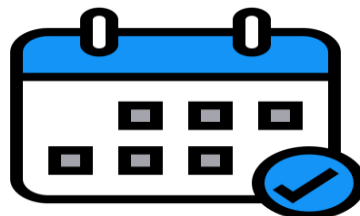


## Report Scheduler Solution

### Overview of the Report Scheduler Solution:

The Report Scheduler solution allows the business user to schedule and email, Reports, Views (System and Personal), FetchXML on a periodic basis to contacts or users in Microsoft D365 Customer Engagement. The Administrator needs to create the schedule run records(one time activity) as required by business.



The Solution saves effort and time in manual extraction of reports, views and queries and emailing the same to contacts or users as required by the business. This increases productivity of business users, saving effort and time, who repeatedly send similar reports periodically like daily, weekly, fortnightly and so on.

#### Sample Scenarios:

1. Sending periodic reports of Sales to Stakeholders.
2. Sending periodic reports of unresolved cases based on criteria to Operations Management in call center.
3. Sending periodic reports of student performance to parents and/or schools in specific geographies.

The solution is intended to increase productivity for customers and users who want to schedule reports or views or queries and email them to contacts or users periodically and methodically as per the business needs. It eliminates the need for the business user to remind themselves to send the reports and also the mundane activity of doing it repeatedly.

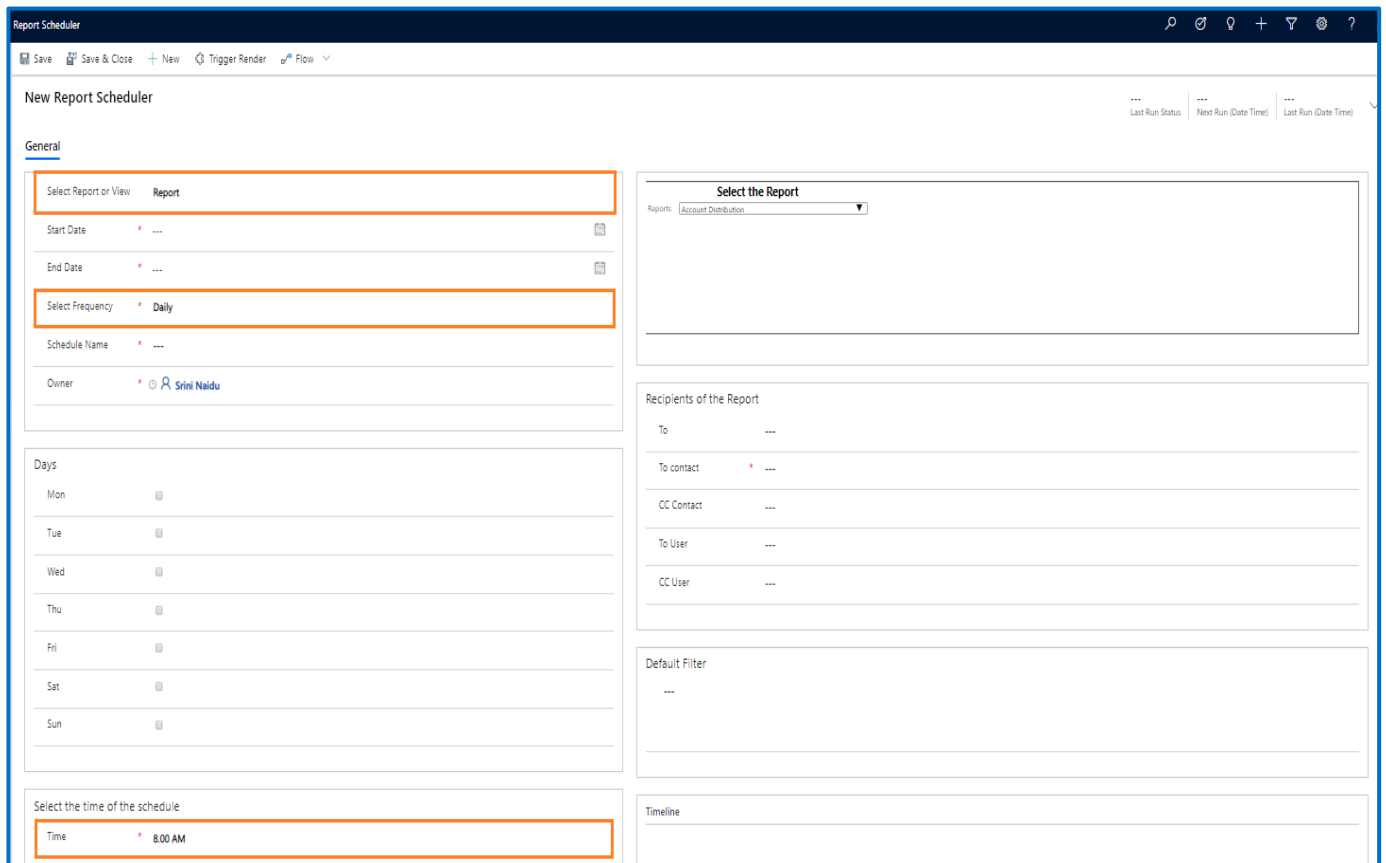
## Report Scheduler Solution

### Screenshots and usage:

The business user needs to navigate to Report Scheduler App and then to Report Scheduler->Click New

The following fields will be set to default values that can be modified as required by user:

Select Report or View or FetchXML, Select Frequency and Time.



**Report Scheduler**

Save Save & Close + New Trigger Render Flow

**New Report Scheduler**

--- Last Run Status --- Next Run (Date Time) --- Last Run (Date Time)

**General**

Select Report or View **Report**

Start Date \* ---

End Date \* ---

Select Frequency \* **Daily**

Schedule Name \* ---

Owner \* **Srin Naidu**

**Days**

Mon ☐

Tue ☐

Wed ☐

Thu ☐

Fri ☐

Sat ☐

Sun ☐

Select the time of the schedule

Time \* **8:00 AM**

**Select the Report**

Reports: **Account Distribution**

**Recipients of the Report**

To ---

To contact \* ---

CC Contact ---

To User ---

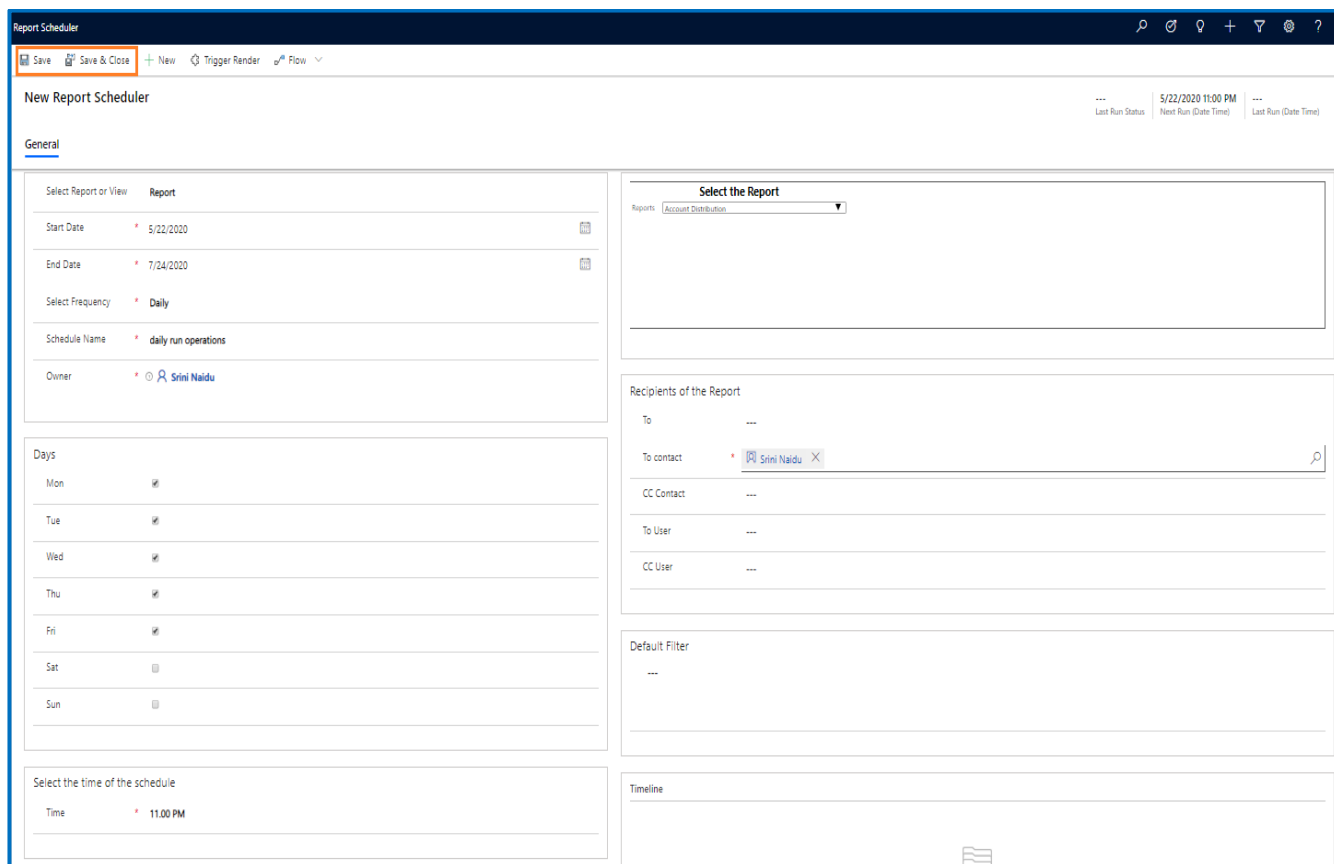
CC User ---

**Default Filter**

---

**Timeline**

Fill the details and save as shown below:



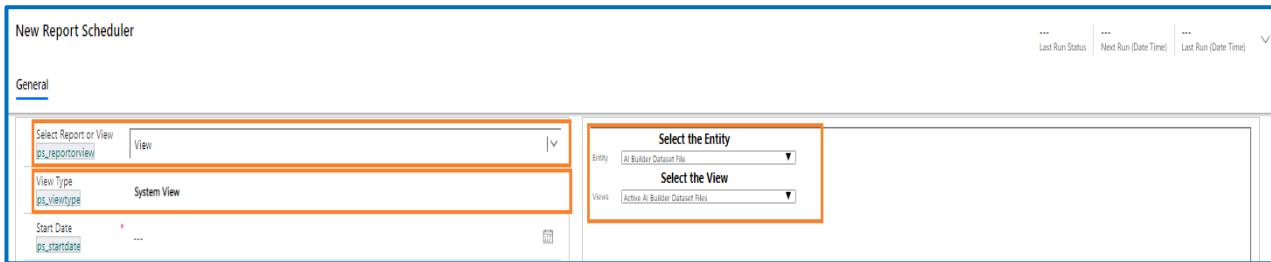
The screenshot displays the 'Report Scheduler' application window. The title bar includes 'Report Scheduler' and standard window controls. The menu bar contains 'Save', 'Save & Close', '+ New', 'Trigger Render', and 'Flow'. The main content area is titled 'New Report Scheduler' and includes a header with 'Last Run Status', 'Next Run (Date Time)' (5/22/2020 11:00 PM), and 'Last Run (Date Time)'. The 'General' tab is active, showing a 'Select Report or View' dropdown set to 'Report'. The form includes fields for 'Start Date' (5/22/2020), 'End Date' (7/24/2020), 'Select Frequency' (Daily), 'Schedule Name' (daily run operations), and 'Owner' (Srin Naidu). A 'Days' section has checkboxes for Mon, Tue, Wed, Thu, Fri (checked) and Sat, Sun (unchecked). The 'Select the time of the schedule' section shows 'Time' as 11:00 PM. On the right, the 'Select the Report' dropdown is set to 'Account Distribution'. The 'Recipients of the Report' section includes fields for 'To' (empty), 'To contact' (Srin Naidu), 'CC Contact' (empty), 'To User' (empty), and 'CC User' (empty). The 'Default Filter' section is empty. The 'Timeline' section is also empty.

The above records depicts a daily record that will run on week days excluding weekends, since Sat(Saturday) and Sun(Sunday) checkboxes are unchecked.

The next run time is displayed in the header and currently allowed to modify, but as a rule of thumb, do not modify this value. User can change the time, by using the time of the schedule. This will ensure no issues with the job picking up the schedule record as intended.

## Report Scheduler Solution

Similarly, if View is chosen as the option while creating the record, then the below options are presented to the user with default values filled in, for certain required fields.



The entity and view that is picked up is based on name of entities that are available in System and sorted alphabetically.

The below default values can be changed as per the user needs. One of the reference to change the Colour values: [https://www.w3schools.com/colors/colors\\_names.asp](https://www.w3schools.com/colors/colors_names.asp)

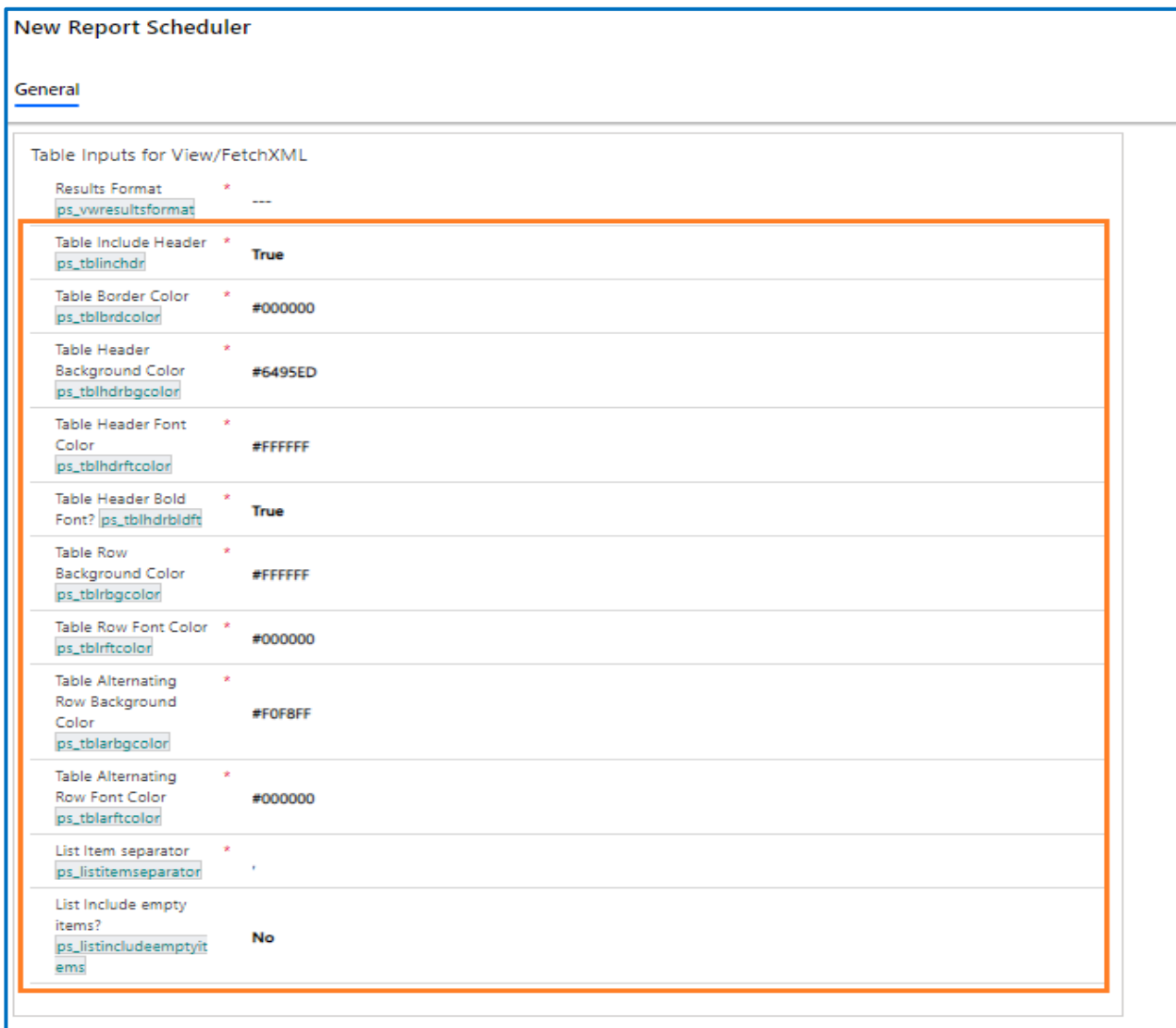


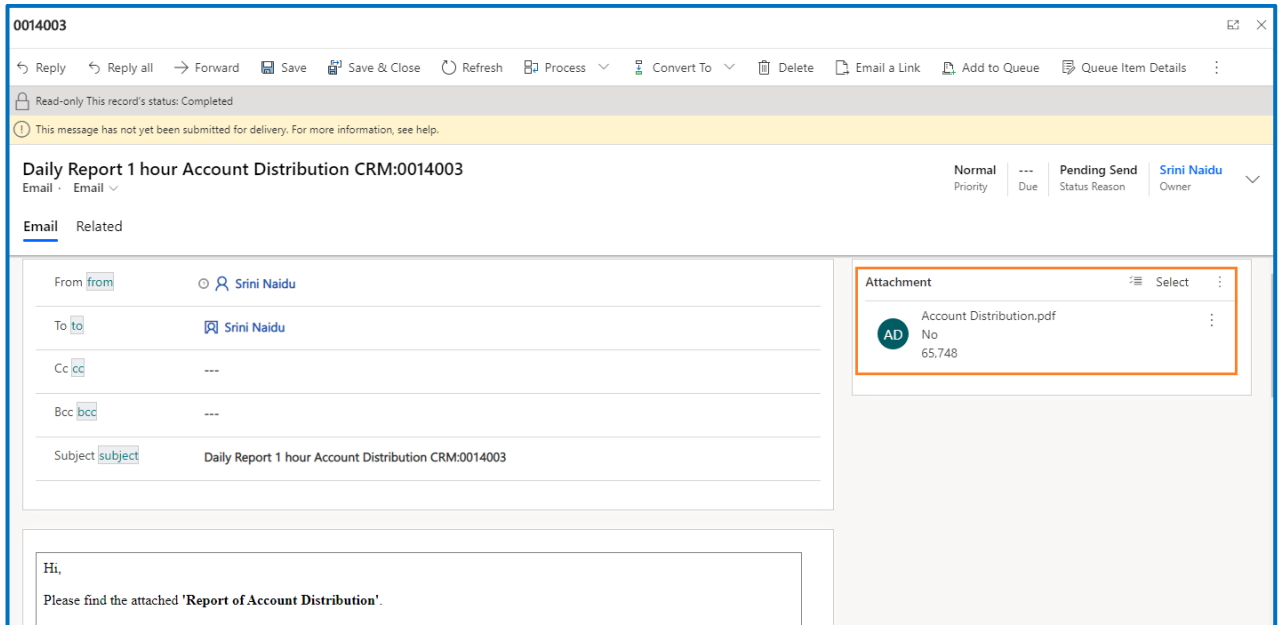
Table Inputs for View/FetchXML		
Results Format	*	---
ps_vwresultsformat		
Table Include Header	*	True
ps_tblinchr		
Table Border Color	*	#000000
ps_tblbrdcolor		
Table Header Background Color	*	#6495ED
ps_tblhdrbgcolor		
Table Header Font Color	*	#FFFFFF
ps_tblhdrftcolor		
Table Header Bold Font?	*	True
ps_tblhdrbldft		
Table Row Background Color	*	#FFFFFF
ps_tblrbgcolor		
Table Row Font Color	*	#000000
ps_tblrftcolor		
Table Alternating Row Background Color	*	#F0F8FF
ps_tblarbgcolor		
Table Alternating Row Font Color	*	#000000
ps_tblarftcolor		
List Item separator	*	,
ps_listitemseparator		
List Include empty items?		No
ps_listincludeemptyit		
ems		

## Report Scheduler Solution

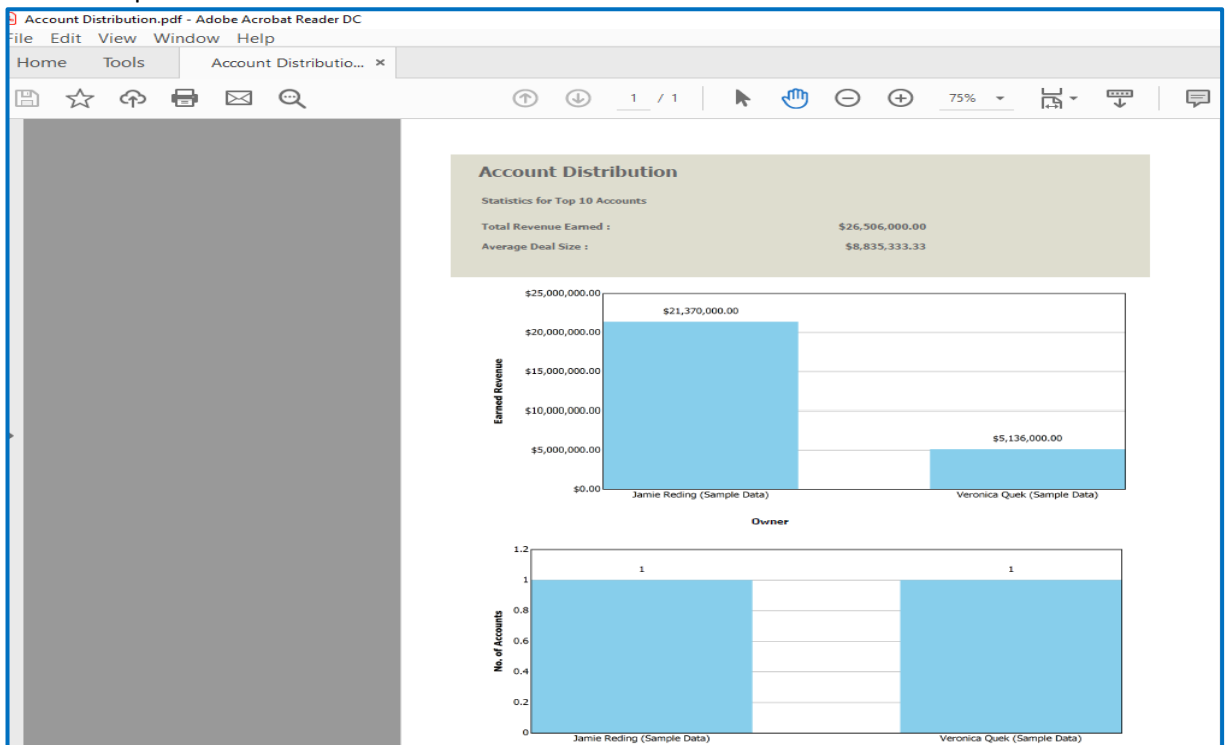
Options similar to the View selection are shown for FetchXML as well, except that the query can be entered into the FetchXML query field.

Results of the Emails sent based on the schedule:

### 1. Email for Report Scheduled in PDF format



The PDF report screenshot:



## 2. Email of Custom Report in Excel Format

0014016 ✉ ✕

✕ Reply ✕ Reply all ➔ Forward 💾 Save 📄 Save & Close ↻ Refresh 📄 Process ▼ 📄 Convert To ▼ 🗑 Delete 📄 Email a Link 📄 Add to Queue 📄 Queue Item Details ⋮

🔒 Read-only This record's status: Completed

⚠ This message has not yet been submitted for delivery. For more information, see help.

**Daily Report every 1 hour Custom Revenue Report CRM:0014016** Normal Priority --- Due Pending Send Status Reason Srini Naidu Owner ▼

Email Email ▼

Email Related

From **from** 🔍 **Srini Naidu**

To **to** 🔍 **Srini Naidu**

Cc **cc** ---

Bcc **bcc** ---

Subject **subject** Daily Report every 1 hour Custom Revenue Report CRM:0014016

**Attachment** 📄 Select ⋮

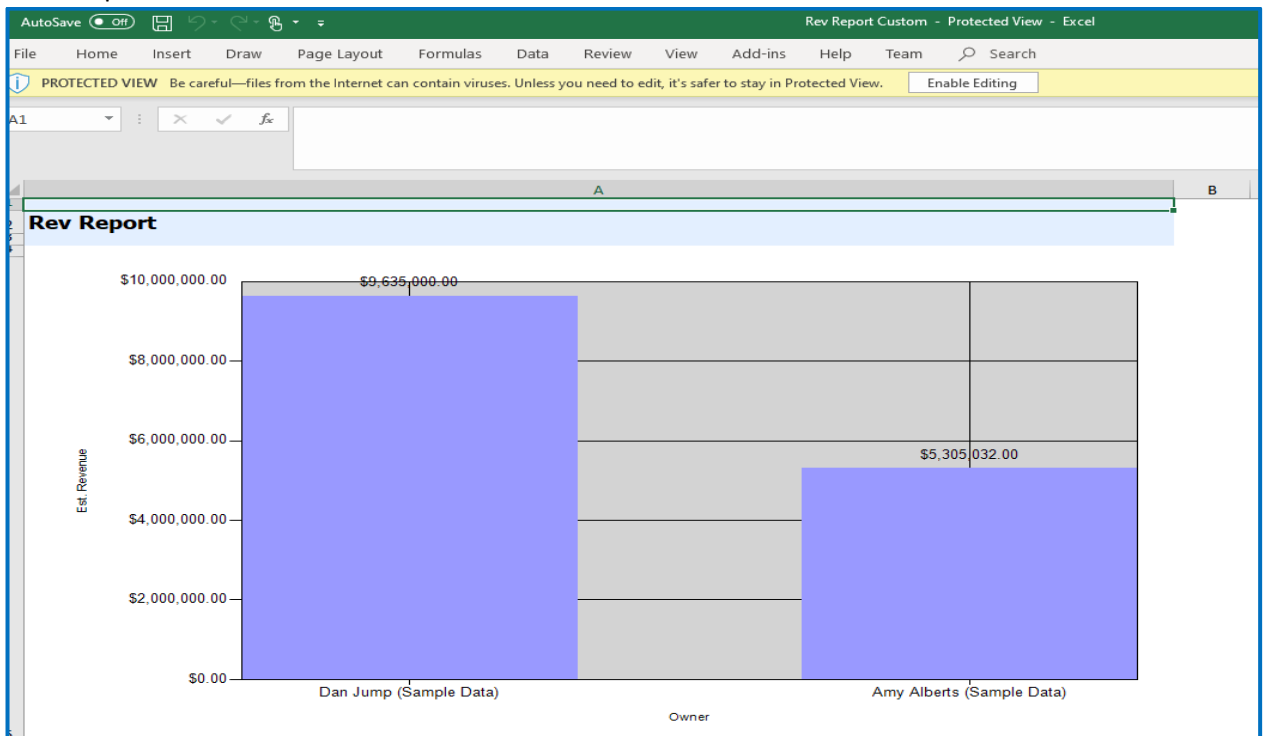
**RR** Rev Report Custom.xlsx  
No 10,161

Hi,

Please find the attached 'Report of Rev Report Custom'.

Regards

### Excel Report screenshot



AutoSave Off

Rev Report Custom - Protected View

File Home Insert Draw Page Layout Formulas Data Review View Add-ins Help Team Search

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

	A	B	C	D	E
1		Potential Customer	Est. Revenue	Owner	
2		Proseware, Inc.	\$34,70,000.00	Dan Jump (Sample Data)	
3		Coho Winery	\$53,05,032.00	Amy Alberts (Sample Data)	
4		The Phone Company	\$61,65,000.00	Dan Jump (Sample Data)	
5			<b>\$14,940,032.00</b>		

### 3. Email of View in CSV format

Reply Reply all Forward Save Save & Close Refresh Process Convert To Delete Email a Link Add to Queue Queue Item Details Share Flow Word Templates

Read-only This record's status: Completed

This message has not yet been submitted for delivery. For more information, see help.

Daily run every hour of Personal View CRM:0014050

Email - Email

Normal Priority Pending Send Status Reason Srinu Naidu

Email Related

From Srinu Naidu

To Srinu Naidu

Cc

Bcc

Subject Daily run every hour of Personal View CRM:0014050

Attachment

File Name T Followed File Size (By...)

Srinu's Active Accounts.csv No 721

See all records

Hi,

Please find the attached 'Srinu's Active Accounts - View results'.

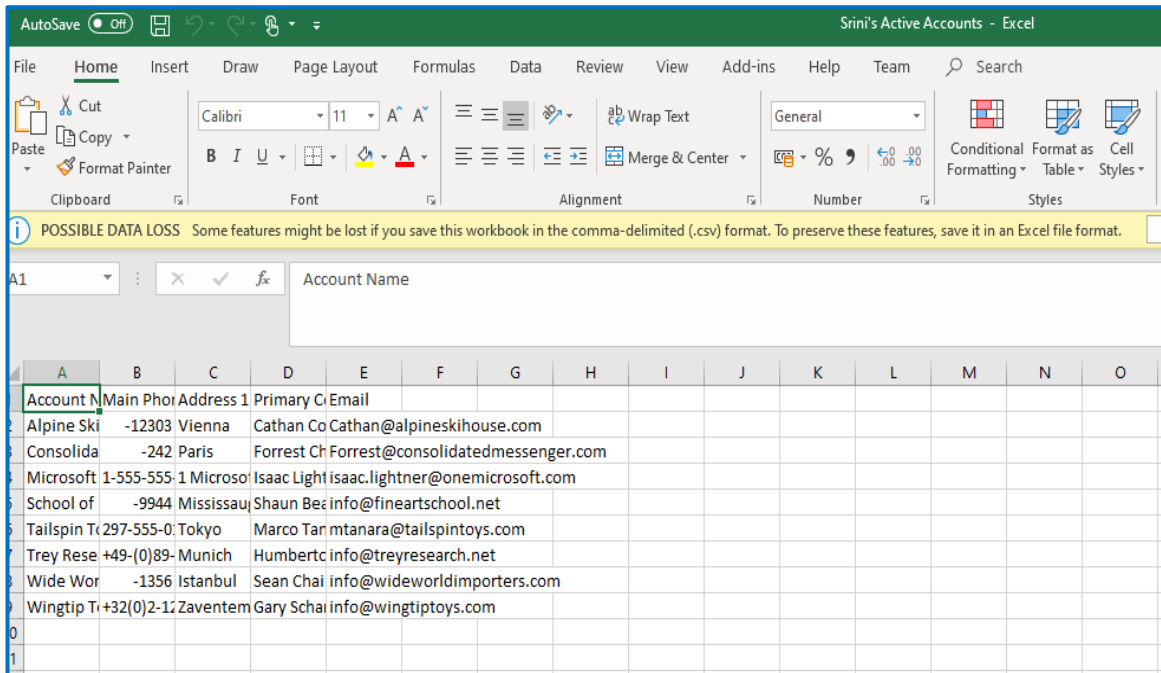
Regards,

Srinu Naidu

System Views will also be emailed like the above screenshot depending on the results format.

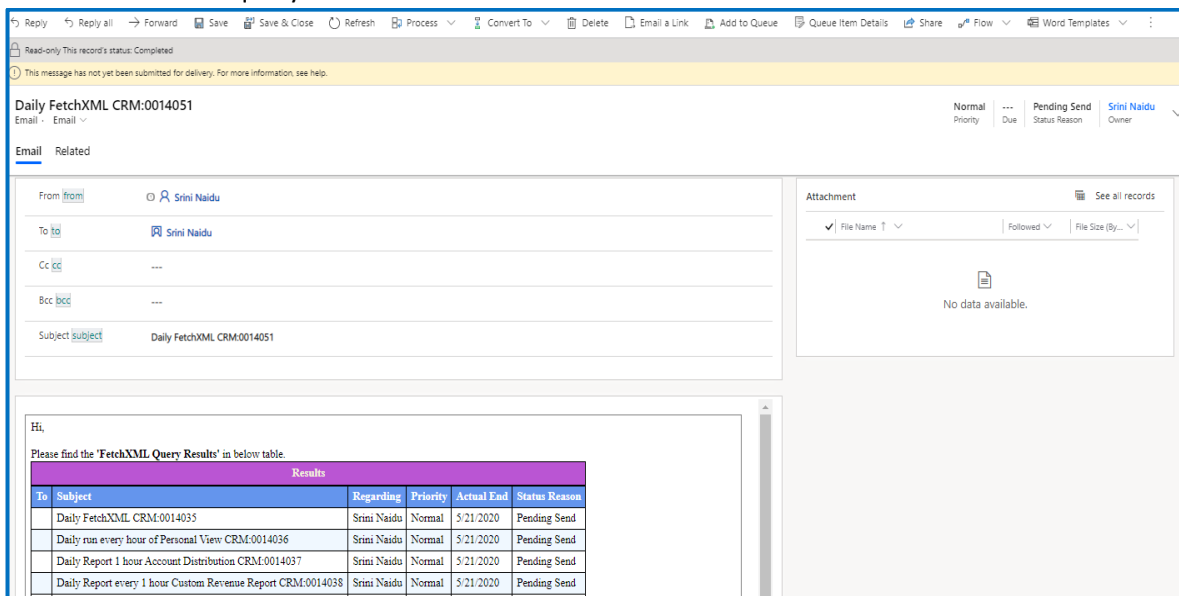
## Report Scheduler Solution

### CSV View Screenshot



Account Name	Main Phone	Address	Primary Contact	Email
Alpine Ski	-12303	Vienna	Cathan Co	Cathan@alpineskihouse.com
Consolidated	-242	Paris	Forrest Ch	Forrest@consolidatedmessenger.com
Microsoft	1-555-555-1	Microsoft	Isaac Light	isaac.lightner@onemicrosoft.com
School of	-9944	Mississauga	Shaun Bee	info@fineartschool.net
Tailspin Toys	297-555-0	Tokyo	Marco Tan	mtanara@tailspintoys.com
Trey Research	+49-(0)89-	Munich	Humbert	info@treysresearch.net
Wide World	-1356	Istanbul	Sean Chai	info@wideworldimporters.com
Wingtip Toys	+32(0)2-12	Zaventem	Gary Schai	info@wingtip toys.com

### 4. Email of FetchXML query in HTML format



**Daily FetchXML CRM:0014051**

From: Srin Naidu  
To: Srin Naidu  
Cc: ---  
Bcc: ---  
Subject: Daily FetchXML CRM:0014051

Hi,

Please find the 'FetchXML Query Results' in below table.

To	Subject	Regarding	Priority	Actual End	Status Reason
Daily FetchXML CRM:0014035		Srin Naidu	Normal	5/21/2020	Pending Send
Daily run every hour of Personal View CRM:0014036		Srin Naidu	Normal	5/21/2020	Pending Send
Daily Report 1 hour Account Distribution CRM:0014037		Srin Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014038		Srin Naidu	Normal	5/21/2020	Pending Send

## Report Scheduler Solution

Reply Reply all Forward Save Save & Close Refresh Process Convert To Delete Email a Link Add to Queue Queue Item Details Share Flow Word Templates

Read-only This record's status: Completed

This message has not yet been submitted for delivery. For more information, see help.

**Daily FetchXML CRM:0014051** Normal Pending Send Sridi Naidu  
Priority Due Status Reason Owner

Email Related

Daily Report every 1 hour Custom Revenue Report CRM:0014028	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014031	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014032	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014033	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily FetchXML CRM:0014047	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report 1 hour Account Distribution CRM:0014048	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014049	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily run every hour of Personal View CRM:0014050	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014029	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014030	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily FetchXML CRM:0014043	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily run every hour of Personal View CRM:0014044	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report every 1 hour Custom Revenue Report CRM:0014045	Sridi Naidu	Normal	5/21/2020	Pending Send
Daily Report 1 hour Account Distribution CRM:0014046	Sridi Naidu	Normal	5/21/2020	Pending Send

Regards,  
Sridi Naidu

### Schedule Run Record:

The Administrator or anyone with the Schedule Administrator role will be able to create the Schedule Run record as per requirement of business.

It is recommended to create the following records at bear minimum:

1. Daily schedule with frequency as 'Daily'.
2. Weekly Schedule with frequency as 'Weekly'.
3. Fortnightly Schedule with frequency as 'Fortnightly'.
4. Monthly Schedule with frequency as 'Monthly'.

### Update 'Trigger Run Report' workflow (if required) by Administrator:

1. For Weekly default is set to update to +7 days, depending on the business needs it can be updated to required number of days.
2. For Fortnightly default is set to update to +14 days, depending on the business needs it can be updated to required number of days.
3. For Monthly default is set to update to +1 month, depending on the business needs it can be updated to required number of days/month.

**Dependencies:**

N/A

**Known Limitations:**

1. Email can be sent to limited people.
2. The colour options are in Hexadecimal format and not available as an option to pick.

**Known Issues:**

1. If the Schedule Run record's run time is modified by the administrator, then there will two workflows out of which one must be manually cancelled.
2. After creation of Schedule Run record, the 'Recurring Scheduler Workflow' must be triggered manually.

Please feel free to reach out to us in case of any queries, suggestions and issues: [info@pramitisoft.in](mailto:info@pramitisoft.in)