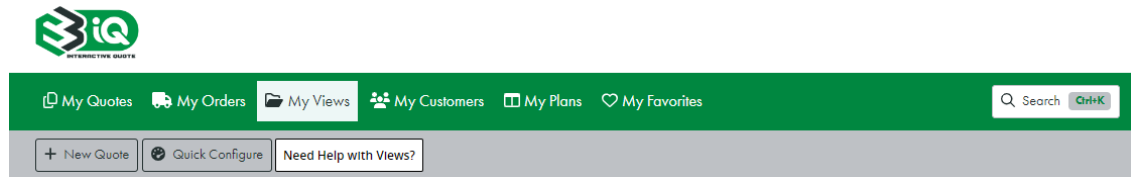
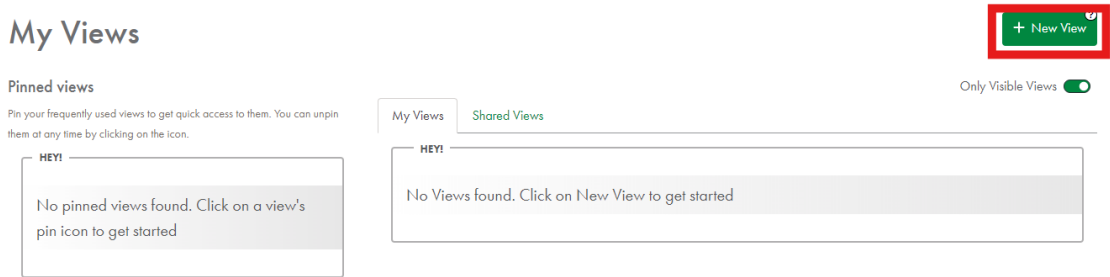


# My Views – EBM IQ

“My Views” allows you to create custom reports based on criteria you specify.



To create a new view click on the “+ New View” option in the right upper corner.



Give your view a name.

While creating your view you will need to ensure you have selected at least one highlighted filter. There are multiple highlighted filters available in different categories, pick the one that is most meaning full for your data.

There are many additional filter options available to add to your query (aka report).

## New View

View Name

Filter query by  Display info

**Dates**  Creation Date \*

Client / Company  Quote Last Modified \*

User Filters  Order Date

Quote Details  Date Requested

Pricing

Catalog Filters

Quote Status

Quote Review

Other Applications

At least one highlighted filter must be selected to continue.

Cancel Create

Once you have selected filter details then you will need to add your “Display Info”. This is where you add the columns you would like to see in your report.

Filter query by

---

Select and reorder the columns that will be seen on this view.

Add Column

The “Create” button will turn green and becomes clickable once you have at least one highlighted filter option selected and have at least one column added.

Once views are created or shared, favorite or most used views can be pinned for quick access.

## My Views + New View

**Pinned views** Only Visible Views

Pin your frequently used views to get quick access to them. You can unpin them at any time by clicking on the icon.

HEY!

No pinned views found. Click on a view's pin icon to get started

My Views		Shared Views	
	Name	Created	
<input type="checkbox"/>	Example Report	12/4/2024	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>