Click on any one of these to select the *filter method* required.
- In this image the filter method *Begins with* has been selected.

	AP: Rec Outstanding Te	o Trans - TEST ALPHA - JUDITH PC LOCAL	- REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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2 82 8% ≅ T Account 12	Raw Data	[Name] 📴 Kegins with 🔻 <enter a="" td="" val<=""><td>lue&gt; / @</td><td>Transactions (Sum)</td></enter>	lue> / @	Transactions (Sum)
★ ③ AP: Rec Outstanding To Tr	BOX0001 BUY001			×0 ×0
ab Name L3 Difference (Sum) ∑	GAM001 MET001	<ul> <li>Is greater than or equal to</li> <li>Is less than</li> <li>Is less than or equal to</li> </ul>		он 0н но 0н
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New Column	TON	ALC Ends with ALC Is like		×16K ×16K
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		<ul> <li>Is blank</li> <li>Is not blank</li> </ul>	Have - Judition - 2010 - 2010	Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

• The *Filter Editor* will now display this filter method choice.

•				
larit	A	P: Rec Outstanding I	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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Home View Design Change Name Change Interval Save Change Interval Redo • History	Grid Chart Sca Ch		Carde Transman Chargedeth Cap Belat Banga Elter	anvert To • emove Data Items it Rules DathDoard
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Data Source DATA ITEMS AP: Rec Outstanding To Trans  Columns	î		Not And	Ċ.
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AP: Rec Outstanding To Tr      Account	e 12,	Account BOX0001 BUY001		Transactions (Sum)           ×0         ×0           ×0         ×0
Name     Difference	(Sum) $\Sigma$	GAM001 MET001		0× 0× 0×
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Transaction	: (Sum)	SPR001 SPR002 SUP001	Not StartsWith [Name], ?]	×156K ×156K ×121K ×121K ×0 ×0
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Sparkline				
Arg	ment		OK Cancel Apply	
	¥			ion: 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

• Your filter search parameters needs to be appropriate to the newly selected column and method.



• Click on the *enter a value* text.

	AP: Rec Outstanding Te	Trans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	- 🗆 X
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ab Name □ Difference (Sum) ∑	GAM001 MET001 PNP002		0× 0× 0× 0×
12 Outstanding 12 Transactions Οutstanding (Sum) Σ	PRI001 SPR001		×0 ×0 ×156K ×156K
Transactions (Sum) $\sum$	SPR002 SUP001	Not StartsWith [[Name], ?]	×121K ×121K ×0 ×0
New Column	TON		×16K ×16K
Sparkine Argument		OK Cancel Apply	
		User : Jud#M 23/01/2020	Version : 1.2.0.3 TEST ALPHA - JUDITH PC LOCAL

- A *text box* will appear.
- Type in or click on the *down arrow* and select an appropriate parameter that applies to this particular column (*Name*) and filter method (*Begins With*).

1		A	r: Kec Outs	tanding to I	irans - TEST ALPHA - JUDITH PC LOCAL - REPORTS DASHBOARD V1.2.0.3	>
tem New Report						
Rec Outstanding To Trans 🛛 🗙						
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ome View Design						
ve Change Interval		Chart Sca	etter Pies	Gauges C	Map Maps 🕶 Filter Elements 💌 🔚 Group 👘 Edit Rules	Green Currency
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P: Rec Outstanding To Trans 🔻	Columns				Not And 💿 💿	L
	1 Account	1z	Raw D	ata	[Name] Begins with	th 5
			Account	t	Transactions (Su	m)
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ab Account			BUY001		×0	
ab Name	Difference (Sum)	Σ	GAM00		*0	
1.2 Difference			PNP002		×0 ×0	
1.2 Outstanding	: Outstanding (Sum)	Σ	i PRI001		×0	
1.2 Transactions			SPR001		×156K	×15
	Transactions (Sum)	Σ	SPR002	-	×121K	×12
			SUP001		Not StartsWith (Name), 'Sprint Distributors International') *0	
	New Column	A	TON		×16K	*1
	Sparkline					
	Argument				OK Cancel Apply	
			-			



- The text box in the *Filter Editor* is not case sensitive, you can type in any part of a word or number.
- In this image, *Boxer* has been selected.

			AP: Rec O	utstanding	To Trans - TEST A	LPHA - JUDII	TH PC LOCA	- REPOR	RTS DASHB	DARD V1.2.0.3				-		×
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Grid Tools																
Home View Design																
Change Interval	Indo • Eco • Pivot Grid	Chart S	catter Pi	s Gauges	Cards Treem		Geo Point Maps *	Range	Filter Elements •	Images ▼ AB Text Box Group	Duplicate	X Delete	Convert To   Remove Data Items  Edit Rules	AB Title	Curren Edit Co	lors
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+ I AP: Rec Outstanding To Tr			1.00	ount 0001									×0	ons (Sum)		×0
ab Account	† Name	12,	BUY		-								*0			
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1.2 Transactions	Outstanding (Sum)	Σ	PRI										×O			×0
	T	7	SPR		-								×156K ×121K			×156K ×121K
	Transactions (Sum)	Σ	SUP		Not Starts	Vith([Name	, 'Sprint Di	stributo	rs Internat	ional")			×121K			×0
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	Argument								OF	Cance	a A	pply				
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										User	: JudithM 2	3/01/2020	Version : 1.2.0.3 TEST	ALPHA - JL	DITH PC LC	CAL
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- 1. You can add more filters.
- 2. You can delete a filter.
- 3. When you have finished making your filter changes and selections, click on *Apply* and *Ok* to apply these to the dashboard item.



		3	AP: Rec (	)utstanding 1	To Trans - TES	T ALPHA - JUDIT	H PC LOCAL -	REPORTS DAS	HBOARD V1.2.0.3			- 0 X
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Data Source AP: Rec Outstanding To Trans •	DATA ITEMS Columns	î			Filter Edito						x	Ċ
	1 Account	12		w Data	[Name]	Begins with Boxer	/ 0 🗕	-2				也 23
+  AP: Rec Outstanding To Tr  Account	1 Name	14	BO	count X0001 Y001							×0 ×0	tions (Sum) xi
ab Name	Difference (Sum)	Σ	ME	M001 T001							0× ×0	×0
1.2 Outstanding	Outstanding (Sum)	Σ	PR	P002 1001 R001	-						×0 ×0 ×156K	×0 ×156k
	Transactions (Sum)	Σ	SPI	R002 P001	Not Star	rtsWith <mark>([Name</mark> ]	, 'Boxer')				×121K	×121K ×0
	New Column	A	то	N					3		×16K	×16K
	Sparkline										-	
	Argument								OK Cance	el Apply		
									User	: JudithM 23/01/2	020 Version : 1.2.0.3 TES	FALPHA - JUDITH PC LOCAL

- The selected filter will be applied to the dashboard item.
- In this image, *Boxer* is no longer displayed in the dashboard item.

4			AP: K	ec Outstand	ing to trans	IEST ALPH	A - JUDITH F	PCLOCAL	- KEPUK	IS DASHBO	OARD V1.2.0.3				- 0
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😑 😼 👯 🚍	† Account	区		Raw Data											<u>د</u> ار
+ I AP: Rec Outstanding To Tr				Account BUY001	Nam	e Back Supplier			Dif	fference (Sur		Outstandir 0	ıg (Sum)	×0	actions (Sum)
ab Account	† Name	12,		GAM001	Gam									×0 ×0	
ab Name				MET001		o Peach Distri	butors							×0	
1,2 Difference	Difference (Sum)	Σ		PNP002	Pick	and Pay (Pty)	Ltd					0		×0	
1.2 Outstanding				PRI001		er World (Pty								×0	
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### **CLEAR A DASHBOARD FILTER**

• To clear a column filter on a selected control type (dashboard item), click on *Clear* on the *right click menu*.

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- The column filter will be cleared.
- In this image, *Boxer* is now displayed in the selected dashboard item.



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### **PRINT PREVIEW A DASHBOARD ITEM**

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• Click on *Print Preview*.



- The *Preview* screen will be displayed.
- You can now view the data contained in the dashboard item before printing.

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### EXPORT TO ....

- You can export data displayed in the dashboard item to *PDF* or *Image* or *Excel*.
- The *Export to Dashboard* option gives you the same *Export To...* options as above.
  - *Note:* For more information refer to Export To topic.



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#### **Related Topics**

- Change dashboard report title
- Set default currency
- Edit dashboard colours
- Change report name
- Change report interval
- Clone Report

### MNU.162.011