Report Subscriptions

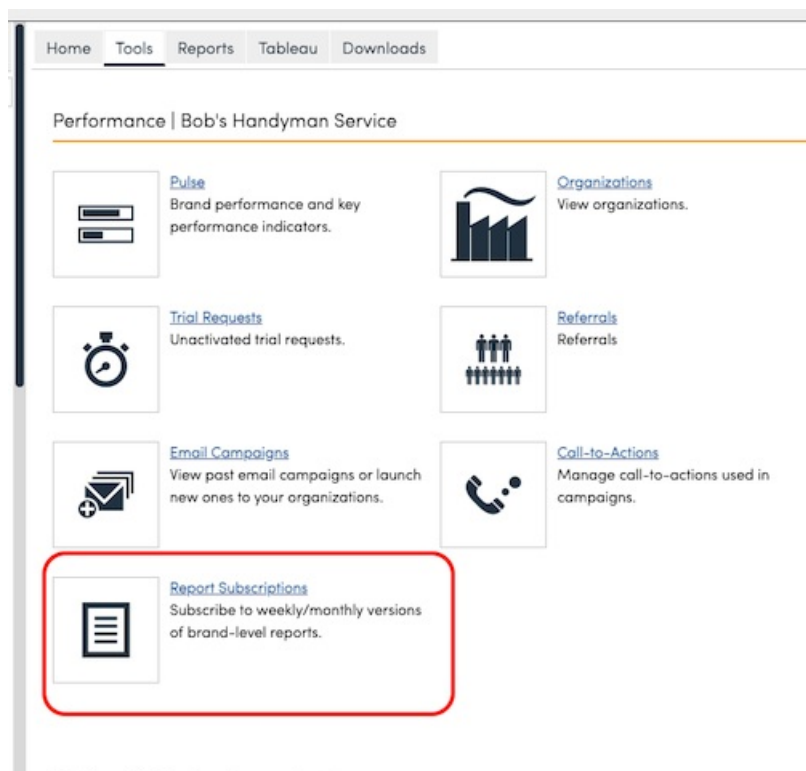12/23/2024 1:17 pm CST

Overview

> ✅ Organizations may take advantage of our add-on feature, "Report Subscriptions" to save time and effort on a weekly or monthly basis.

This features is available in **MarketPlace** (or perhaps is already available to an organization by the Franchisor including it in the service**minder** package).

Settings and Navigation

Users may go to **Control Panel>Tools** and select **Report Subscriptions**, once enrolled. Here, subscriptions to ALL downloads and many reports can be set up.

Report Subscriptions

Currently available reports for subscription include:

1. Appointment Summary

2. End of Period

3. Hours Summary

4. Invoice Summary

5. Proposal Summary

6. Revenue by Lead Source

Reports will be sent as "default" for the trailing 30 or 7 days, depending on recurrence.

Add a Report Subscription

Subscribers can be any brand admin user with Reports permission. Click "Add" and then select the report, the frequency (weekly/monthly) and the date/day you want this to be run. Then select your subscribers from the available list.

Download Subscriptions

Download subscriptions are a bit different:

1. Go to the Downloads Tab

2. Choose your Download

3. Set your filters

4. Choose dates (optional)

5. Select "Save as subscription" in the bottom right & click the Download button

This creates the download subscription, which can then be managed in the **Control Panel>Tools>Report Subscriptions** section.