

Download Snapshots

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Who can use this feature?

Users with the **Download Snapshot** permission.

Auth Reps are able to download combined customer data snapshot files.

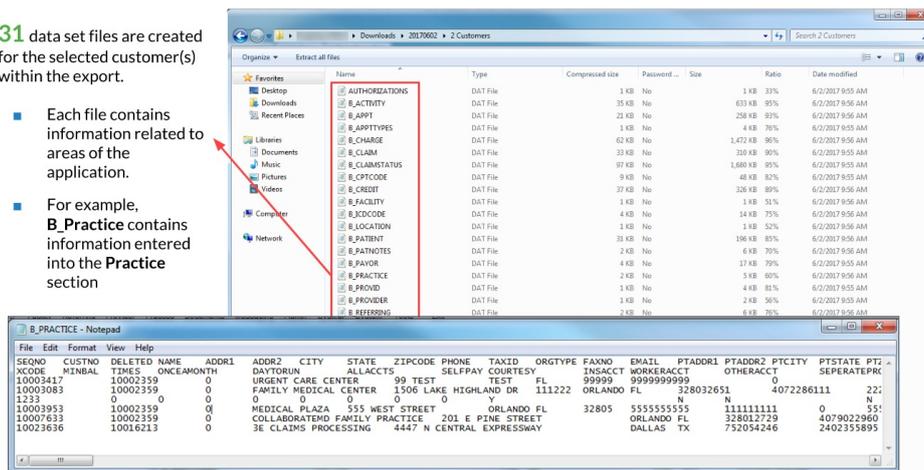
Once a one-time or recurring Data Snapshot is available for download, it can be downloaded from within the application.

Did you know you can auto-retrieve your snapshots via our WebAPI? Reference our [WebAPI documentation](#) for more information.

1. Click the  icon with your name located in the top right corner of the screen.
2. Select **Download Snapshots**.
3. Locate and click on the **Data Snapshot** from the list.
4. Once the Data Snapshot window opens, locate the downloaded zip file and choose the application you wish to open it with (e.g., Excel, Notepad, etc.)

31 data set files are created for the selected customer(s) within the export.

- Each file contains information related to areas of the application.
- For example, **B_Practice** contains information entered into the **Practice** section



Best Practices

- When sending and sharing Data Snapshots, it is the Auth Rep's responsibility to ensure they are securely sending the data by adhering to HIPAA rules and regulations.

- We highly suggest downloading recurring Data Snapshots daily, as you will NOT be able to recover snapshots from previous days. Data Snapshots reflect real-time data as it appears on the run date.
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