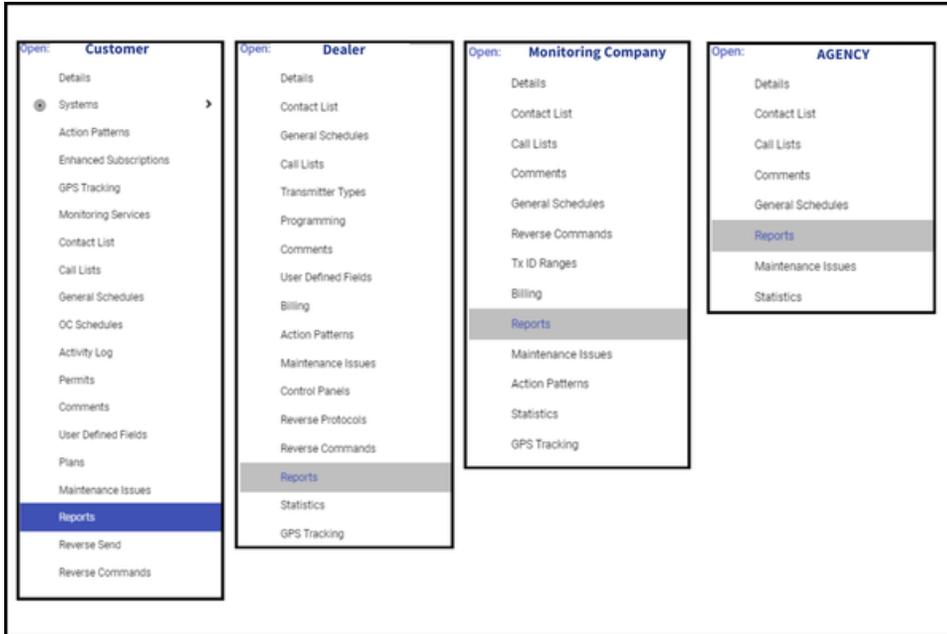


Schedule a Report

To schedule a report within Manitou, select the record to include then navigate to the reports form on the entity record.



1. Select the report to schedule.
2. Click the Plus sign (+). This loads the Report Scheduling card.
3. Update the report name.

1. Name this specific to the customer, dealer, etc. type and the specifics of the report. For example. **Customer X - Monthly Customer Status.**

The image shows a 'Report Scheduling' card with a 'MAIN' button in the top right corner. The card has two input fields: 'Title' and 'From'. The 'Title' field contains the text 'Test Monthly Customer Status' and the 'From' field contains the text 'Customer ID CMTEST'. There is also a 'Priority' field with the value '6' and a search icon with the number '4' next to it.

4. Complete the Report Details.
5. Click Next.
6. Select the report destination(s).

Customer Status

MAIN DISTRIBUTION SCHEDULE

Advanced ▾

Printer Contact List Type Owner CMTEST Q # Caryn's Test Customer 4 400 Low Voltage Drive x

Show Suppressed

Q

Caryn's Test Customer				Email		
Name	Type	Contact Points	Name	Type	Address	
Caryn's Test Customer	Customer +	Printer Printer			No Results	
Detroit Police Department	Police +	E-Mail carynmorgan@orioncatconsulting.com				

Rows: 10 ▾ 1-2 of 2 Rows: 10 ▾ 1-2 of 2

OPTIONS ADVANCED CANCEL PREVIOUS **NEXT** DONE

1. If overriding the report destination, expand the Advanced section.

Customer Status

MAIN DISTRIBUTION SCHEDULE

Advanced ▾

Contacts Filter

Contacts Customers

Dealers Branches

Agencies Authorities

Email AttachmentType

PDF

RTF

CSV

Override

Name Type

Email

Address ADD

2. Remember to click Add. Click Next.

Customer Status

MAIN DISTRIBUTION SCHEDULE

Advanced ▾

Contacts Filter

Contacts Customers

Dealers Branches

Agencies Authorities

Email AttachmentType

PDF

RTF

CSV

Override

Name Type

Email

Address **ADD**

7. Set the Report Frequency.

Customer Status

MAIN DISTRIBUTION **SCHEDULE**

Next Run Date
09/16/2024 11:41

Monitoring Service Type
Interval

Type Frequency

CANCEL PREVIOUS NEXT DONE

Next Run Date
09/16/2024 11:55

Monitoring Service Type
Monthly Customer Status Rep:

Interval

Type Frequency
Month 1

8. Click **Done**.
9. Click the **Save** icon (📄) to commit the report to the record.

The scheduled report shows in the listing of reports.

Scheduled Reports				
Title	Last Run	Next Run	Interval	User
Monthly Customer Status		09/16/2024 11:55:30	1 Month(s)	

Rows: 10 1-1 of 1