

Report Subscriptions (Scheduled Reporting)

Overview

Report Subscription is an optional feature that can be enabled for [Report Generator](#). If Admin has set the original report as subscribable and you have been granted Subscribe permissions (based on Role), you can set a scheduled reporting task for your generated report to be automatically updated and emailed to yourself or other nominated recipients on a daily, weekly or monthly basis during the subscription period. Note that recipients are added by email and are therefore not restricted to those within your company.

On this page:

- [Overview](#)
- [Step-by-step](#)
 - [Create a new report subscription](#)
 - [View/edit a current subscription](#)
 - [View Subscription Log of sent events](#)
 - [View a report](#)
 - [Delete a report](#)
 - [**UPDATE**](#)
 - [Nick naming a subscribed report. \(Available from versions 4:40 upwards\)](#)
- [Additional Information](#)
- [Related Resources](#)

Step-by-step



If you arrived at the Report Subscription page by clicking 'Subscribe' from the [Report Generator](#) screen, then the report you are subscribing to is the only one displayed.

Create a new report subscription

1. Login to your website and click **Dashboard**.
2. On your 'Dashboard', scroll down to the '**My Pages**' section and click **Report Subscription**.

My Pages

 Approve Orders Orders that need your approval	 My Favourites Your favourite products	 Order Import Import orders
 Orders On Hold Orders that you have placed on hold	 Orders Templates A list of your saved order templates	 Report Generator Report Generator
 Report Subscription Report Subscription	 Order History Check the status of your order	 Pay Account Pay outstanding invoices

3. In the 'Report Subscription' list, you can scroll down the list of reports available or search for it. **Note** - Tick 'Show Inactive Reports' and click Search to display inactive reports as well.

Report Subscription

Search

Report Search

☒ Show Active Reports ☐ Show Inactive Reports

Search Results

13 records (1 page)

Report Name	Report Description	Report ID	
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	32	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	31	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	30	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	29	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	28	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	27	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>



You can only subscribe to generated reports based on original reports that have been enabled for subscription. If the list is empty, there are no reports you can subscribe to. (See your website Administrator for assistance.)

4. Click **Subscribe** for the report. The **Manage Subscriptions** panel for the report is displayed. Any current subscriptions will be displayed.

Manage Subscriptions

Current Subscriptions

Recipient Email Address	Start Date	End Date	Frequency	Active	Last Run Date	
sarah123@gmail.com	17/11/2020 9:32:00 AM	26/11/2020	Daily	<input checked="" type="checkbox"/>	17/11/2020	<input type="button" value="Delete"/> <input type="button" value="Update"/>

5. To create a new subscription, click the **New Subscription** button.

Manage Subscriptions

New Subscription

Recipient Email Address	Start Date	End Date	Frequency	Active	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Daily	<input checked="" type="checkbox"/>	<input type="button" value="Cancel"/> <input type="button" value="Add"/>

6. In **Recipient Email Address**, enter one or more recipient email addresses for this subscription. If there are more than one recipient, use a semi-colon ';' to separate each email address.
7. In the **Start Date** and **End Date** fields, enter the beginning and end dates for the subscription period.
8. In **Frequency**, select how often an updated report will be run and emailed: **'Daily'**, **'Weekly'** or **'Monthly'**.
9. The **Active** checkbox lets you pause/continue a subscription. It is ticked by default when a subscription is created. If you do not want the subscription to run after creating it, untick **Active**. You can tick it any time after the subscription has been created.
10. To save the subscription, click **Add**. If the subscription is active, recipients will be sent an email with the report attached based on the start date/end date and frequency.



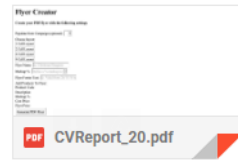
Test report subscription email

You can test that your report subscription has been set up correctly by entering your email address as 'Recipient Email Address' and setting the date to today and time to a few minutes into the future. Check that you receive an email with the report. The Subject line displays the text Admin entered for 'Email Subject' when the report was created.

noreply@commercevision.net

to me ▾

Sales Order Report 1 for CSSUser has been generated on 17/11/2020 for Sarah Sales Order Report 1 for CSSUser 1st Report.



If you do not receive the email:

- check your Junk Email folder
- check you have entered your email address correctly

View/edit a current subscription

To display the details of an existing subscription,

1. Find the report and click **Subscribe**. Details of any current subscriptions and when an email was last sent are displayed.

Manage Subscriptions						
Current Subscriptions						
Recipient Email Address	Start Date	End Date	Frequency	Active	Last Run Date	
sarahh3.testing@gmail.com	17/11/2020 9:32:00 AM	26/11/2020	Daily	<input checked="" type="checkbox"/>	17/11/2020	Delete Update
sl3434@commercevision.com.au	17/11/2020 11:06:00 AM	20/11/2020	Weekly	<input checked="" type="checkbox"/>		Delete Update

2. (i) To remove the subscription from the system, click **Delete**.
 (ii) To edit the details of the subscription, change any information in the fields and click **Update**. If you have changed any information and do not want to save it, click **Cancel Subscriptions** to revert to existing details and close the 'Manage Subscriptions' panel.
 (iii) To pause the scheduled emailing of the report, untick the 'Active' checkbox and click **Update**.

View Subscription Log of sent events

To view the log of a report's subscription send activity, click the **Audit** button.

Subscription Log				
Recipient Email Address	Sent Date Time	Status	Cc	Bcc
sl3434@commercevision.com.au	17/11/2020 11:09 AM	Successful		
sl3434@commercevision.com.au	17/11/2020 11:06 AM	Successful		
sarahh3.testing@gmail.com	17/11/2020 09:32 AM	Successful		

The log provides details of each email sent event. **Note** - In 'Status', 'Successful' refers to a successful email sending event by the system.

View a report

In case you want to view a report for any reason, e.g., check it is the right one to subscribe to, click the **View** button next to the report. The system will automatically download the report to your device.

Delete a report

You can delete a report you generated through [Report Generator](#). Only reports that have no current subscriptions can be deleted.

To delete a report,

1. Click the **Delete Report** button.
2. Confirm you want to delete the report in the popup message. Click **Yes** to complete the deletion or **No** to cancel it.

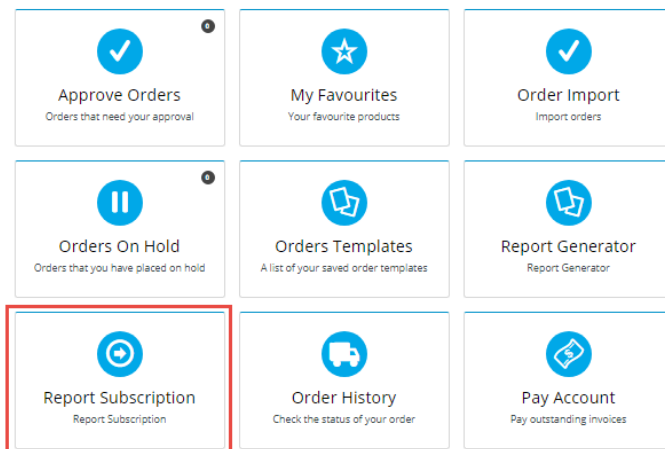
****UPDATE****

Nick naming a subscribed report. (Available from versions 4:40 upwards)

From Version 4:40+ you can add a nickname to the report you have subscribed to. This will allow you to name the report to your liking without affecting any other user who has subscribed to the same report. Follow the below steps to add a nick name to a subscribed report.

1. Login to your website and click **Dashboard**.
2. On your 'Dashboard', scroll down to the '**My Pages**' section and click **Report Subscription**.

My Pages



3. In the 'Report Subscription' list, you can scroll down the list of reports available or search for it. **Note** - Tick 'Show Inactive Reports' and click Search to display inactive reports as well.

Report Subscription

Search

Report Search

☒ Show Active Reports ☐ Show Inactive Reports

Search Results

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Report Name	Report Description	Report ID	
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	32	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	31	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	30	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	29	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	28	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	27	<input checked="" type="checkbox"/> Subscribe <input type="checkbox"/> Audit <input type="button" value="View"/>

4. Find the report you want to add a nickname to and click on the **edit** icon

≡ Search Results

2 records (1 page)			
Report Name	Report Description	Report ID	
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	121	Subscribe Audit Download
<div></div>			
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	119	Subscribe Audit Download
<div></div>			
2 records (1 page)			


5. After clicking on the icon, a field will open up, allowing you to type in a nickname for the report. Enter in a nickname for the report. Click on '**Save Nickname**' to save the changes, or click on '**Cancel**' to cancel any changes.

≡ Search Results

2 records (1 page)			
Report Name	Report Description	Report ID	
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	121	Subscribe Audit Download
<div><div></div><div><input type="text" value="May 2023 Report"/></div><div>Save Nickname Cancel</div></div>			

6. After clicking on 'Save Nickname' the nick name will be saved against the report.

≡ Search Results

2 records (1 page)			
Report Name	Report Description	Report ID	
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.	121	Subscribe Audit Download
<div><div></div><div><input type="text" value="May 2023 Report"/></div></div>			

Note: The nickname is only visible to your login. No other users will see this nickname. The nickname will **not** appear on the email that is sent to you.

Additional Information

Minimum Version Requirements	4.23 4.40 for Naming your reports.
Prerequisites	A report must be enabled for subscription.
Self Configurable	No
Business Function	Reporting
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related Resources

- [Reporting Functions](#)
- [Google Tag Manager with Universal Analytics](#)
- [Scheduled Reporting](#)
- [Run a Report](#)
- [Report Generator \(Scheduled Reporting\)](#)
- [Configure Scheduled Reporting](#)
- [Google Universal Analytics](#)
- [Report Subscription Widget](#)
- [Report Generator Widget](#)
- [Create Users to Approve Report](#)