acuitypricing

Getting Started | Saving, Sharing, Exporting, and Scheduling

Acuity Pricing allows most information to be exported into Excel for further analysis. This can be done on an ad hoc basis, or scheduled to be sent directly to the user's email.

What you need

- You have read the Creating an Acuity Pricing Report instructions.
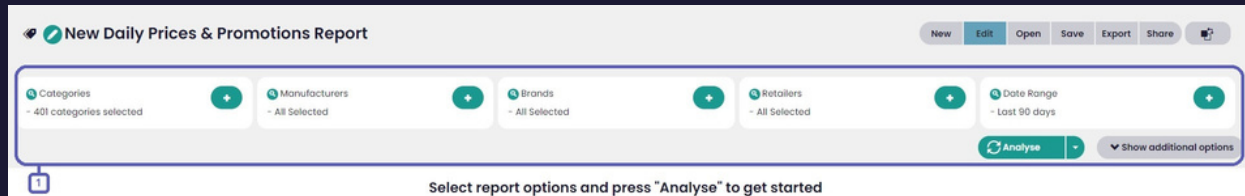- Access to the Acuity Pricing Platform and reporting suite.

Report Export Options

Export Instantly

Schedule Future Exports

Share with a Colleague

Exporting | Step 1

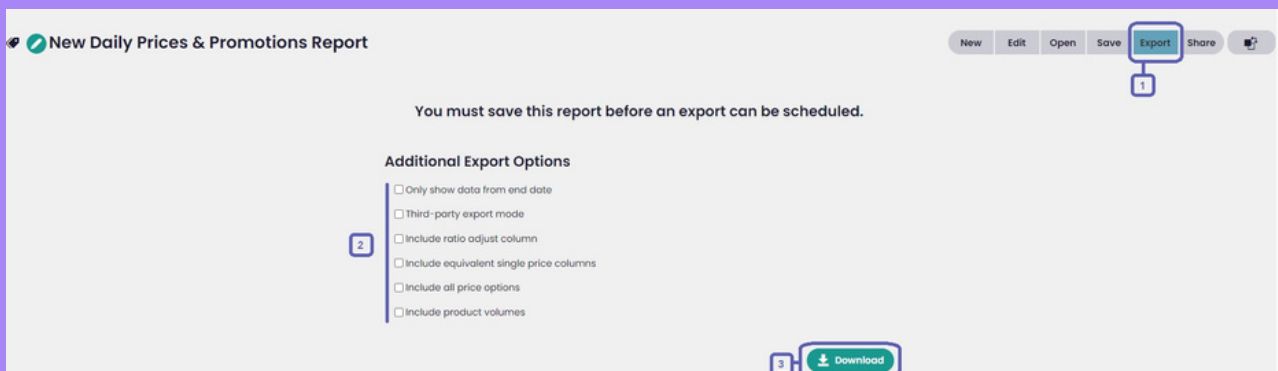To export a report created in the platform, firstly make sure you have selected the correct parameters.

Exporting | Step 2

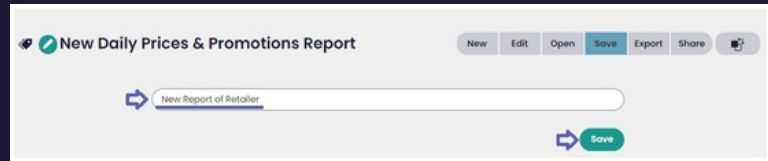Once selected:

1. Click the Export button.
2. Click Download Now.

Please note: each report has slightly different export options.

Saving A Report

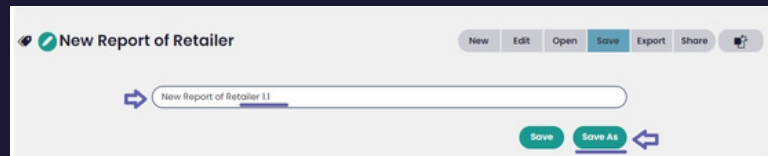The reports can be saved at any time.
1. Click on the Save button.
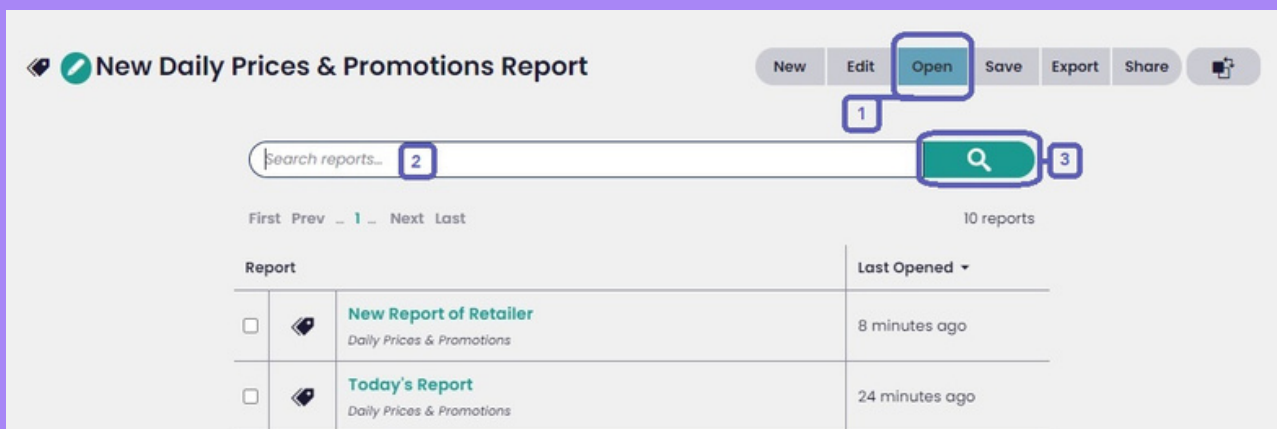2. Give the report a name.
3. Click the next Save button.

Use the Save As button to
create a copy of the report.
1. Alter the Report Name.
2. Click the new Save As button.

Accessing the Report

Once saved, the report can be accessed from the Open button. Any changes can be made here, just ensure you save the report again after any changes are made.
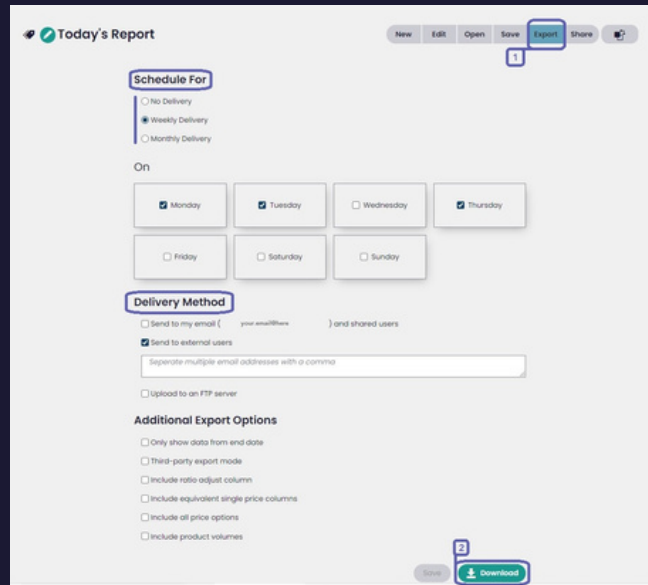
Scheduling A Report

You can schedule the excel export to be delivered regularly, without logging in.

1. Ensure the report is set up as per the above instructions.
2. Click on the Save button.
3. Click on Export.
4. Click the Scheduled Export tab.
5. Select the day of the week required (you can select multiple) or the day of the month.

Sending to non-Acuity Pricing users.
1. Tick Send to external sources.
2. Enter the recipients' email addresses.

Chosen recipients will receive the report via email on scheduled days with the excel report attached. Please be aware, if **over 5MB,** the report will be a download link.

Sharing the Report

You can share the report with any other Acuity Pricing user within the same account (this includes the report within the tool and any associated scheduling).
1. Click the Share button.
2. Select everyone or choose selected colleagues.
3. Click Share.
4. Use the comment box to make a comment about the report.