



Scheduling Reports

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Overview of Scheduling Reports

Scheduling reports is a simple way to save time and get the exact data you need to see without having to spend the time to run the report.

Scheduled reports can be both email and sent via Director messaging, so no matter the delivery method preferred, it can be done. Reports can be sent in the PDF, Excel, Excel (Data Only), and Word formats. There are no limits to the number of reports that can be scheduled; however, be mindful to not schedule too many reports at the same time so that server performance isn't hindered.

The screenshot shows the 'Reports' window in FasTrax Director v1.385.72. The window has a blue sidebar on the left with icons for Dashboard, Pricebook, Inventory, Reports, Maintenance, Loyalty, and Schedules. The main area is titled 'Reports' and has tabs for Favorites, List Reports, Sales Reports, Inventory Reports, Scheduled Reports (selected), and Accounting Exports. Below the tabs is a section for 'Current Scheduled Reports' containing a table with the following data:

Name	Type	Frequency	Run Day	Last Ran	Recipient	Run Time
Daily Dept Sales	ucReports_Dep...	Daily		12/13/2016 11:28 AM	Email	11:00 PM
Daily Tax Report	ucReports_Sale...	Daily		12/18/2016 10:29 AM	Email	3:00 AM
Daily Z Report	ucReports_RegZ	Daily		12/18/2016 10:29 AM	Email	1:00 AM

At the bottom of the table area are 'Edit Report' and 'Delete Report' buttons. The bottom right corner of the window shows 'Store Mode (Store # 1) Settings ...'.



How to Schedule a Report

1. From within Director, choose the "Reports" button



2. After choosing any report and inputting the desired parameters, choose the "Add to Scheduled Reports" hyperlink

[Add To Scheduled Reports](#)

3. The "Add To Scheduled Reports" window will pop up. Input the preferred delivery methods and time, as well as give the scheduled report a name

Dialog box titled "Add To Scheduled Reports" with the following fields and options:

- Scheduled Report Name: [Text Input Field]
- Run Frequency: Daily (dropdown)
- Run Time: 1:00 AM (dropdown)
- Export Type: PDF (dropdown)
- Recipient Type: Director Msg (dropdown)
- Run For Prior Day
- Buttons: Cancel, Add

4. Choose the "Add" button

Add

The FasTrax Scheduled Tasks program must be set to run as a scheduled task every hour on the machine that functions as the server.