# Automate

Increase your organisation's efficiency with Automate which allows you to schedule the production and distribution of the Cascade³d reports you choose, so that you can ensure that the right reports are sent to the right people at the right time.

## Why use Automate?

### Saves your organisation time

- Automate existing Excel report templates that you need regularly.

- Reports are prepared overnight so they are ready as soon as you login each day.

- Look at exactly the same report each time to ensure consistency of reporting.

### Flexibility to suit your organisation

- Distribute the report via email, email a link to the report or save the report to a folder location with no notification.

- Setup different versions of the same report for different frequencies or different site, email or membership groups.

- Select fixed or dynamic date ranges to suit your requirements. E.g. New members that joined last month.

- Assign individual users to a specific site or group of sites, so they receive focused information.

### Sensible data

- Filter the data to show only information relevant to a specific set of users, minimising both the amount of data you need to send and helping you to comply with data protection rules.

- Automatically archive reports by storing a snapshot of your chosen report on a given date or regularity.

- Lock down those reports that are tested and signed-off, so no one can accidentally amend the settings.

- Cascade³d remotely monitors the production of reports to ensure we are able to act as quickly as possible if something goes wrong.



*"Automate saves us a lot of time going backwards and forwards with individual sites, as managers receive reports directly from the system on a regular basis. Site managers only receive information about their specific site, keeping data secure and allowing them to focus on managing their membership with information such as postcode analysis, gender and age profiles."*
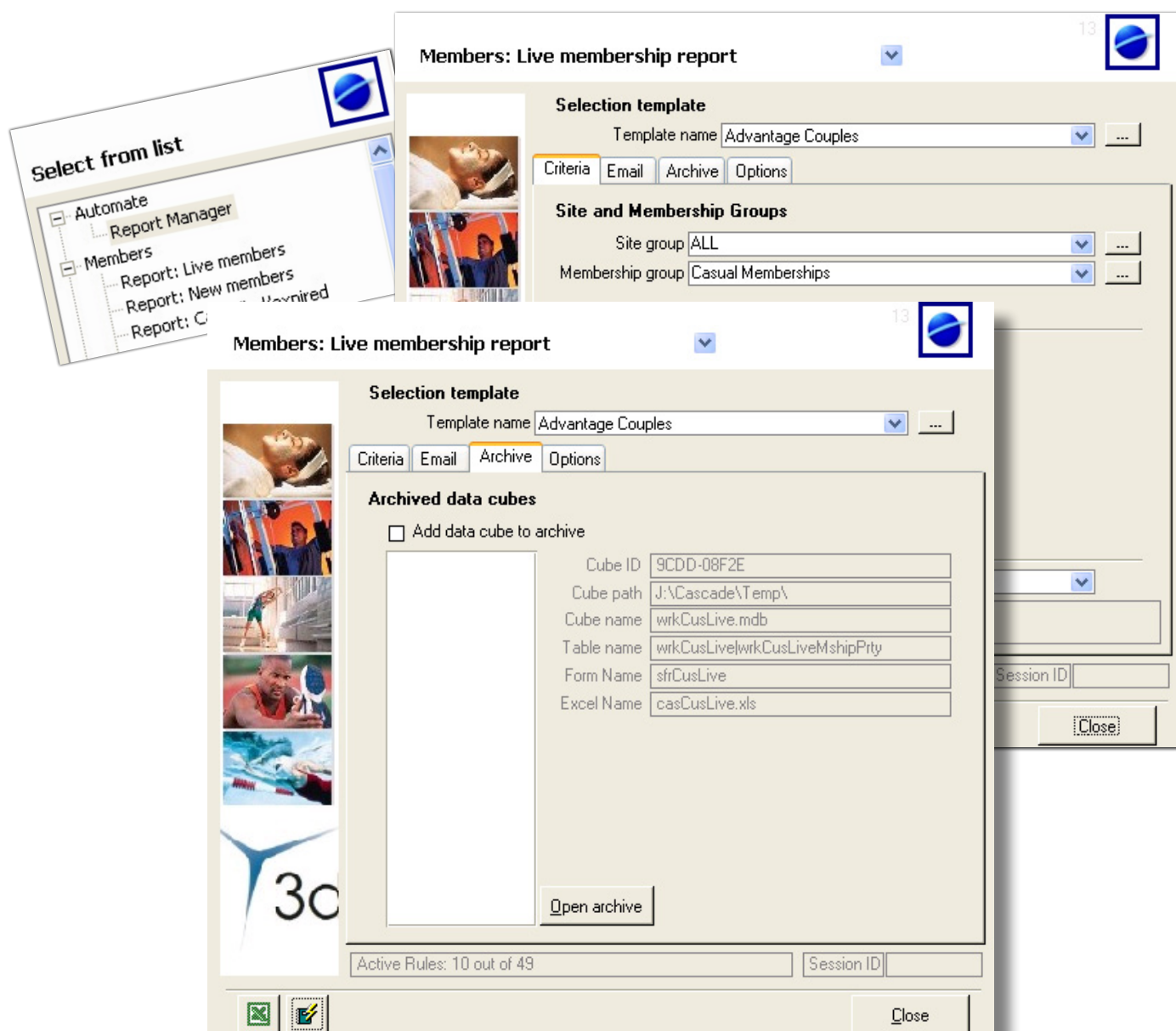
Adrian Bond, Group IT Manager, DC Leisure

## How does it work?

- Automate can be used with both tailored Excel and default template Cascade³ᵈ reports.

- Following installation, we work with you to establish appropriate site, membership and email groupings and to complete a template specification of who you would like to receive which report(s), when and with what criteria set.

- Our team will review the specification and confirm the feasibility, setup and test the automation of the agreed reports and setup scheduled overnight tasks and support monitoring arrangements.

## How much might it cost?

- Automate software is implemented with an initial setup cost and an annual licence fee. The actual cost of implementation will be based on the level of automation your business requires.

- Concurrent licences allow any member of staff to access the software, one user at a time per licence.

- Contact us to understand how you can manage your business more efficiently by implementing Automate with your existing Cascade³ᵈ Reports system.



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*Cascade³ᵈ is a software company based in The Cotswolds in the UK, providing database driven solutions for the leisure industry. We already work with over 500 leisure centres in the private, public and trust sectors delivering highly effective management reporting tools and marketing communications.*

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