Fuse5 Training Materials

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.



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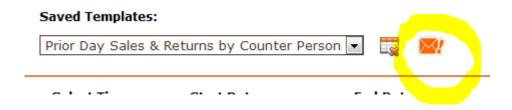


3. Generate the report by clicking "Generate Now".  Once the report has run give the report a name in the "Save Report Criteria As Template" line and click "Save".  Once you have done this you should be able to access the "Saved Template" drop down and select your created template.
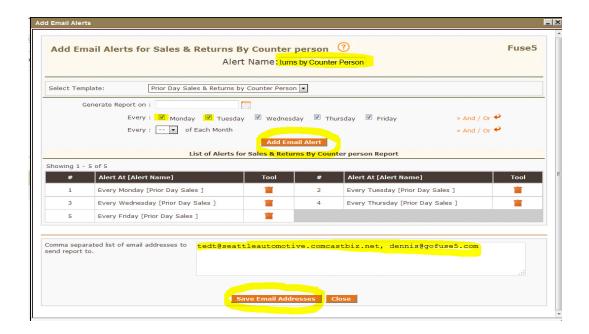
4. Click the red envelope icon next to the templates  (says "Create Email Alert") when you hover over it.



5. 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.



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