



FAQ

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How do I set up entity filters?

Entity Filters group entities together for reporting purposes. With an entity filter, you can quickly pull combined data for multiple entities in to one report. There is no limit to the amount of entity filters you can create.

To set up entity filters, go to **Setup > Entities > Entity Filters**.

Entity Filters (edited)

Location

Description: East Coast

Entities Store Group 1 Store Group 2

Included Entities

Remove Entities Export to Excel

Entity #	Entity
6	Atlanta
7	New York
10	Miami

Available Entities

Add Entities Export to Excel

Entity #	Entity
1	Austin
2	San Antonio
3	San Francisco - Mission
4	San Francisco
5	The Dead Fish
8	Henderson
9	New Orleans
11	Chris' Caribbean
13	Toots Tower
50	Viva Villa
100	Commissary Centralized Shipping

1. Select **New Record** to create a new entity filter. (If you wish to edit an existing filter, simply double-click that filter name.)
2. Enter a description for this filter.
3. Add entities from those listed under **Available Entities**.
4. **Save** your new filter.

Was this Helpful ?

How do I make a vendor a 1099 vendor?

How do I make a vendor's invoice with a different 1099 box type than the default?

I am trying to import vendor files but Compeat says the directory doesn't exist. What do I do?

Items aren't auto-populating when I place orders. What do I do?

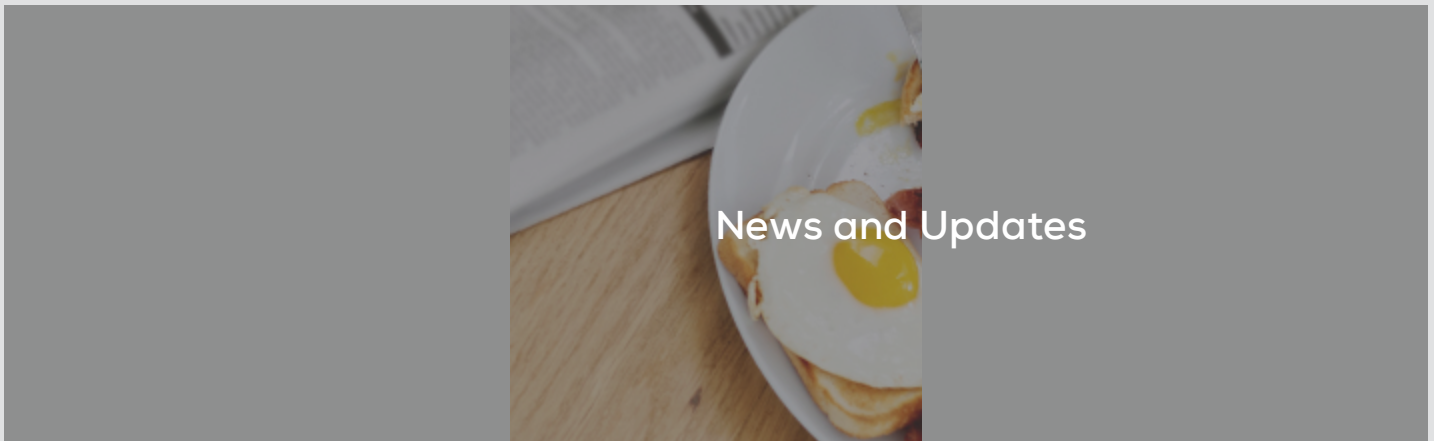
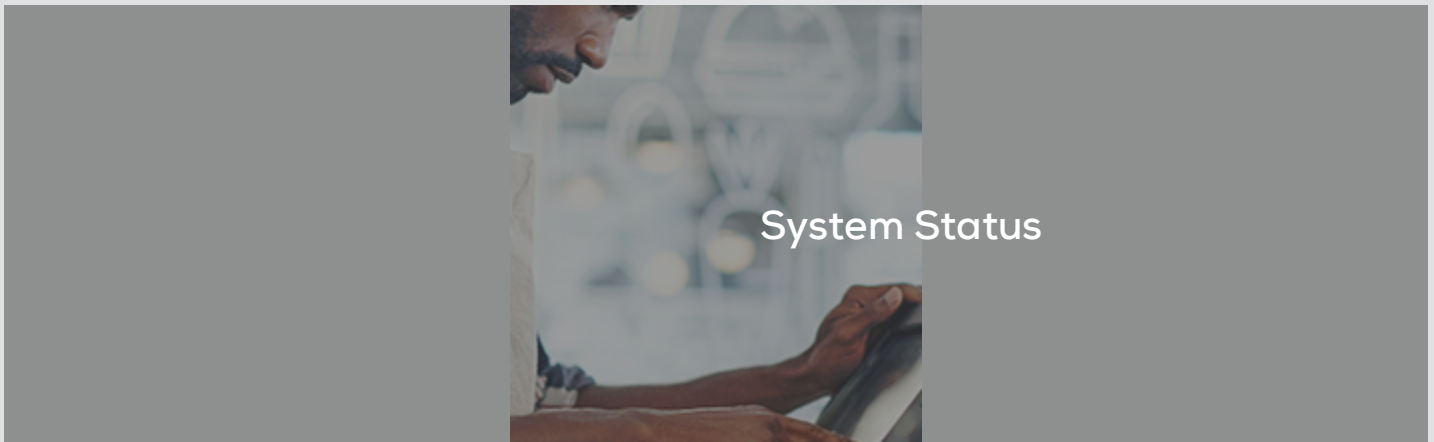
I get a catch weight error when importing invoices. What do I do?

What kind of barcode scanner can I use for mobile inventory counts?

I get a sales tax error when importing invoices. What do I do?

How do I fix an item that was matched incorrectly on an invoice or order guide import?

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