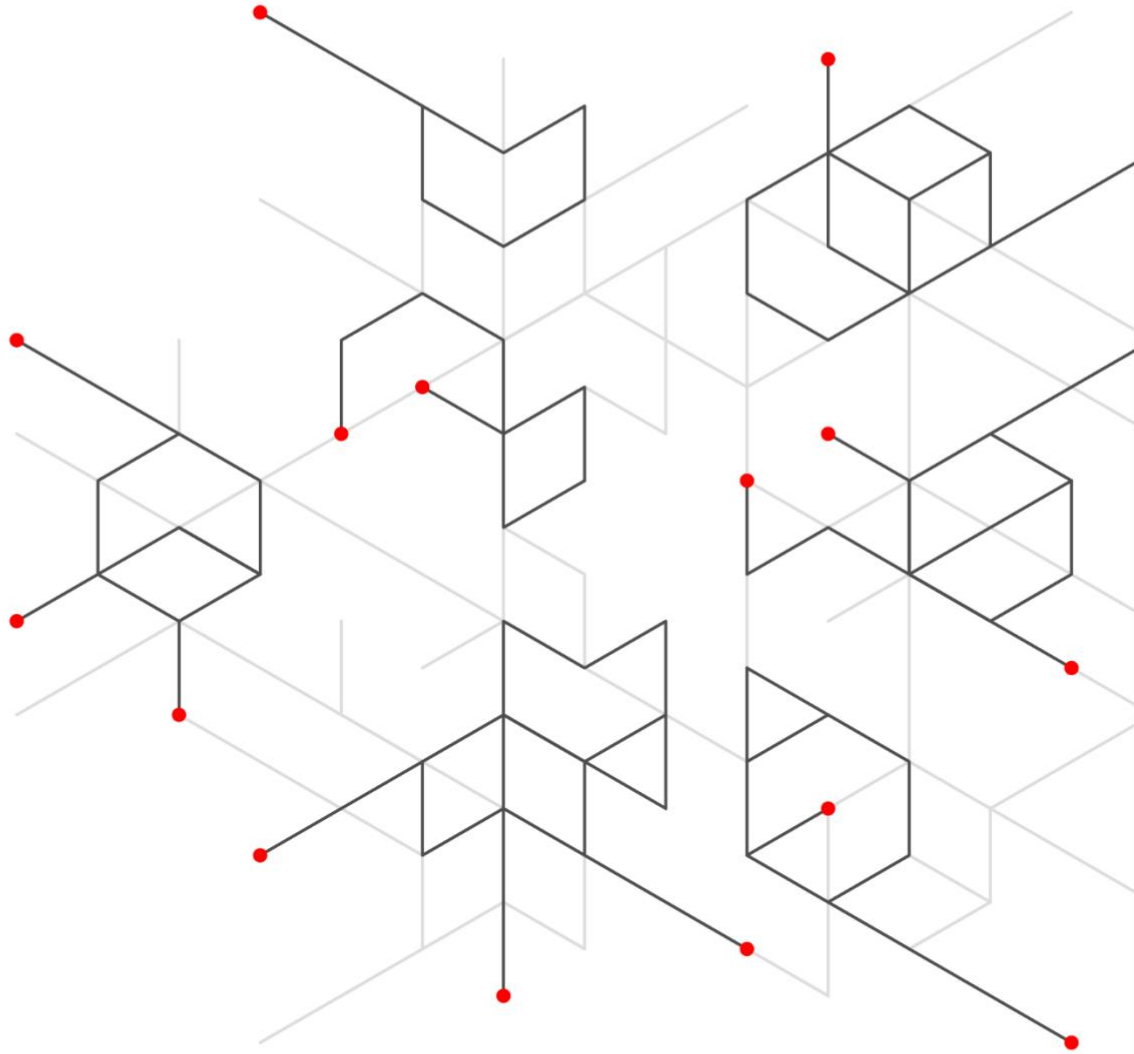
instant systems



USER MANUAL

How to Schedule a Report

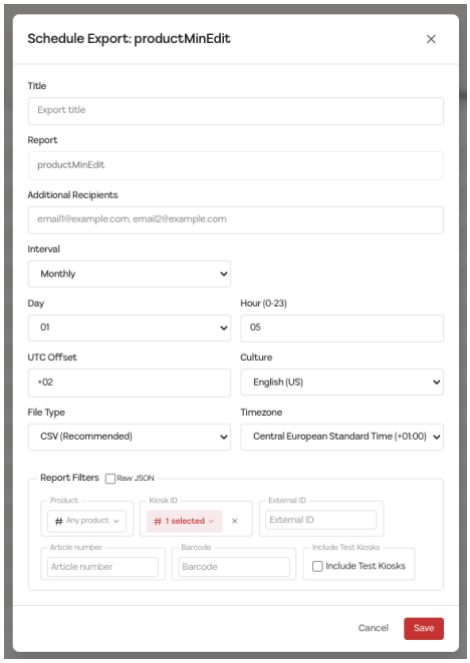
VERSION 26/05

Scheduling Reports

You can schedule recurring reports directly from the search results on any report page. This guide uses the Restock Report as an example, but the setup process is the same for all reports. Scheduled reports are delivered automatically as Excel files via email.

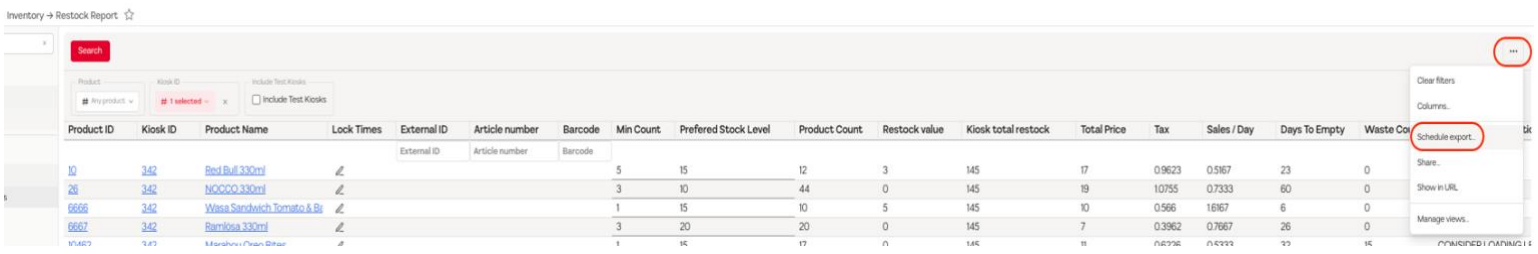
How to Schedule a Report

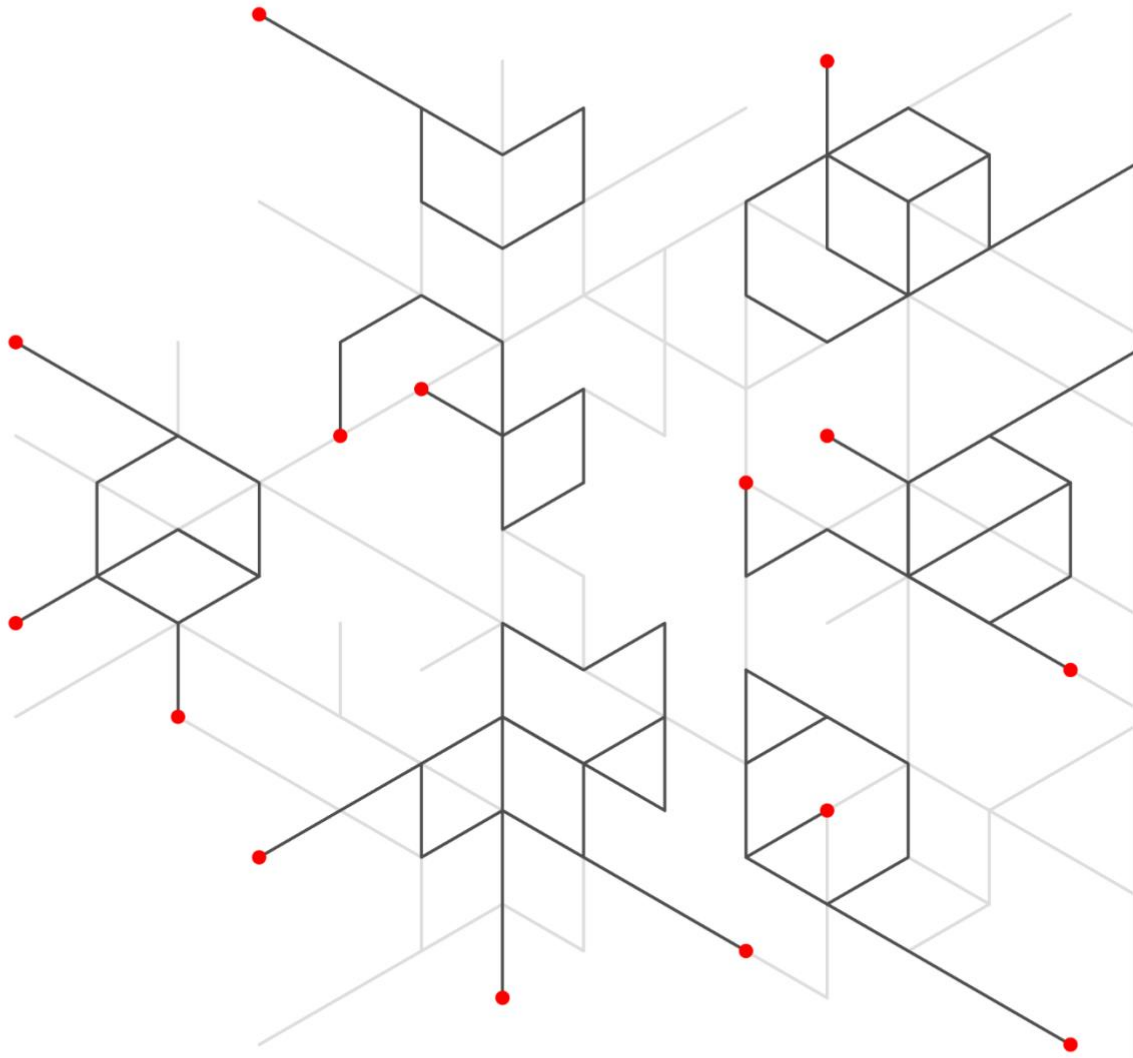
1. Perform your search and apply any desired filters on the report page.
2. Click the icon with the three dots to the right of the search button (see screenshot below).
3. Fill in the scheduling options:



   - **Title**: Enter a clear name for the report export.
   - **Additional Recipients**: Add email addresses for any extra recipients (separate multiple addresses with commas).
   - **Interval**: Choose how often the report should run (daily, weekly, monthly, or yearly).
   - **Weekday**: Select the specific day and time for the report to be generated.
   - **Culture**: Select the formatting for dates, numbers, and CSV separators.
   - **Filetype**: Choose the desired export file format.
   - **Timezone**: Select the time zone to be used in the report.

Note: Any filters you applied before clicking the schedule icon will automatically be saved with the report. If no filters were set, configure the desired criteria in the remaining fields.





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