compeat™

Procedures and Best Practices

How To Set Up Daily Reporting Subscriptions

Daily Report Subscriptions allow you to auto-generate an email to subscribed users with an Entity's Daily Sales, General Notes and Maintenance Notes. First, you will have to ensure the appropriate Groups has Security Access to this Feature. The two main components are **Transactions › Daily Notes & Setup › Daily Reports Subscriptions**

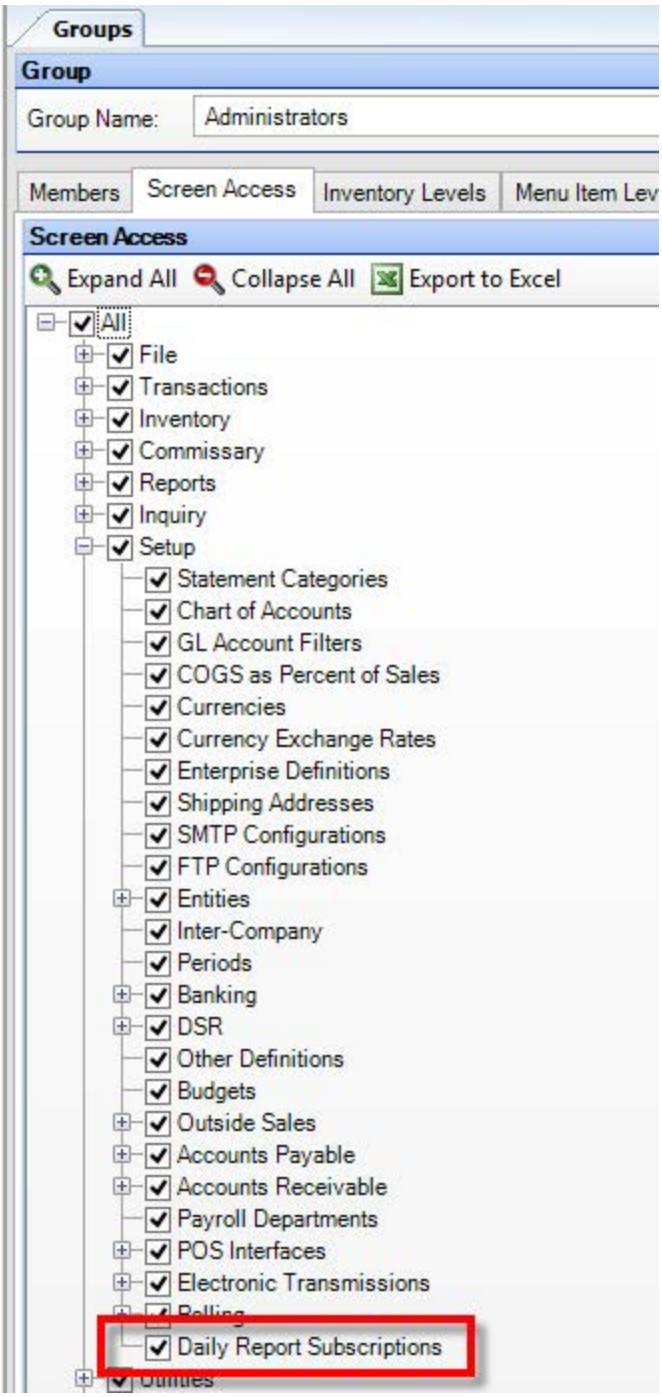
Groups
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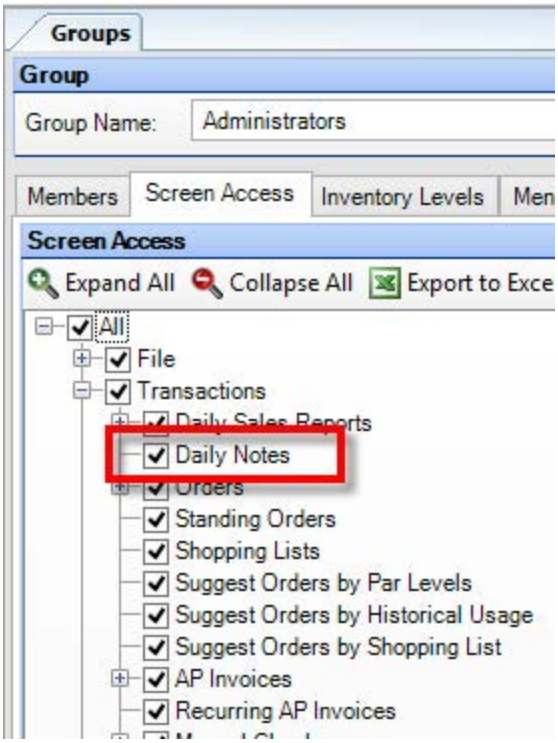
Chart of Accounts
GL Account Filters
COGS as Percent of Sales
Currencies
Currency Exchange Rates
Enterprise Definitions
Shipping Addresses
SMTP Configurations
FTP Configurations
Entities
Inter-Company
Periods
Banking
DSR
Other Definitions
Budgets
Outside Sales
Accounts Payable
Accounts Receivable
Payroll Departments
POS Interfaces
Electronic Transmissions
Daily Report Subscriptions



Second, any User who wishes to receive the Daily Report Subscriptions must have an Email Address included in their User record. For more information see **Users** in **Setup** › **Security** › **Users**.

Note: Only the Security Administrator of your Organization has access to update these records.

A separate SMTP Configuration may need to be setup for the outgoing Daily Reports Emails. To add a new SMPT Configuration navigate to **Setup** › **SMTP Configurations**.

A Total Sales GL Account Filter should also be created. This way the Daily Email will include Daily Sales instead of one particular category of Sales. To create a new GL Account Filter navigate to **Setup** › **GL Accounts Filters**.

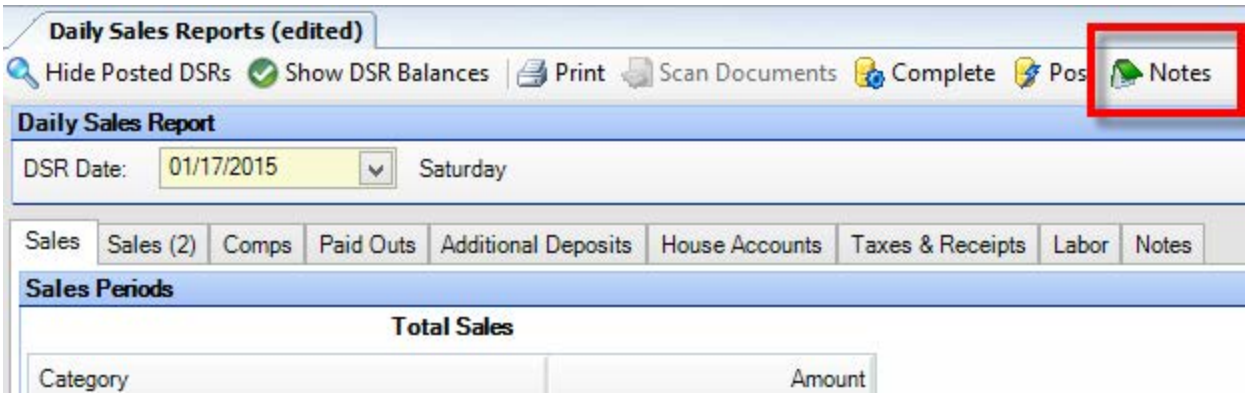
Note: Only gross sales is available at this time. In Enterprise Definitions there is a tab for Subscription Setup.

This is where you will select the GL Account Filter you just created, the new SMTP Configuration as well as a Send Time. The Send Time you choose will have to be after your DSRs poll into Compeat.

Tip: Do not include a re-send time unless you want to receive 2 emails daily.

The final step in the setup process is to choose the Users who wish to receive the Daily Emails as well as what information they'd like to see included. See Daily Reports Subscriptions for more information.

Now that you have completed the setup, you can begin entering additional information in your DSRs. There is a Notes button in the Header of the DSR. This is where managers will be able to add both General Notes about their days sales and operations as well as any maintenance notes.



Finally, if a User doesn't receive the initial Daily Email there is an option to Re-Send this email in **Utilities** › **Re-send Daily Reports**. Select the Date of the DSR and the User you wish to re-send to. If you leave the User field blank, the email will be re-sent to all Users subscribed.

Was this Helpful ? yes no

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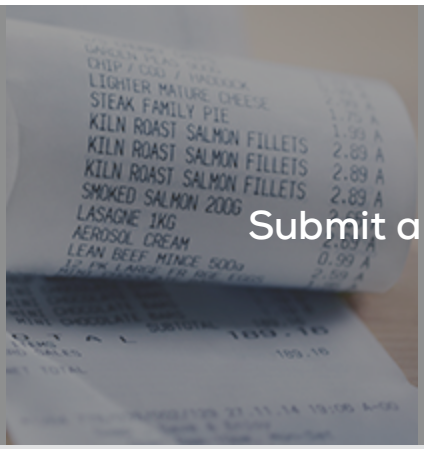

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Austin, TX 78727 | (512) 279-0771 | support@compeat.com