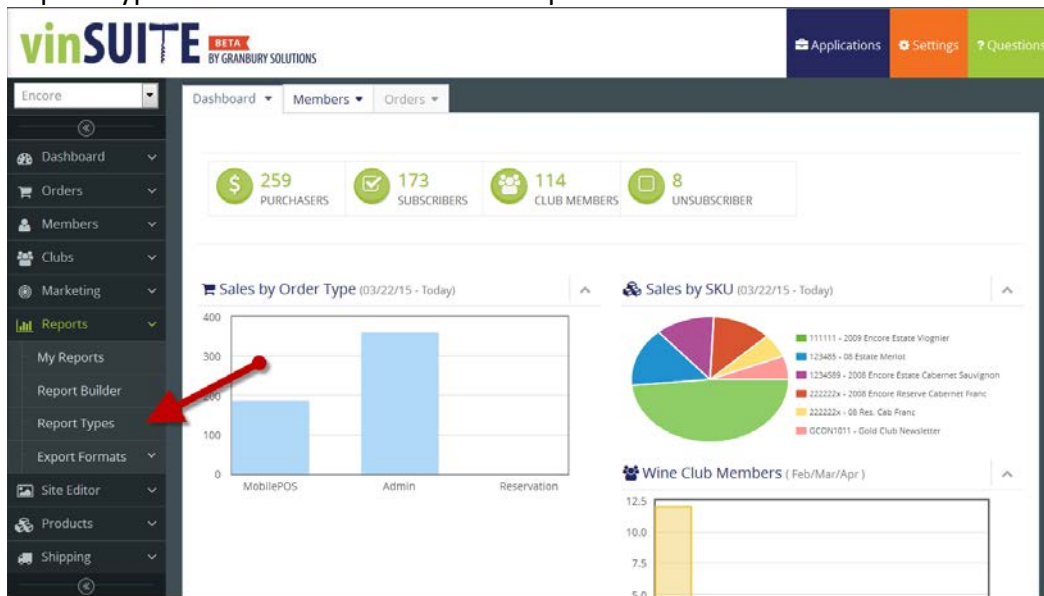


What are Report Types?

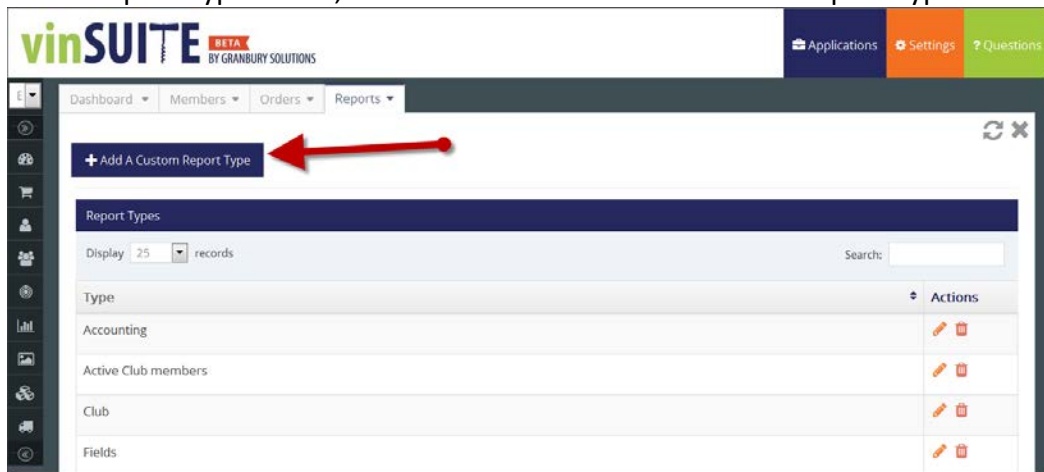
Report Types are a tool for organizing the reports you create using the Report Builder. Using Report Types, you can quickly and easily filter your My Reports list and find the reports you need. The list of Report Types varies by winery, so you will be able to set up these types and organize your reports any way you would like. For example, you can create a “Wine Club” Report Type to assign to all of your reports pertaining to the Wine Club.

Adding a Report Type

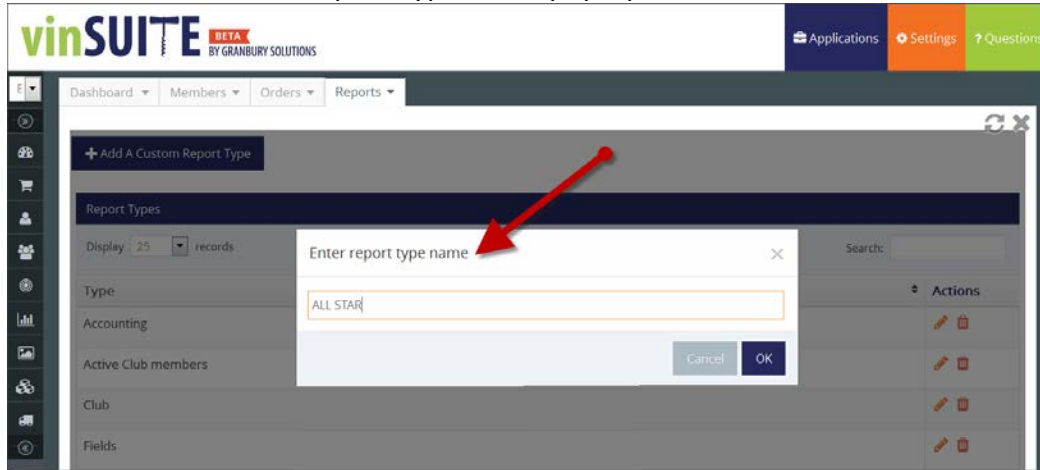
1. In vinSuite, expand the “Reports” section of the left hand navigation then choose “Report Types”. The Report Types table will show in the workspace.



2. In the Report Types table, click the button to “Add a Custom Report Type” at the top of the page.



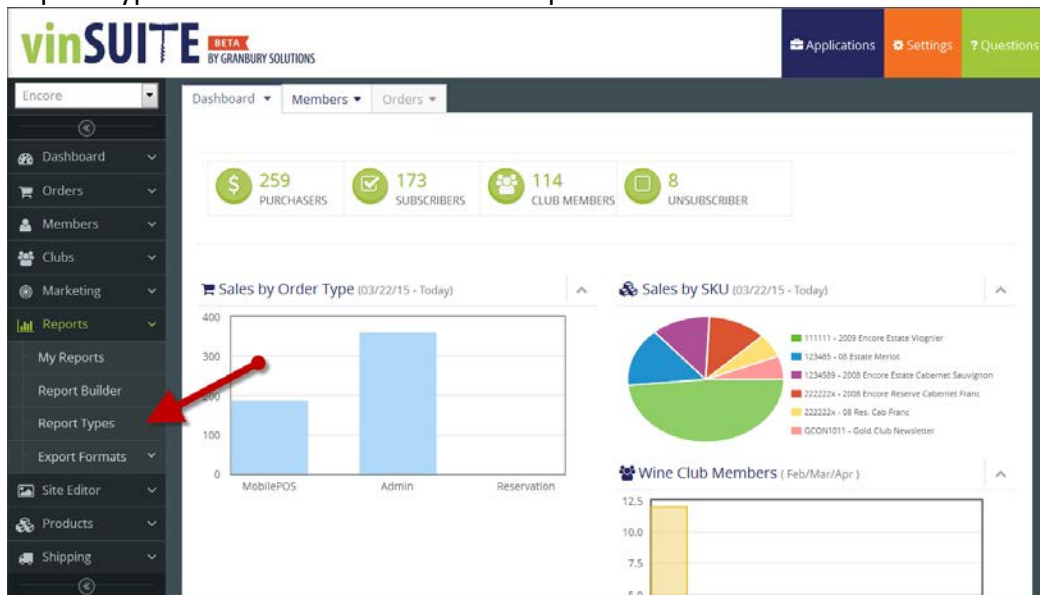
3. Enter the name of the Report Type in the pop-up, then click 'OK'.



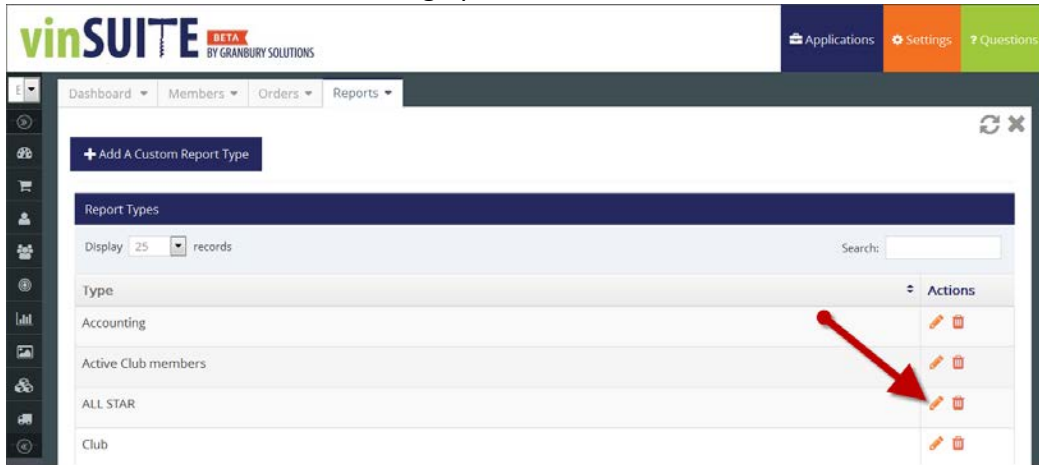
4. The Report Type list will be updated to reflect the new Report Type.

Editing a Report Type

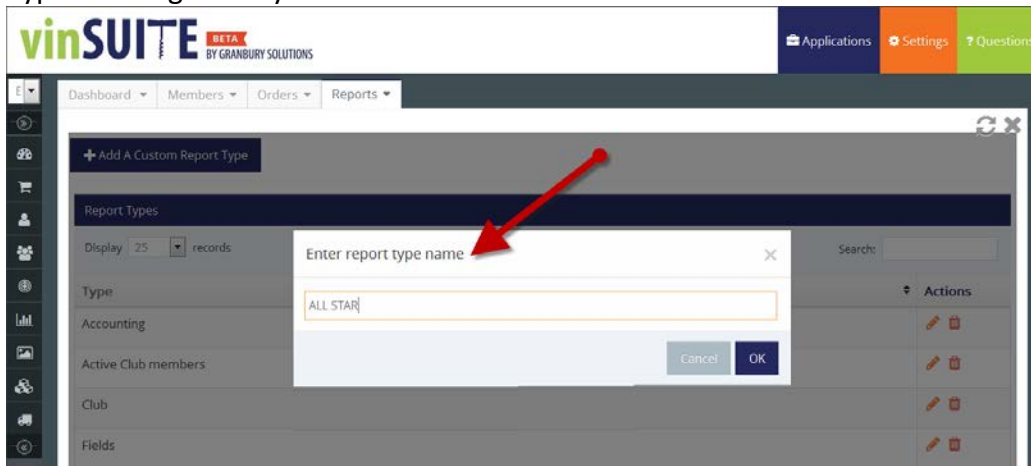
1. In vinSuite, expand the “Reports” section of the left hand navigation then choose “Report Types”. The Report Types table will show in the workspace.



2. In the Report Types table, find the Report Type you wish to edit. To quickly filter this list you may use the 'Search' field in the upper right of the workspace. Once you have located the Report Type you would like to edit, click the orange pencil in the 'Actions' column of the table.

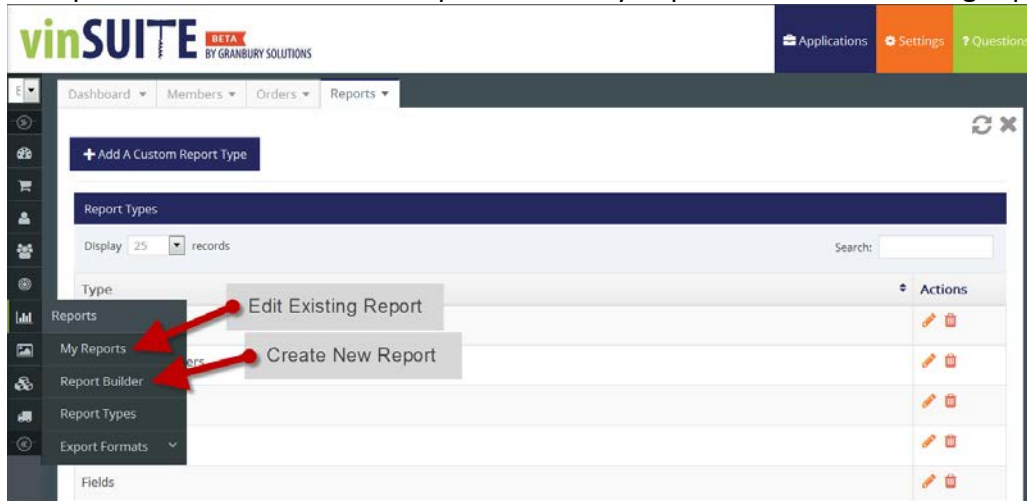


3. *The trashcan icon in this column will delete the Report Type.
4. Make your change to the Report Type and click 'OK' to save. The change will be reflected in the Report Type table right away.



Applying a Report Type to a Report

1. In Report Builder create a new report or use My Reports to edit an existing report.



2. In Step 1 of the Report Builder, use the “Report Type” field to assign the correct Report Type. You will need to make the rest of your adjustments to the report (Steps 2 & 3) then use the save options in Step 4.

