



 *Camp & Class Manager*

# Report Concierge User Guide



Release notes for the Report Concierge are [located here](#).

### What is Report Concierge?

Ability to schedule CCM Custom Season and Financial reports and have them auto-generate on a user defined cadence that naturally integrates with business processes; a.k.a. Report Process Automation.

- **Use Case 1:** Generate weekly waitlist reports during height of registration period to send to Program Directors at various locations for proactive waitlist management
- **Use Case 2:** Run the last 7 days Failed Payments report and send it to your finance team on Monday mornings for account remediation processing
- **User Case 3:** Run a Daily Attendance Report for the previous day and send it to your Attendance Coordinator for hard copy archiving

### What Reports are in Scope for the initial release on 8/13?

#### Finance Reports

- Accounts Receivable
- Credit Balance
- Customer Payments / Refunds
- Failed Installment Payment
- Financial Activity
- Internal Discount
- Payment Plan
- Transaction Report
- Custom Financial Report

#### Custom Season Reports

- Cart Abandonment
- Daily Attendance
- Merchandise Purchase
- Participant Attendance
- Session Capacity
- Waitlist Report
- Check-in Report (PDF)
- Waitlist and Session Registration (PDF)
- Custom Report

### Is there a limit to the number of reports that can be scheduled?

Report Concierge is limited to 100 scheduled reports per agency.

- Does not include paused/expired reports
  - **Paused:** Reports that are placed on Pause status by the agency
  - **Expired:** Expired reports can be re-activated by providing a new expiration date. Max is 1 -year from current day
    - Finance reports will expire 365 days after the scheduled date by default unless otherwise adjusted
    - Operations reports will expire 31 days after “season end date” (latest session end date offered in the season)
- When limit is reached, users will be alerted with a warning as new concierge reports requests cannot be activated

### How does an agency user create a Report Concierge request?

Via the “**Schedule**” button available on main report screen.

### Who has access to the Report Concierge request functionality?

All agency users that have access to the reports per user defined roles.

### Where are the Report Concierge requests seen?

In the “Scheduled Reports” view of each report group (Financial and Season)

- **Finance:** Finance > Reports > Scheduled Reports on right side bar
- **Operations:** Season Dashboard > Reports > Scheduled Reports on right side bar



### **What action can be taken by the user after a scheduled report request is created?**

- User can Edit (modify) the report concierge scheduling instructions
  - Rename scheduled report
  - Change date range
  - Change report frequency pattern
  - Change/Set an expiration date
  - Change recipients
  - Change e-mail adornments (i.e. Subject and Message body)
- Users can delete scheduled report
- Users can pause scheduled reports

### **Can report parameters be modified in the Report Concierge request edit function?**

No, report parameters cannot be modified. A new scheduled report will need to be created if new report parameters are needed (e.g. session selection).

### **What time will emails be delivered for scheduled report requests?**

Emails will go out at 00:00 UTC on days selected to be sent.

### **Who can receive the concierge reports?**

Only registered agency users. Non-agency users cannot be included in the recipient list.

### **Are the data restrictions associated with the recipient respected at time of report view?**

No, the recipient's data restriction will not be applied to the report. It is the responsibility of the Report Concierge creator to identify the proper data view and send the report to the proper user recipient list.

### **If an agency user gets deleted from the system, will the concierge request be deleted?**

No, the user will still be included in the concierge request. An agency admin user will have to update the concierge request to take the deleted user OFF the concierge requests.

### **How will the reports be delivered in the concierge emails?**

Reports will be delivered as URL links in the body of an email.

- Concierge report URLs are static.
  - If changes are made to the report within CCM, those will not be carried over to reports already scheduled.
- Users are encouraged to manually archive the downloaded reports.

### **What is the shelf-life of the URL from Concierge Report emails?**

Concierge Report URLs will be kept active for 4 years.

### **What changes are made to Season Reports that will be included in this release?**

Filters are retained so that users do not need to re-define the filters each time the report is accessed. This applies to both standard ad hoc and Report Concierge delivered reports.



**What differences are there in the Concierge Request for Custom Financial Report (CFR) vs the rest of the reports?**

The CFR Concierge Request follows the previous request format with no ability to customize the email subject line and body.

**Will previously scheduled Custom Financial Reports populate in the Finance Schedule View?**

Yes, these scheduled Custom Financial Reports will appear in the Schedule Reports view in the Finance tab.

**How is the Date Range used in the report production?**

The Report Concierge date range will supersede the date range used in an ad-hoc report. The date range will be determined by the same criteria used in the creation of the ad-hoc reports. See below table for date range meaning and recommendations.

Type	Report	Report Date Range Semantic	Applicability of Scheduler defined Dynamic Date Range
Operations Reports	Cart Abandonment Report	Abandonment Date	No issue. Report views for Yesterday, last 7 days, last month, and last 3 months. If there is a user need to have this longer, generate the report ad-hoc. These reports are more operational useful when they have shorter duration periods such as 'yesterday' or 'last week'.
	Daily Attendance Report	Session Date	
	Merchandise Purchase Report	Date of Purchase	
	Participant Attendance Report	Attendance Date	No issue, no date range is applied to the concierge version of these reports. Concierge reports behave functionally as ad-hoc reports.
	Session Capacity Report	n/a	
	Check-In Report	n/a	Report views for yesterday, last 7 days, last month, and last 3 months are supported. To manage the waitlist pro-actively, the best practice optimal window should be a near-term duration timeframes from TODAY (e.g. yesterday, or last 7 days). Looking at registrations past the 3-month window will be an edge case, and generating an ad-hoc report will be the appropriate action to retrieve those registrants.
	Waitlist Report	Registration Date	
Custom Report		Report views for yesterday, last 7 days, last month, and last 3 months are supported. Longer duration dynamic dates (e.g. since a user provided mm/dd/yy) may be appropriate for some custom reports. In those cases, generating the report ad-hoc or using previously archived concierge reports to cover the date range are the workarounds.	
Financial Reports	Credit Balance	n/a	No issue, no date range is applied to the concierge version of this report. Concierge report behaves functionally as ad-hoc report.
	Accounts Receivable	Transaction Date (Order Date)	No issue. Ad-hoc reports run with default month-to-date run time. Concierge reports can run these reports with a MAX timeframe for the last 3-months. Running the reports over 3 months, especially the CFR is discouraged due to performance implications.
	Custom Payments / Refunds		
	Failed Installment Payment Report		
	Financial Activity		
	Internal Discount		
	Payment Plan Report		
	Transactions Report		
Custom Financial Report			