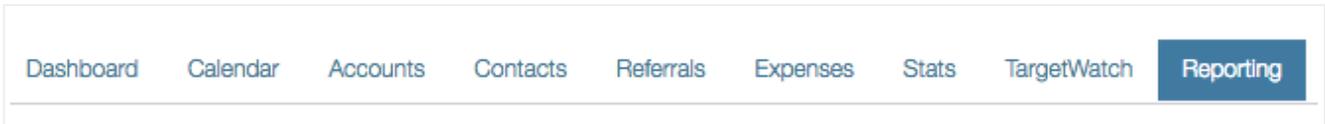


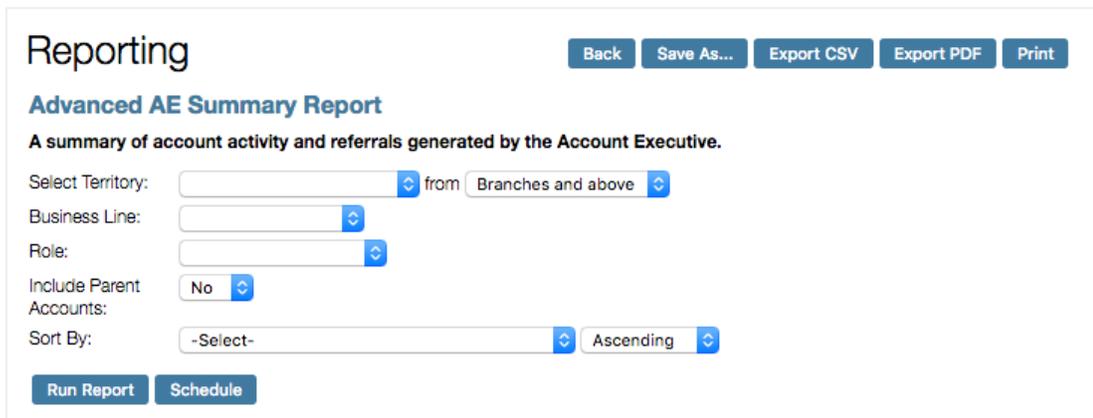
Configuring And Scheduling Reports

Any of the reports on the *Reporting* page of PlayMaker can be customized by using filtering options at the top of the report. Once the report filters are set to deliver the desired results, the report can be saved to view on-screen later, or it can be scheduled to email on a recurring basis. This article describes how to configure and save a report, as well as how to set up a scheduled report.



To configure and/or schedule a report, navigate to the *Reporting* link in the PlayMaker web environment. Once the reporting page has loaded, click on a report to customize and save for later viewing or scheduling.

The picture below shows the filters available on most reports. These filters allow a user to tailor reports based on their individual needs. As a reminder, the options that will be available in each filter are based on the user's permissions. Once customized, the new version of the report is only saved to that user's account and not able to be viewed by other users.

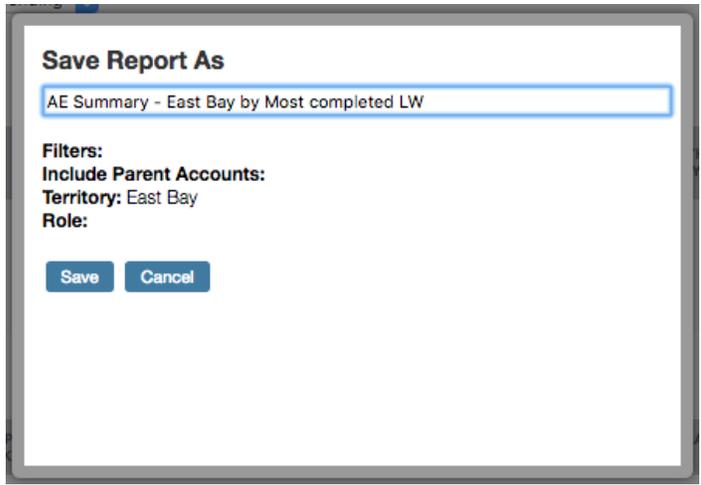
The screenshot shows the 'Reporting' interface. At the top right are buttons for 'Back', 'Save As...', 'Export CSV', 'Export PDF', and 'Print'. Below is the title 'Reporting' and a sub-title 'Advanced AE Summary Report'. A description reads: 'A summary of account activity and referrals generated by the Account Executive.' The filter section includes: 'Select Territory:' with a dropdown menu and 'from' followed by another dropdown menu set to 'Branches and above'; 'Business Line:' with a dropdown menu; 'Role:' with a dropdown menu; 'Include Parent Accounts:' with a dropdown menu set to 'No'; and 'Sort By:' with a dropdown menu set to '-Select-' and a secondary dropdown menu set to 'Ascending'. At the bottom are buttons for 'Run Report' and 'Schedule'.

Note: It is suggested to save reports before scheduling them. This allows users to go back and review filters set in the report. If a report is not saved before scheduling, **only the schedule can be edited or removed. Filters for that scheduled report cannot be viewed.**

Saving a Report

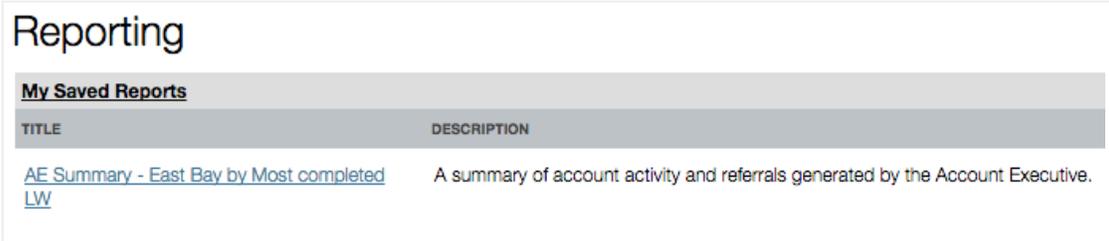
To save a report to be viewed on-screen:

- Set filtering options as desired.
- Click *Run Report* to ensure desired results are met.
- Click *Save as...*
- Enter a detailed name (the example below shows the report type, area, and sorting priority) into the pop-up dialog box.



The image shows a 'Save Report As' dialog box. At the top, the title is 'Save Report As'. Below the title is a text input field containing the text 'AE Summary - East Bay by Most completed LW'. Underneath the input field, there are filter settings: 'Filters: Include Parent Accounts: Territory: East Bay Role:'. At the bottom of the dialog box, there are two buttons: 'Save' and 'Cancel'.

- Click *Save*.
- The report is saved and shows up at the top of the *Reporting* page, in the new *My Saved Reports* section.



The image shows a screenshot of the 'Reporting' page. The main heading is 'Reporting'. Below it, there is a section titled 'My Saved Reports'. This section contains a table with two columns: 'TITLE' and 'DESCRIPTION'. The table has one row of data.

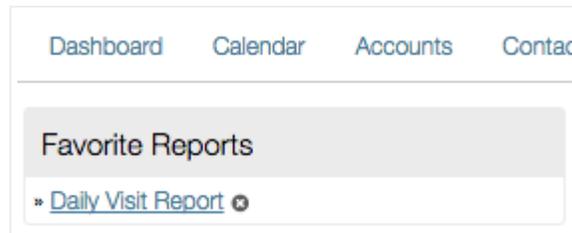
TITLE	DESCRIPTION
AE Summary - East Bay by Most completed LW	A summary of account activity and referrals generated by the Account Executive.

Favorite Reports

If the default filtering options deliver the desired results, a report can be marked as a "Favorite." This is done by clicking on the white thumbs-up icon in the right column of the *Reporting* page. Once selected, the thumbs-up icon will fill in, to give a visual queue that it has been selected, as shown in the following image:



Additionally, any reports marked as a "Favorite" will show up in the *Favorite Reports* box, up in the top left corner of the *Reporting* page.



Exporting a Report to CSV & PDF

The two right icons in the Actions column allow users to export that report to a .csv file (for Excel) or a PDF file.



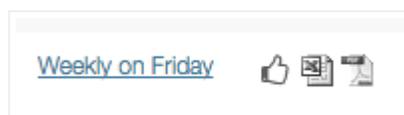
Scheduling a Report

To schedule a report to be emailed:

- View the saved report that needs to be scheduled, or set filtering options as desired.
- Click *Run Report* to ensure desired results are met.
- Click *Schedule*.

Start Date:
 Time Interval:
 File Format:
 Distribution List: blackwidow@pmcrm.net
 Email addresses:
 Message to include with email:
 Only send email when report returns at least 1 result?
 Status:
 Note: reports are sent out at 1:00 AM, Central Standard Time. To schedule a 'Daily' report, you may need to select 'Yesterday' for the report date range.

- In the pop-up window, select the *Start Date* for the report.
- Set the *Time Interval* (or frequency) of the report. Recurring weekly, bi-weekly, or monthly reports will use the *Start Date* to determine which days the report will be generated.
- Select *File Format* for the report to be delivered in (PDF or .csv file, which can be opened by Excel).
- Set the *Distribution List*. By default, the user creating the report will be included in the distribution (but can be removed by deselecting the checkbox next to the user's email address). Additional users can be added by entering email addresses, each separated by a comma.
- If a message should accompany the email, enter it in the next box.
- PlayMaker recommends to *Enable* the feature of only generating a report when there is at least 1 result to display. This will cut back on inbox clutter by only delivering reports when data is available.
- Ensure *Active* is selected in the Status drop-down. *Inactive* will remove the scheduled report.
- Click *Save*.



The report is now scheduled. To confirm this, click on the Reporting link at the top of the page to return to the list of reports. In the *Schedule Report* column (second from the right), the report that is

schedule will now display the frequency of the schedule (shown above), rather than reading *Not Scheduled*. Clicking on this link will provide the option to change the schedule or distribution list. To change the report itself, deactivate the current scheduled report (by turning the *Status* to *Inactive*), then create a new report with the desired filters and set a new schedule.