

Include Dynamic Restrictions on a Custom Report

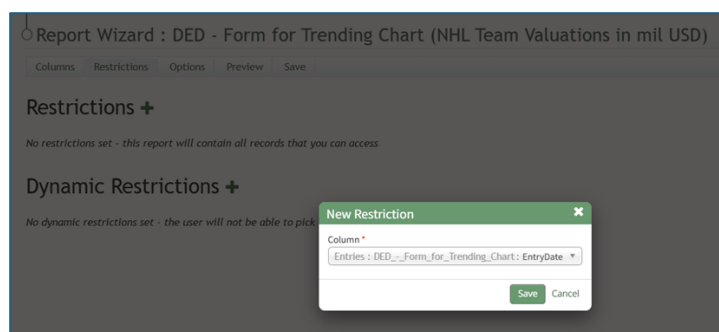
To include dynamic restrictions on a date field in a custom report, go to the Custom Report Tab on the Manage Reports Page and select the three-dot icon next to the report title opening the context menu.



The screenshot shows the 'Manage Reports' interface. At the top, there are tabs for 'Custom Reports' and 'System Reports'. Below the tabs is a 'New Report' button. The main area is a table with two columns: 'Title' and 'Primary Module'. The table lists several reports, including 'CRM', 'Join Our Team - Initiated Via', 'Join Our Team - Status', 'Join Our Team - Status (Not Closed)', 'Sales Information Request - Contact Reason', 'Sales Information Request - Find Method', 'Sales Information Request - Initiated Via', 'Sales Information Request - Status', and 'Sales Information Request - Status (Not Closed)'. A context menu is open over the 'Join Our Team - Status' row, showing options: 'View Report', 'Run Report', 'Copy Report', 'Report Wizard' (highlighted), 'Download Report', 'Report Properties', and 'Delete Report'.

Title	Primary Module
CRM	Forms
Join Our Team - Initiated Via	Forms
Join Our Team - Status	Forms
Join Our Team - Status (Not Closed)	Forms
Sales Information Request - Contact Reason	Forms
Sales Information Request - Find Method	Forms
Sales Information Request - Initiated Via	Forms
Sales Information Request - Status	Forms
Sales Information Request - Status (Not Closed)	Forms

Select "Report Wizard" and open the Restrictions Tab on the Report Wizard Page. Select the plus "+" icon to open the New Restriction Modal.



The screenshot shows the 'Report Wizard' page for a report titled 'DED - Form for Trending Chart (NHL Team Valuations in mil USD)'. The 'Restrictions' tab is selected, and a 'New Restriction' modal is open. The modal has a 'Column' dropdown menu with the selected option 'Entries : DED...Form_for_Trending_Chart: EntryDate'. There are 'Save' and 'Cancel' buttons at the bottom of the modal.

Select the column for the date-related field you would like to add dynamic restrictions to from the dropdown menu options provided. Select "Save" on the modal.

Report Wizard : DED - Form for Trending Chart (NHL Team Valuations in mil USD)

Columns Restrictions Options Preview Save

Restrictions +

No restrictions set - this report will contain all records that you can access

Dynamic Restrictions +

✕ Entries : EntryDate

The dynamic restriction field now shows on the Restrictions Tab. Select the “Save Tab” to save the dynamic restriction. When you run the report, the dynamic restrictions will now show and allow for additional filtering of the chosen date-related column.

DED - Form for Trending Chart (NHL Team Valuations in mil USD) Reports > Run Ded - Form For Trending Chart (nhl Team Valuations In Mil Usd)

Entries : EntryDate : to

Today Yesterday Last 7 Days Last 30 Days Month To Date Last Month Year To Date Last Year

Set Filter Clear

Team	Year	Valuation (in mil USD)	EntryDate
Anaheim Ducks	2022-01-01	725	2023-06-19 16:13:57
Arizona Coyotes	2022-01-01	450	2023-06-19 16:13:57
Boston Bruins	2022-01-01	1400	2023-06-19 16:13:57
Buffalo Sabres	2022-01-01	610	2023-06-19 16:13:57

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