

SnapReporter

Importing a BSR file into the Supervisor Workstation

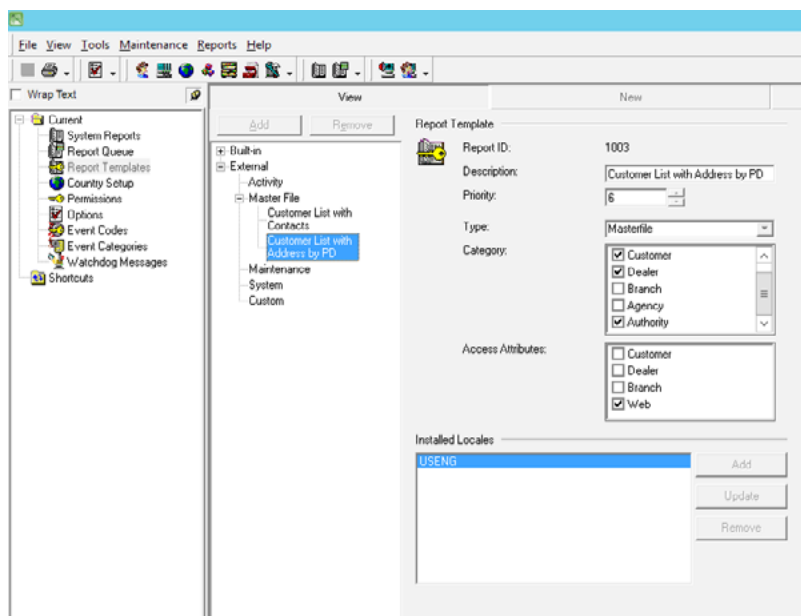
To import a BSR file, created through the SnapReporter into the Supervisor Workstation, please do the following:

1. Confirm the location of the BSR file saved from the Bold SnapReporter.
2. Launch the Supervisor Workstation.
3. Navigate to the Reports Menu then Report Templates.
4. Click Edit.
5. Collapse the “Built-in” section.
6. Select the category to place the report under.
7. Click Add.
8. Enter a Report Description for the new report.
9. Search for and select the BSR file to import.
10. Once the report loads click OK.
11. Return to the Navigator and locate the new report.
12. Single click on it and select under which category(ies) the report will show and, if you configured from/through parameters, you may select Customer and/or Dealer Access Attributes.
13. Once all information is correct, click Save.

To test the report:

1. Open the System Reports form.
2. Locate the new Report name.
3. Single Click the report name.
4. Enter/Select any parameters, if needed.
5. Click Next
6. Select a report destination, or enter an override address.
7. Click Finish.
8. Verify the report delivers the expected report output.

It is possible to now schedule these reports on customer or dealer records.



Important Information:

- Be sure that the bsr file is saved to NOT include the report data.
- Keep Report descriptions simple and clear.
- If you cannot find the new report name, the system reports menu may have been open during the report addition. Close the System Reports and load it again.