

How do I create custom reports?

Last Modified on 12/22/2021 3:13 pm MST

We have spent a lot of time creating the custom reports option for you. This gives you access to create all sorts of reports to search and sort your data.

Creating a custom report

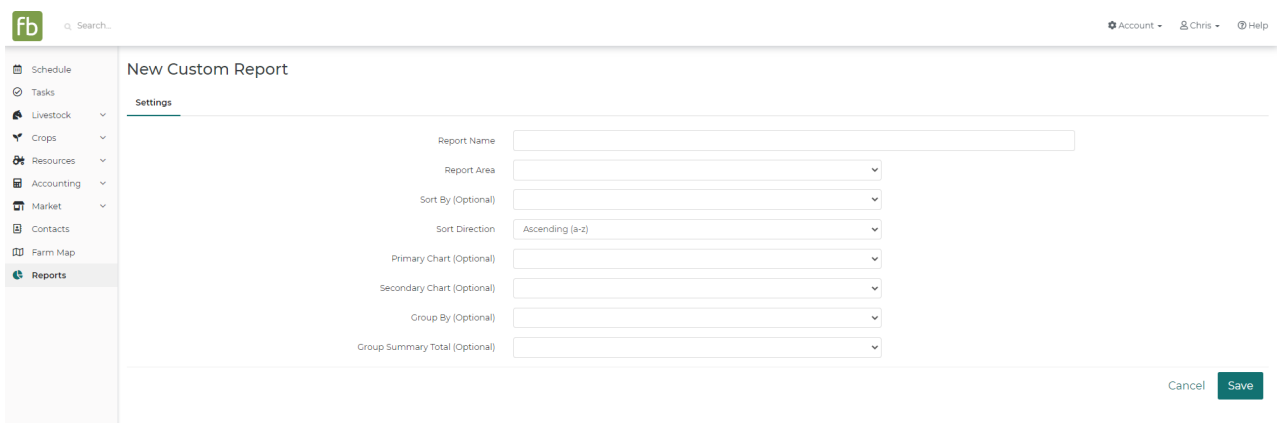
Start by going to the Reports tab and clicking on the Green 'New Custom Report' in the custom reports section. This will give you the option to select Report name, Report area (Accounting, Tasks, Notes, etc.) and other options to select.

Once you have saved your settings Farmbrite will ask you to select your Report fields and filters.

(Note: You must select "Report fields" in the second list for your report to pull information.)

You can always go back and change these filters and fields after you have saved. Depending on the report it may give you links to click on in the report where you can dive into the report information further.

Once you have saved this custom report it will remain in your custom reports tab. It will pull new information each time you run it (as your information changes so will the report).



The screenshot shows the 'New Custom Report' settings form in the Farmbrite application. The form is titled 'New Custom Report' and has a 'Settings' tab selected. The form contains several input fields and dropdown menus:

- Report Name: A text input field.
- Report Area: A dropdown menu.
- Sort By (Optional): A dropdown menu.
- Sort Direction: A dropdown menu with 'Ascending (a-z)' selected.
- Primary Chart (Optional): A dropdown menu.
- Secondary Chart (Optional): A dropdown menu.
- Group By (Optional): A dropdown menu.
- Group Summary Total (Optional): A dropdown menu.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

There are many options of creating reports. Sometimes it pays to tinker with the report to get exactly what you need.