PlayMaker SPARK

Easily Review Last Week's Events

In the [Measuring Performance with Reports](#) article, we provide an overview for two reports that marketers should look at on a regular basis in the last video. The first report, the *Advanced AE Summary*, provides a high level overview of activity with the accounts that are assigned to you. The second report, the *Daily Visit Report*, provides more insight into your events. This article discusses how to utilize the *Daily Visit Report* to look at the prior week's notes to ensure that all of your activity has been captured.

Accessing and Running the Daily Visit Report

The *Daily Visit Report* can be found in the *Events* section of the *Reporting* page. Clicking on the name of the report will open the report.

By default, the report is set to show results for only that particular day, as *Today* is selected in the *Date Range* dropdown menu.

To view your events for last week, click on the *Date Range* dropdown menu, and select *Last Week*.

Note: There are three *Last Week* options available, each for a different 7-day period. The three options that are available are: Sun - Sat; Mon - Sun; Sat - Fri. These different options reflect different reporting periods that agencies use, with the most common being the standard calendar week, Sunday through Saturday. Choose the appropriate *Last Week* option for your agency.

Once the appropriate *Date Range* has been selected, choose the sorting method that you prefer. To easily spot open (or incomplete) events, we suggest using *Completed* a as the sorting criteria, and setting the order to *Descending*, which will put Incomplete at the top of the list. Once these two filters are set, click the *Run Report* button.

Daily Visit Report

What are my open/completed daily sales activities?

The report will run showing your events for last week, with the incomplete events at the top of the results.

Note: Events that were marked as complete on mobile but do not have notes added will not count as completed events. Notes must be present for events to properly report as completed.

Saving the Report for Future Use

Now that you have the report just the way you want it, it's time to save the report. Saving reports adds a new report to your Reporting page, allowing you to simply click on a saved report instead of having to set filtering and sorting criteria each time you want to see the same set of data.

After setting the filters and running the report to confirm that the results meet your expectations, click the *Save As…* button above the filtering options.

A window will pop up, displaying a summary of the report. We suggest renaming the report to something that makes it easy to identify, such as *My DVR - Last Week*, or something similar. This name will be displayed on the Reporting page, so it's best to be able to quickly understand what the report will display. Once you are satisfied with the name, click *Save*.

The new report now resides on your *Reporting* page, making it easy to return to. A new section should appear on the page called *My Saved Reports*, which will be at the top of the list of reports.

The next step would be to schedule the report, so that it automatically is sent to you at the frequency of your choosing. This process is covered on the last page of this document.

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Now that the report is saved, it is easy to come back to for frequent viewing. However, you can also have the report emailed directly to you at a frequency of your choosing. This is done by scheduling the report.

With the report open, click the *Schedule* button.

A window will open with the scheduling options available.

We recommend the following settings:

1. Set the date to the next day that you would like for the report to run. We suggest running the *Daily Visit Report* for the prior week on Monday, so the next Monday was selected in the *Start Date* field.
2. Set the frequency that you would like to run the report. If the *Start Date* was set for a Monday, the report will run weekly on Mondays.
3. In the *File Format* field, you can choose to receive the document as a *PDF* file (not able to be edited) or a *CSV* file (which can be opened and edited in Excel).
4. Make sure the *Status* is set to *Active*. If the report is set to *Inactive*, it will stop the schedule.
5. Click *Save*. The report is now scheduled and will automatically generate in the early morning hours of the date populated in the *Start Date* field.

You're now set to receive your weekly report to your inbox, so you don't have to remember to login into PlayMaker and run the report to review your activities.