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.

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