Custom Reports

Help Documentation

Custom Reports Overview

A Custom Report allows you to combine bits and pieces of different standard reports into a single report that details just the information you want to display. This makes it easier to get the proper information to the right people within an Organization. Once a Custom Report is created, it's available in the Custom Reports area and can be viewed, and used, just like any standard report: it can be exported or emailed to whoever requires the information.

Manage Custom Reports

Clicking on this area displays any existing Custom Reports in the content pane. Here, you can select one and edit its settings or delete it entirely. You also create new Custom Reports from this area.

Scheduled Email Reports

Clicking on this area displays any Custom Reports that have been scheduled to be sent daily, weekly or monthly. If a report has been set up to send daily, it's also possible to pause the sending of that report by simply disabling it. This prevents you from having to delete the schedule and then create it at a later time once you're ready to start sending it again. It's also possible to send a Custom Report outside its standard schedule with the Send Now button. NOTE: Scheduled Email Reports send out at 2:00 a.m. at the time set up on the SmarterTrack server and are sent from the default Brand's SMTP account.

Creating Custom Reports

Follow these steps to create a custom report:

- Log in to the SmarterTrack management interface as a System Administrator.
- Click on the Reports icon.
- Under the Custom Reports header click Manage Custom Reports in the navigation pane.
- Click the New button in the content pane toolbar.
- In the Custom Report tab, type the Name of the report and select the Default Date Range of the data for which the report covers.
- Click the Report Items tab.
- Click the Add Item button from the content pane toolbar.
- To specify the report items that you want to include in this custom report, select the appropriate report items from the list.
- Click the OK button .
- To add more report items, repeat steps 7-9 until complete.
- Once your new Custom Report is configured, click the Save button .