SWS - Forms in the Report Menu - Scheduled Reports

Last Modified on 08/05/2024 5:46 pm EDT

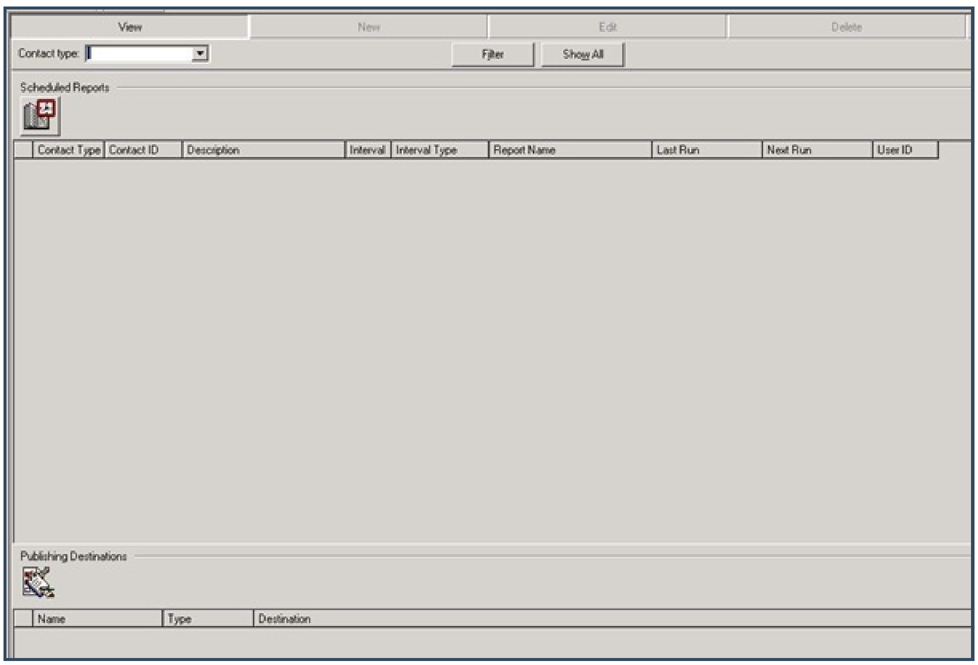
The Scheduled Reports form allows you to search for and view specific Scheduled Reports in Manitou. You can search by Company, Customer, Dealer, or Branch.

Viewing Scheduled Reports

Perform the following steps to view a specific Scheduled Report:

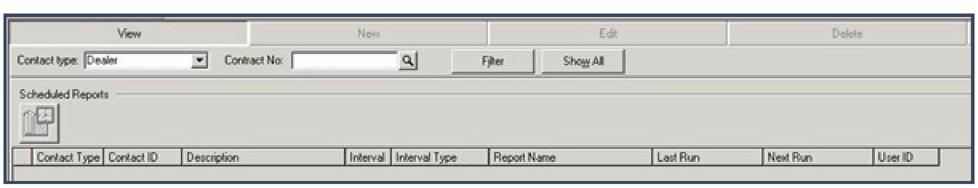
1. Navigate to the Reports menu, and select "Scheduled Reports".

   Result: The "Scheduled Reports" form displays as shown in the following screenshot:

2. Open the "Contact type:" dropdown menu, and select "Company", "Customer", "Dealer", or "Branch".

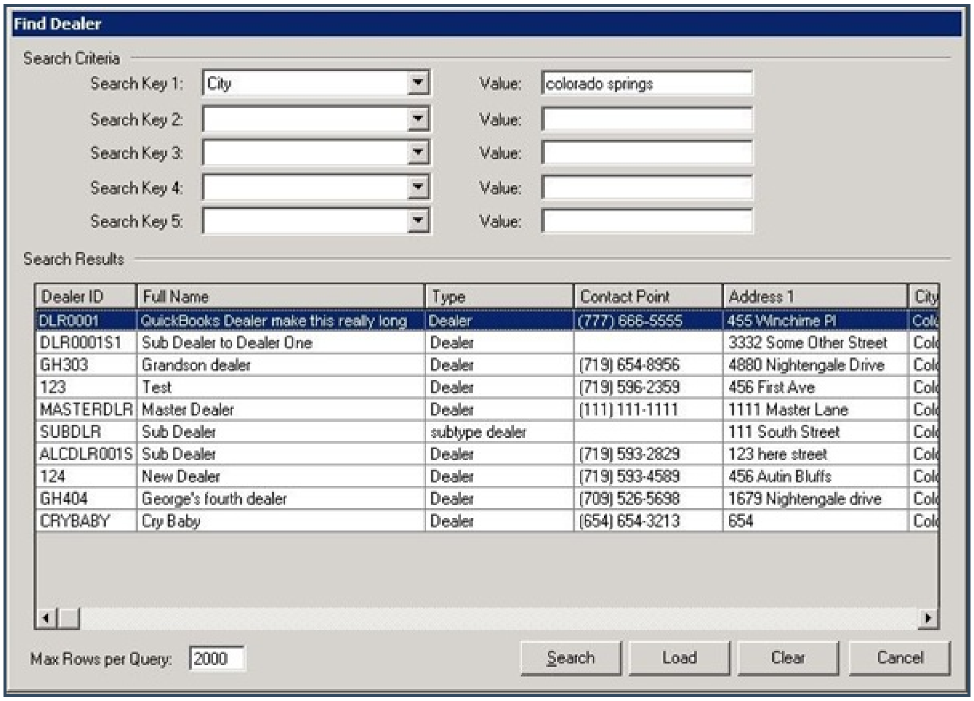
   Result: The "Contract No:" field displays as shown in the following screenshot:

3. If you want to display every instance of the Contact Type, click "Show All".
4. If you select the "Show All" option, skip steps 4-8 and continue with step 9.
5. If you want to limit your search to a specific Company, Customer, Dealer, or Branch, select the icon to the right of

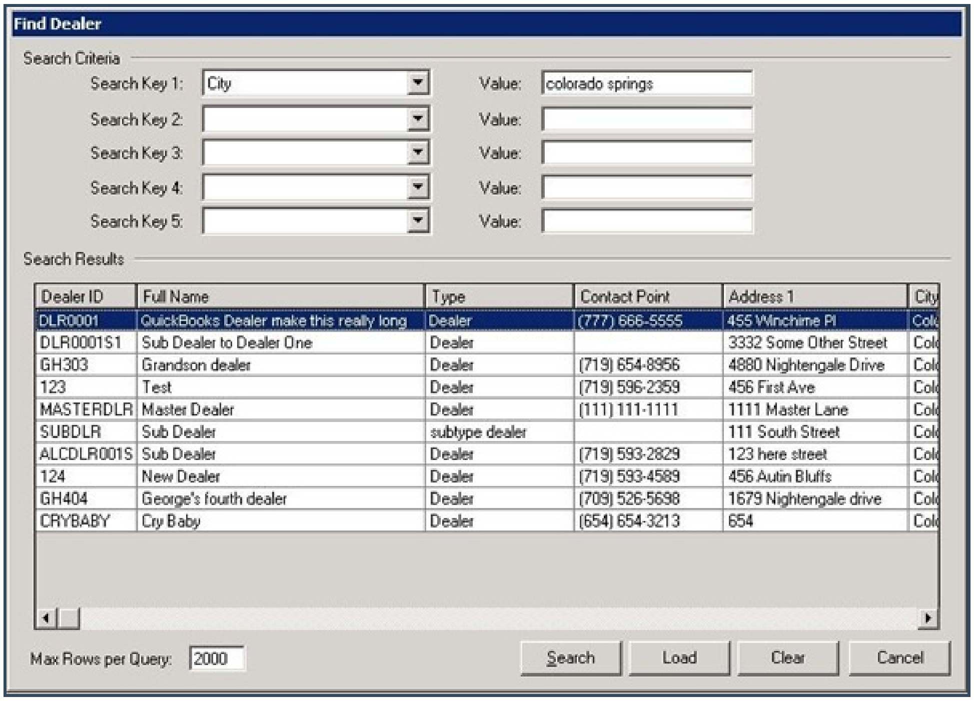
the "Contract No:" field.

Result: The "Find" window displays as shown in the following screenshot:



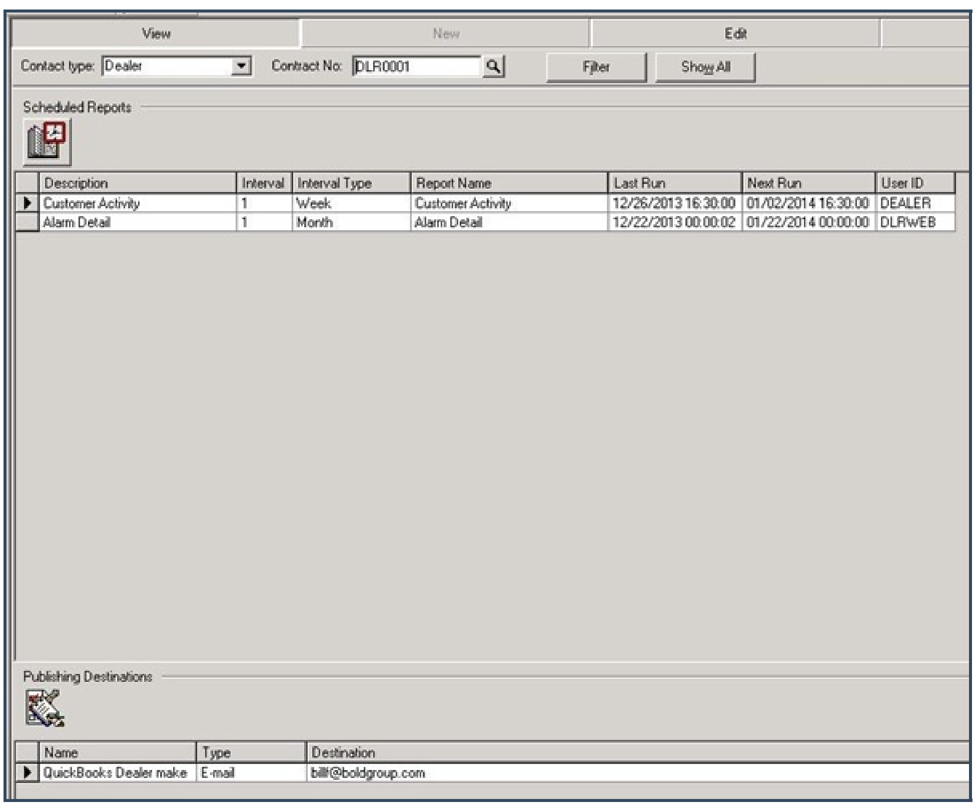
6. Select the search criteria you want from the "Search Key" dropdown menus, and enter a value in the corresponding "Value" fields.
7. When you have entered all the search criteria and values you want, click "Search".

   Result: Your search results display in the "Search Results" area of the window as shown in the following screenshot:



8. Select the Entity you want from the list and click "Load".

   Result: Any Scheduled Reports for the Entity you selected now display on the Scheduled Report form as shown in the following screenshot:



9. Select the specific Report you want to view, and click "View Selected".

Result: A window displays details for the Scheduled Report you selected as shown in the following screenshot: