

Best Practice Guides for Reports

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How to Set Up Scheduled Reports



The scheduler is available for every detailed report with the exception being the Activities' report.



To view scheduled reports, click on the **Scheduler** tab to view a list of detailed reports and the frequency of how often they're sent, or to change the settings/requirements on a scheduled report.



To see scheduled report in advance, click on the **Request Now** button. This feature will send the scheduled report immediately and still continue to send the report on the scheduled date.



If using Custom Fields, Administrators will see a Toggle to select or deselect the field(s) to include or exclude from the report.

For complete instructions see [How to Set Up Scheduled Reports](#).

Monthly Report



Any change in details will take affect in the next round of monthly generation.

For complete instructions see [Monthly Report](#).