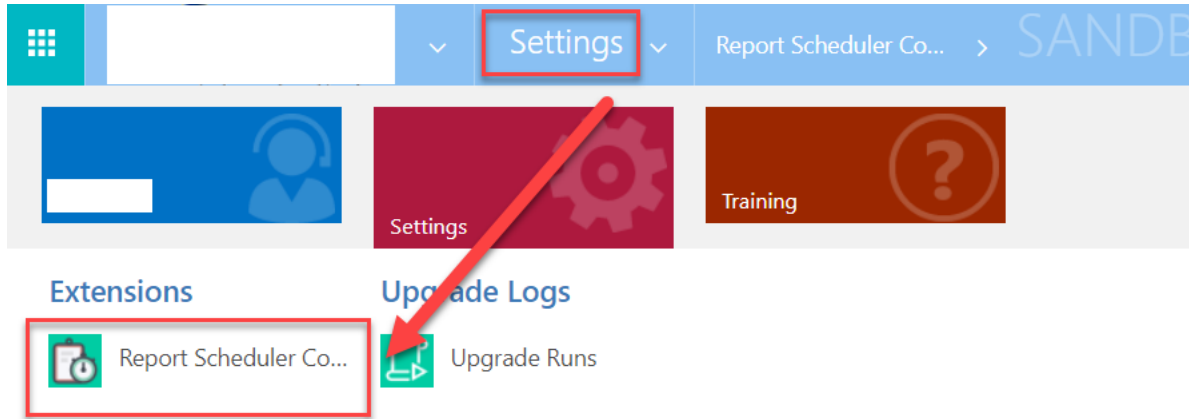


Arbela Report Scheduler

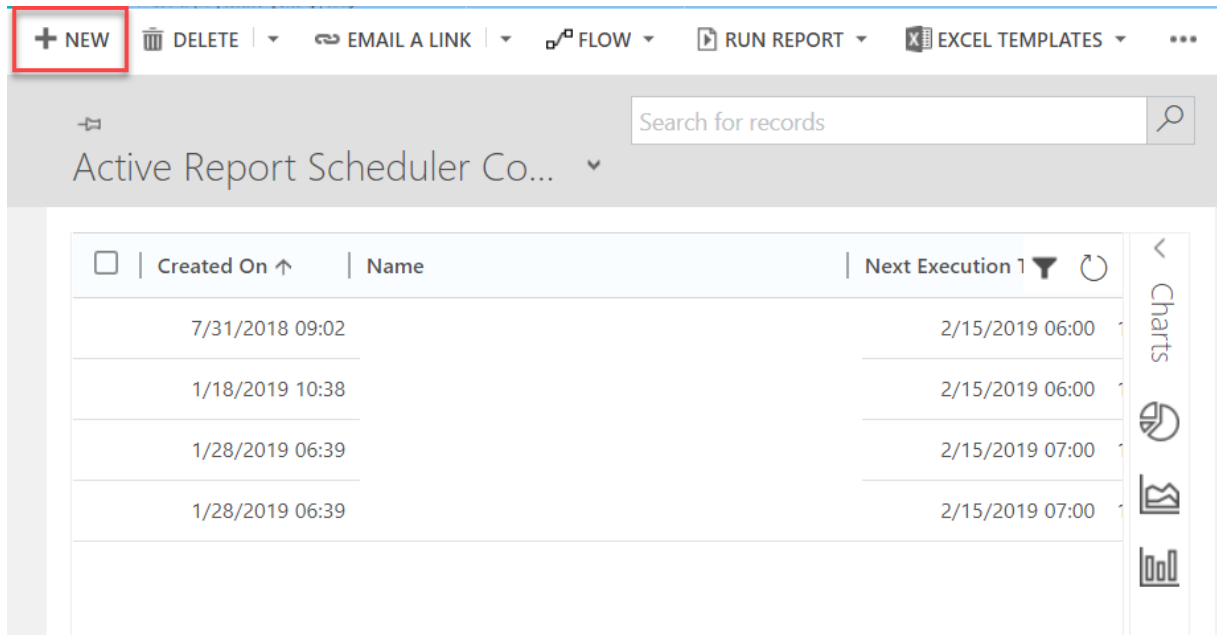
The Arbela Report Scheduler is a managed solution for Dynamics 365 Customer Engagement. It allows organizations to schedule recurring reports to be emailed out to a list of individuals.

After installing the solution, under **Settings** you will find the extension **Report Scheduling Configuration** added.



This is a custom configuration entity that stores the recurrence and email settings for each scheduled report.

To create a report scheduling recurrence, create a new configuration record.



SAVE


SAVE & CLOSE

NEW

FLOW

FORM EDITOR

REPORT SCHEDULER CONFIGURATION : INFORMATION

New Report Scheduler Configur... 

Scheduler Configuration

Next Execution Time *


4/16/2019 08:00

Execution Interval *

1 day

Report Name *

Report ID



Format *

PDF

Email Configuration

Email Subject *

.....

Email Recipients *

.....

Email Description *

.....

Input the following information:

- Next Execution Time
 - Must be in the future.
- Execution Interval
 - Can be a matter of minutes, hours or days.
- Report Name
 - There is logic in place here such that the name must be an exact-character match to an existing Report that resides in the same Dynamics 365 CE instance. If the name does not match, an error will be thrown.
- Report ID
 - Automatically populated from the Report Name.
- Format
 - PDF, Excel, or Word
- Email Subject
- Email Recipients
 - Email addresses separated by a semicolon. These do not have to be contacts in D365. If no contact record is found when the record saves, a new contact will be created.
- Email Description
 - Body of text to include in the email. No HTML.

Reports will be sent by a D365 service account that must be configured in the solution.