



Installing Custom Netcaddy Pro Reports

2019 - Winter Edition

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Overview

Netcaddy Pro has default reports within the program. In order to add custom reports to Netcaddy Pro, Users must download and install them. The following guide explains the process of downloading and installing the new custom reports.

Use Case(s)

For example, the User would like a report that details lunch and dinner reservations separately as opposed to the standard report that shows all reservations together.

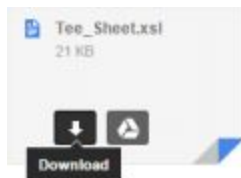
Accessing the Tool

Before reviewing these instructions, please ensure Netcaddy is installed on your computer.

Users will receive an email from Clubessential with more information on Netcaddy Pro Custom Reports. There will be a file attached to the email with an XSL extension.

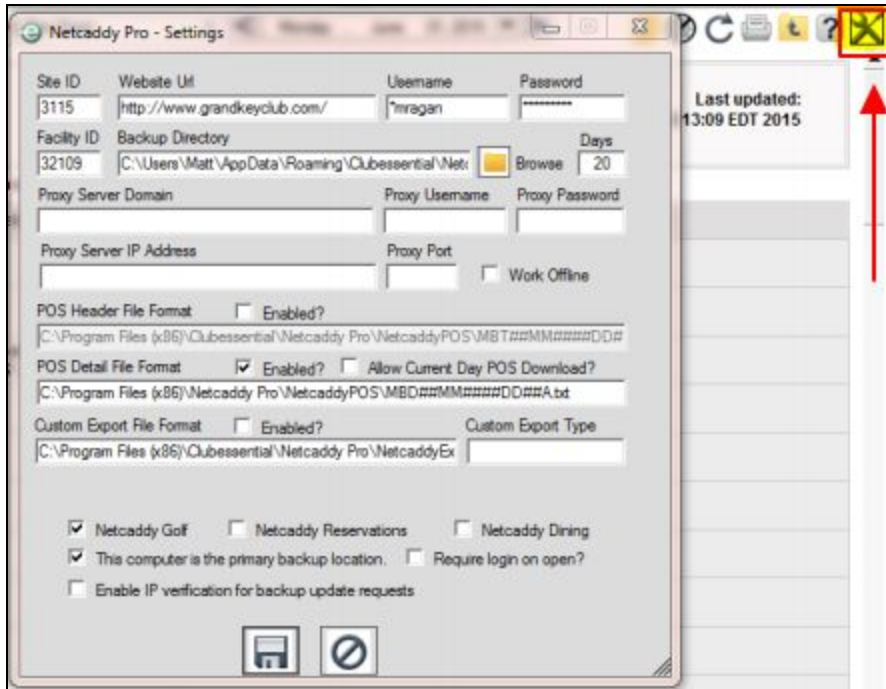
Installing

1. **Save** the report to your desktop.
 - a. Right-click the report and select **Download** or **Save Link As**. See below for an example of how this would appear in Gmail.

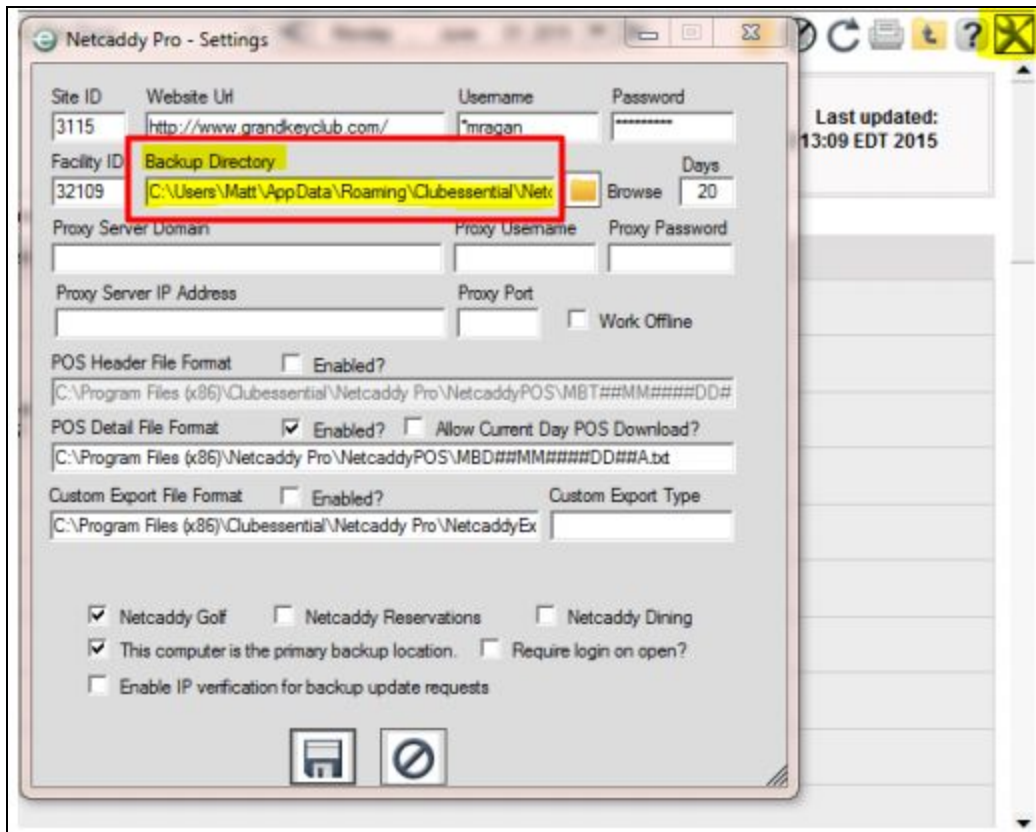


2. **Open** Netcaddy Pro.

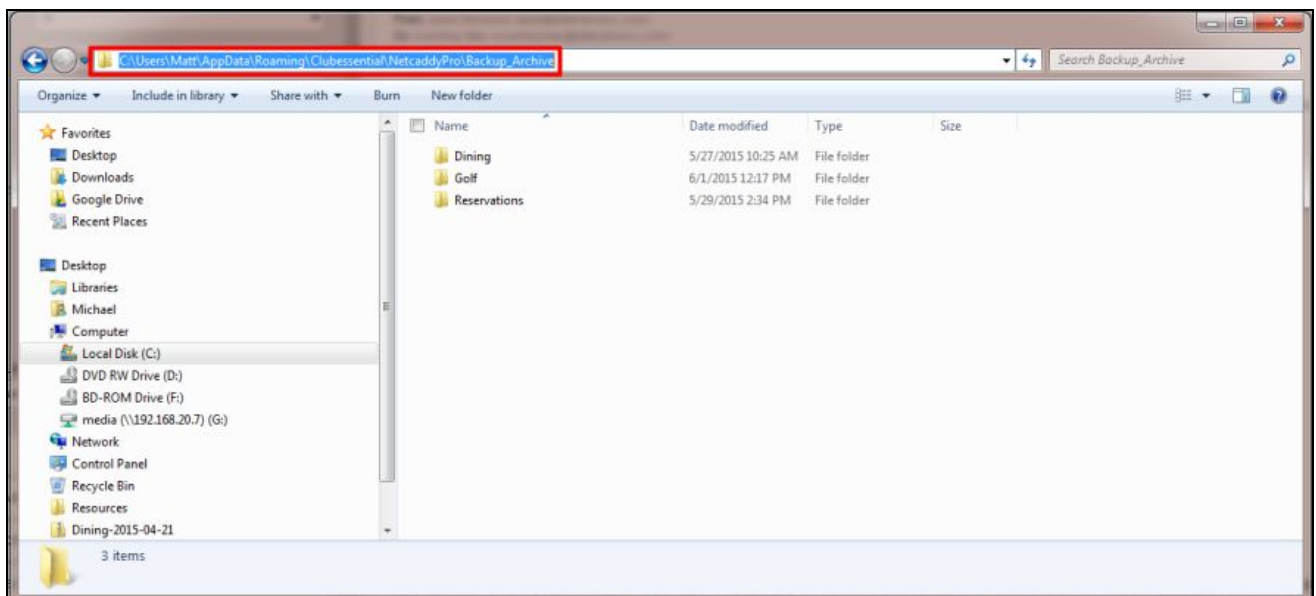
3. Click the wrench and screwdriver icon to open the **Preferences** menu.



4. Select and copy the file path, located in the **Backup Directory** field.



5. Once the Backup Directory file path is selected and copied, navigate to that backup folder on your computer
 - a. Open windows file explorer and paste the file path into the top bar by clicking the **Start** menu and **Computer** - or - click the folder icon on the taskbar.



6. To place the report drag or copy and paste the report from your desktop to the appropriate folder.

Please Note: The Reservations folder is for anything that is not Dining or Golf - such as Courts, Massage, Lessons, etc.

7. Close and re-open Netcaddy Pro and the new report(s) will now be available.

