

## Creating Report Alerts (Emails)

1. Go to DATA TOOLS > REPORTS. Pick the report you want to create an alert and email for and open it.

All Reports	
<a href="#">Show All Reports</a> <a href="#">Show Favorite Reports</a> <a href="#">Show Report Group</a>	
Inventory/Products	
Report Name	Description
A Item, Zero QoH	Shows when you have a "0" qoh for any line code.
Core Out Quantity By Linecode	Daily snapshot of gross sales, gp%, eod numbers and discrepancy.
Core Returns	Core returns for specific time periods.
Core, Warranty, & Defect Inventory Valuation	Core, Warranty, & Defect Inventory Valuation with dollars.
Customer Product Ranking	Customer Product Ranking Report.
Driver Delivery Log	Delivery log for drivers with delivery times and totals.
Historical Inventory Totals by Location	Historical Inventory Totals by Location.

2. Pick the appropriate data for your report. (locations, time frames, line codes, counter person, etc.)

Portrait
Landscape

Saved Templates:
-- Select Template --

Save Report Criteria As Template:
Save

Store Location
Truck 70
Truck 71
Truck 72
Truck 73
Auburn Corporate

Select Time
Yesterday

Start Date
06-03-2013

End Date
06-03-2013

Counter Person
Teresa Gerald
Terrence Churchill
Timm Cissney
Todd Early
Tom Chaffee
Tony Shineman
Victor TeGantvoort
Wade Williams
Web Orders
Will Steele

Generate Now
Create HTML

Hold CTRL to select multiple.
SELECT ALL: ☒

Hold CTRL to select multiple.
SELECT ALL: ☒

3. Generate the report by clicking "Generate Now". Once the report has run give the report a name in the "Save Report Criteria As Template" line and click "Save". Once you have done this you should be able to access the "Saved Template" drop down and select your created template.

Portrait
Landscape

Saved Templates:
Prior Day Sales & Returns by Counter Person

Save Report Criteria As Template:
Save

Store Location
Seattle Branch 01
Tacoma Branch 02
Lynnwood Branch 03
Olympia Branch 04
Auburn Branch 05

Select Time
Yesterday

Start Date
06-03-2013

End Date
06-03-2013

Counter Person
Administrator
EOD TEST AR
OPS MGR
PART EXPERT
Amanda Chilcott
Barry Marks
Beth Ferguson
Bob Williams
Buddy Olinger
Carmen Gardner

Generate Now
Create HTML
Export To C

Hold CTRL to select multiple.
SELECT ALL: ☒

Hold CTRL to select multiple.
SELECT ALL: ☒

Jun 4, 2013.
Sales & Returns By Counter person

All	User	SO Date	SO#	Parts	Labor	Freight	Sales (Parts)
+ All				\$90,949.71	\$0.00	\$25.72	\$90,97

## Fuse5 Training Materials

- Click the red envelope icon next to the templates (says "Create Email Alert") when you hover over it.

### Saved Templates:

Prior Day Sales & Returns by Counter Person ▼



- Once in the ADD EMAIL ALERTS screen give it an alert name, pick the days of the week or day of the month you want to receive the report via email, choose if you want the report attached to the email as either a CSV or HTML document (you can select both), ADD EMAIL ALERT, then enter the email address(es) you want the report to go to in the bottom box. Once done click SAVE EMAIL ADDRESSES.

**Add Email Alerts**

**Add Email Alerts for Sales & Returns By Counter person** ? Fuse5

Alert Name: turns by Counter Person

Select Template: Prior Day Sales & Returns by Counter Person ▼

Generate Report on :

Every : ☒ Monday ☒ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday » And / Or

Every : -- of Each Month » And / Or

**Add Email Alert**

**List of Alerts for Sales & Returns By Counter person Report**

Showing 1 - 5 of 5

#	Alert At [Alert Name]	Tool	#	Alert At [Alert Name]	Tool
1	Every Monday [Prior Day Sales ]		2	Every Tuesday [Prior Day Sales ]	
3	Every Wednesday [Prior Day Sales ]		4	Every Thursday [Prior Day Sales ]	
5	Every Friday [Prior Day Sales ]				

Comma separated list of email addresses to send report to: tedt@seattleautomotive.comcastbiz.net, dennis@gofuse5.com

**Save Email Addresses** **Close**

- You should now receive an email at the appropriately selected time with the report you set the alert up for.