

Memorized Reports in the New Desktop UI

Overview

Learn how to organize your existing **Memorized Reports** for the new Desktop UI and recreate the functionality you used in the previous Desktop. This guide walks you through arranging report groups, moving reports, and creating a group with the **Run All Reports** option.

What Changes With the New Desktop

Your Memorized Reports remain available, but the way they are organized on the previous Desktop does not carry over to the new Desktop menu. This includes existing report-group organization and the previous Run All arrangement. The reports themselves are not lost; you can reorganize them for the new Desktop and create a new group with a **Run All Reports** button.

Why Reorganize Them?

Organizing Memorized Reports in the new Desktop lets you put frequently used report groups in the order that works best for your store and restore the convenience of running a group of reports together. The steps below show how to reorder groups, create a Run All group, and move reports into it.

NOTE

Changes made to report organization on the new Desktop are specific to the new Desktop menu. If you later switch back to the previous Desktop, **those new menu changes will not appear there.**

Reorganizing your Memorized Reports

1. **Open Manage Reports.** From the main menu, select **Reports > Reports Menu Management > Manage Reports**.
2. **Locate your Memorized Reports.** Expand **Memorized Reports** to view your existing report groups and individual Memorized Reports.



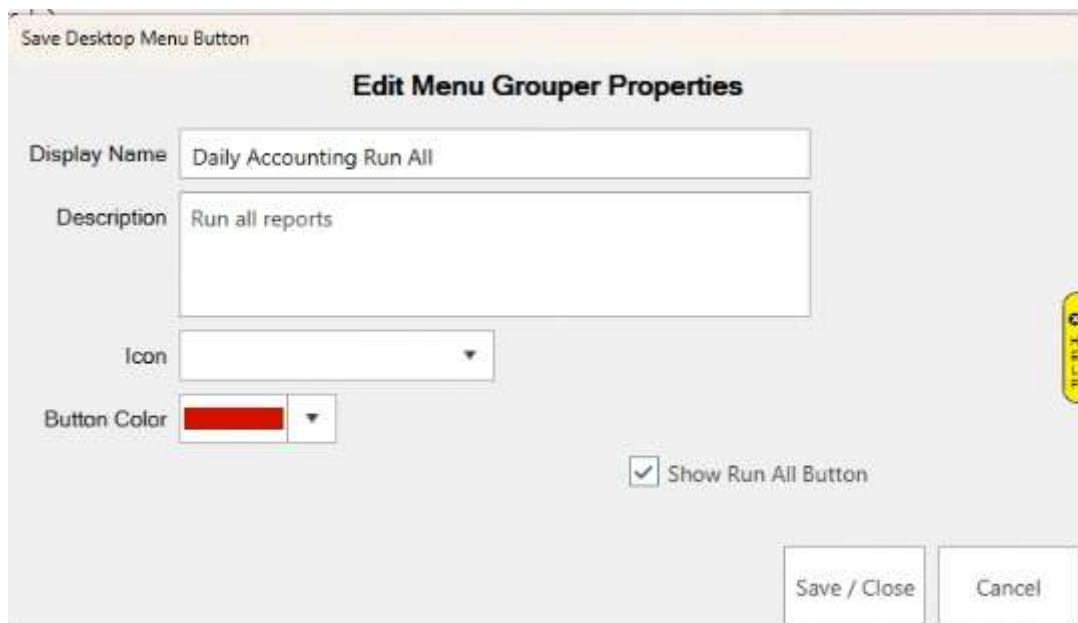
3. **Reorder a report group.** Drag a group to the preferred location, or select the group and use the up- and down-arrow buttons at the bottom of the window to move it.



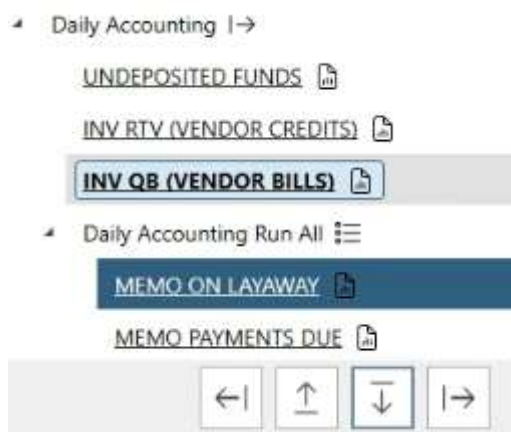
4. **Create a group for Run All Reports.** Select the report group you want to organize, then click **Add Group** in the upper-right corner.



5. **Configure the new group.** Enter a **Display Name** and any optional description. Check **Show Run All Button**, then click **Save / Close**.



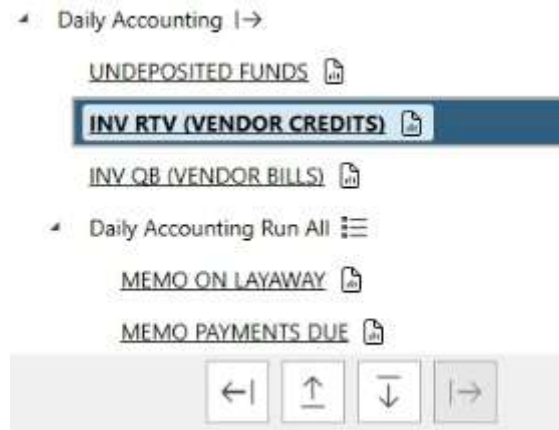
6. **Move reports into the new group.** Select the report you want to move and position it directly above the new group. Click the right-arrow button to move the selected report into that group.



NOTE

The right-arrow button is available only when the selected report is directly above the destination group. Use the up- or down-arrow buttons first when needed.

7. **Repeat for the remaining reports.** Continue moving reports until the new group contains all of the reports you want to run together.



8. **Save and confirm your changes.** Click **Save / Close**. Return to **Reports** and open the updated group to confirm the reports appear in the desired order and the **Run All Reports** option is available.

