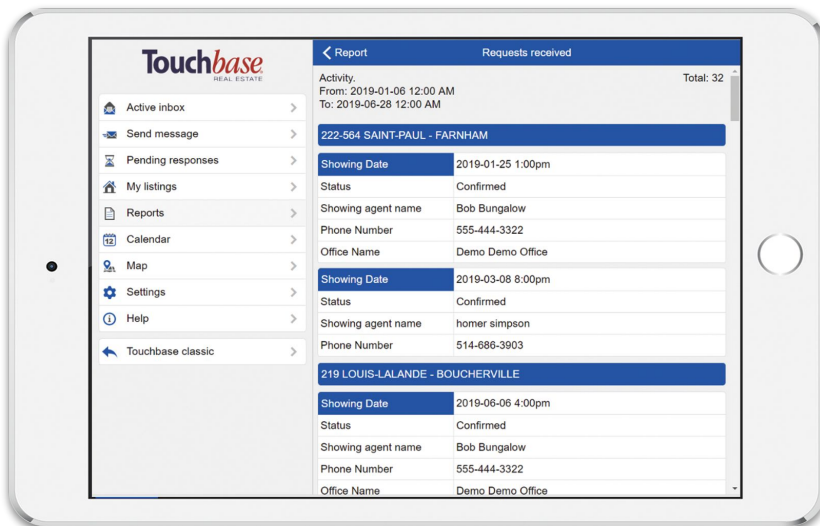


# Touchbase reports



## CONCISE OR DETAILED REPORTS: **YOUR CHOICE!**

There are many options! You can customize reports, view activity for each property and much more! REALTORS® particularly like reports of all **requests received and sent**.

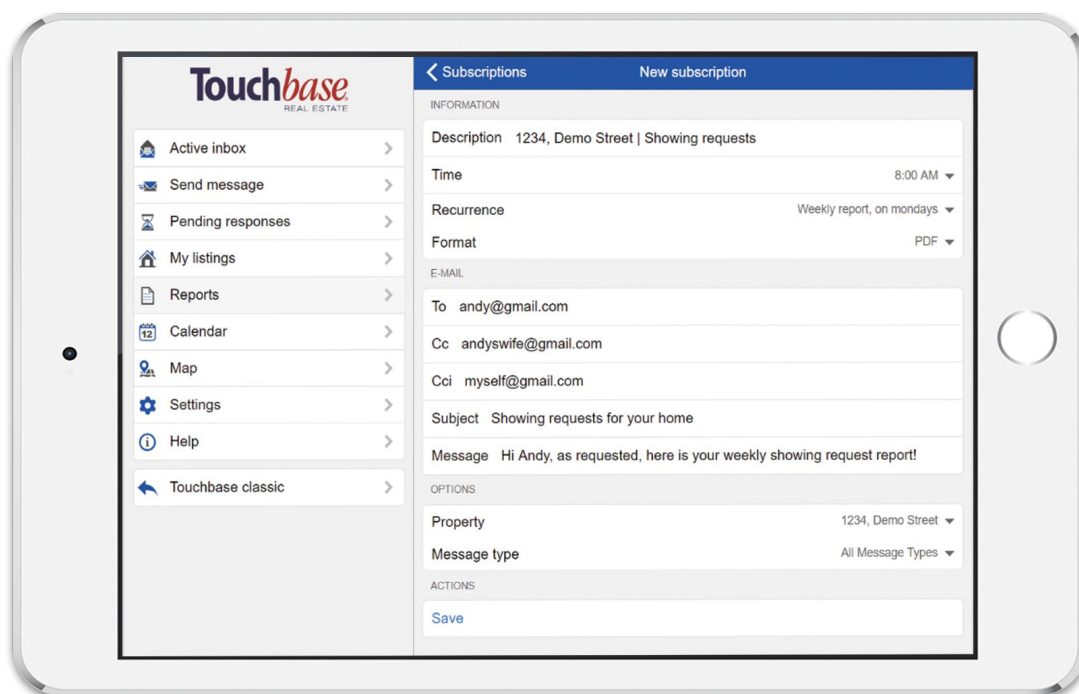
Go to **Main menu > Reports > Appointment Activity Reports > Requests received/Requests sent**.

- ✔ For a more detailed report, go to **Main menu > Reports > Message reports > Detailed > Display report**.
- ✔ Use the filters to see the messages you are looking for specifically, or display all message types.

# Touchbase reports

## AUTOMATIC REPORTS

Subscribe (or subscribe your clients!) to automatic reports so that you can have daily, weekly or monthly reports with any type of information you please!



**For example: Andy wants to receive a weekly report of all incoming showing requests for his house. He would like to receive them every Monday at 8 a.m.**

- ✔ To do so, select **Reports > Report by property > Automatic reports > New subscription**.
- ✔ Simply fill out the fields accordingly! You can even **edit the subject and content** of the email, **choose the format** of their report (PDF, Excel, or CSV) and copy yourself into the emails.

# Touchbase reports

## INSIDER TIP

Touchbase reports are saved in a secured database for 2 years.

**RECOMMENDATION:** Send yourself automatic reports of all your messages, in case you should ever need them.



Touchbase is legally recognized as a reliable source of evidence when a REALTOR® is challenged in a court of law.