Using the Date Picker

Master the new tools for custom and preset date ranges.

Before using the date filters, you need to open a report. We will use the Sales Summary Report as our example.

- Folder Navigation: Click on the Operations folder and select the Sales Summary Report.

- Search Bar: Alternatively, you can use the Search Bar at the top of any screen to quickly find a specific report by name.

By default, the Reporting Hub displays data for "Yesterday." To change this, follow the steps below:

1. Selecting an Exact Date

If you need to view data for one specific day:

- Click on the Date Picker at the top of the report.
- Change the dropdown from Relative Time Frame to Exact Date.
- Click the Calendar Icon in the second box that appears and select your desired date.
- Click the blue Update button.

2. Setting a Date Range

If you need to view data over a period (e.g., a specific week):

- In the Date Picker dropdown, select the option Between.
- Two date boxes will appear. Select your Start Date in the first and your End Date in the second.
- Click the blue Update button to refresh the report.

3. Advanced Timeframes (Monthly, Quarterly, Annual)

For broader reporting needs, the Hub offers preset intervals:

- Click the Date Picker dropdown and select More.
- Choose from options such as Monthly, Quarterly, or Annually.

Pro Tip: Always remember to hit the blue Update button after changing your settings, or the report will not reflect your new date selection!