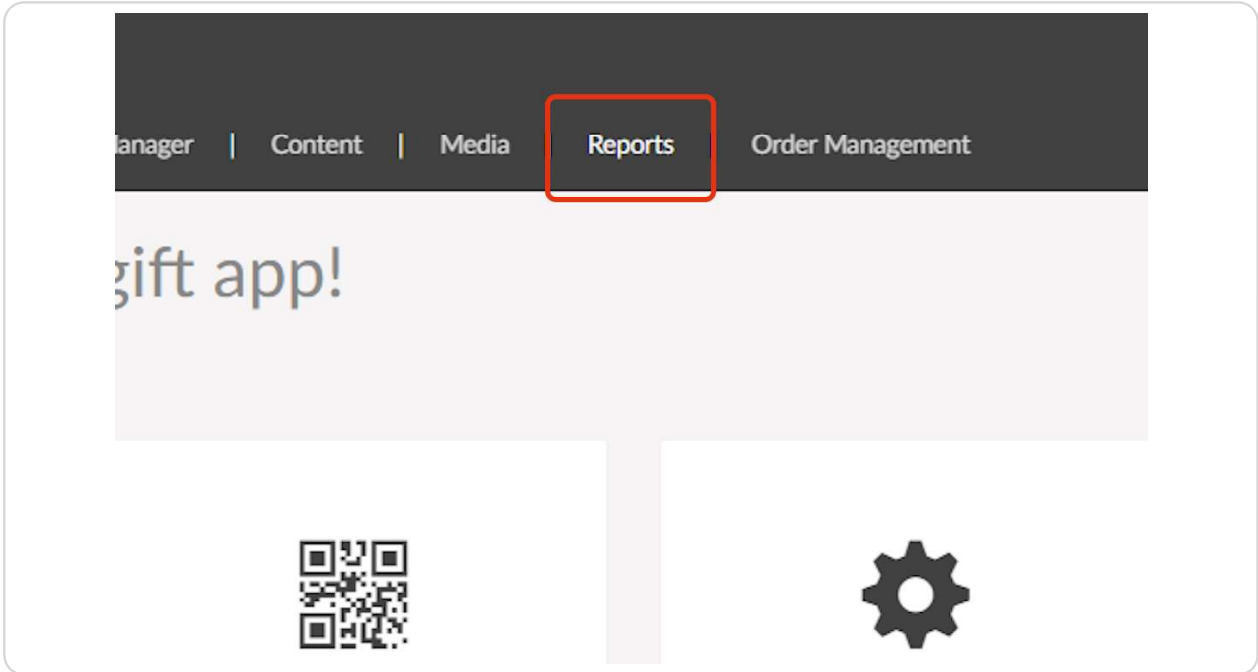


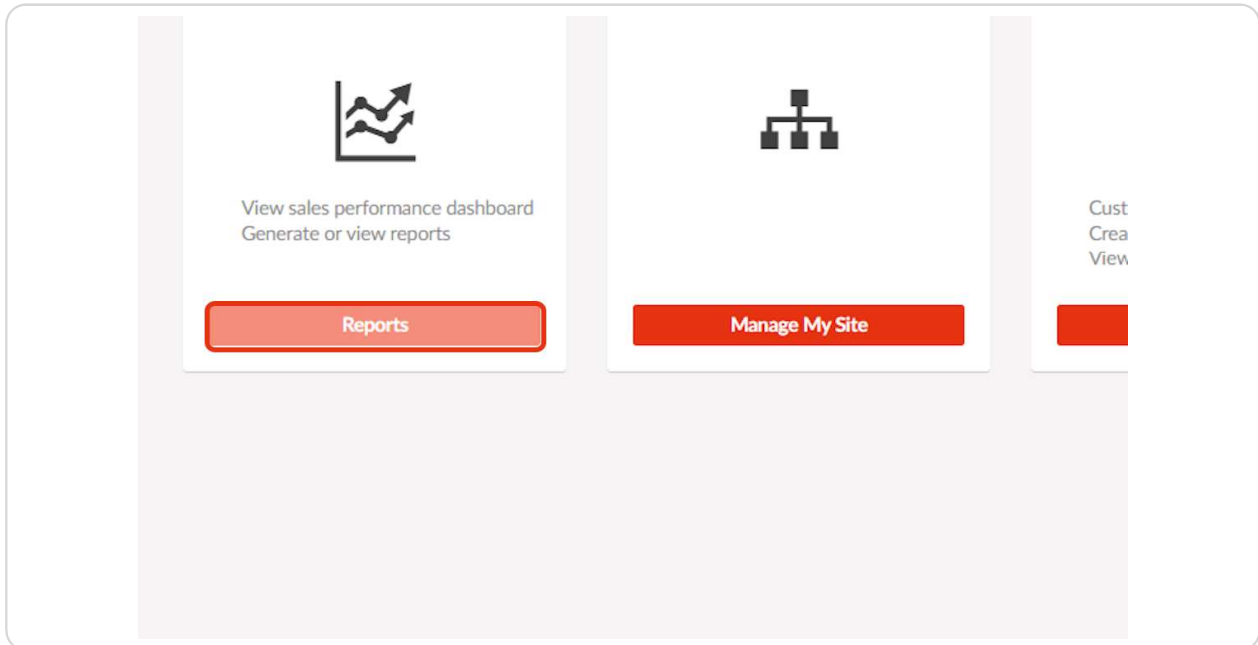
STEP 1

Click on Reports in navigation bar



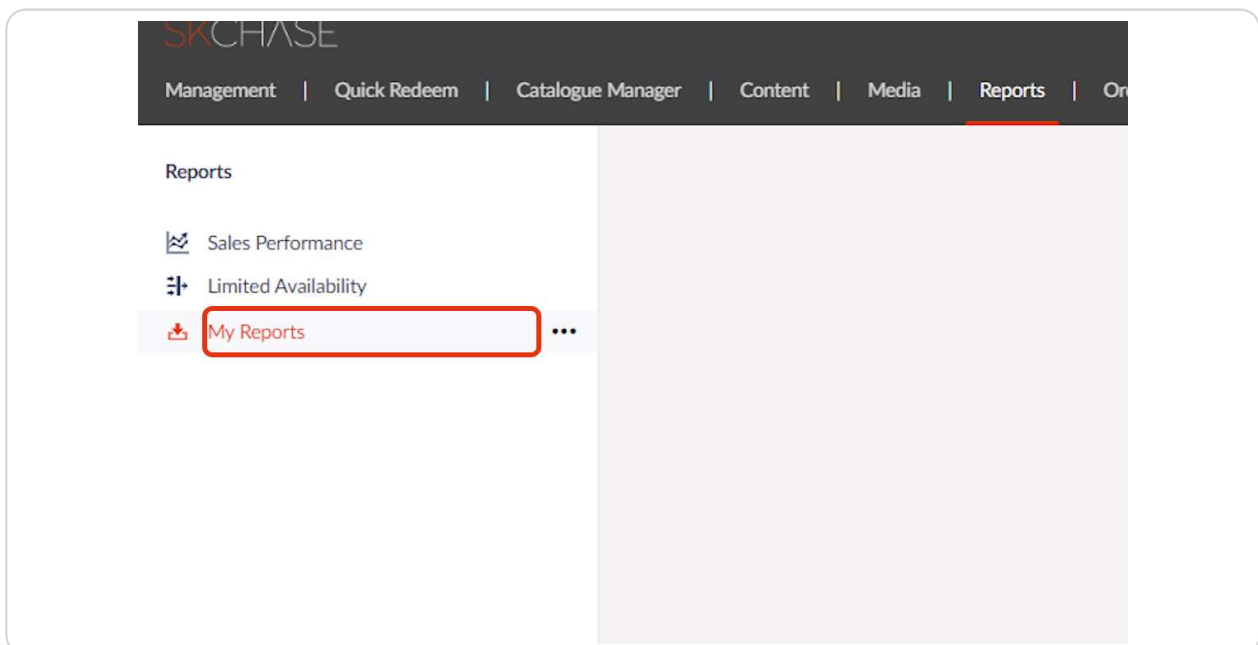
STEP 2

Or click on Reports in panel



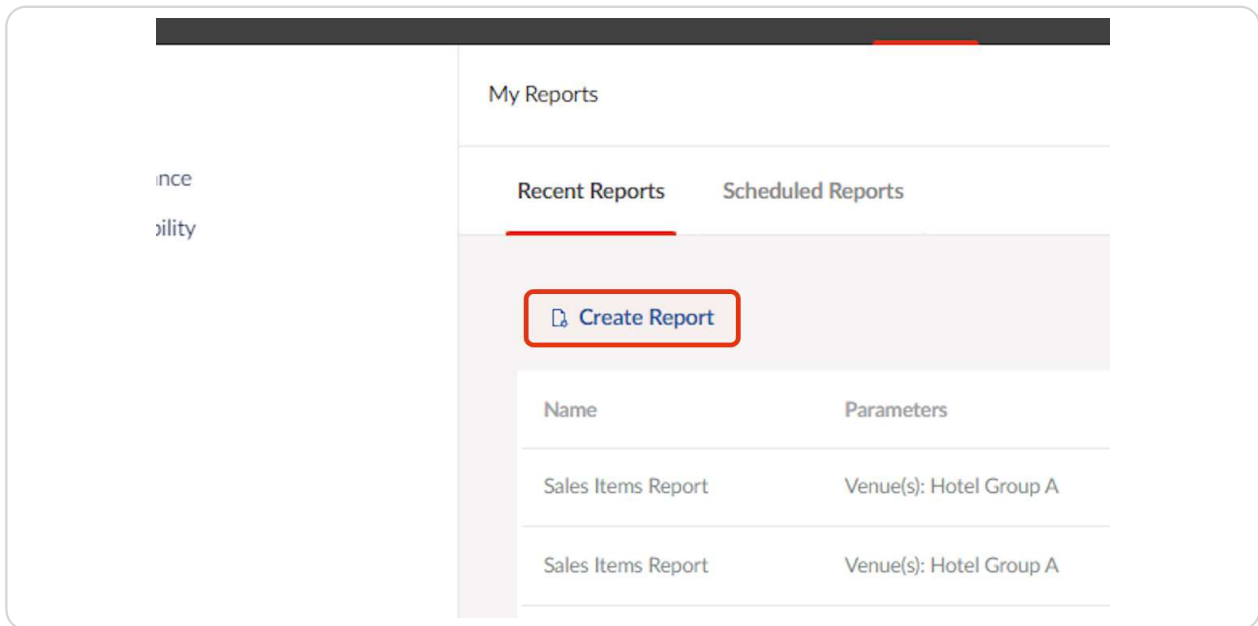
STEP 3

Click on My Reports



STEP 4

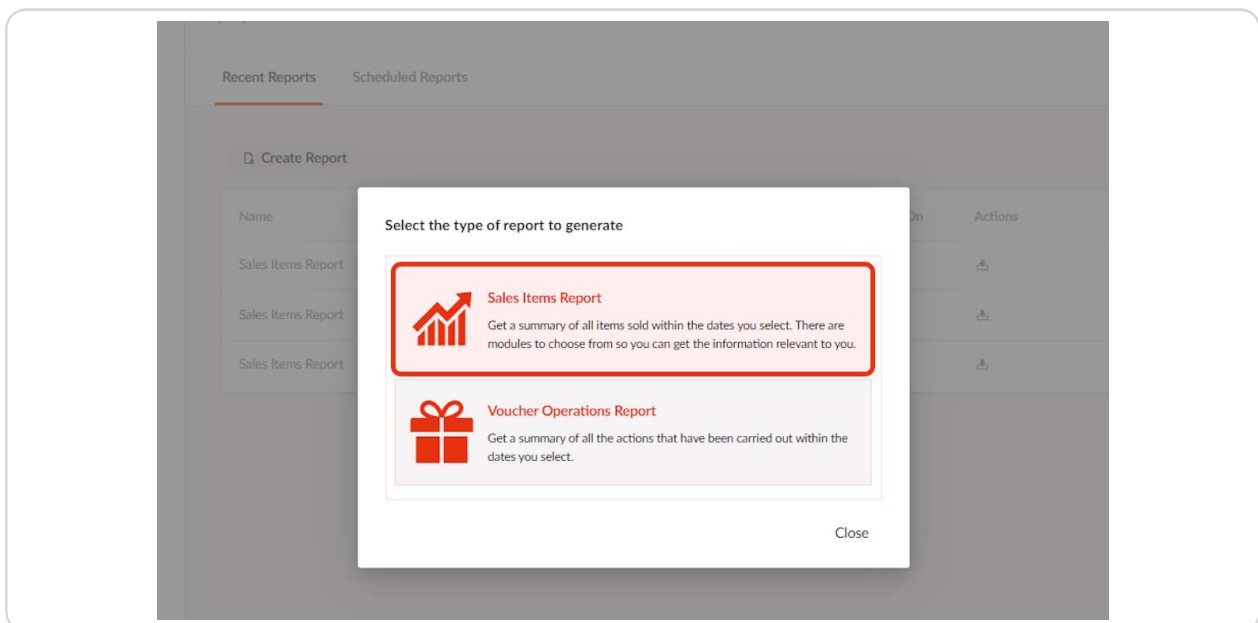
Click on Create Report



STEP 5

Click on Sales Items Report

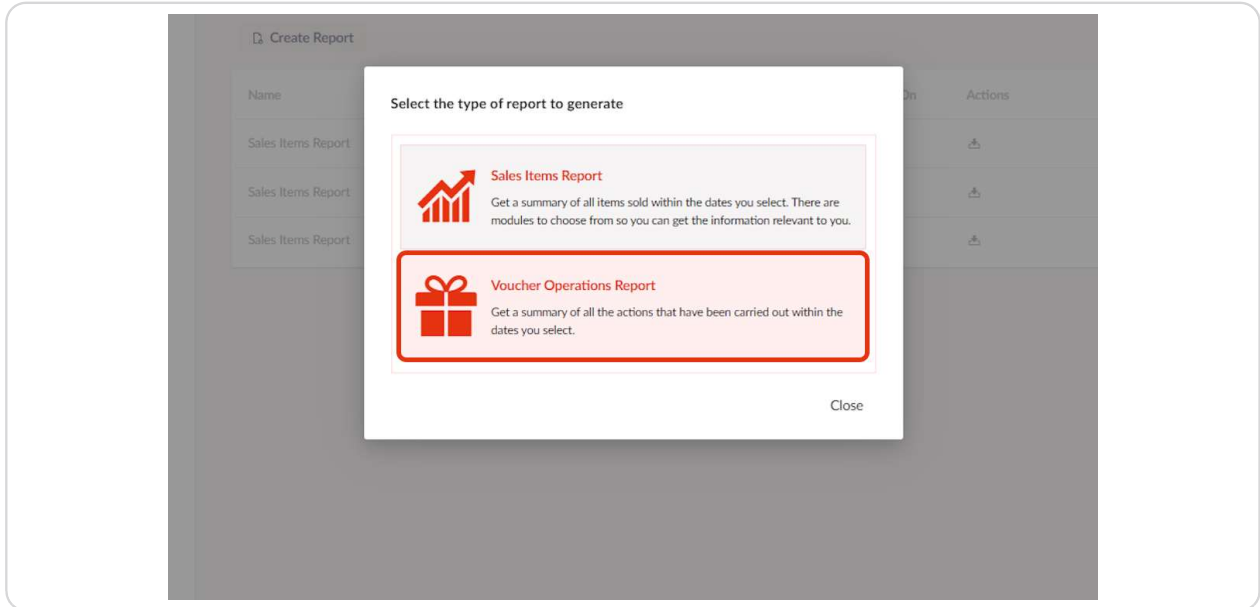
This report gives a summary of all vouchers sold within a specific date range



STEP 6

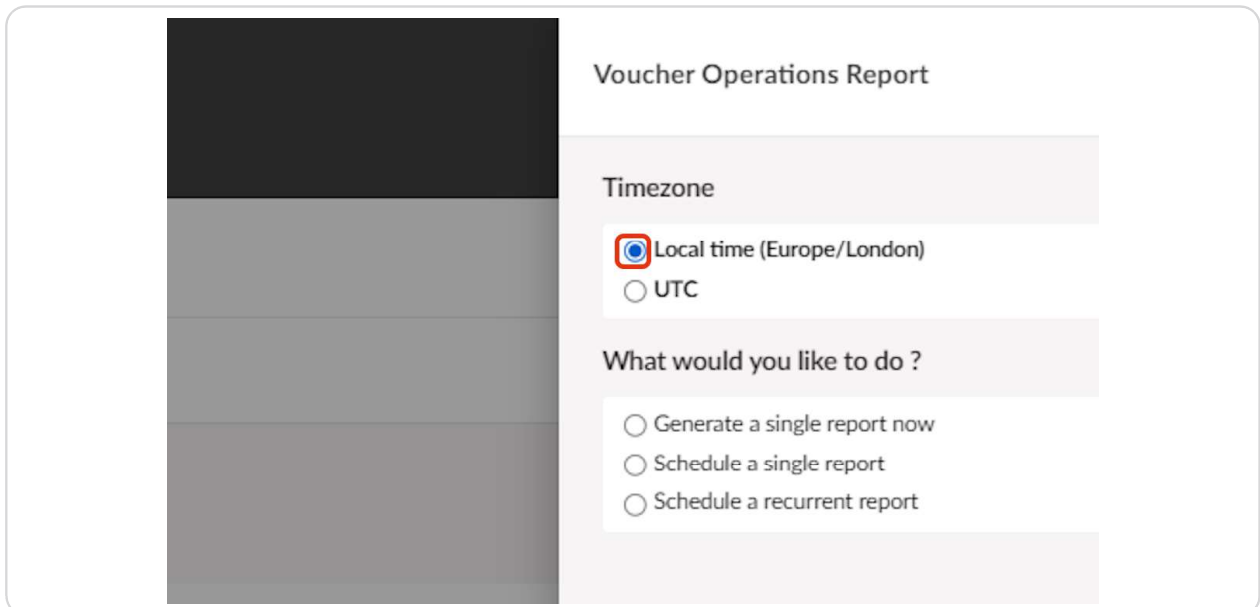
OR click on Voucher Operations Report...

This report gives a summary of all actions carried out per voucher within a specific date range



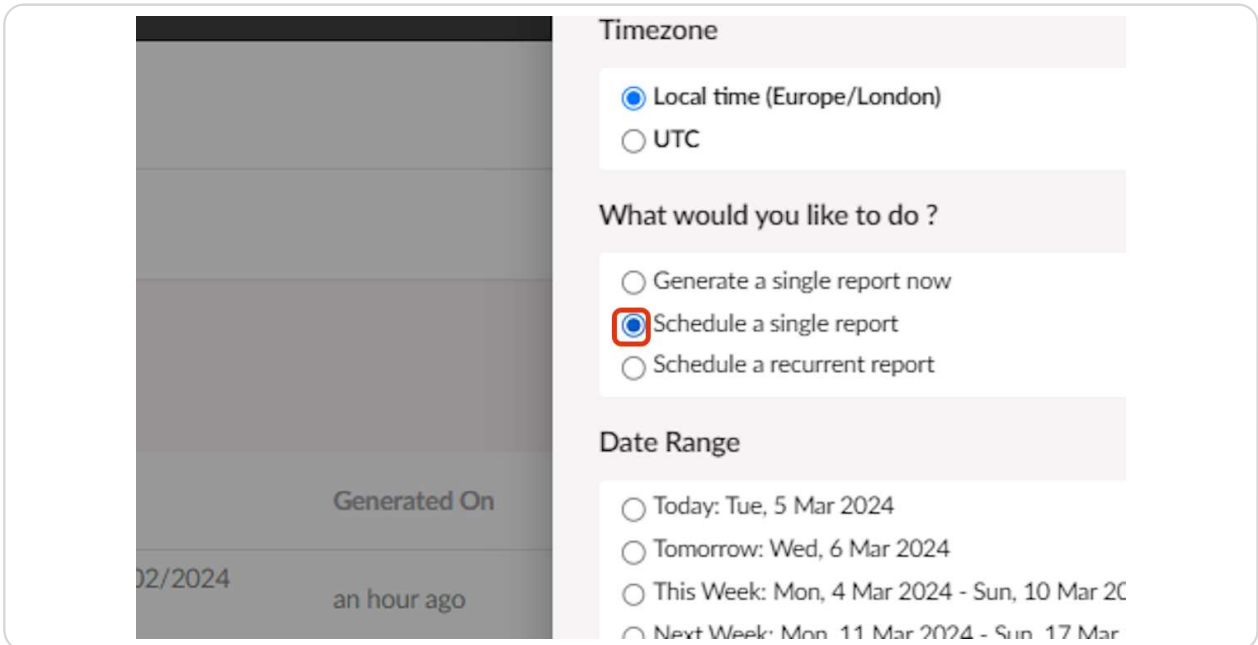
STEP 7

Choose Timezone



STEP 8

Choose to Schedule a single report

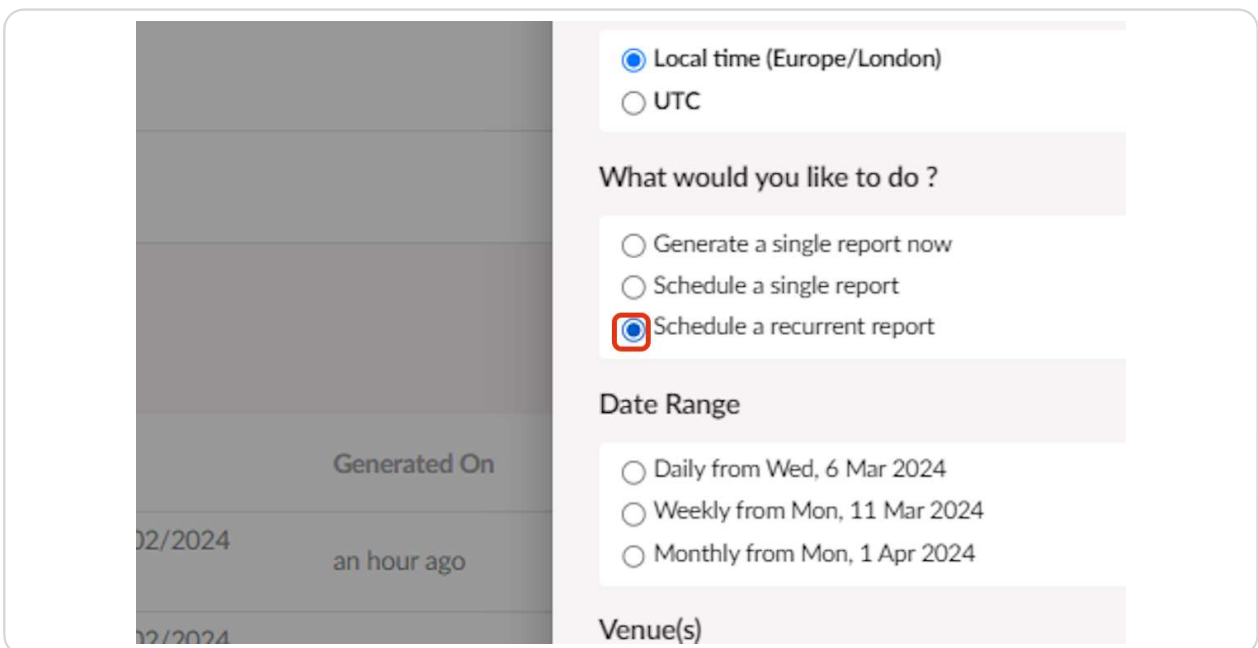


The screenshot shows a report generation interface. On the left, a greyed-out report preview is visible with the text "Generated On" and "an hour ago". On the right, the configuration options are as follows:

- Timezone:**
 - Local time (Europe/London)
 - UTC
- What would you like to do ?**
 - Generate a single report now
 - Schedule a single report
 - Schedule a recurrent report
- Date Range:**
 - Today: Tue, 5 Mar 2024
 - Tomorrow: Wed, 6 Mar 2024
 - This Week: Mon, 4 Mar 2024 - Sun, 10 Mar 2024
 - Next Week: Mon, 11 Mar 2024 - Sun, 17 Mar 2024

STEP 9

OR choose to Schedule a recurrent report



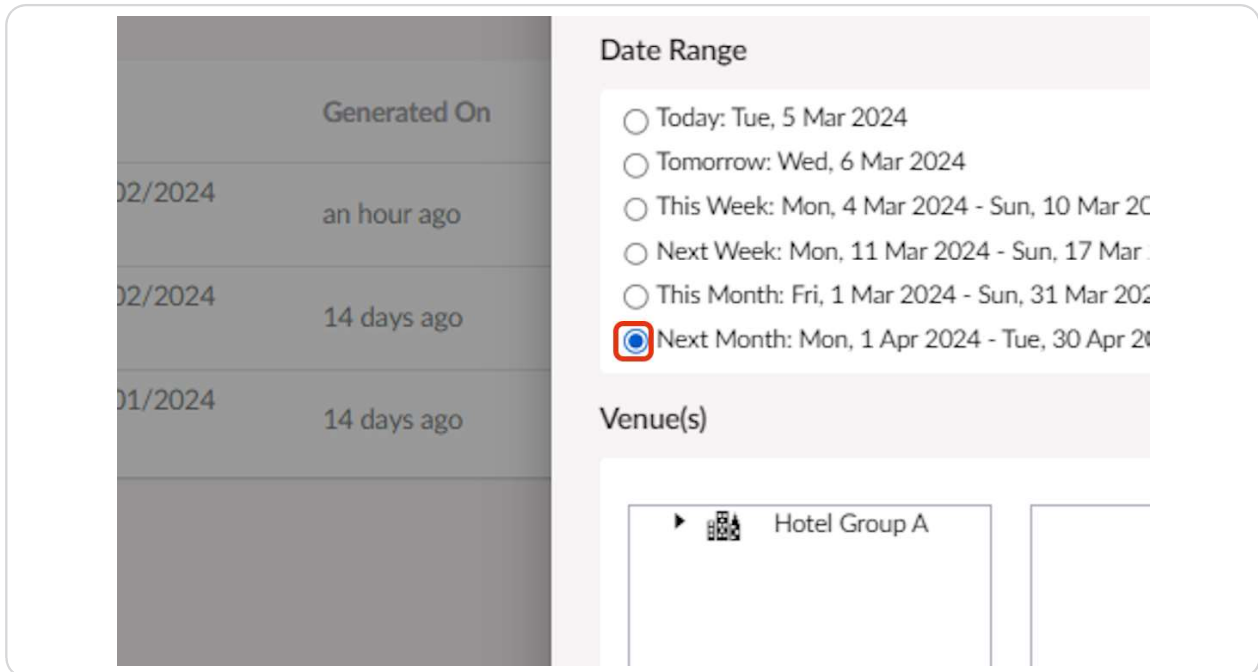
The screenshot shows a report generation interface. On the left, a greyed-out report preview is visible with the text "Generated On" and "an hour ago". On the right, the configuration options are as follows:

- Timezone:**
 - Local time (Europe/London)
 - UTC
- What would you like to do ?**
 - Generate a single report now
 - Schedule a single report
 - Schedule a recurrent report
- Date Range:**
 - Daily from Wed, 6 Mar 2024
 - Weekly from Mon, 11 Mar 2024
 - Monthly from Mon, 1 Apr 2024
- Venue(s):**

STEP 10

Select a Date Range

When scheduling a single report you will be given a choice of daily, weekly or monthly options




The screenshot displays a user interface for scheduling a report. On the left, a table titled "Generated On" shows a list of reports with their generation dates and times. On the right, a "Date Range" selection menu is visible, with the "Next Month" option selected. Below the date range menu, a "Venue(s)" section shows a dropdown menu with "Hotel Group A" selected.

Generated On	
02/2024	an hour ago
02/2024	14 days ago
01/2024	14 days ago

Date Range

- Today: Tue, 5 Mar 2024
- Tomorrow: Wed, 6 Mar 2024
- This Week: Mon, 4 Mar 2024 - Sun, 10 Mar 2024
- Next Week: Mon, 11 Mar 2024 - Sun, 17 Mar 2024
- This Month: Fri, 1 Mar 2024 - Sun, 31 Mar 2024
- Next Month: Mon, 1 Apr 2024 - Tue, 30 Apr 2024

Venue(s)

▶  Hotel Group A

STEP 11

Select a Date Range

When scheduling a recurrent report you can choose to run the report either daily, weekly or monthly

The screenshot displays a user interface for scheduling a report. On the left, a table shows a list of reports generated on various dates (02/2024, 02/2024, 01/2024) with their respective generation times (an hour ago, 14 days ago, 14 days ago). On the right, there are configuration options for a recurrent report. The 'Date Range' section has three radio button options: 'Daily from Wed, 6 Mar 2024', 'Weekly from Mon, 11 Mar 2024' (which is selected and highlighted with a red square), and 'Monthly from Mon, 1 Apr 2024'. Below this, the 'Venue(s)' section shows a dropdown menu with 'Hotel Group A' selected.

Generated On	
02/2024	an hour ago
02/2024	14 days ago
01/2024	14 days ago

Generate a single report now

Schedule a single report

Schedule a recurrent report

Date Range

Daily from Wed, 6 Mar 2024

Weekly from Mon, 11 Mar 2024

Monthly from Mon, 1 Apr 2024

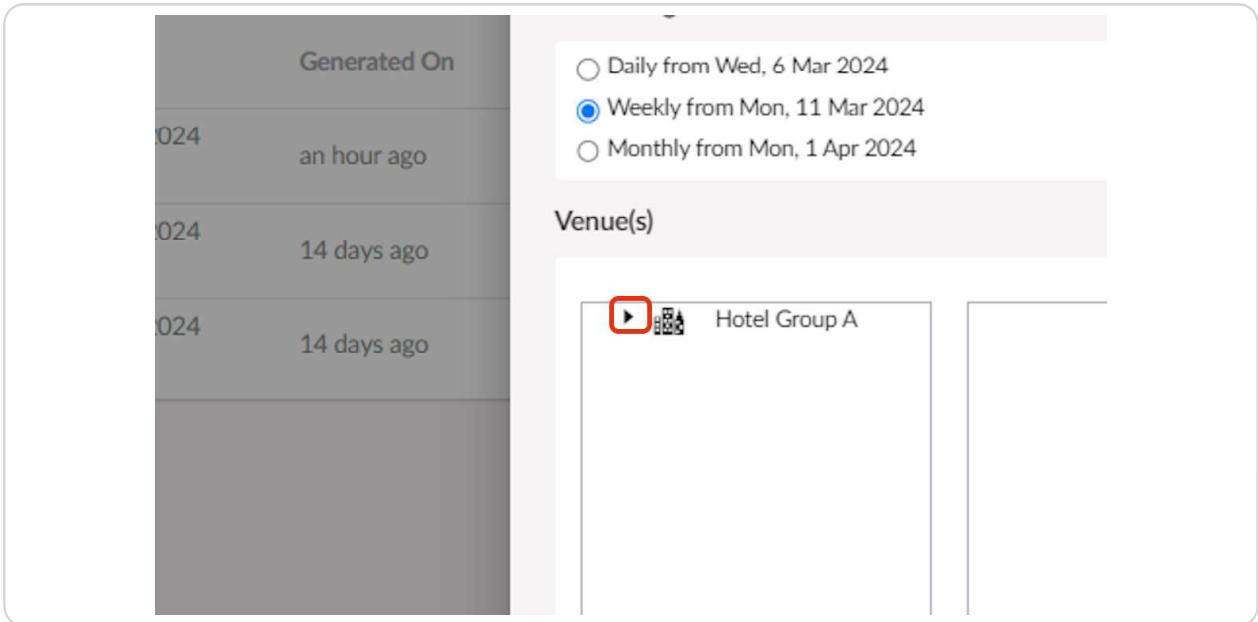
Venue(s)

▶ Hotel Group A

STEP 12

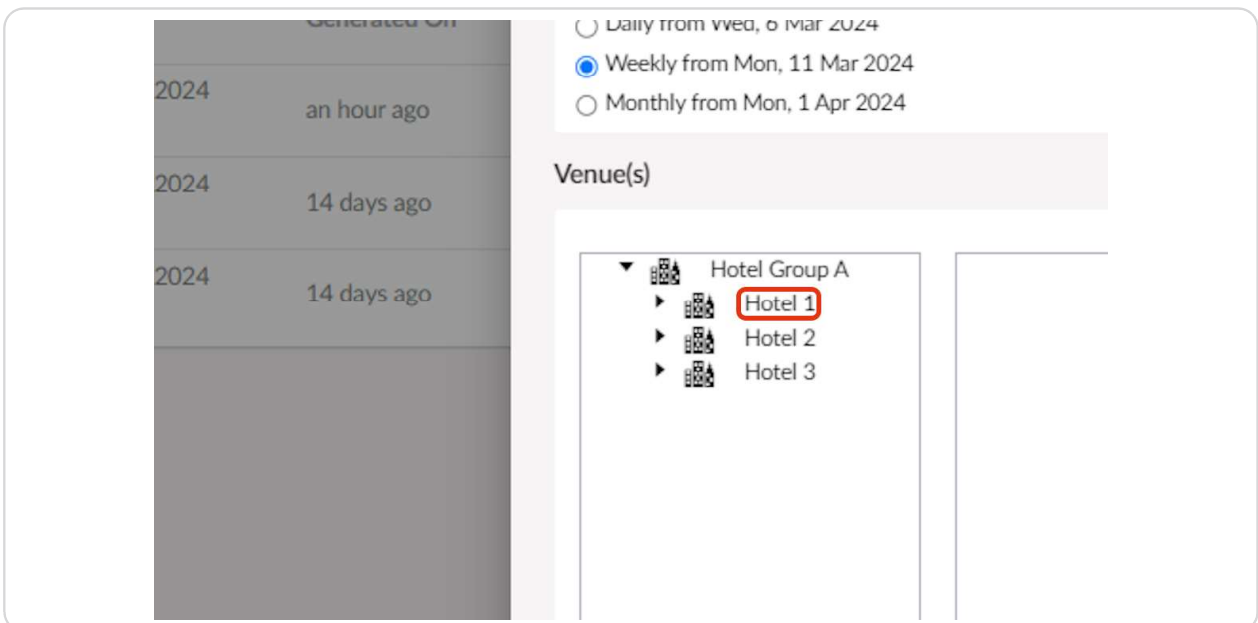
Select Venue(s) you would like to schedule the report for

You can expand groups of Venues by clicking on the arrow



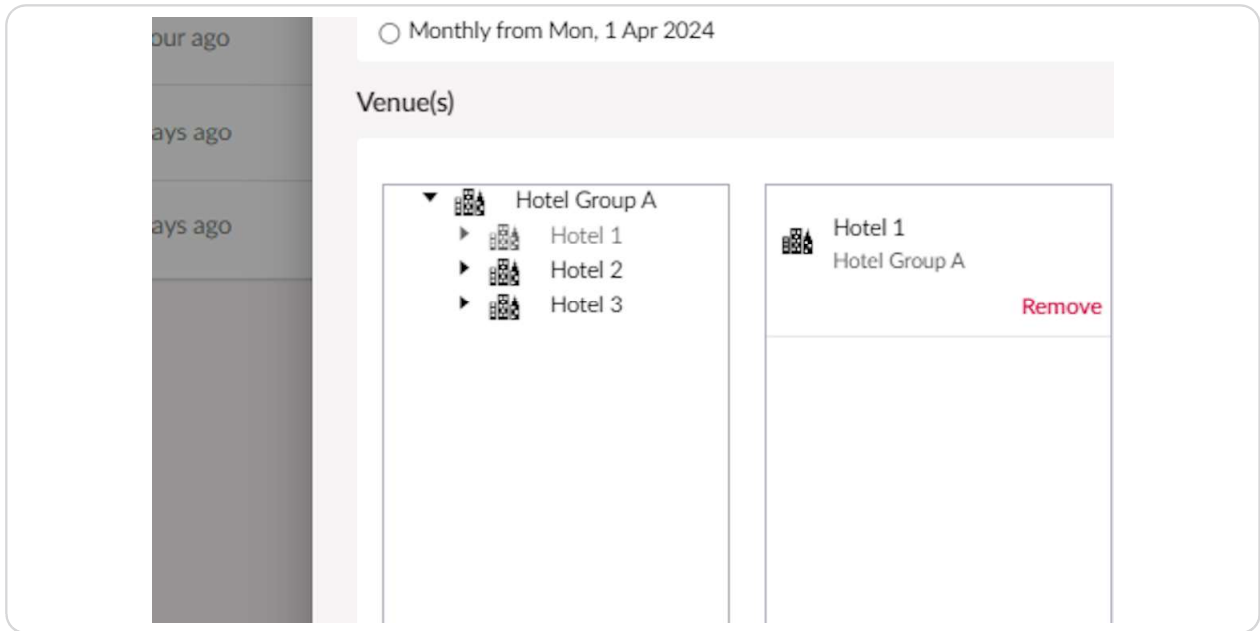
STEP 13

Click on the venue name to select it



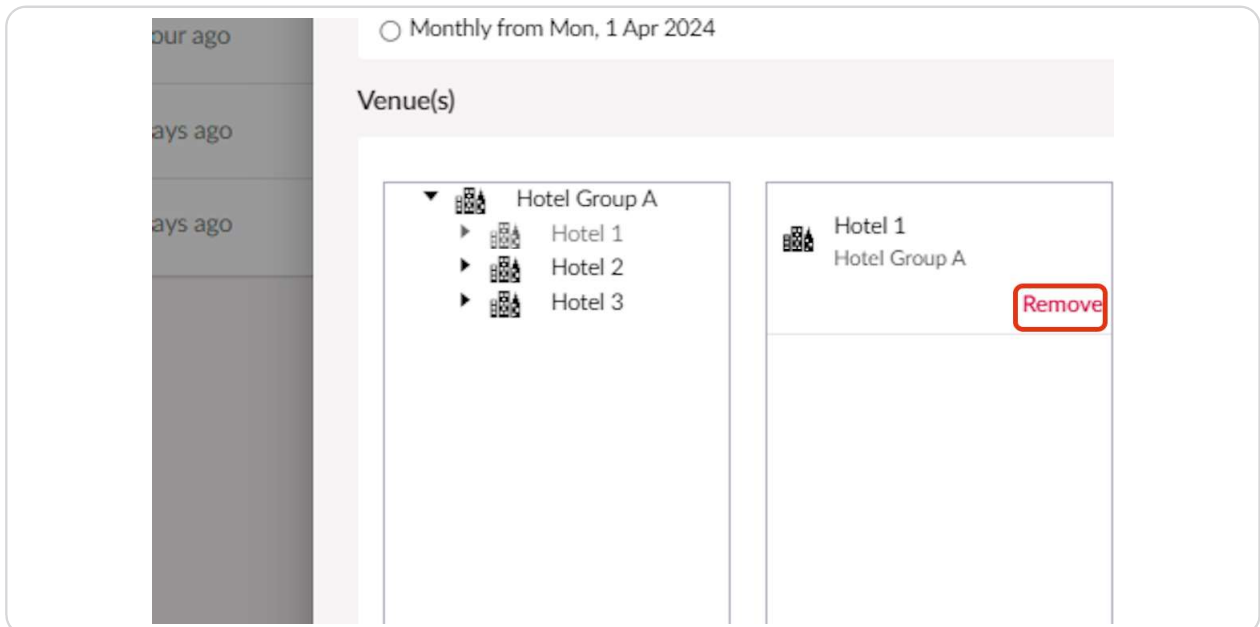
STEP 14

The venue will then move into the right-hand side column



STEP 15

You can remove Venue(s) from the right-hand side column by clicking on Remove



STEP 16

When running a Sales Report there is optional data you can include

Optional Data to include

- Financial Data (Type of payment, refund and discount information)
- Buyer Data
- Recipient Data
- Voucher Data (Current balance and validity of vouchers)
- Marketing Data (Marketing question responses)

STEP 17

Tick any additional info you would like to include

Optional Data to include

- Financial Data (Type of payment, refund and discount information)
- Buyer Data
- Recipient Data
- Voucher Data (Current balance and validity of vouchers)
- Marketing Data (Marketing question responses)

STEP 18

When running a Sales Report there are also Optional Filters you can apply to exclude data

Optional Data to include

- Financial Data (Type of payment, refund and discount information)
- Buyer Data
- Recipient Data
- Voucher Data (Current balance and validity of vouchers)
- Marketing Data (Marketing question responses)

Optional Filters

- Exclude fully refunded vouchers
- Exclude complimentary vouchers

STEP 19

Tick any filters you would like to apply

Optional Data to include

- Financial Data (Type of payment, refund and discount information)
- Buyer Data
- Recipient Data
- Voucher Data (Current balance and validity of vouchers)
- Marketing Data (Marketing question responses)

Optional Filters

- Exclude fully refunded vouchers
- Exclude complimentary vouchers

STEP 20

If you would like to receive an email notification when your scheduled report is ready to download tick the **Email completed report** box

The screenshot shows a report generation interface with the following elements:

- Buyer Data
- Recipient Data
- Voucher Data (Current balance and validity of vouchers)
- Marketing Data (Marketing question responses)
- Optional Filters**
 - Exclude fully refunded vouchers
 - Exclude complimentary vouchers
- Email completed report**
 - trainingteam@skchase.com
- Buttons: **Cancel** and **Generate**

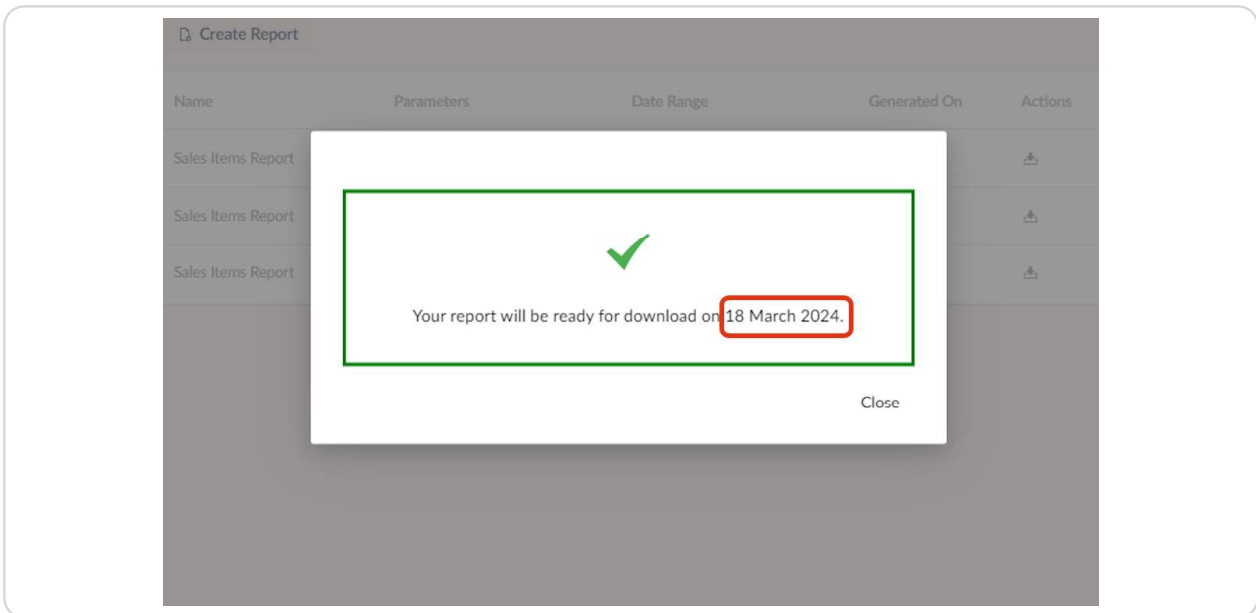
STEP 21

Click **Generate**

This screenshot is identical to the one in Step 20, but the **Generate** button is highlighted with a red border to indicate the next action.

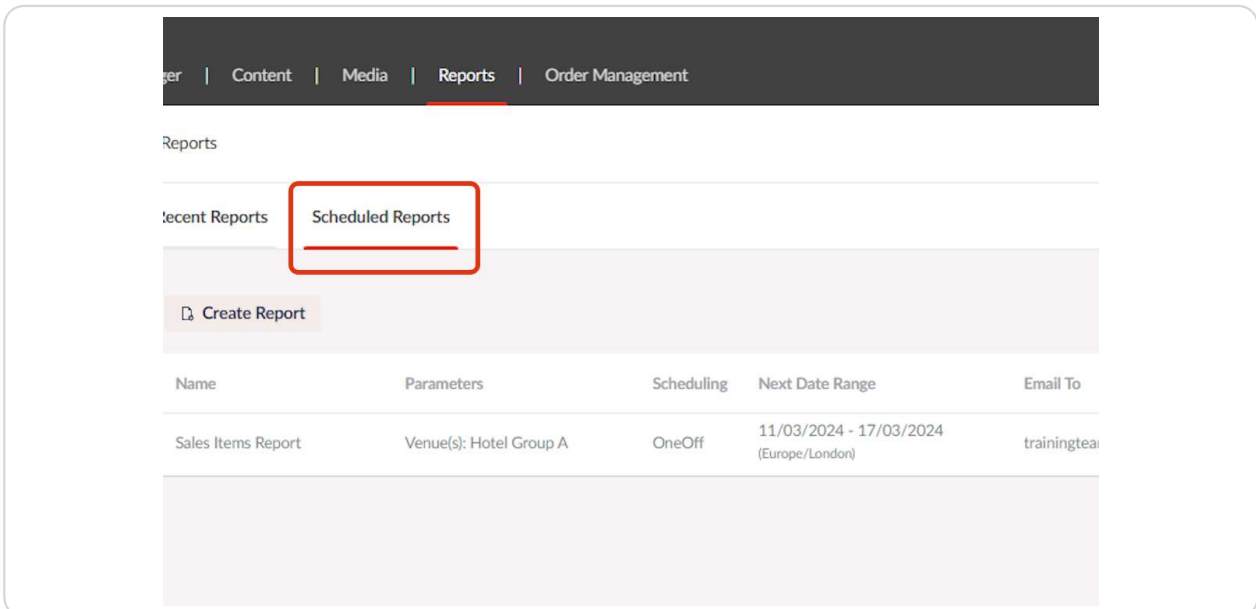
STEP 22

A pop up message will appear telling you when your report will be available to download



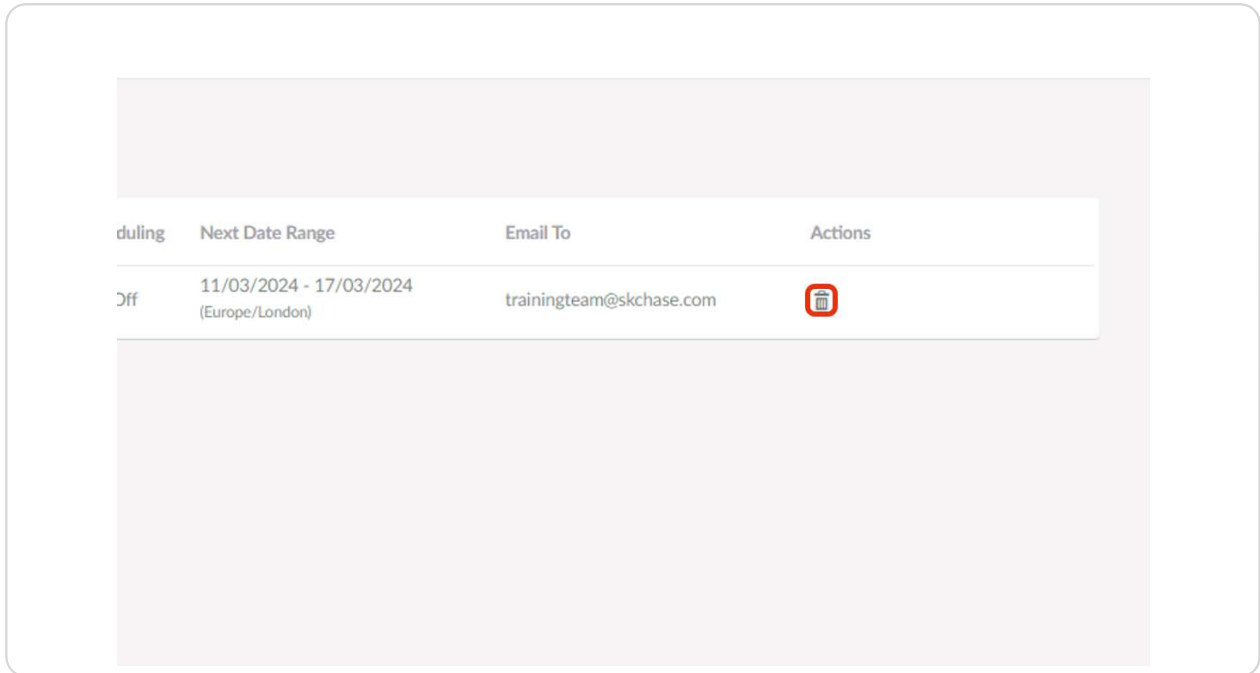
STEP 23

You can view a summary of reports you have scheduled in the Scheduled Reports tab




STEP 24

You can delete any Scheduled Reports you have set up under the Actions column



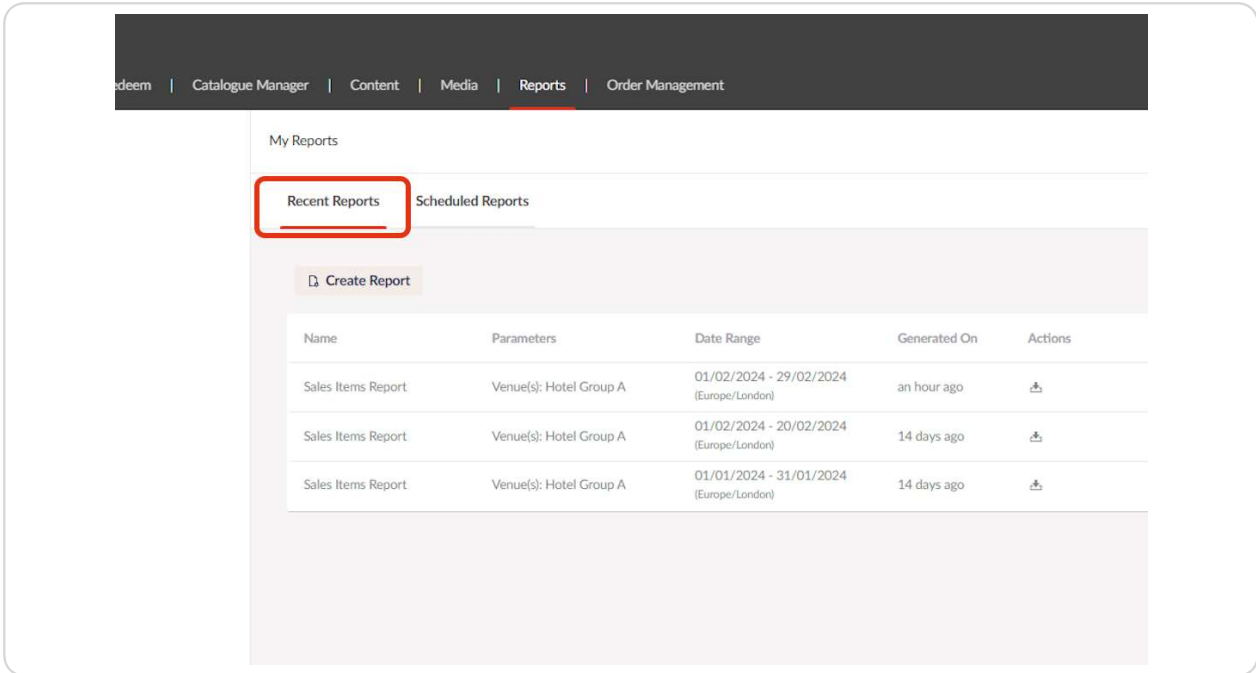
The screenshot shows a table with the following data:

Scheduling	Next Date Range	Email To	Actions
Off	11/03/2024 - 17/03/2024 (Europe/London)	trainingteam@skchase.com	

STEP 25

On the date your scheduled report becomes available to download it will appear under the Recent Reports tab. Login and navigate to this section

You will also receive an email notification when your report becomes available if you opted to receive this when scheduling



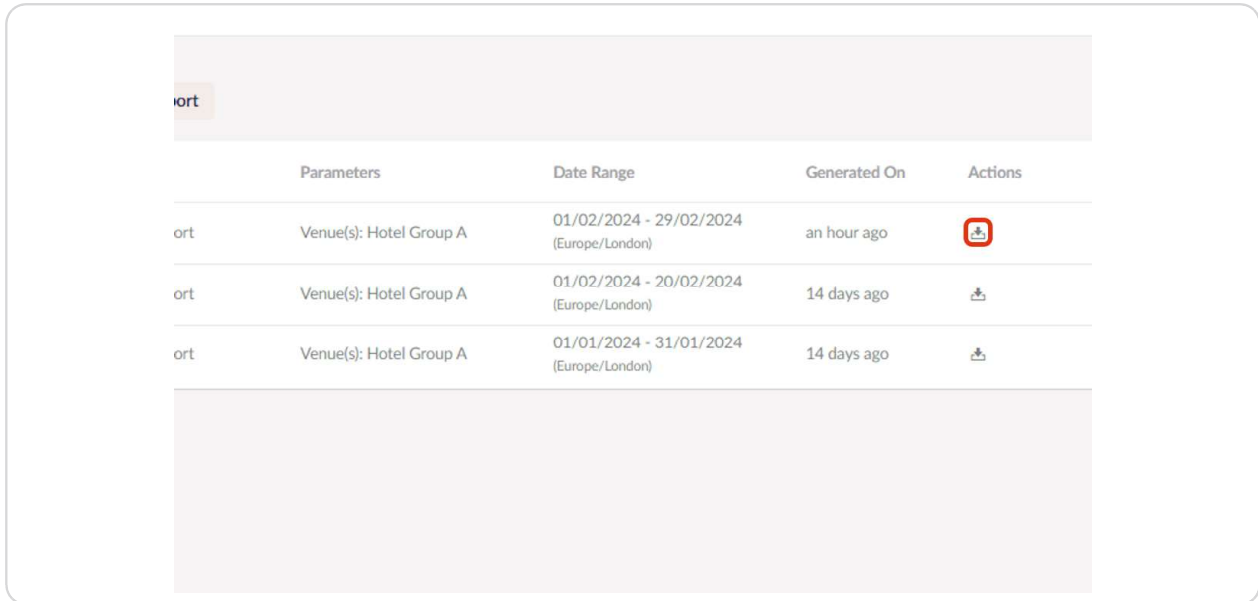
The screenshot shows a navigation menu at the top with 'Reports' highlighted. Below it, the 'My Reports' section has two tabs: 'Recent Reports' (highlighted with a red box) and 'Scheduled Reports'. A 'Create Report' button is visible. The main content is a table with the following data:

Name	Parameters	Date Range	Generated On	Actions
Sales Items Report.	Venue(s): Hotel Group A	01/02/2024 - 29/02/2024 (Europe/London)	an hour ago	
Sales Items Report.	Venue(s): Hotel Group A	01/02/2024 - 20/02/2024 (Europe/London)	14 days ago	
Sales Items Report.	Venue(s): Hotel Group A	01/01/2024 - 31/01/2024 (Europe/London)	14 days ago	

STEP 26

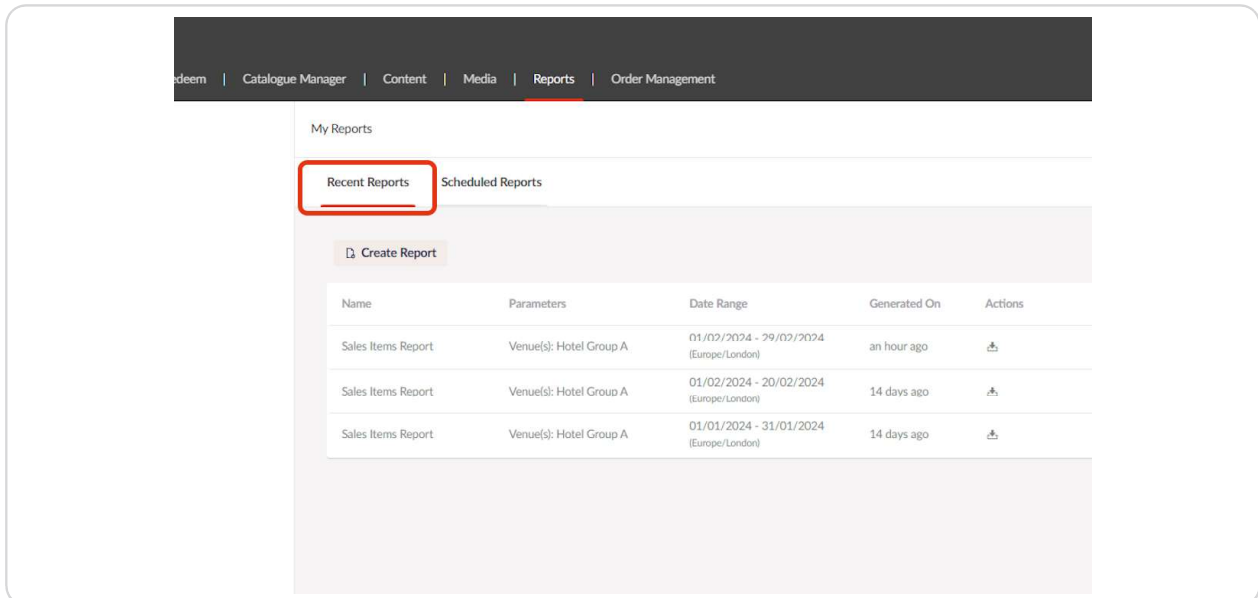
Click on the download button

Your report will then download into your device's downloads folder



STEP 27

Reports will remain available in the Recent Reports tab for 45 days



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