Reports
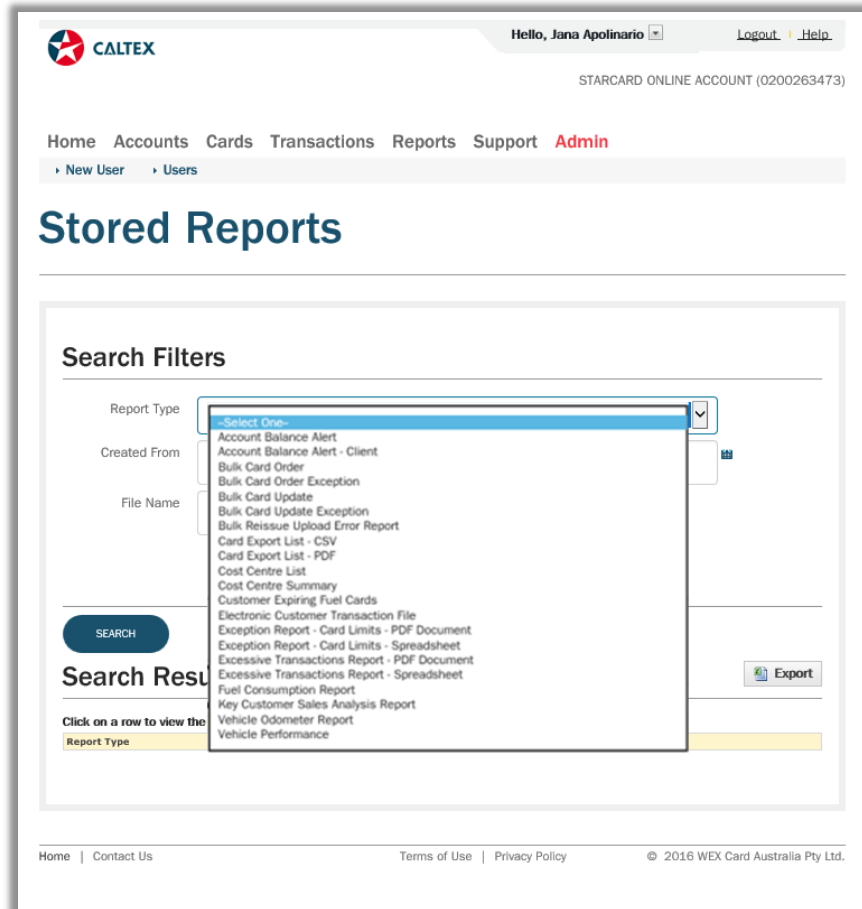
Find and download reports, Schedule a Report to receive it via email and Request a Report to download the reports available online. Availability of some Report Type is dependent on Account set up. Call CSC for more information.
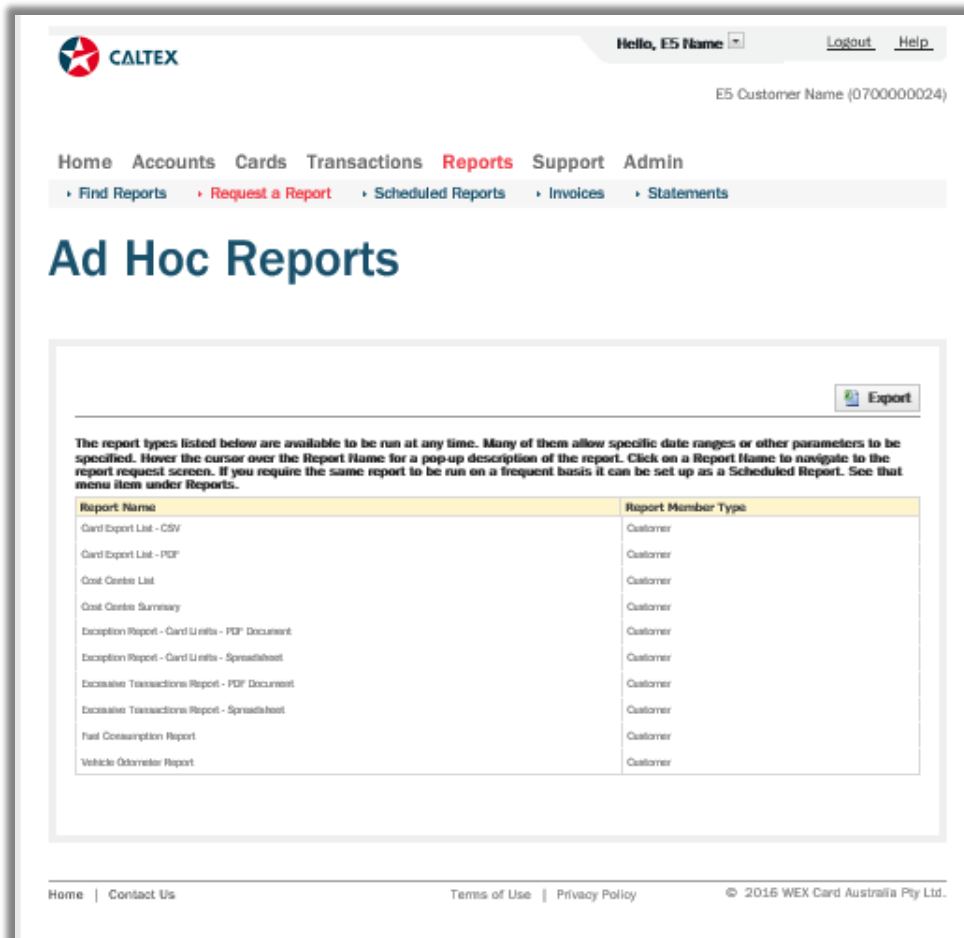
Reports > Find Reports

1. Go to **Reports Menu > Find Reports Sub-menu > Stored Reports Section**

2. Set filters as needed

3. Click the "**Search**" button

4. Available Reports for the account/s will populate at the bottom of the screen

5. Click the "**Export**" button. A report in **CSV file** format will be generated which gives an option to **"Open"** or **"Save"** the file to your computer or "Cancel" the export report request

Reports > Request a Report

It shows all the available customer Ad Hoc reports configured in the system.

1. Go to **Reports Menu > Request a Report Sub-menu > Ad Hoc Reports Section**

2. Click the "**Report Name**" of the needed report *(another window will pop-up)*

3. Set the "**Report Parameters**"

4. Enter the "**Email Address**" where the Ad Hoc Report should be sent or leave it blank to have report to be delivered via the browser

5. Click on the "**Generate**" button

6. A confirmation message at the top of the screen will show up stating "Success! Email has been submitted."

Reports > Schedule a Report

1. Go to **Reports Menu > Scheduled Reports Sub-menu > Add a Scheduled Report button** *(Scheduled Reports Maintenance window will pop-up)*

2. Select the "**Report Type**"

3. Override the "**Schedule Name**" if needed

4. Tick the "**Enabled**" radio button to activate the report

5. Select the "**Frequency**" Select the "**Contact Ranking**" from the dropdown options

6. Tick the "**Compress Attachment**" radio button to receive compressed file attachment

7. Select "**Delivery Type**"

8. Enter the **email address** where the report should be sent regularly

9. If needed, specify the "**Report Dates**" - Created on, Last Reported on and Previous Reported on Dates

10. Specify "**Report Parameters'** Click the "**Save**" button

11. A confirmation stating "**Congratulations**. Your Scheduled Report has been created." will show at the top part of the screen

12. Click the "**Back to Scheduled Reports List**" to see the newly scheduled report