

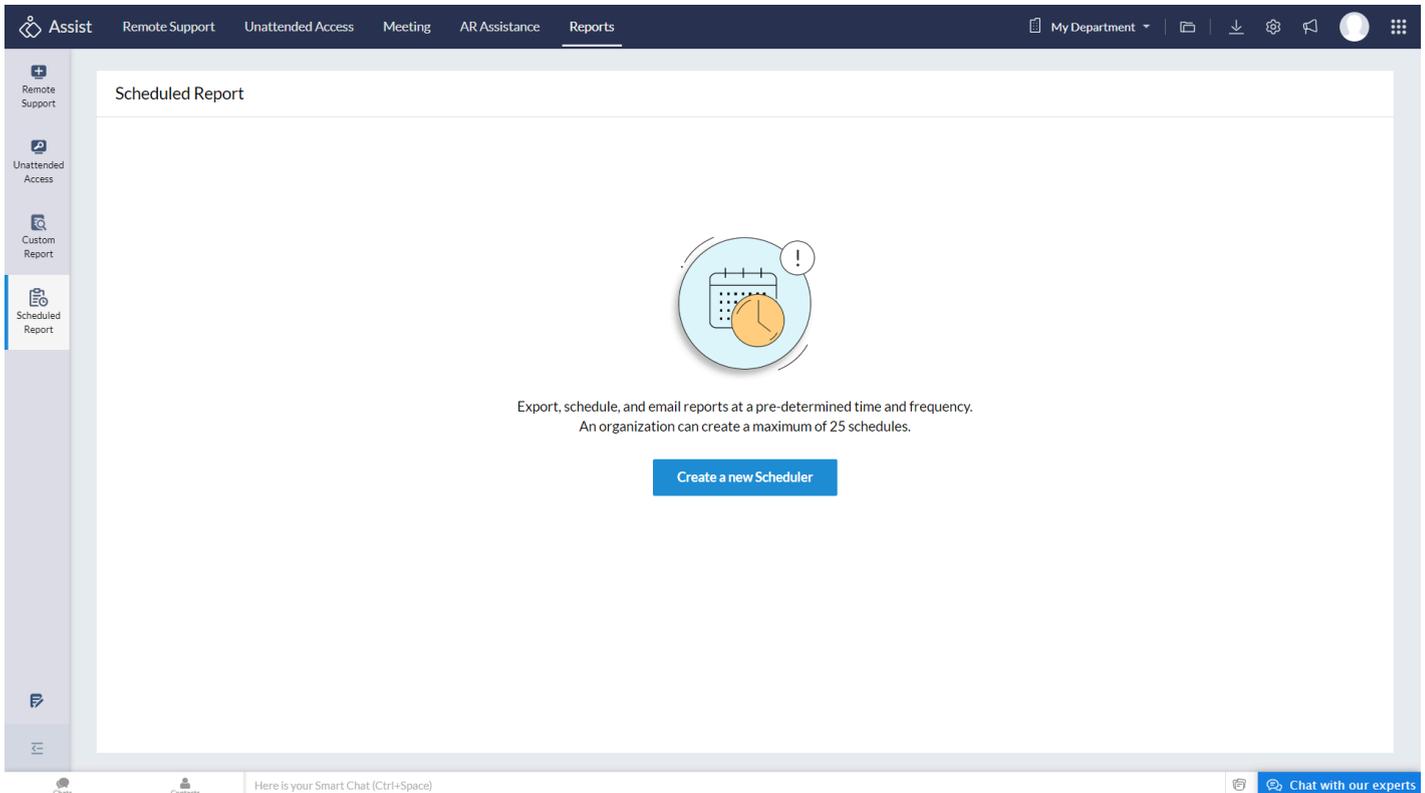


# Scheduled Reports

The Scheduled Reports feature enables technicians to automate report generation and delivery, offering timely insights without the need for manual intervention. With Scheduled Reports, you can easily personalize report schedules, ensuring that essential information reaches you at regular intervals.

## *To create a Report scheduler*

1. Navigate to **Reports > Scheduled Report**.
2. Click **Start a new Scheduler**.



3. Provide details like **Scheduler Name** and **Description** (Description should be under 500 characters).

The screenshot shows the 'Create a new Scheduler' form in the Zoho Assist interface. The form is partially filled with placeholder text. The Scheduler Name field contains 'Name of the Scheduler', the Description field contains 'Tell a detailed brief about this Schedule.', the Report field is set to 'Select the reports to be scheduled.', the Frequency field has 'Monthly' selected, the Start date & time field shows '2023-09-11' and '13:39', the Report format field has 'Retain' selected, the File type field has 'CSV' selected, the Password field contains 'Enter password to secure the file', and the Mail to field contains 'john@john.com'. The form has 'Cancel' and 'Add' buttons at the bottom right.

4. Select at least one desired report from the drop-down menu for scheduling and mailing.

The screenshot shows the 'Create a new Scheduler' form in the Zoho Assist interface. The 'Report' dropdown menu is open, showing options: Custom, Service Queue, and Dial In. The Scheduler Name field contains 'Malcolm Technicians', the Description field contains 'Tell a detailed brief about this Schedule.', the Report field is set to 'Select the reports to be scheduled.', the Frequency field has 'Monthly' selected, the Start date & time field shows '2023-09-11' and '13:39', the Report format field has 'Retain' selected, the File type field has 'CSV' selected, the Password field contains 'Enter password to secure the file', and the Mail to field contains 'john@john.com'. The form has 'Cancel' and 'Add' buttons at the bottom right.

5. Customize the mailing frequency as **Monthly, Weekly, or Daily** based on your needs.

6. Specify the **start date & time**; note that the start date & time must be after the current date & time.

7. Your personal information can be **retained, masked, or removed**, as per the selected preference.

8. For added security, you can set a **password** to protect your report.

## 9. Enter the **email addresses** to which the reports should be sent, up to a maximum of five.

The screenshot shows the 'Create a new Scheduler' dialog box in the Zoho Assist interface. The dialog is titled 'Create a new Scheduler' and contains the following fields and options:

- Scheduler Name \***: Malcolm Technicians
- Description**: Tell a detailed brief about this Schedule. (with a plus icon)
- Report \***: Custom, Service Queue, Dial In (with a dropdown arrow)
- Frequency**: Monthly, Weekly, Daily (with radio buttons)
- Start date & time**: 2023-09-11, 13:39 (with a calendar icon and a clock icon)
- Report format**:
  - Personal data**: Retain, Mask, Remove (with radio buttons)
  - File type**: CSV, PDF (with radio buttons)
- Password**: Enter password to secure the file (with a text input field)
- Mail details**:
  - Mail to \***: malcolm@zylker.com (with a dropdown arrow)
  - (Up to 5 email addresses)

Buttons: Cancel, Add

After successfully creating a scheduler, the subsequent scheduler will automatically follow the set frequency.

### ***To view the created scheduler***

Click on scheduler to view its details.

The screenshot shows the 'Scheduled Report' interface in the Zoho Assist application. The interface displays a list of schedulers and a detailed view of the 'Malcolm Technicians' scheduler.

**Scheduled Report**

Total: 1

Scheduler Name	Last Run Time	Next Run Time	Frequency
Malcolm Technicians	-	Sep 11, 2023 13:39	Monthly

**Malcolm Technicians** Scheduler

**Scheduler Name**: Malcolm Technicians

**Report**: Custom, Service Queue, Dial In

**Frequency**: Monthly

**Start date & time**: Sep 11, 2023 13:39

**Schedule status**: Scheduled

**Last Run Time**: -

**Next Run Time**: Sep 11, 2023 13:39

**Report format**

**Personal data**: Retain personal data

**File type**: CSV

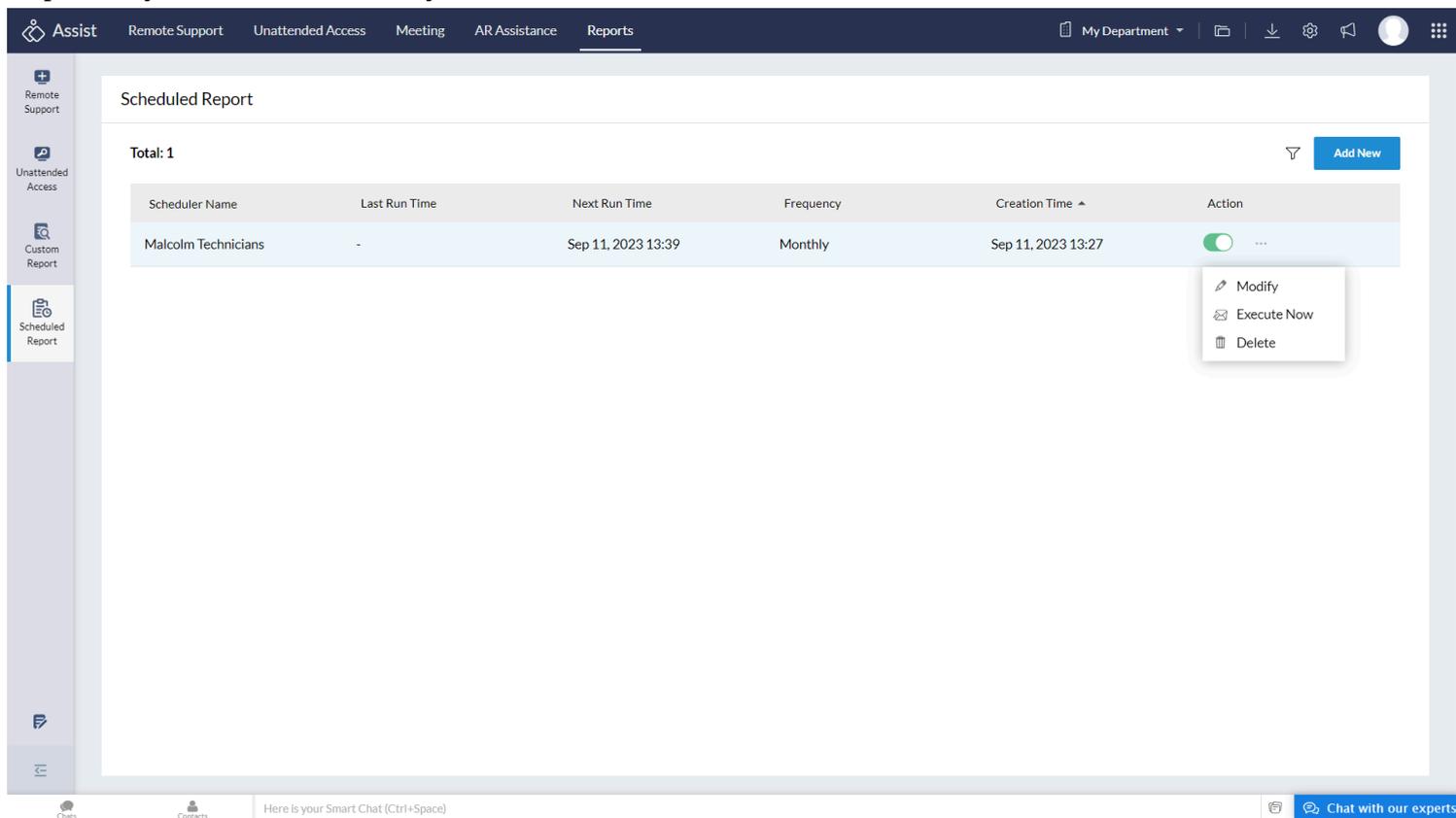
**Mail details**

**Mail to**: malcolm@zylker.com

Buttons: Edit

## To modify or delete the scheduler

You can modify or delete the scheduler by clicking the three dots icon and choosing **Modify** or **Delete** respectively. Scheduler will always be active in status unless deleted or disabled.



The screenshot displays the 'Scheduled Report' interface in Zoho Assist. The top navigation bar includes 'Assist', 'Remote Support', 'Unattended Access', 'Meeting', 'AR Assistance', and 'Reports'. The left sidebar contains icons for 'Remote Support', 'Unattended Access', 'Custom Report', and 'Scheduled Report'. The main content area shows a table with one report entry:

Scheduler Name	Last Run Time	Next Run Time	Frequency	Creation Time	Action
Malcolm Technicians	-	Sep 11, 2023 13:39	Monthly	Sep 11, 2023 13:27	<input checked="" type="checkbox"/> ...

The context menu for the report entry includes the following options:

- Modify
- Execute Now
- Delete

After deletion, you will no longer receive any subsequent email reports.

## To execute the scheduler

**Execute Now** allows you to instantly receive reports to the specified email addresses. This option is available only when the scheduler is active. Using **Execute Now** will not impact your upcoming scheduled report delivery time.

Click the three dots icon and choose **Execute Now**.

The screenshot shows the Zoho Assist interface with the 'Reports' tab selected. The main content area is titled 'Scheduled Report' and displays a table with one entry. The table has columns for Scheduler Name, Last Run Time, Next Run Time, Frequency, Creation Time, and Action. The entry for 'Malcolm Technicians' has a 'Next Run Time' of 'Sep 11, 2023 13:39' and a 'Frequency' of 'Monthly'. The 'Action' column for this entry shows a green toggle switch and a three-dot menu icon. A context menu is open over the three-dot icon, showing options: 'Modify', 'Execute Now', and 'Delete'. The 'Execute Now' option is highlighted. The interface also includes a top navigation bar with 'Assist', 'Remote Support', 'Unattended Access', 'Meeting', 'AR Assistance', and 'Reports'. A bottom bar contains 'Chats', 'Contacts', 'Here is your Smart Chat (Ctrl+Space)', and 'Chat with our experts'.

Scheduler Name	Last Run Time	Next Run Time	Frequency	Creation Time	Action
Malcolm Technicians	-	Sep 11, 2023 13:39	Monthly	Sep 11, 2023 13:27	<input checked="" type="checkbox"/> ...

A confirmation prompt will be shown as below. Click **Execute now** to proceed.

The screenshot shows the same Zoho Assist interface as above, but with a confirmation dialog box overlaid. The dialog box is titled 'Execute now' and contains the text: 'The report scheduler (Malcolm Technicians) is next set to run on Sep 11, 2023, at 13:39. Would you like to execute it now?'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Execute now'. The background interface is dimmed.