How to Save & Reset Memorized Reports

The report menu has been reorganized to be easier to navigate. Inventory, Salesperson, and Customer performance reports have been moved and grouped under the new button **Analytics**.

If you are a memorized reports user, you will not see these changes until you reset the report button structure. This document explains how to save your memorized reports, reset the reports menu, and then reimport your memorized reports.

- 1. Click Administrative > Manage Reports Menu.
- 2. At the bottom, click Supervisor > Export Memorized Reports.



3. Check the memorized reports you wish to export, then click OK.

	Export Memorized Reports Choose an exported memorized repor reports that are to be exported. Reports File	ts file (leave blank to create a r	new file). Then select the	
	Report Title Daily Sales Report Monthly Sales Report Monthly Commission Report Sales Person Performance report Salesperson CAT Performance Report Monthly Sales Tax Report Monthly Inventory Performance by Category nventory Performance by Age Only	Button Text Daily Sales Monthly Sales Report Monthly Commission Report Sales Person Performance report Salesperson CAT Performance Report Monthly Sales tax INV Performance by CAT INV Performance by Age	Belongs To Sales Reports Sales Reports Sales Reports Sales Reports Sales Reports Sales Reports Monthly Performance Reports Monthly Performance Reports	
	All None		OK Cancel	

4. Your reports will be exported. Make a note of the filename it exports to.



5. Next, click **Supervisor > Reset to Program Defaults**.

	New Group	Add Run All Button		Move Up			Expand	Collapse
	Disable	Delete	Move	Left M	ove Right			
	Properties			Move Down				
	Supervisor					Revert	Save / Close	Cancel
Import Memorized	Reports							
Export Memorized	Reports							
Reset To Program	Defaults							
Cancel 😽								

- 6. The Edge will automatically make a backup. Click **Save**.
- 7. Now, click **Supervisor > Import Memorized Reports** and then click the **Browse** button in the top right.

Import Memorized Reports						
Choose a memorized reports file. Then select the reports that are to be imported.						
Reports File	Reports File					
Report Title Button	Text Based On	2				

8. Select your report backup file, then click **Open**.

🖳 Open				×
	gramData > AJSLLC > edge > VerticalMenu	ٽ ~	Search VerticalMenu	Q
Organize 🔻 New folder				- 🔳 🕜
📰 Pictures 🛛 🖈 🔨	Name	Date modified	Туре	Size
🝐 Google Drive 🖈 🚽	ReportVerticalMenu132074108461519327	7/12/2019 9:14 AM	EDGEREPORTMEN	4 KB
Local_Dom NEW NewsFeed	VerticalMenu132074111060518127.edgeR	7/12/2019 9:18 AM	EDGEREPORTMEN	7 KB
File nar	me: ReportVerticalMenu132074108461519327.edg	eReportMenu 🗸 🗸	Vertical Menu Zip Fi	iles(*.edgeR > Cancel

9. Select the reports to import, then click **OK**.

	Import Memorized Reports Choose a memorized reports file. Then select the reports that are to be imported.						
	Reports File C:\ProgramData\AJSLLC\edge\VerticalMenu\ReportVerticalMenu132074108461519327.edgeRep Browse						
1	Beport Title Daily Sales Report Monthly Sales Report Monthly Commission Report Sales Person Performance report Sales person CAT Performance Report Monthly Sales Tax Report Monthly Inventory Performance by Category nventory Performance by Age Only		Daily Sales Monthly Sales Report Monthly Commission Report Sales Person Performance report Salesperson CAT Performance Report Monthly Sales tax INV Performance by CAT INV Performance by Age	Daily Activity Daily Activity Commission Report Salesperson Performance Report Salesperson Category Performance Re Sales Tax Report Inventory Performance By Category Inventory Performance By Age			
	<	All None		OK Cancel			

- 10. Click Save/Close.
- 11. Your memorized reports will be restored under the button **Imported Reports**. You can go back into **Administrative > Manage Memorized Reports** to reorganize these in the button hierarchy.

For more on memorized reports:

- Video
- **Document**