



Scheduling a Report process

16 Steps [View on Tango](#)

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STEP 1

Once on the Report Customization page - Click on process

The screenshot displays the RECTRAC Report Customization interface for the 'POS Service Item Sales Report'. The main area features a 'Service Items DataGrid' with columns for Service Item, Record Type, Short Description, Status, Type, and SubType. A list of 13 items is shown, including 'Printer Test', 'Hot Tea', 'Milk', 'Juice', 'Hot Cocoa', 'Coffee', 'Egg Scrambled', 'Egg Over Medium', 'Egg Over Hard', 'Egg Hard Boiled', 'Egg Whites', 'Bacon', 'Sausage', and 'Hash Browns'. To the right, there are sections for 'Service Item Range' and 'Transaction Filters'. The 'Service Item Range' section includes options for 'Use Service Item Range', 'Service Item Code WildCard', and 'Service Item Status'. The 'Transaction Filters' section includes options for 'Use Item Original Transaction Date Range', 'Begin Transaction Date', 'End Transaction Date', 'Use Item Original Transaction Time Range', 'Use Quantity Range', and 'Service Item Sale Archived'. At the bottom, there are buttons for 'Add Output', 'Update Output', and 'Output Type', along with a 'Made with Tango.us' watermark.

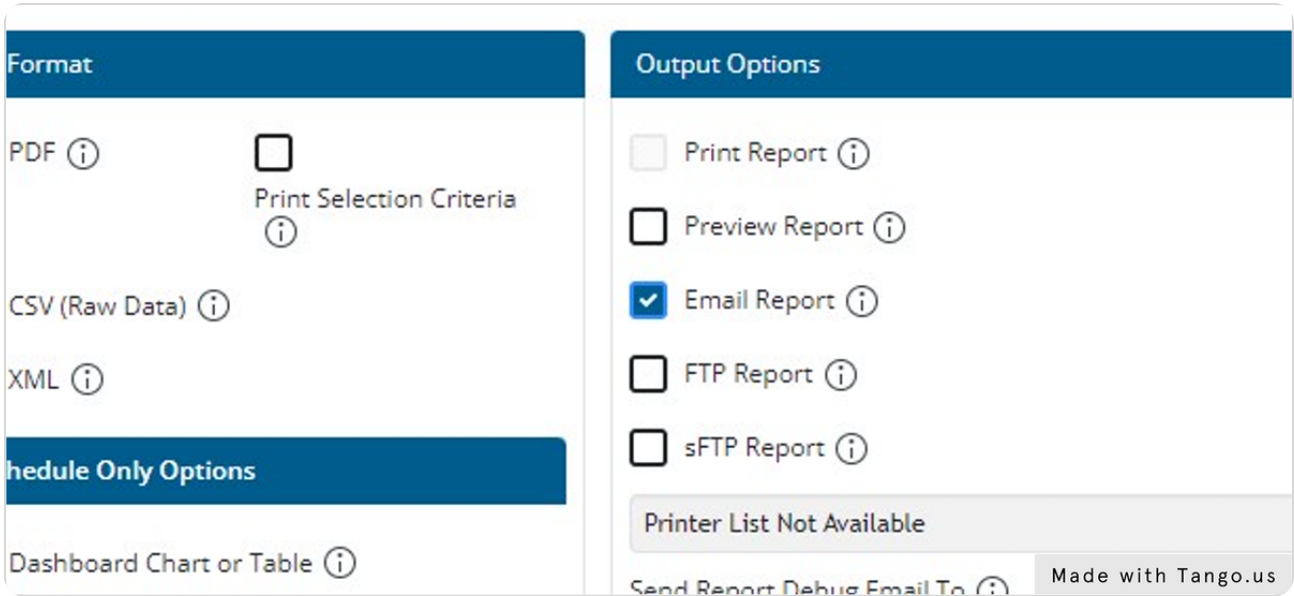
STEP 2

Select the file format you want to be delivered to you

The screenshot shows the 'Report Options' dialog box overlaid on the report customization page. The dialog is divided into two main sections: 'File Format' and 'Output Options'. In the 'File Format' section, the 'PDF' option is selected with a checked checkbox, and the 'Print Selection Criteria' option is also selected. Other options include 'CSV (Raw Data)', 'XML', and 'Dashboard Chart or Table'. A 'Schedule Only Options' section is also visible. In the 'Output Options' section, the 'Preview Report' option is selected with a checked checkbox. Other options include 'Print Report', 'Email Report', 'FTP Report', and 'sFTP Report'. A message 'Printer List Not Available' is displayed. At the bottom, there is a field for 'Send Report Debug Email To'. The 'Made with Tango.us' watermark is present in the bottom right corner.

STEP 3

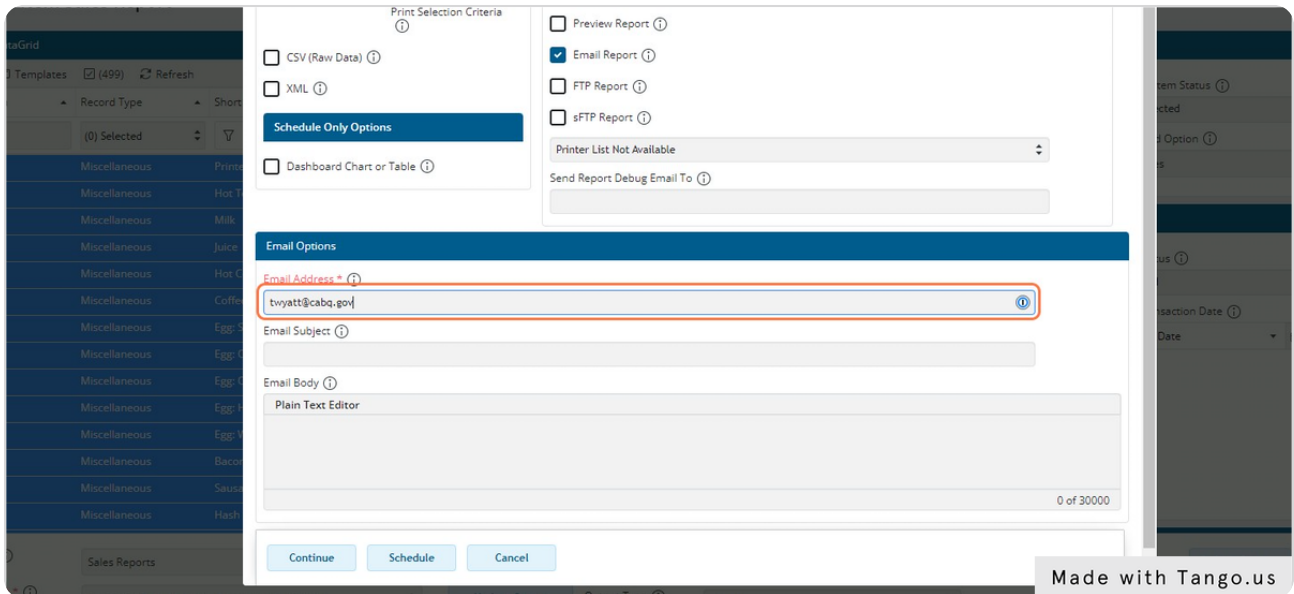
Select Email Report in Output Options



STEP 4

Add in the Email you want the reports to be delivered to.

You can add multiple by comma separating the email addresses



STEP 5

Give your email a descriptive subject line

The screenshot shows a configuration window for a report. On the left, there is a list of record types under 'Miscellaneous'. The main configuration area has several sections:

- Schedule Only Options:** Includes checkboxes for 'CSV (Raw Data)', 'XML', and 'Dashboard Chart or Table'. The 'Email Report' checkbox is checked.
- Email Report Options:** Includes checkboxes for 'FTP Report' and 'sFTP Report'. Below these are a dropdown menu for 'Printer List Not Available' and a text field for 'Send Report Debug Email To'.
- Email Options:** This section contains:
 - Email Address *:** A text field containing 'twyatt@cabq.gov'.
 - Email Subject:** A text field that is highlighted with a red rectangular box.
 - Email Body:** A 'Plain Text Editor' area with a character count of '0 of 30000'.

At the bottom of the configuration window are three buttons: 'Continue', 'Schedule', and 'Cancel'. A watermark 'Made with Tango.us' is visible in the bottom right corner.

STEP 6

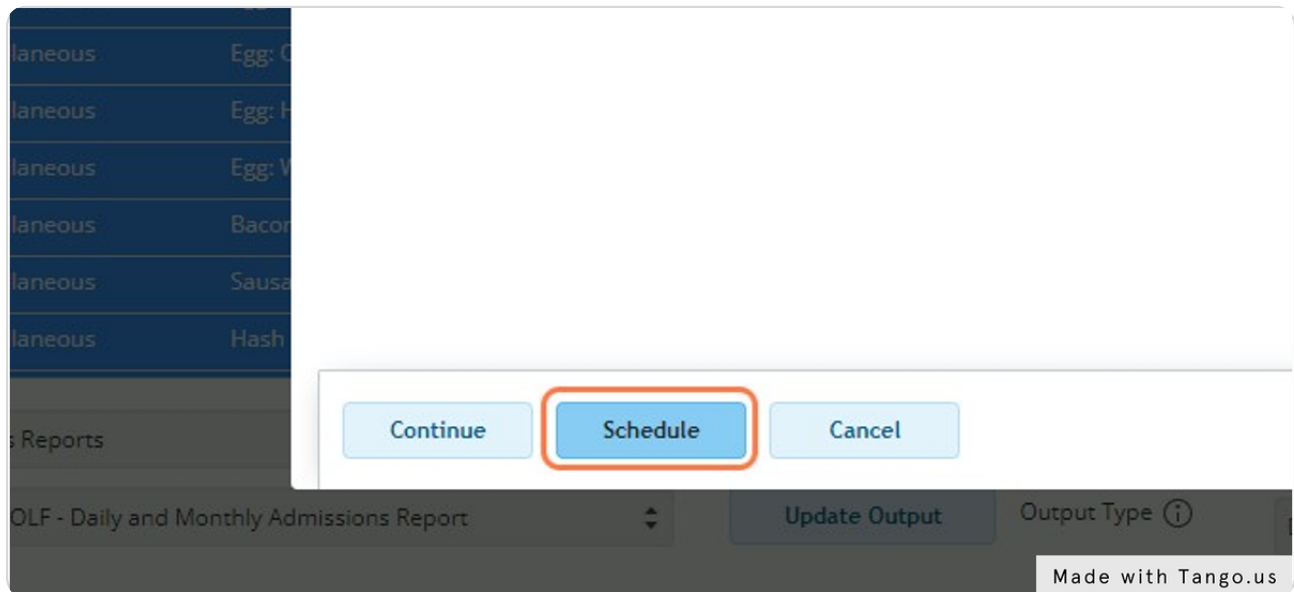
Include any additional text you want in the email body

This screenshot is identical to the one in Step 5, showing the same configuration window. However, in this step, the 'Email Body' text editor area is highlighted with a red rectangular box, indicating where the user should add additional text to the email body.

The rest of the interface, including the record type list, 'Email Options' section, and buttons, remains the same as in Step 5. The watermark 'Made with Tango.us' is also present in the bottom right corner.

STEP 7

Click on Schedule



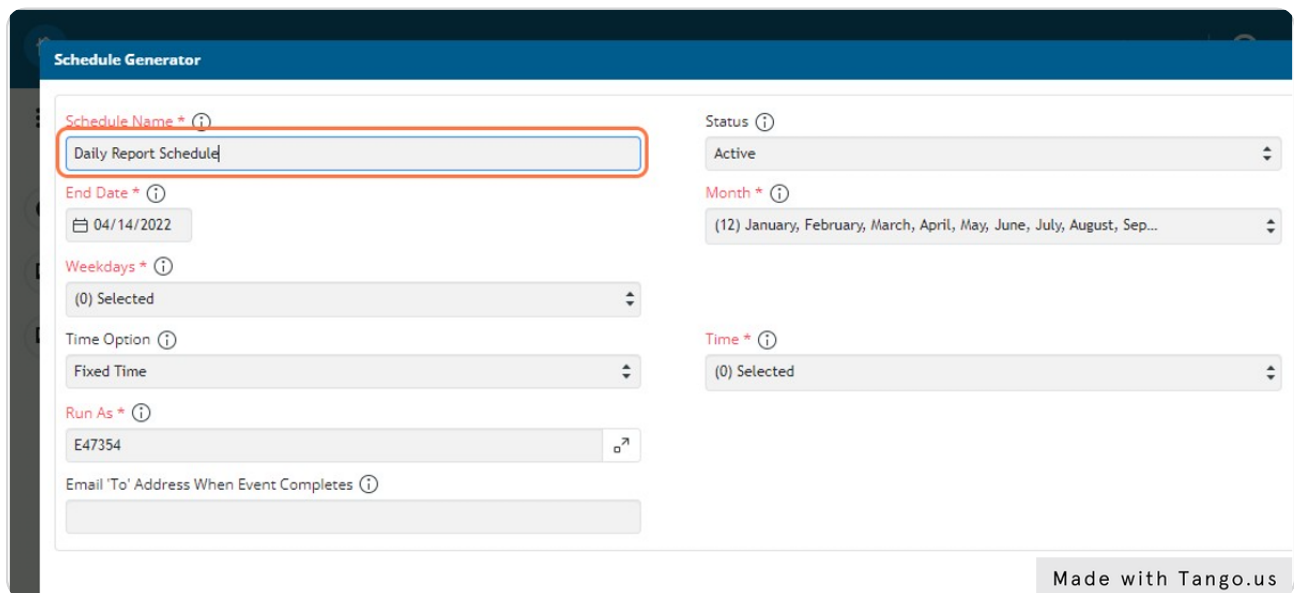
STEP 8

Give the schedule a descriptive name

Examples:

Daily Golf Profit Center Report

Weekly Golf Admissions Report



STEP 9

Select the date you wish the reports begin being delivered

The screenshot shows a form with several fields. On the right side, there is a 'Begin Date *' field with an information icon, containing a date picker set to '04/14/2022'. Below it is a 'Day Option' field with an information icon, set to 'Specific Weekdays'. On the left side, there are two dropdown menus; the second one shows 'June, July, August, Sep...'. A 'Made with Tango.us' watermark is visible in the bottom right corner.

STEP 10

Give this schedule an end date

The screenshot shows the 'Schedule Generator' form. It includes fields for 'Schedule Name *' (set to 'Daily Report Schedule'), 'End Date *' (set to '04/14/2022'), 'Weekdays *' (set to '(0) Selected'), 'Time Option' (set to 'Fixed Time'), 'Status' (set to 'Active'), and 'Month *' (set to '(12) January, Febru...'). There is also a 'Time *' field set to '(0) Selected'. A 'Run As *' field is partially visible at the bottom left. A 'Made with Tango.us' watermark is in the bottom right corner.

STEP 11

Select the Months you wish the report to be delivered

All 12 months are selected by default

The screenshot shows a form with several fields. On the left, there are three vertical scroll bars. The 'Status' dropdown is set to 'Active'. The 'Month' dropdown is set to '(12) January, February, March, April, May, June, July, August, Sep...'. The 'Time' dropdown is set to '(0) Selected'. On the right, the 'Begin Date' is 04/14/2022 and the 'Day Option' is 'Specific Weekdays'. A 'Made with Tango.us' watermark is visible in the bottom right corner.

STEP 12

Select the "Day Option"

The screenshot shows a close-up of the 'Day Option' field. The 'Begin Date' is 04/14/2022. The 'Day Option' dropdown is set to 'Specific Weekdays' and is highlighted with an orange box. A 'Made with Tango.us' watermark is visible in the bottom right corner.

STEP 13

Select the weekdays you wish your reports to be delivered to you

The screenshot shows a form for scheduling reports. The 'Weekdays' dropdown menu is highlighted with an orange border and contains the text '(0) Selected'. Other visible fields include 'Schedule Name *', 'End Date *' (04/14/2022), 'Time Option' (Fixed Time), and 'Run As *' (E47354). On the right side, there are buttons for 'Status' (Active), 'Month *' ((12) Janu...), and 'Time *' ((0) Selec...).

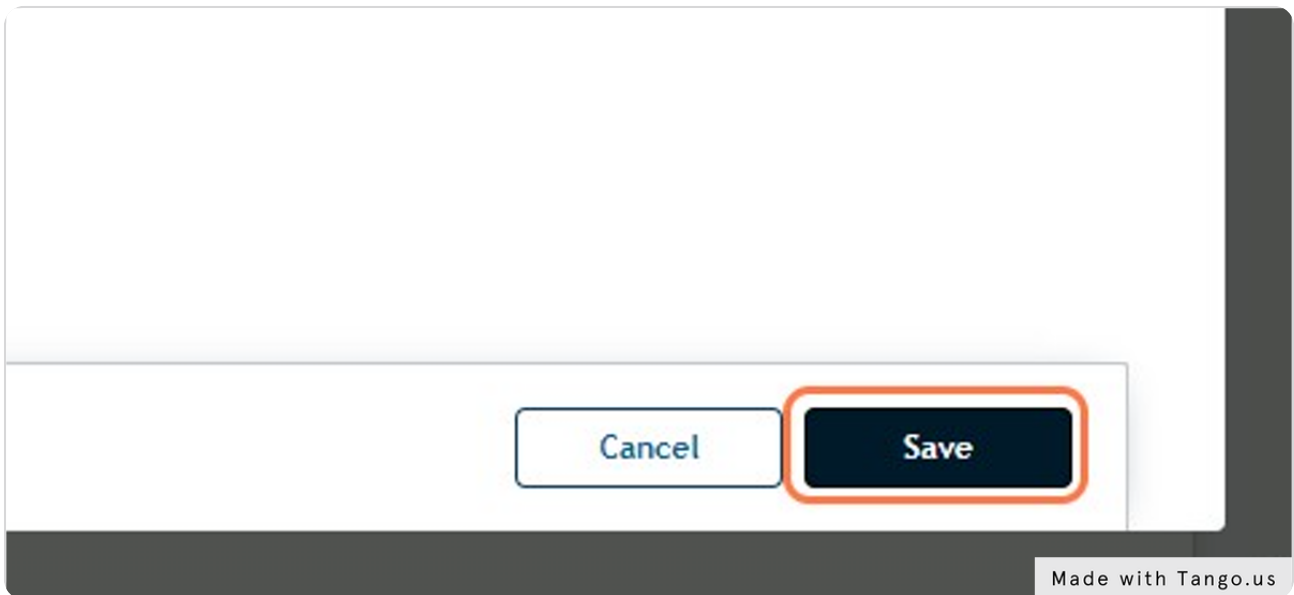
STEP 14

Select the specific time you want the reports to be delivered to you

The screenshot shows a form for scheduling reports. The 'Time *' dropdown menu is highlighted with an orange border and contains the text '(0) Selected'. Other visible fields include 'Month *' ((12) January, February, March, April, May, June, July, August, Sep...). On the left side, there are three vertical dropdown menus. On the right side, there is a 'Made with Tango.us' watermark.

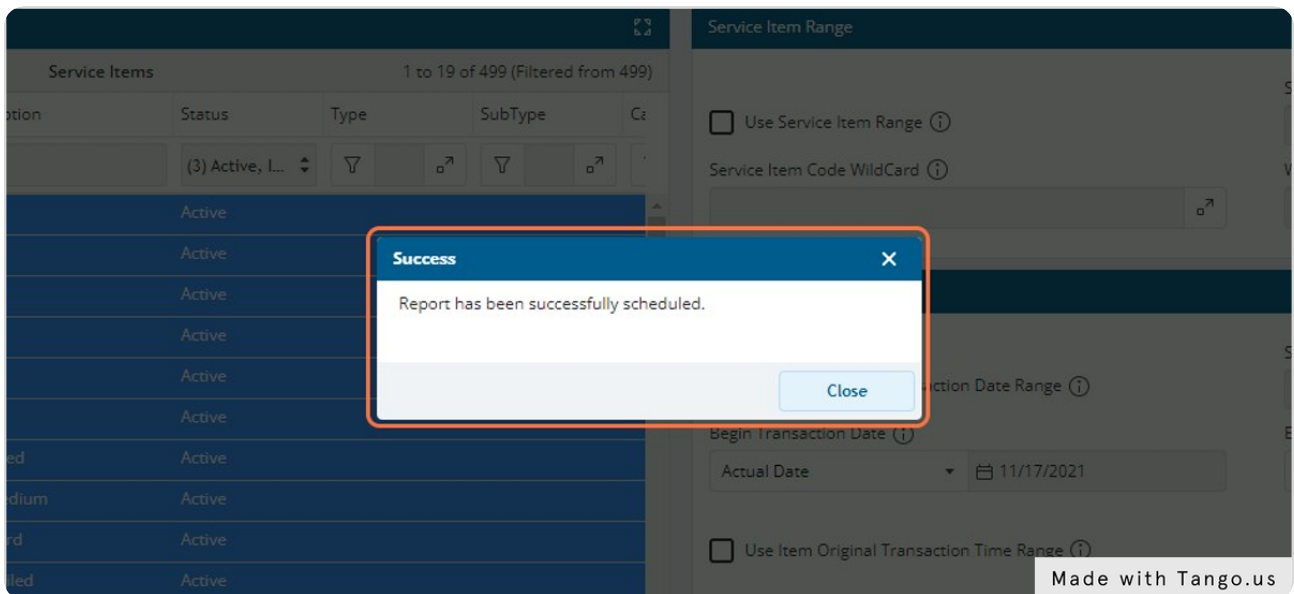
STEP 15

Click on Save



STEP 16

Close the success message once you are done scheduling your report delivery



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