

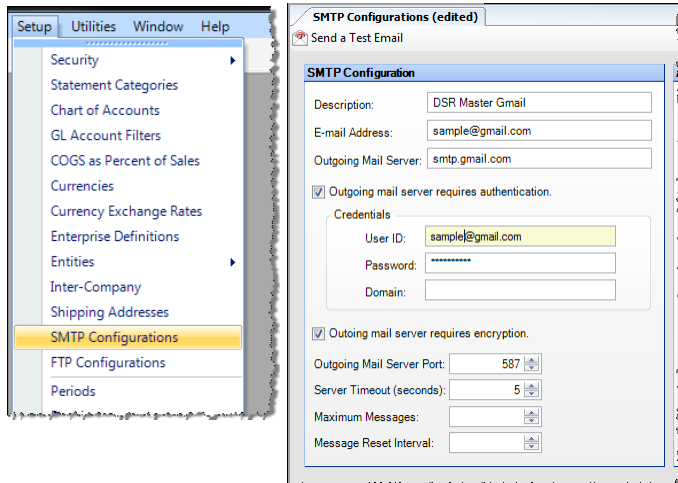
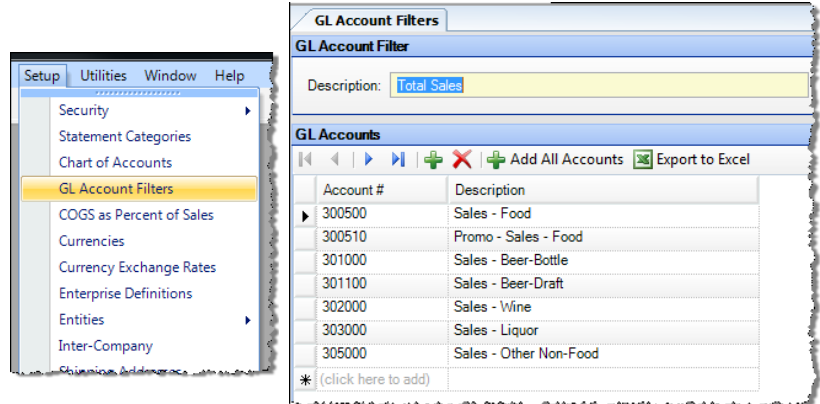
Daily Report Subscriptions

Compeat offers the ability to automatically send your Daily Sales Report to a group of users each morning.

There are several steps to setup, they are outlined below.

Step 1 – Set Up a Total Sales GL Account Filter

Under Setup > GL Account Filters – ensure you have a Total Sales Filter established with all relevant Sales Accounts setup in the detail section.



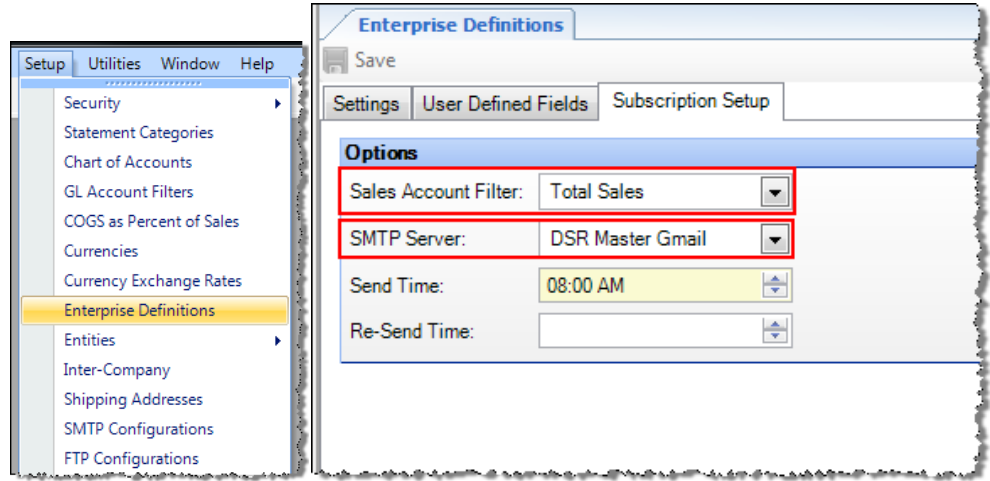
Step 2 – Set up an SMTP Configuration for sending out these subscriptions under Setup > SMTP Configurations.

This will be the “sending” email for all subscriptions company wide, so a broad main line type of email is best practice. The example is aptly titled “DSR Master Gmail”.

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Step 3 – Apply those two configurations to the Enterprise Definitions screen.

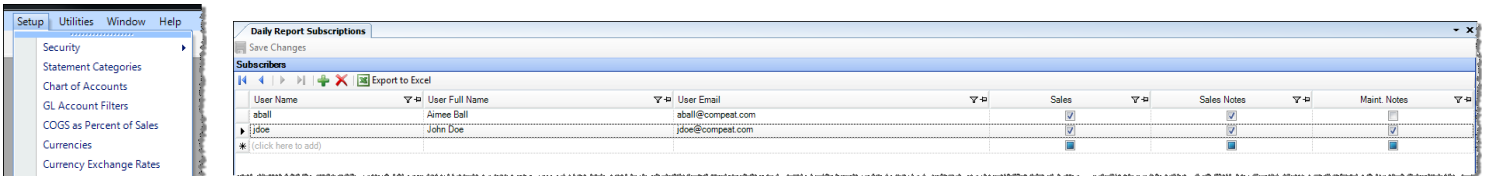
Under Setup > Enterprise Definitions – Subscription Setup Tab, Insert the Total Sales GL Account Filter and the SMTP Setup you used for the subscriptions via the drop downs.



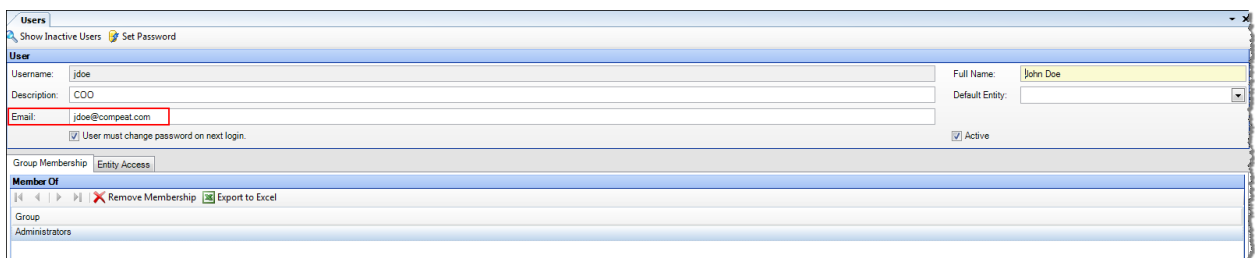
Also, insert a “Send Time” – a time around 8am or 9am is usually sufficient for allowing data to populate into the system and also allows enough time for an end user to enter notes into the DSR before it gets sent.

Step 4 – Decide who gets the subscriptions

Under Setup > Daily Report Subscriptions – fill in username or Full Name, the other fields will auto-populate. Check the checkboxes for each user who needs to receive the different aspects of subscriptions.



Note that the email auto-fills based on the user’s record in the User Security screen under Setup > Security > Users. You must have the Security Password to access this screen to change/add email addresses.



Daily Report Subscriptions

Emails should start to be sent automatically every morning at the specified time in Enterprise Definitions.

If you are ever missing a subscription, use the Utility under Utilities > Re-Send Daily Reports. This will allow you to re-send one DSR at a time to certain users (leave user blank to send to all).

