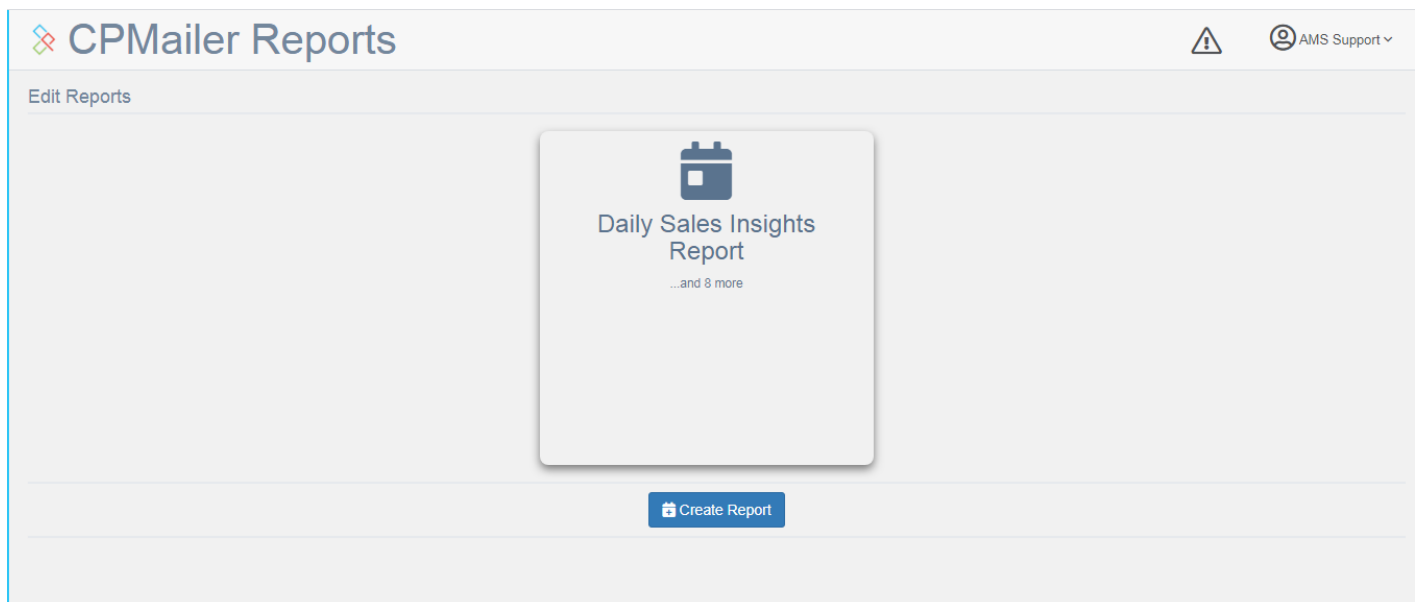


Managing your own CPMailer reports

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

Create New CPMailer Report

ⓘCPMailer Basics:

Report Title:

Daily CPMailer Report for AMS

ⓘReport Frequency:

☐ Disabled ☒ Daily ☐ Weekly ☐ Monthly

ⓘCPMailer Blocks:

☒ Branch Sales

☒ Clerk Sales

☒ Clerk Sales Summary

☐ Top 10 Categories

☐ Top 10 Classes

☐ Top 10 Customers

☒ Top 10 Gaining Categories

☐ Top 10 Gaining Classes

☒ Top 10 Gaining Customers

☐ Top 10 Gaining Industries

☐ Top 10 Industries

☒ Top 10 Losing Categories

☐ Top 10 Losing Classes

☒ Top 10 Losing Customers

☐ Top 10 Losing Industries

Submit

Delete Report

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.

Edit CPMailer Report

ⓘCPMailer Basics:

Report Title:

Daily CPMailer Report for AMS

ⓘReport Frequency:

☐ Disabled

☒ Daily

☐ Weekly

☐ Monthly

ⓘCPMailer Blocks:

☒ Branch Sales

☒ Clerk Sales

☒ Clerk Sales Summary

☐ Top 10 Categories

☐ Top 10 Classes

☐ Top 10 Customers

☒ Top 10 Gaining Categories

☐ Top 10 Gaining Classes

☒ Top 10 Gaining Customers

☐ Top 10 Gaining Industries

☐ Top 10 Industries

☒ Top 10 Losing Categories

☐ Top 10 Losing Classes

☒ Top 10 Losing Customers

☐ Top 10 Losing Industries

Submit

Delete Report

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

Revision #1

Created 10 July 2020 16:09:13 by Jim

Updated 10 July 2020 16:24:27 by Jim