

Setting User Report Favourite

Once you have checked on the column with the tick box with the report that you'd like to add to your favourites list.

One can set the favourite report category to open up automatically.

System Configuration > General > User Setup

The screenshot shows the 'Edit Employee Info' window with the 'User Management' tab selected. The 'Module Access' sub-tab is active, displaying a grid of module access settings. The 'Default Favourites Report' checkbox is highlighted with a red box.

Module Access	
System Configuration Module:	No Access
General Ledger Module:	No Access
Debtors Module:	No Access
Creditors Module:	No Access
Inventory Management Module:	No Access
Job costing Module:	No Access
Energy Module:	No Access
Reports And Security Role:	No Access
Shortcut Role:	No Access
Form Security:	Full Access
CRM:	No Access
Asset:	No Access
Lab Module:	No Access
Production Module:	No Access

Below the module access grid, there are several checkboxes and dropdowns for user setup:

- Allow Multiple Module Windows: ☒
- Show Column Selector: ☒
- View Security Button: ☐
- Allow Statement Export: ☐
- Storeman: ☐
- Change Control Manager: ☐
- Supplier Bank Acct. Change: ☐
- Sales Order Status: ☐
- Default Favourites Report: ☒ (highlighted)
- Module Dashboard: ☐
- Job Supervisor: ☐
- Financial Supervisor: ☐
- Change Control Supervisor: ☐
- Password Supervisor: ☐
- Purchase Supervisor: ☐
- Messages Supervisor: ☐
- Sales Margin Supervisor: ☐
- Hide Slider Menu: ☐
- Internal User Popup: ☐
- Mobile Access: ☐
- Mobile Role:
- Exclude CRM: ☐
- Preferred Users:
- Warehouse Access:
- Default Warehouse:
- Default Storeman:
- Process by Internal User: ☐

When accessing your report list, this will default to the Favourites category

Management Reports

Search
Open
Printing Status
Permissions
Manage Reports

Category:
Favourites
Description:
Note:

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#	Category	Description	Note	Tag Code	Modified	Favourite
1	Auditors Reports	Inventory Valuation	This a report of all items, cost multiplied by quantity, t...	AR117		☒
2	Creditors	Approved Purchase Order Detail	Shows a report on approved Purchase Orders.	CM132		☒
3	Creditors	Creditors Graph	Shows a line or bar graph of all GRVs less Return to S...	CM42		☒
4	Creditors	Document History	Shows a full report of Creditors Documents which hav...	CM104		☒
5	Creditors	Sales By Creditor	Sales By Creditor	CM380		☒
6	Creditors	Supplier Listing	Report on all Creditors which have being added to the...	CM6		☒

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