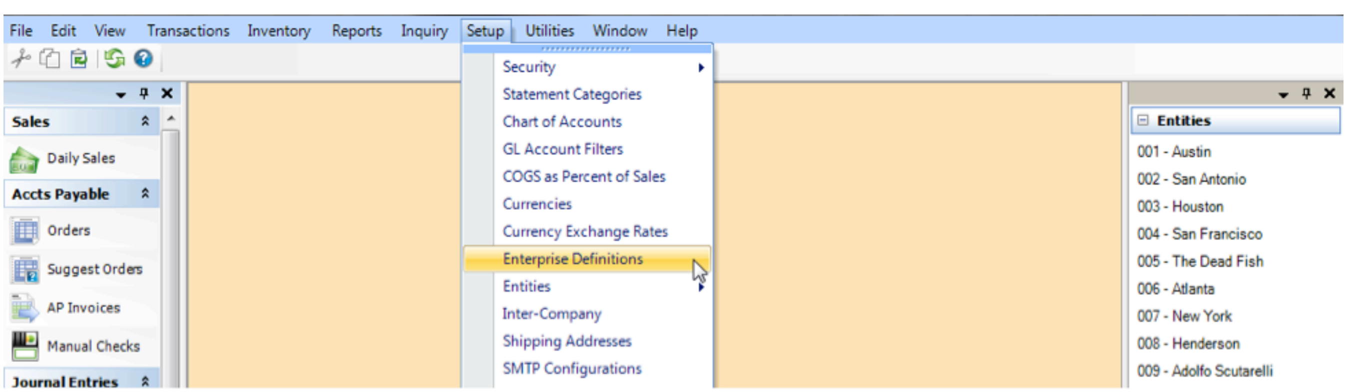
FAQ

Is there a way to have our daily sales emailed to us?

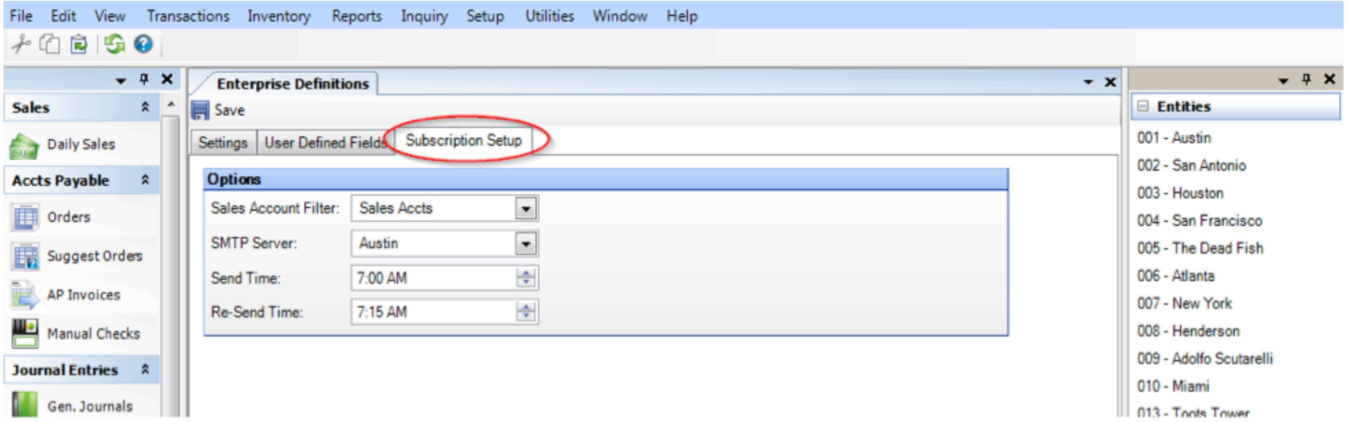
Yes! You can set this up via Advantage's **DSR Daily Subscription**. It's a two-step process, so make sure you follow through with both steps in order to complete the setup process.

Step 1: Setup DSR Subscription Type



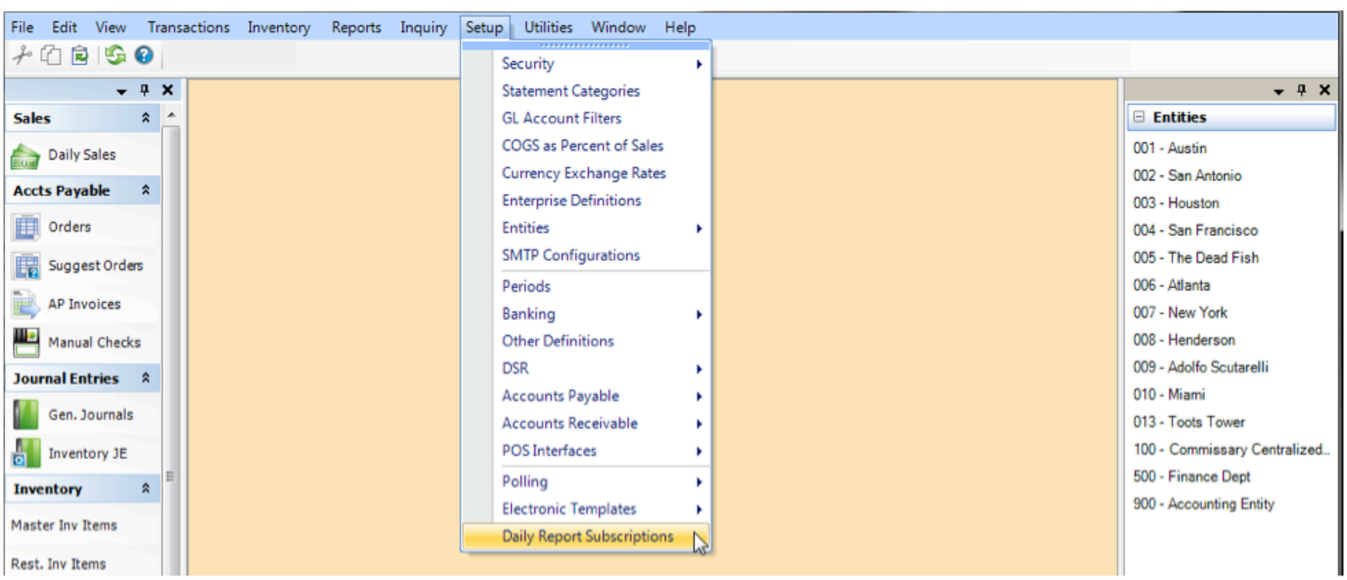
1. Go to **Setup** › **Enterprise Definitions**.

2. Select the **Subscription Setup** tab

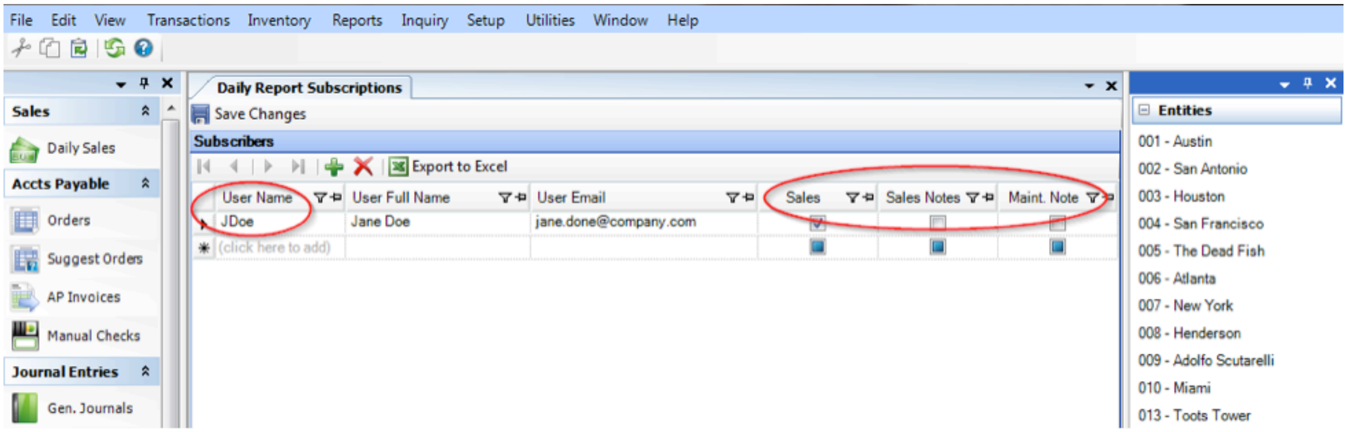


1. Choose which sales type you would like sent in the **Sales Account Filter** drop-down (these categories are defined under **Setup** › **GL Account Filters**).
2. Select which e-mail address the report will be sent *from* in **SMTP Server**.
3. Last, choose which time you would like the report sent in **Send Time**.
4. **Save** your changes.

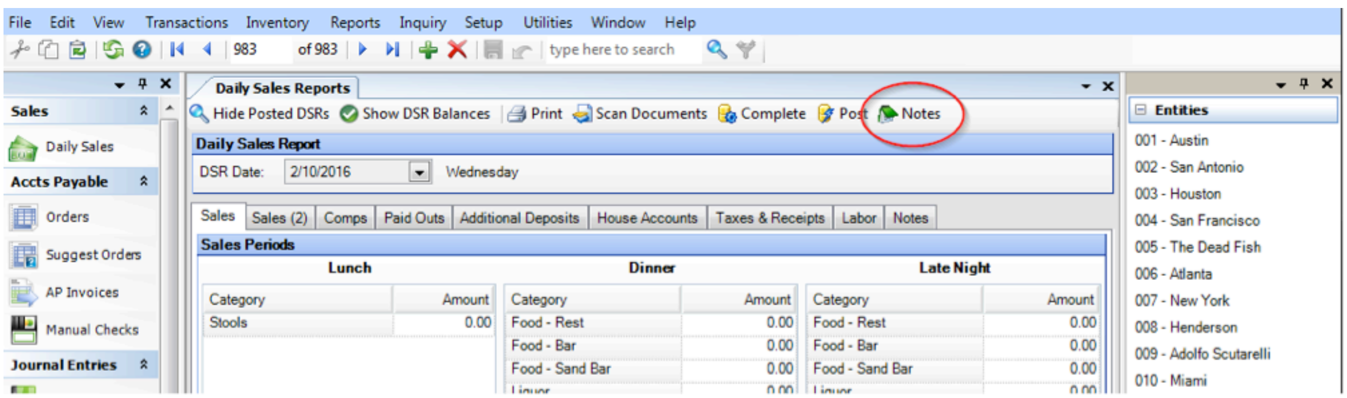
Step 2: Setup Users to Receive E-mails



1. Go to **Setup** › **Daily Report Subscriptions**.
2. Enter the users you wish to have receive the e-mail. You can add more users by using the **green +**, or by typing in the bottom most row.



1. Select what data you would like included in the e-mail: Sales, Sales Notes, or Maintenance Notes (these notes are entered on the DSR screen – see bottom screenshot).
2. **Save** your changes.



If you ever need to resend the e-mail, you can do so via **Utilities** › **Re-Send Daily Reports**.

Was this Helpful ? yes no

Can I access Advantage on my Mac?

How do I re-set my security password?

My Vendor Aging Report shows a $0 balance with invoices and credit memos. How do I clear them off the report?

My Customer Aging Report shows a $0 balance with invoices and payments. How do I clear them off the report?

There is an invoice or payment showing on my Vendor Aging that shouldn't be. Why?

How do you set up bank import templates?

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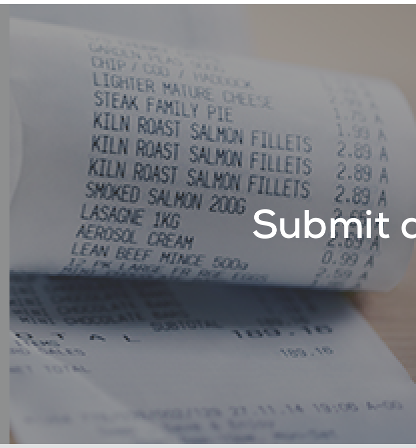

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Enhancements and Feedback

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