

Change the Report used for Drill Down Functionality

Document #:	3179	Product:	CenterPoint [®]	
Each report in CenterPoint with drill down capabilities has a default report assigned that it uses to display the information being				

drilled down to. For example, if you drill down on an Income Statement report, the General Ledger report will be displayed by default.

Occasionally, users may want to have the system display a customized version of that report instead of the default. For example, if you have customized the General Ledger report and you want that report to be used when drilling down on an Income Statement. The instructions below explain how to change the default drill down report.

Change the Default Drill Down Report

- 1. From the **Reports > Reports** menu, select the report you would be drilling down from. In this case, the Income Statement.
- 2. Click **Preview** to display the report.
- 3. Select the **General** tab.

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Ge	General	▼ +	Alpine Sports	
General Header	Title	Income Statement	Income Statement	
Heade	Style	(Default)	1/1/2010 to 11/30/2010	
	Date	Upper Left Comer 🔹	Jan 2010	
Columns	Time Page No.	Upper Left Comer (Line 2)	Nov 2010 Actual	
Group & Sort Filters Footer		Upper Right Comer 🔹		
		 Filter selections in report footer Show report totals Group headings on each page 		
		Show totals only	382,504.64	
		Show row counts	1,248,908.00	
	Drill Down		ces (19,577.00)	
		Default	431.50	
		General Ledger 2nd test General Ledger from income stmt	Total Revenue \$1,612,267.14	

4. In the **Drill Down** field, select the customized report that you'd like the system to display when drilling down on this particular report.

Note: The Drill Down drop down box will only show customized versions of the same report that the system defaults to. For example, an Income Statement Drill Down box will only show customized General Ledger reports.

- 5. Click Refresh.
- To save the report so that it always uses the custom report for drill downs, click the yellow star
 to save the report as a favorite. Specify a Name for the report and click OK. The custom report will be displayed in Reports > Reports > Favorites.

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