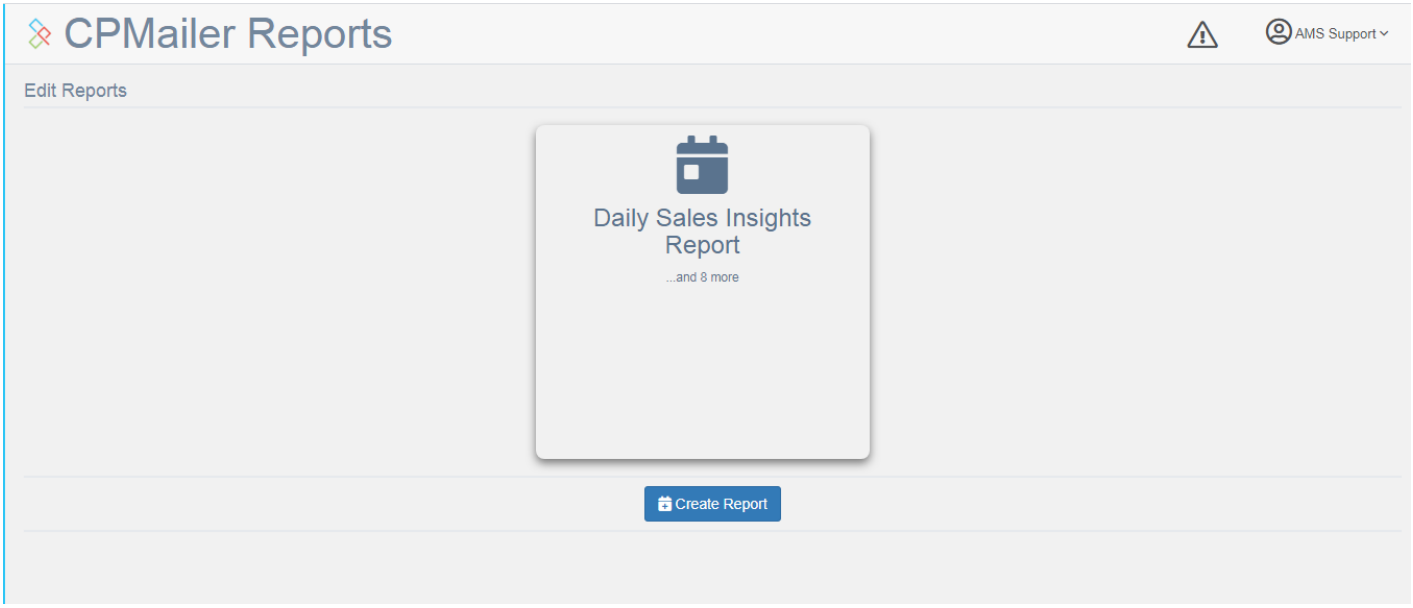
CPMailer

- Managing your own CPMailer reports
- User Reports
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- Adding Users & Reports

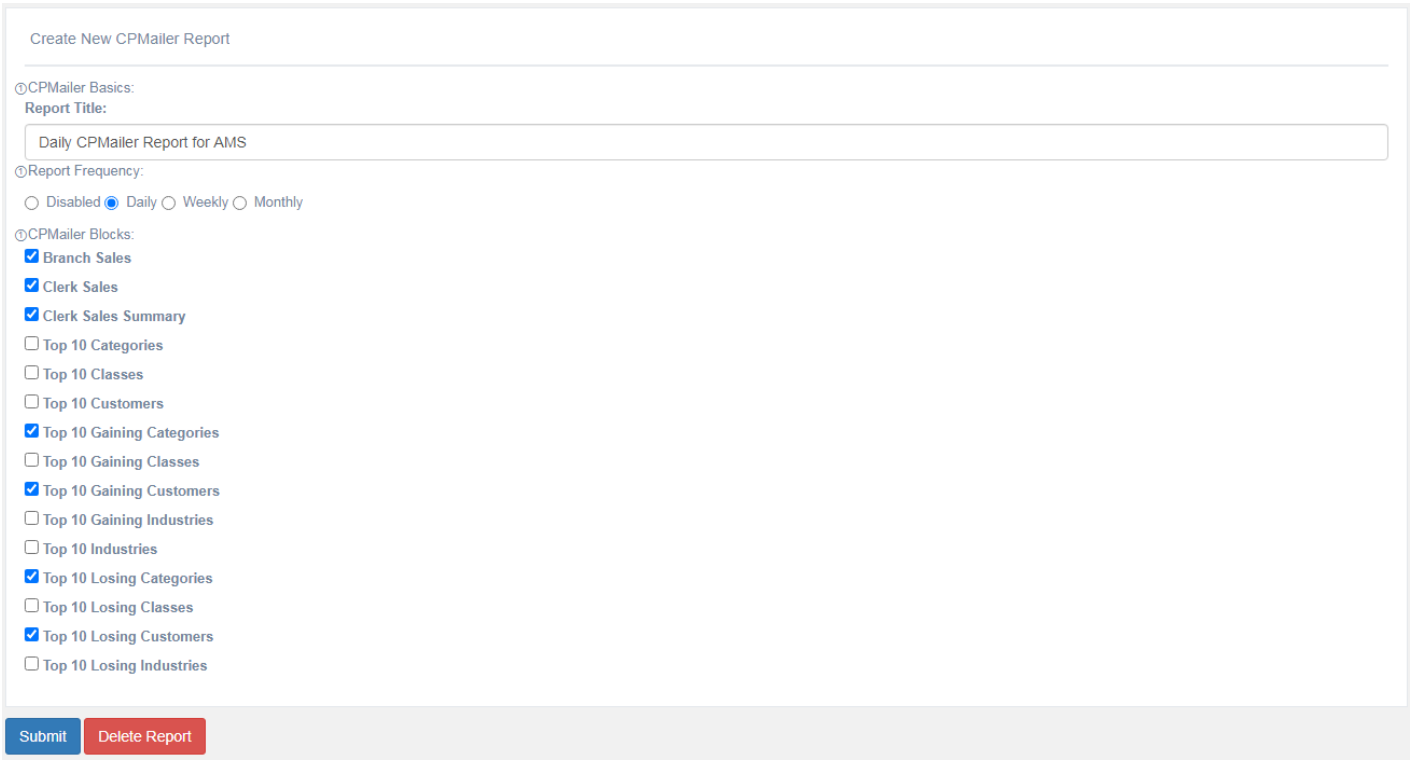
Managing your own CPMailer reports

The CPMailer Core is the base module within the CPMailer. This module allows you to manage your own personal reports. As of V1.4, the CPMailer core underwent an update to how reports can be built. Reports are sent on a Nightly/Weekly/Monthly basis and are sent in 'blocks' within an email. So, one email can potentially have all possible reports, or you could generate a number of emails with specific types of reports in each.



Creating New Reports

To generate a new report email, click the **Create Report** button



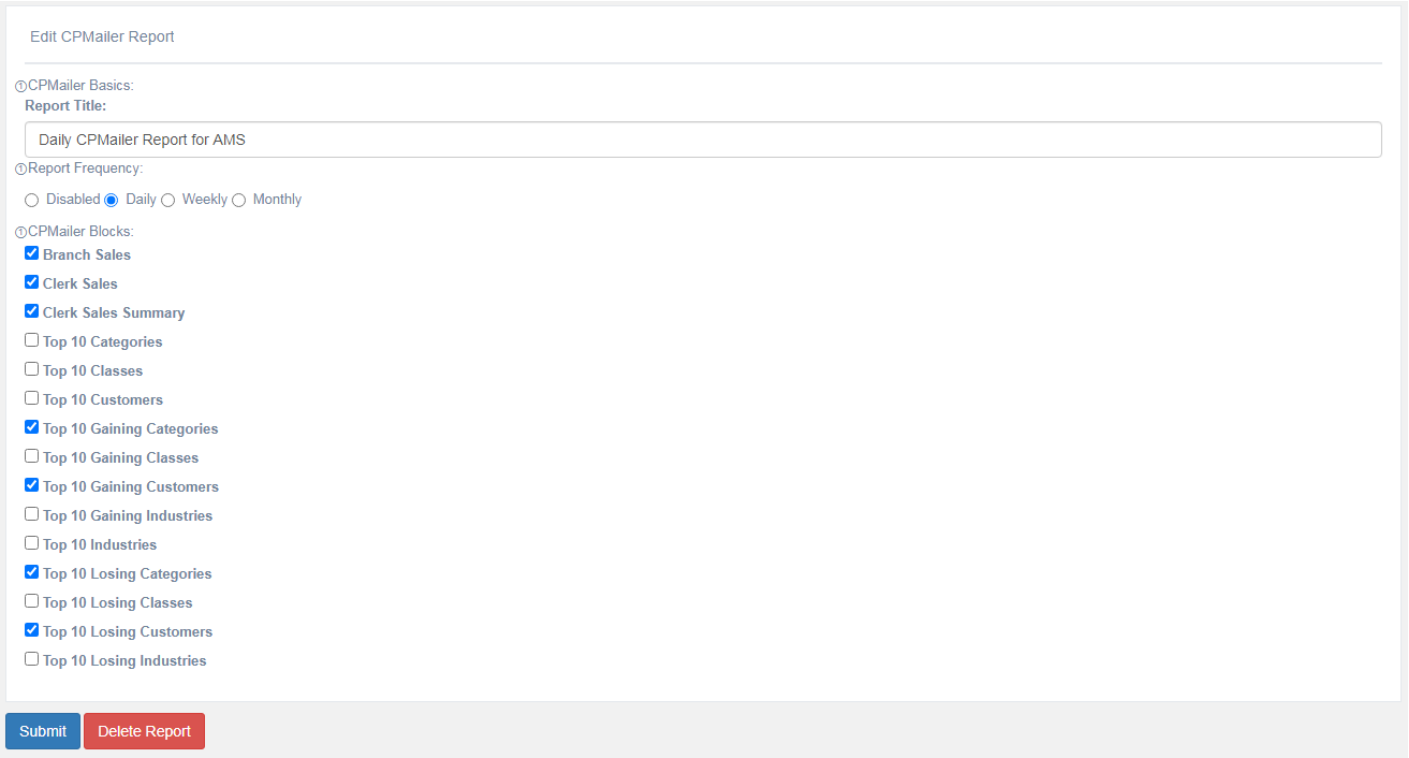
The creation of the report has 3 steps:

1. First, select a name for your new report email. This can be anything you like.
2. Pick a frequency which this email will come. Daily/Weekly/Monthly reports need to be created individually.
3. Pick the reports you wish to appear on the email.

Once the report is generated, it will be actioned to send on the next potential cut-off.

Editing / Removing Reports

To edit or delete a report, click on the report you wish to manage from the CPMailer Core page.



You can edit any of the fields and click **Submit**, or just click **Delete Report** to delete the report email

User Reports

Lookup Table

The user reports page displays a list of all the users and their associated email addresses, as well as any daily/weekly/monthly report blocks they are currently setup to receive.

From this table you can click on a user to edit their daily, weekly, or monthly report blocks. Additionally if they are a CPMailer user, they can be deleted.

CPMailer Users

CPMailer users represent email addresses that you wish to send reports to, but are not associated with an account on the COUNTERPOINT Cloud Platform. These users can be created freely and carry no additional charges or fees, however they are not real users in the sense that they are unable to log in, and do not exist outside the CPMailer module.

Editing User Reports

Editing a user report allows you to select one or more blocks from predefined lists, in order to build a report of the information this user will find necessary or useful. As you select blocks, the report preview will populate and give you a glance at what the report may look like - however the blocks and their shapes are not accurately represented here.

There are currently 2 different types and subheadings of report blocks:

Summary Blocks

Summary blocks are sorted by a relevant value (total calls, net sales, etc.) and limited to a total of 5 rows. This is handy if you want a quick glance at how your top performers are doing, without all the length that comes with the detailed blocks. Additionally, should you decide that you do want to look at the entire information set, it is attached to the generated report as a .csv file which should open in any standard spreadsheet program.

Detailed Blocks

Detailed blocks typically hold the same information that the attachments from summary blocks do - all of the information generated for a specific report block. For large companies, these blocks can grow to be quite large and it may be smart to limit how many of these make it into a user's report.

Special Reports

Special reports allow the generation of reports that don't fit into the block/frequency model of user reports. These reports are typically only configurable by on/off, and require additional calculations to send.

Customer Alert Report

The customer alert report polls every customer in record and checks it against predefined conditions, raising an alert if the values or calculations exceed a threshold. Using this, it is possible to send each Salesrep a list of all their assigned customers which triggered an alert at the end of the month.

These should be the same calculations found under the CounterCRM module, in the Recent Activity > Customer Alerts tab.

Adding Users & Reports

Log into the cloud platform and navigate to the CPMailer > User Reports

If this is a new user, they must first be added as a specific 'Report only' user.

If this is not a new user, or once you add the user, click the users row in the listing table and you will be given a few options. (Note, that the current reports that the user gets are listed in the table)



You can select to edit Daily/Weekly/Monthly reports. In this instance, we wanted to change the weekly reports, so we click on the button.

This will take you to a screen with the optional reports for the user. Here you can select the reports you want to send. The preview on the right will adjust as you add/remove reports.