

# Filter and Edit Reports

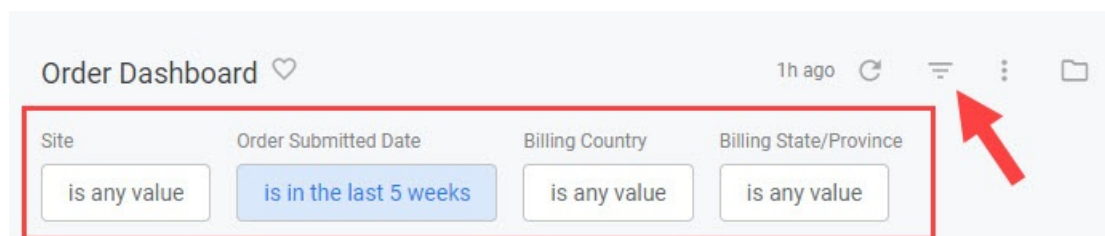
While viewing a dashboard, you can apply filters to specify the data being collected in the report or modify the criteria to display custom order attributes that may not be included by default. You can also change the displayed time zone as needed.

## Apply Report Filters

Most reports will automatically open with the default filter options. However, some may require the user to provide a filter value before loading the report. Two common filters that are used for all dashboards are:

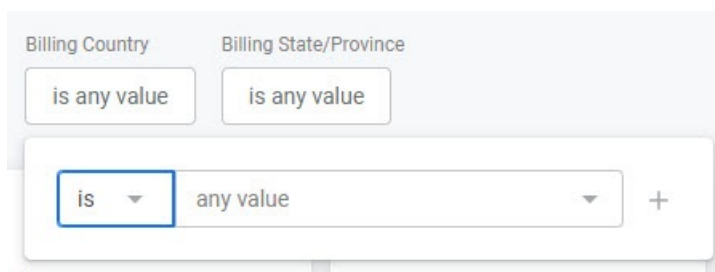
- **Site:** A multi-value filter to select specific sites in the organization. Set to all sites by default.
- **Date:** A single value filter indicating the date range in which to evaluate orders/shipments based on their creation date. This is set to the current month by default.

Filters are displayed at the top of the dashboard, but can be toggled on or off using a button in the top right.

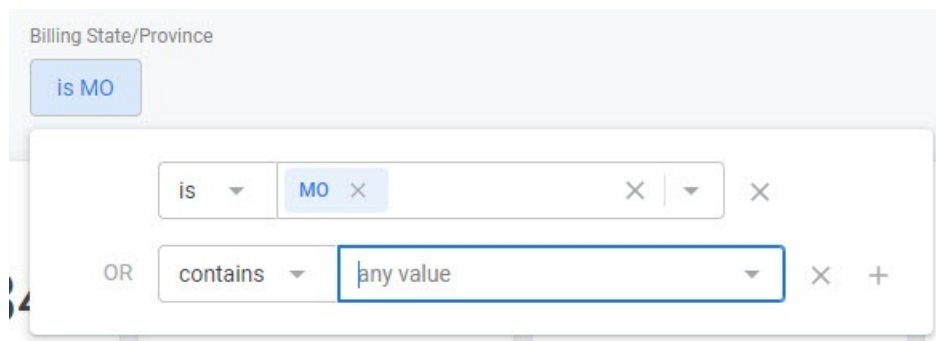


To edit a filter:

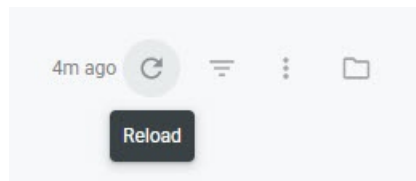
1. Click the box underneath a filter name that indicates the current value.
2. Editable fields appear in which you can select the filter's comparison logic and value.



3. Add additional criteria with the plus sign. Clicking the X will remove a criterion.



4. Click **Reload** in the top right to update the report with the new configuration.



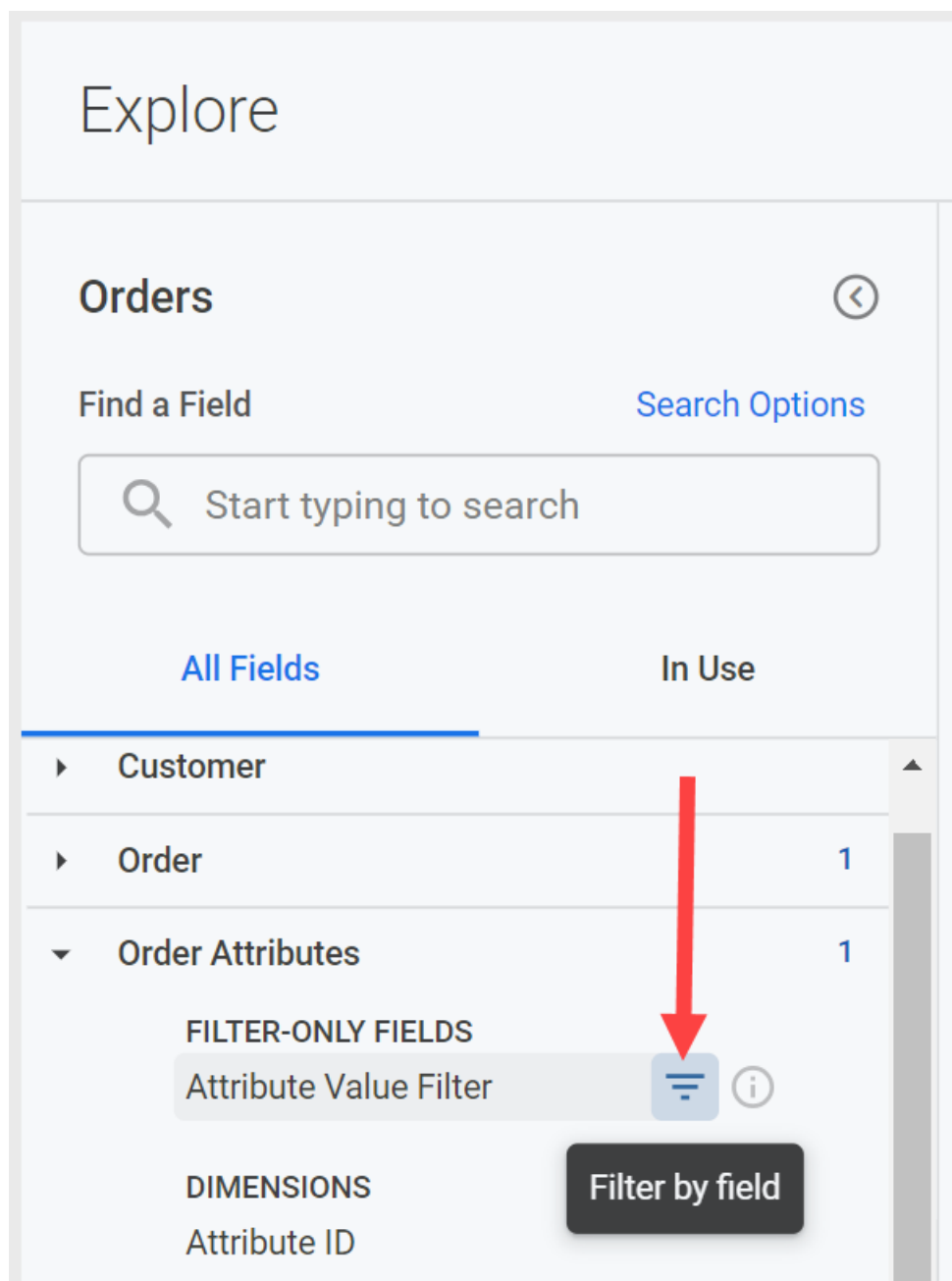
## View Custom Attributes

While custom order attributes are not included in Standard Reports by default, you can access them through explores. You can either filter for orders that contain a certain attribute value or add custom attributes to the report data for visualization.

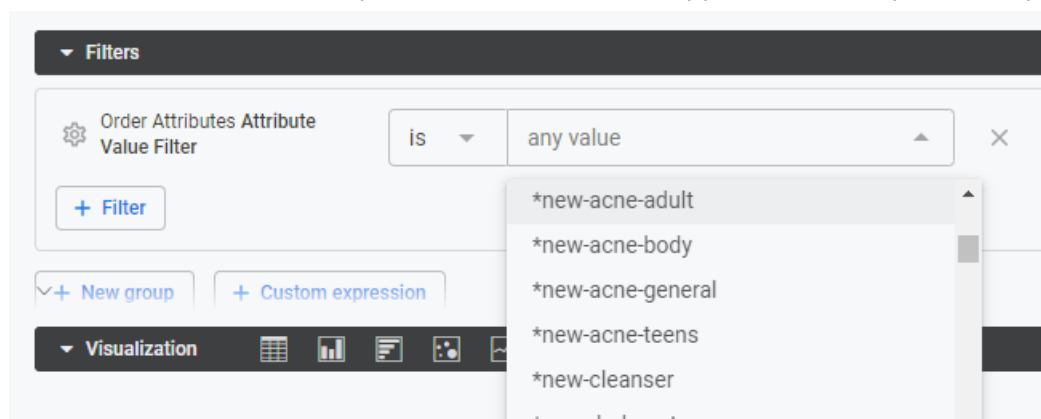
### Filter on Attributes

To use custom attributes as a filter:

1. Select an explore from **Kibo Standard Reports > Explores**, such as the Orders Explore.
2. In the left-hand fields menu, expand Order Attributes.
3. Hover over Attribute Value Filter in the Filter-Only Fields and click **Filter by field**.



4. Select a value from the drop-down filter menu that appears at the top of the reporting pane.

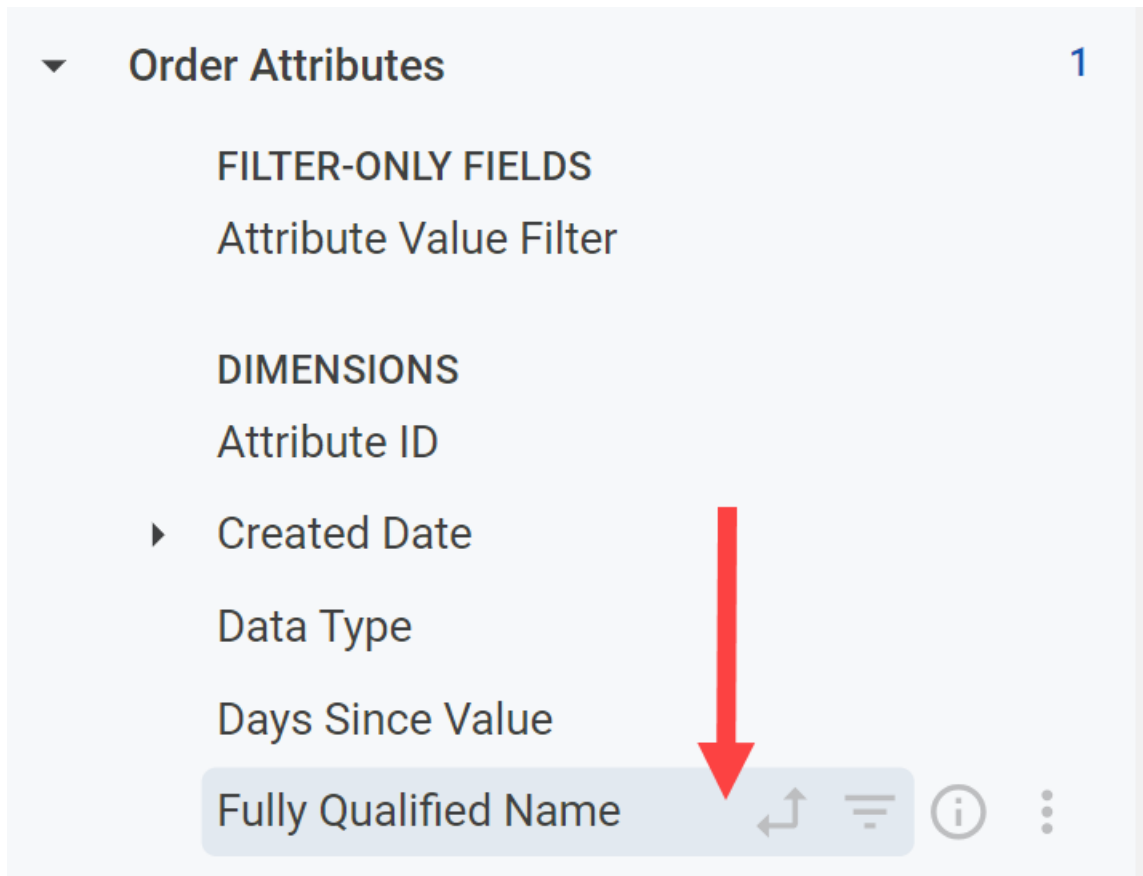


The report will now be filtered to contain only orders that contain that value in their attributes.

## Add Custom Attributes

Add custom attributes to reports by pulling in the attribute name and value type:

1. Select an explore from **Kibo Standard Reports > Explores**, such as the Orders Explore.
2. In the left-hand fields menu, expand **Order Attributes**.
3. Click the **Fully Qualified Name** field from the Dimensions. This will add it to the Data section of the reporting pane.



4. Scroll down and click the **Value (String)** field as well, or another appropriate data type for your attribute.
5. Click **Run** to view the updated report with attribute data.

## Display Multiple Attributes

If you add multiple custom attributes to a report, you'll notice that a separate table row is created for each attribute on every order. To improve readability and condense the data into a single line per order:

1. Expand the settings icon on the Fully Qualified Name column and click **Pivot**.

The screenshot shows a data visualization interface. A context menu is open over a table, with the 'Pivot' option highlighted by a red rectangle. A red arrow points from the 'Pivot' option to the table. The table has four columns: 'Order Number', 'Order Attributes Fully Qualified Name', 'Order Attributes Value (St', and an unlabeled column. The table contains five rows of data.

	Order Number	Order Attributes Fully Qualified Name	Order Attributes Value (St	
1	55562010	tenant~avalara_events	[{"id": "30113_50629_5556	
2	54005340	∅	∅	
3	58188687	tenant~first-subscription-order	∅	
4	57950074	tenant~first-subscription-order	∅	
5	58247591	tenant~subscription_no	PS50779618	

2. In the Order Attributes fields on the left, click **Attribute Value List** from the Measures.

## MEASURES

Attribute Value Count

Attribute Value List

Average Attribute Value

► Averages

Order Count

Total Attribute Value



3. Expand the settings icon on the the **Value (String)** column, or whatever data type you selected, and click **Remove**. This value column is not necessary because the Attribute Value List will display all values.
4. Click **Run** to see the reformatted data table.

Data

Results

Add calculation

Row Limit

500

Column Limit

50

Totals

Subtotals

Row Totals

⚠ Row limit reached. Results may be incomplete

Order Attributes Fully Qualified Name >		tenant-avalara_event	tenant-backorder-notification-flag	tenant-first-subscription-order	tenant-initial_order_number	tenant-ip_address
Order Order Number ↓	Order Attributes Order ID	Order Attributes Attribute Value List	Order Attributes Attribute Value List	Order Attributes Attribute Value List	Order Attributes Attribute Value List	Order Attributes Attribute Value List
1 58557032	1799b8fa10f4ef00012d5a17000075a1	0	0	False	0	0
2 58557031	1799b8c56f3b5f000186a709000075a1	0	0	False	0	2603:8080:4a01:6373:808
3 58557030	1799b8ae216c060001bde8b0000075a1	0	0	False, proac-4b037521e3cc4ade93084069c0e9bc6c	0	0
4 58557029	0	0	0	0	0	0
5 58557028	1799b8830355020001d3bbb4000075a1	0	0	0	50825682	0
6 58557027	0	0	0	0	0	0
7 58557026	1799b8e6f3b5f000186a708000075a1	0	0	False	0	2603:3001:2604:9d00:d5d
8 58557025	1799b86b4e83ef000160030b000075a1	0	0	False	0	0

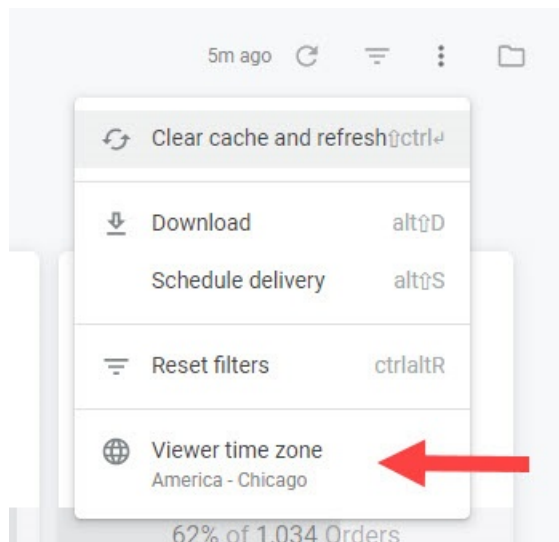


This will display all custom attributes for every order, even if no value is populated. If you don't want to view all possible attributes, you can expand the settings icon on **Fully Qualified Name** and click **Filter** to create a new filter for one or more specific attributes.

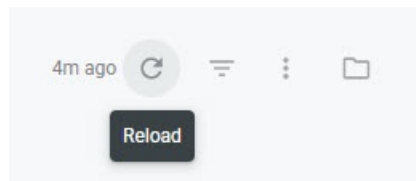
## Update the Time Zone

All reports default to US Central Time (CST, or "America - Chicago") to perform date comparisons.

1. Expand the options menu in the top right.
2. Click **Viewer time zone**.



3. Select a time zone from the pop-up that appears.
4. Click **Reload** in the top right to update the report based on the new date comparison.



## Reporting Currencies

Standard out-of-the-box reports and dashboards display all values in USD by default, and will convert any non-USD values when ingesting that data into the report. This conversion uses the exchange rate of the date that the originating event occurred (usually when the order was placed), as exchange rates are updated on a daily basis.

If you want your standard reports and dashboards to use a non-USD currency, you can have your default set to a different currency during the implementation process. Kibo recommends making this change during implementation rather than after it goes live, as this will not convert any historical reporting data to the new currency value. Any data that is compiled by reports after the setting change will be in the new currency and any data compiled before the change will remain in USD.

Alternatively, you can create [custom reports](#) based on "transactional" data fields instead. These fields will display values in their original currency without conversion, matching the order and shipment details in the Admin and Fulfiller UIs and API data. You can also use these fields to perform your own conversions if desired.

# Explore

292 rows · 1s · just now · America - Chicago

Time Zone

Run



## Order Refunds



Find a Field



order total



All Fields

In Use

Shipping Total

Shipping Total (Transactional)

Subtotal

Subtotal (Transactional)

Tax Total

Tax Total (Transactional)

Total

Total (Transactional)

Total Collected

Total Collected (Transactional)

500 Fields

Filters (2)

Order Refund Payment Interaction Interaction Type is "Credit"

Visualization



Order Parent Checkout Number

Order Number

External Order

1

25858

25859

...

25858-25859

2

25858

25859

...

25858-25859

3

25858

25859

...

25858-25859

4

25739

25861

...

25739-25861

5

25739

25861

...

25739-25861

Data

Results

Add calculation

Row Limit

500

Order Refund Reason



Order



Order



Order



Order



Order



Order



Order



Order

Refund

Payment

Interaction

Created

Order

Refund

Order

Number

Order

External

Order

ID

Order

First

Name