

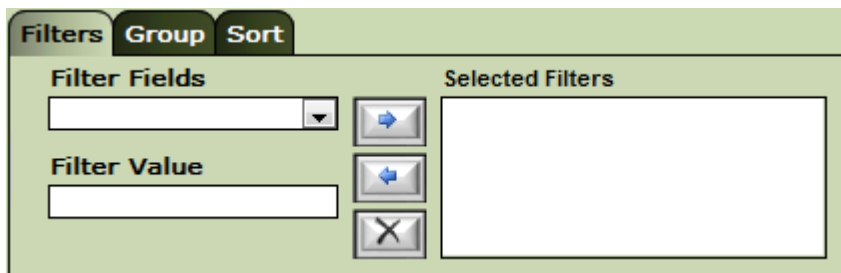
Report Selection Screen

Category: Reports | Created: June 10, 2026 | Updated: September 01, 2026

Report Selection Screen

Screen Location - Main Menu > Reports > Any Category

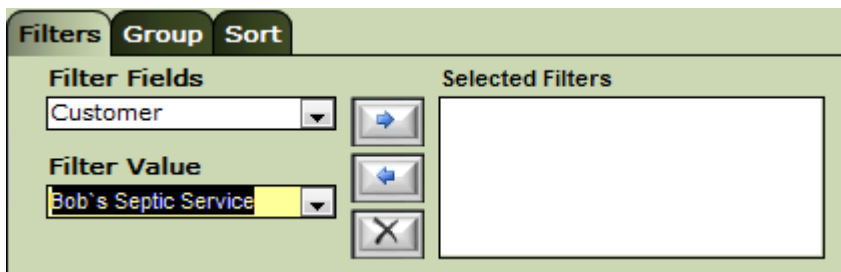
Some reports will offer a dialog of options that include Filters, Group and Sort.



The screenshot shows a dialog box with three tabs: 'Filters', 'Group', and 'Sort'. The 'Filters' tab is active. It contains two input fields: 'Filter Fields' and 'Filter Value'. The 'Filter Fields' field has a dropdown arrow. To the right of these fields are three buttons: a top right-arrow button, a middle left-arrow button, and a bottom double-left-arrow button. To the right of these buttons is a large empty box labeled 'Selected Filters'.

Each of these options can be used in combination with the others to offer sometimes hundreds of different outputs from the same basic report. Many of the reports will continue to have a separate filter for a range of dates or As Of date.

Filters - Use this option to reduce the amount of information to be included in the report. For example, you may only want to see information for a particular customer. Select the Filter Field, the Filter Value, and then click the top right-arrow button to add that filter to the Selected Filters list.



This screenshot shows the same dialog box as the previous one, but with values entered. The 'Filter Fields' dropdown now shows 'Customer'. The 'Filter Value' dropdown now shows 'Bob's Septic Service'. The top right-arrow button is highlighted, indicating it is the next step to click to add the filter to the 'Selected Filters' list.

Use the middle left-arrow button to remove a highlighted filter from the Selected Filters list, or the bottom double-left-arrow button to remove all filters from the Selected Filters list.

You may set multiple filters to further reduce the information to just the information you are interested in on a report. In our example, we may only want to see information for that customer but destined for only one particular state.

The screenshot shows the 'Filters' tab selected. It contains two input fields: 'Filter Fields' and 'Filter Value', each with a dropdown arrow. To the right of these fields are three buttons: a blue arrow pointing right, a blue arrow pointing left, and a grey 'X' button. On the right side of the tab is a 'Selected Filters' table.

Selected Filters	
Customer	Bob's Septic Service
Job Number	2048

Look to the end of the report to see what filters were used to produce that particular report.

Group - Use the Group option to break the report up into groups. Each group will have subtotals and a count of detail lines for that group. For example, if a Customer group is available for a report, then we can select Customer and decide if we want the groups to print in ascending or descending order.

The screenshot shows the 'Group' tab selected. It has two dropdown menus: 'Group By' with 'Customer' selected, and 'Order' with 'Ascending' selected. Below these is a small text note.

* Grouping breaks the report information up into sections or groups that provide separate totals for each group including number of items in each group in ascending or descending order. Reports will default to a common grouping if one is not selected.

Sort - Use the sort option to determine the order each detail line will print within a group. For example, if an item such as Invoice Total is available, then you may select it and the Order descending to show the highest total items first.

The screenshot shows the 'Sort' tab selected. It has two dropdown menus: 'Sort By' with 'Invoice Total' selected, and 'Order' with 'Descending' selected. Below these is a small text note.

* Sorting will determine the order the information is printed within each group. The sort field selected can be printed in ascending or descending order. Reports will default to a common sort field if one is not selected.

The following example report shows all Invoices in a date range for Alice County, Earthworks Inc, grouped by Job Name, with details sorted in descending Invoice Total order.

INVOICE DETAIL REPORT

HaulWare Trucking, Inc.

For the Period From 1/1/2021 To 12/31/2021

Invoice Date	Invoice #	Customer	Job #	Line Items	FSC	Tax	Invoice Totals
Job Name: Bratee Kids Playground							
06/25/2021	210625-03	Alice County Earthworks, Inc.	2021-Bratee Kids Playgro	\$12,000.00	\$0.00	\$0.00	\$12,000.00
Invoice Count: 1				\$12,000.00	\$0.00	\$0.00	\$12,000.00
Job Name: Safeway Parking Lot #6							
06/25/2021	210625-04	Alice County Earthworks, Inc.	2056-Safeway Parking Lot	\$735.05	\$22.69	\$0.00	\$757.74
03/15/2021	210315-01	Alice County Earthworks, Inc.	2056-Safeway Parking Lot	\$698.91	\$21.58	\$0.00	\$720.49
Invoice Count: 2				\$1,433.96	\$44.27	\$0.00	\$1,478.23
Job Name: Schoolhouse Hwy Overpass							
03/11/2021	210311-02	Alice County Earthworks, Inc.	2013-Schoolhouse Hwy O	\$797.10	\$20.33	\$0.00	\$817.43
09/27/2021	210927-01	Alice County Earthworks, Inc.	2013-Schoolhouse Hwy O	\$453.75	\$0.00	\$0.00	\$453.75
Invoice Count: 2				\$1,250.85	\$20.33	\$0.00	\$1,271.18
Job Name: Turnbull Towers							
09/22/2021	210922-01	Alice County Earthworks, Inc.	2063-Turnbull Towers	\$0.01	\$0.00	\$0.00	\$0.01
Invoice Count: 1				\$0.01	\$0.00	\$0.00	\$0.01
Invoice Count: 6				Report Total:			
Report Filters: Customer = Alice County Earthworks, Inc.				\$14,684.82	\$64.60	\$0.00	\$14,749.42

Notice the date range, group and sort options are shown at the top, and filters shown at the bottom.

Detail / Summary - Some reports will offer the ability to just print the group subtotals and final report totals and leave out the details.

Date RangeLast Year▼

From Date1/1/2021To Date12/31/2021

☒ Detail☐ Summary

Saved Report Parameters

Select the Summary option on the right side (if available) to exclude the details.

INVOICE SUMMARY REPORT

HaulWare Trucking, Inc.

For the Period From 1/1/2021 To 12/31/2021

Job Name	Line Items	FSC	Tax	Invoice Totals
Bratee Kids Playground	\$12,000.00	\$0.00	\$0.00	\$12,000.00
Safeway Parking Lot #6	\$1,433.96	\$44.27	\$0.00	\$1,478.23
Schoolhouse Hwy Overpass	\$1,250.85	\$20.33	\$0.00	\$1,271.18
Turnbull Towers	\$0.01	\$0.00	\$0.00	\$0.01
Invoice Count: 6	Report Total:	\$14,684.82	\$64.60	\$0.00
				\$14,749.42

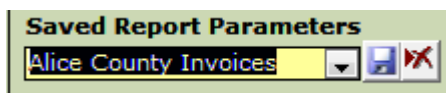
Report Filters: Customer = Alice County Earthworks, Inc.

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Saved Report Parameters - Save your report parameters and give the saved parameters a name that describes the report.



Use the disk button to save the report, and delete button to remove a previously saved report. Tip: Enter the Saved Report name in the First Title field to remind yourself what saved report you are looking at.

Report Logo - There is a ReportLogo switch available from Setup > Company Settings > Switches. Send your logo design to support and we will configure this switch for you so your logo appears on the reports.

Please call or [Email](#) us for Information on this topic.