



QUICK START GUIDE

Enrollment Report

This Quick Start Guide outlines **how** to access & use the Enrollment Report in eDesk.

Enrollment Report

Upon accessing eDesk, select **Reports** from the dashboard:



Then select **View Report**:



Once selected, follow these steps to use the **Enrollment Report**:

- First, if you have more than one property, enter the site number (5-digit number).
- Then, select **Total** or **Valid** from the **Type** menu.
- Then, enter the date range and click **Search**.

This report shows enrollments at your property for the selected date range.

- First, select **Total** or **Valid** from the **Type** menu.
- Then, enter the date range and click **Search**.
- The **Total** view displays all enrollments with **enrollment dates** that occurred during the date range selected. Suggested Use: Display the **Total** view to help your team understand the reason an enrollment is not valid.
- The **Valid** view only displays Valid Enrollments that became **valid** within the date range selected. Please note: The date a Valid Enrollment becomes valid is the date the **Enrollment Stay** is processed. Suggested use: Display the **Valid** view to accurately track Valid Enrollments.



The screenshot shows a search interface for the Enrollment Report. It includes a site number input field (partially obscured by a black box), an Enrollment Start Date of 04/01/2024, an Enrollment End Date of 06/30/2024, a Type dropdown menu set to Total, and a Search button.

- **Total**: Displays all enrollments with **enrollment dates** that occurred during the date range selected.

Suggested Use: Display the **Total** view to help your team understand the reason an enrollment is not valid.

- **Valid**: Displays **Valid Enrollments** that became **valid** within the date range selected. The date a **Valid Enrollment** becomes valid is the date the **Enrollment Stay** is processed.

Suggested use: Display the **Valid** view to accurately track **Valid Enrollments**.

Why didn't an enrollment become a Valid Enrollment?

- *There isn't a stay associated with the enrollment.*
- *An email address wasn't included at time of enrollment.*
- *The enrollment stay didn't have an average nightly rate of US\$25.*
- *The enrollment wasn't processed through the PMS or eDesk.*
- *The enrollment occurred after checkout.*
- *The enrollment occurred more than 120 days before checkout.*