Report Subscriptions

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Overview

Tracking performance data shouldn't be a manual chore. With serviceminder's **Report Subscriptions** add-on, brands and organizations can automate the delivery of key reports and data exports, saving time and ensuring consistent visibility into business operations.

Whether your franchisor has included this feature in your account or you activate it through the **Marketplace**, subscriptions allow users to receive essential metrics on a weekly or monthly basis, directly in their inbox.

> This article will review:
> - Report Subscriptions
> - Download Subscriptions

Report Subscriptions

To set up **Report Subscriptions** at the organization level, navigate to **Control Panel > Tools > Report Subscriptions.**

To configure Report Subscriptions at the brand level, navigate to **Dashboard > Tools > Performance > Report Subscriptions.**

Report Subscriptions
Subscribe to weekly/monthly versions of brand-level reports.

Once there, you have three options:
- Click **Add** to create a new subscription.
- Click **Edit** to make changes to an existing subscription.
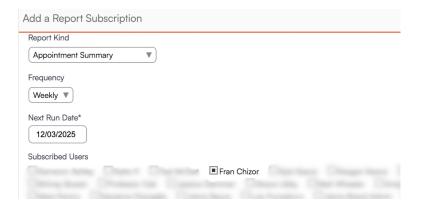- Click on the name of the subscription to review its details.

	Kind	Frequency	Next Run Date
Add...			
Edit	Download Branding Appointments	Weekly	12/9/2025

You can configure the following settings for a report subscription:
- **Kind**: Which report is being subscribed to.
- **Frequency**: How often the report runs (weekly or monthly).
- **Next Run Date**: When you want the report to run next (it will run automatically at the set interval after that date).
- **Subscribed Users**: Who you want to receive the report.

Currently available **organization** 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

Current available **branding** reports for subscriptions include:

1. End of Period Summary

2. End of Period Details

3. Proposal Summary

4. Revenue by Accounting Class

5. Revenue by Lead Source

6. Revenue by Organization

7. Proposal Close Rates

Download Subscriptions

To enable **Download Subscriptions:**

1. Go to the Downloads Tab (either in Organization Reports or in the Dashboard)

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

6. Choose the Frequency - Weekly or Monthly

7. Click Download

▣ Save this download as a subscription?

Frequency ✓ Weekly

Monthly

Download

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