Last Modified on 09/28/2026 2:40 pm EDT

Select Tab

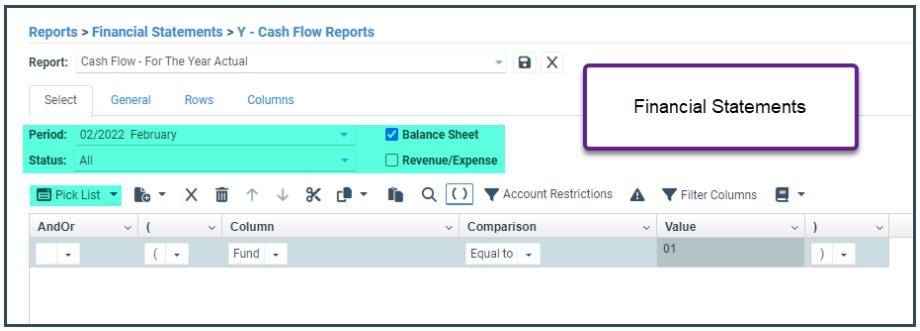
Choose a Report > Customize Report > Select Tab

Select Tab of Customize Report

The general purpose of the select tab is to filter the report to include only the data needed. Each report writer has minor differences, but the majority of functionality is the same.

Each section will show highlighted items that are not present on all report writers.

Financial Statements



- Period filter: Runs the financial statement with all information as of that period.
- Status: refers to the accounts being included in the report. (All, Active, Inactive)
- Checkboxes for Balance Sheet and Revenue/Expense indicate which types of accounts to display.
- Pick List. This will allow the user to select different account parts and see the descriptions.
-  Allows users to see their current account restrictions. Account Restrictions are set up in Sign On by a system administrator for your organization.

Detailed Report Writer

- **Period filter:** Pulls all of the transactions within the specified range.
- **Journal Entry Status:** Refers to which journal entries should be included in the report. (Posted, Unposted, All)
- **Sum Cash By:** applies only to Report Type: General Ledger on the General tab. It's an option to summarize entries to cash accounts, rather than listing each individual transaction on the cash accounts.
- **Include Balance forwards:** When you run a report that does not start at the beginning of the year, this will add a row that shows the ytd up to the start of the report filter.
- **Pick List:** This will allow the user to select different account parts and see the descriptions.
- Allows users to see their current account restrictions. Account Restrictions are set up in Sign

On by a system administrator for your organization.

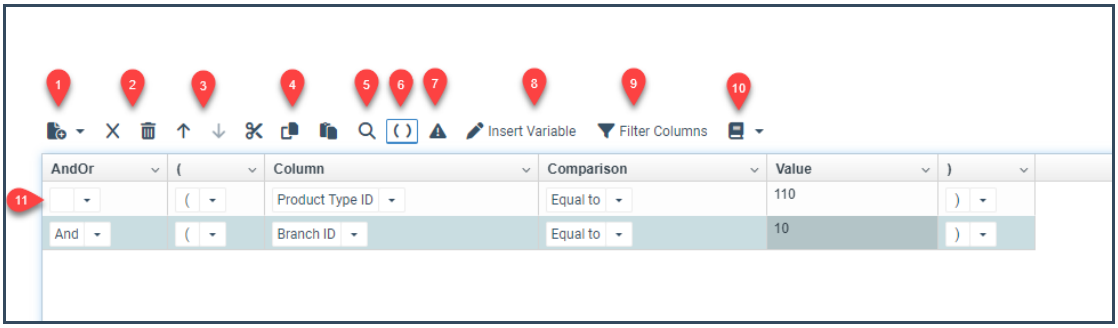
- Adds a variable for the current date. It is used in the lower part of the select area.

Generic Report Writer

The generic report writer can be used to create reports for any dataset. Because of this, the filters are set up under the *General tab > Report Variables*. See the General Tab of the Generic report writer for more information on the setup. Generic reports are not required to have report variables set up. They may rely solely on the lower section of the select tab. The above image is just an example of how variables may appear. The next section will explain those features.

Lower Select Area

This section is on every report writer that generates a grid-style report. Any feature that is unique to a specific report writer is noted in its corresponding section above.



1. Add a new row to the logic section below
2. Delete one row or delete all rows
3. Move the highlighted row up or down
4. Cut, copy, paste, selected row
5. Search for a specific item. This is dependent upon the data type of the field that you are filtering. If it is a date, then it will show the calendar to select a specific date. If it is an account, then it will allow you to search for an account, etc.
6. Add parentheses to separate items
7. Adds a prompt to the value cell of a select row. When a prompt is saved, the report will not run until that item is filled in.
8. Insert a variable into the Value cell below. This allows for flexibility in the report. An example of a variable is @Fixed.Date@, which will always pull the current date.
9. Filter Columns: If the standard filtering on the Select tab does not contain the item you want to filter by, you can filter based on column values. This is a little slower than a Select filter would be because it is after the data has already been queried from the database. Note: If a filter exists on an amount column, the total on the amount column will include everything selected–not just what is filtered. The filter is to limit lines that are displayed, not the

underlying ones.

10. Print the selection grid
11. Select row: This adds logic to limit the records shown. It is read like a sentence from left to right. The example above reads “Only show the data where the product type ID is equal to 110, and the Branch ID equals 10. You can add as many pieces of logic as needed to narrow down your results.