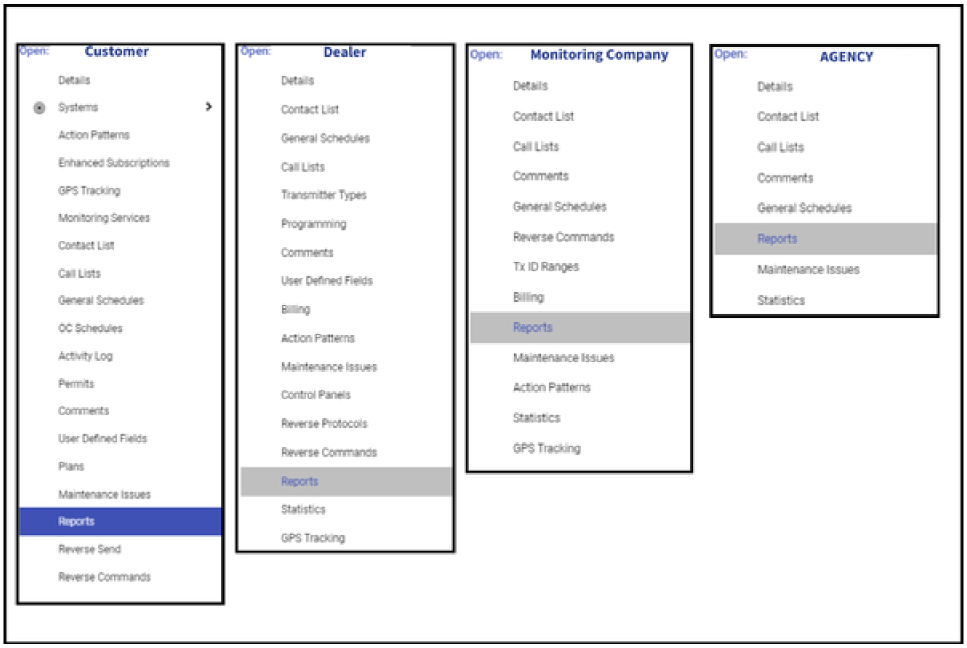
Reports on Entity Records

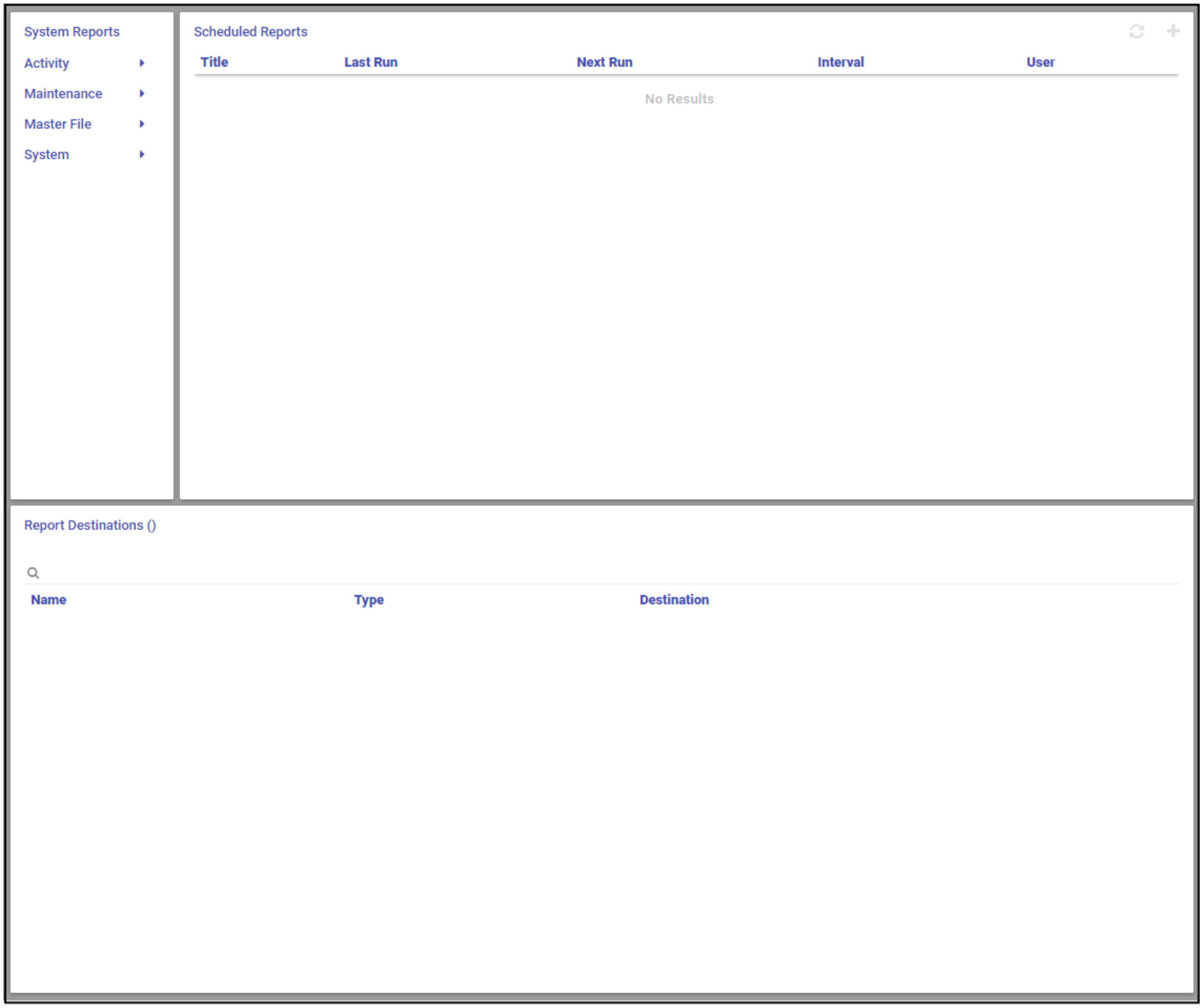
Each entity record in Manitou may generate one-off and scheduled reports. The following details how to locate and manage reports on an entity record:

1. **Open the Entity** on which you wish to schedule your report.
    - Reports are available on the Customer, Dealer, Agency, and Monitoring Company records.

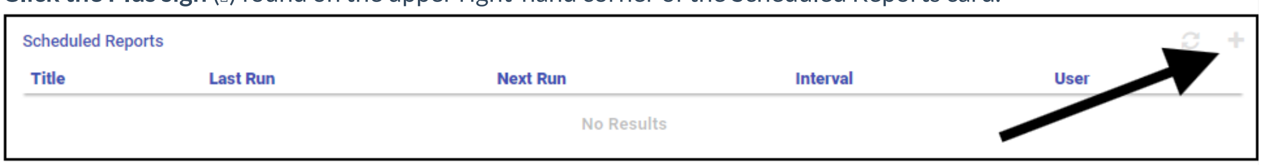


2. **Navigate to the Reports form.**

Scheduled Report Creation



1. **Click the Plus sign** () found on the upper right-hand corner of the Scheduled Reports card.



2. **Select the Report to Schedule**.
3. **Enter the appropriate Title**. We highly recommend renaming any scheduled report to specifically label the report to ensure easy location in your reports list.
4. **Set the Report parameters**.
5. If required, click **Options** and choose the appropriate values.
6. If needed, click **Advanced** and choose the appropriate values.
7. When entered as desired, click **Next**.
8. When sending reports to non-listed persons, expand the **Advanced Section** choose the Type for email attachments, **enter the name** and **email address** details, and click **Add**.
9. If printing, **select the company printer** and click the plus sign () to add.
10. If sending to persons listed on the **entity contact list**, select the person, select the destination, and click the plus sign () to add it to the list.

11. After selecting and setting the report destinations, click **Next**.
12. **Set the next run date and time.** Sometimes this may be in the past.
13. Set the **Interval** and frequency. Common frequencies are:
    - Daily
    - Weekly
    - Monthly
14. When set, click **Done**.
15. **Save** (▯) the record.

One-off Report Creation

1. Expand the **System Report Section** containing the report to run.

2. **Click the desired report**.
3. **Set the report Title**, if desired.
4. Enter the **Report Parameters**.
5. If necessary, select the **Advanced** or **Options** details for the report.
6. If emailing, click **Next**.
    1. **Set the report destinations** as noted above.
    2. Click **Send Email**.
7. If running for information, click one of the options to display or download the report.

    - **Display Now** - loads the completed report to the screen.
    - **Download (PDF) -** downloads the completed report as a PDF (Document Image)
    - **Download (RTF)** - downloads the completed report as a Rich Text Format (Word Document)