Report Favorites

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You can save the reports that you print often to the Favorites tab (or the Database tab or Network tab). This will allow you to quickly locate the reports that you want to print on a regular basis. The reports that are saved on the Favorites tab can be standard, default reports, default reports that include a specific filter, or a default report that has had some variations defined (additional columns, groups, sorting, etc.) It can also include reports that have been customized specifically for your business. The Favorites tab is accessed by selecting Reports > Reports > Favorites tab.

> Note: The database and network tabs will only be displayed if your preferences have been set a certain way. See the Reports Setting topic for more information about how to set the tabs that you want to display.

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Save a Default Report as a Favorite:

1. Highlight the report on the **Reports** tab (Reports > Reports).
2. Right-click on the report name, and then select **Add to Favorites** or **Add to Database** (this selection will only display if you have your **File** > **Preferences** > **General** > **Report** preference for **Display Database Favorites** is set to **Yes**).
3. In the **Enter a name for the favorite** box, enter a name you are likely to recall.
4. Click **OK**.

Save a Customized Report as a Favorite

1. Make the needed changes to a default report and click **Preview**.
2. Click on the yellow star icon.

3. In the **Enter a name for the favorite** box, enter a name you are likely to recall.
4. Click **OK**.

Rename a Report on the Favorites tab

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab or **Database** tab (this selection will only display if you have your File > Preferences > General > Report preference for Display Database Favorites is set to Yes).
3. Select the report you want to rename.
4. Right-click and select **Rename**.
5. Enter the new name for the report and then press **Enter**.

Delete a Report on the Favorites tab

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab or Database tab (this selection will only display if you have your File > Preferences > General > Report preference for Display Database Favorites is set to Yes).
3. Select the report you want to delete.
4. Click **Remove** or right-click and select **Delete**.
5. At the "**Are you sure you want to remove this item?**" message, click **Yes**.

Set the Favorites Tab as the Default Report tab

When the Reports > Reports menu is selected, the system defaults to being active on the Reports tab. If you prefer, you can have the system default to being active on the Favorites tab instead.

1. Select **File > Preferences**.
2. Within Preferences, select **General > Reports**.
3. Select the **Application** or **Database** tab.
4. In the **Default Report tab** field, select **Favorites**.
5. Click **Save**.

> Note: To determine which tab will be the default tab when you select Reports > Reports, select *File > Preferences > General > Reports,* click on the *Application* tab, and in the *Default Report Tab* box, select the tab to display as the default.

> Note: If you want only your Favorites to display when you select Reports > Reports, select *File > Preferences > General > Reports,* click on the *Application* tab, and in the *Disable Reports Tab* box, select *Yes.*

Organize Reports on the Favorites tab into Folders

Folders can be created on the Favorites tab to easily organize your favorite reports. If you've grouped a number of reports together in a folder on the Favorites tab, you can run the reports together as a batch report by clicking Print or Preview from the Favorites, Databases, or Network tab. You will have a Batch Date and Company Report Selections available for the folder. If you click the Batch Date Filter, you will be able to apply a based off of date for the group of favorite reports. If a folder has sub-folders, all reports in sub-folders will also appear in the batch to run. If the run option is selected on the sub-folder only reports under the sub-folder will be run. If the sub-folder has other sub-folders those reports will be included in the batch. For more information, see the Create a Batch Report topic.

1. Right-click in the blank space on the Favorites tab and select **New Folder**.
2. Enter a **Name** for the folder.
3. Drag and drop reports or other folders into your new folder.

Rename a Folder on the Favorites

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab or **Database** tab.
3. Select the folder you want to rename.
4. Right-click and select **Rename**.
5. Enter the new **Name** for the folder and then press **Enter**.

Delete a Folder on the Favorites tab

If you delete a folder, all reports in the folder will also be deleted.

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab or **Database** tab.
3. Select the folder you want to delete.
4. Right-click and select **Delete**.
5. At the "**Are you sure you want to remove this item?**" message, click **Yes**.

Export a Customized/Favorite Report:

If you have customized a report in CenterPoint and you'd like to share it with another user, you can quickly export the report. Deliver the report via email or a usb drive and the other user can import the customized report into their system. Note: All filters applied to the favorite are removed prior to exporting the favorite.

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab .
3. Select the report you want to export.
4. Right-click and select **Export**.
5. The export location defaults to the Documents folder. The default file name is the name of the favorite with the file extension .cpfav. Click **Save**.

Import a Customized/Favorite Report

If a customized report has been provided to you, save the file into your Documents folder on your computer prior to importing it into CenterPoint.

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab.
3. Right-click and then select **Import** (do not make a selection on the Favorite tab prior to right-clicking).
4. The import location defaults to the Documents folder. Select the report favorite to import and click **Open**.
5. On the Add Favorite screen, enter a name for the favorite and then click **OK**.

Export All Database Favorite Reports

If you have customized reports on the Database tab in CenterPoint and you'd like to share all of the reports with another user using the same database, you can quickly export the reports. Deliver the reports via email, a usb drive, or a shared network drive and the other user can import all of the customized reports into their system.

1. On the **Reports** menu, select **Reports**.
2. Click the **Database** tab .
3. Right-click and select **Export All**.
4. The export location defaults to Documents folder. The default file name is DatabaseFavorites.cpfavs. Click **Save**.
5. Click **OK**.

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This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.

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Import All Database Favorite Reports

If all the customized report favorites from the Database tab has been provided to you, save the DatabaseFavorites.cpfavs file into your Documents folder on your computer prior to importing the file into your CenterPoint database. When importing database favorites, all existing database favorites will be replaced.

1. On the **Reports** menu, select **Reports**.
2. Click the **Database** tab.
3. Right-click and then select **Import All**.
4. The import location defaults to the Documents folder. Select **DatabaseFavorites.cpfavs** and click **Open**.
5. At the *All database favorites will be replaced with the imported data, are you sure?* message, click **Yes**.
6. Click **OK**.

View Favorite Report Properties

1. On the **Reports** menu, select **Reports**.
2. Click the **Favorites** tab or **Database** tab.
3. Select the report you want to view the source report and source location of the report the favorite report was created from.
4. Right-click and then select **Properties**.
5. Click **Close**.