

Automatic Report Delivery

Module Guide: Automatic Report Delivery

Module Location

Settings > System Settings > Automatic Report Delivery

Module Purpose

The **Automatic Report Delivery** module serves as the central configuration hub for scheduling the automatic delivery of reports via email to predetermined recipients. Its goal is to automate the distribution process of routine reports—whether daily, weekly, or monthly—so that management and relevant staff can consistently receive important data without needing to create it manually each time.

View and Feature Explanation

The main page of this module is the interface for viewing and managing all existing report delivery schedules.

Search Filter

- **Setting Name:** Allows an administrator to search for a specific report delivery schedule by its name.
- **Search:** A button to apply the selected filters.
- **Show all:** A button to clear the filters and display all existing schedules again.

Settings List Table

- **No:** Serial number.
- **Setting Name:** A descriptive name for the report delivery schedule.
- A "No Data" message will appear if no automatic report delivery schedules have been created yet.

Action Buttons

- It is likely that there is an "Add New" button or similar to open the form for creating a new schedule, although it is not visible in the image.

Expected Workflow Based on Convention

Although the detailed form is not visible, the workflow for such a module generally includes:

1. **Creating a New Schedule:** The administrator creates a new entry and gives it a clear name, for example, "Daily Sales Report for Area Sales Managers."
2. **Selecting the Report:** The administrator selects which report from the list of existing reports in the system they want to send, for example, "Sales Report per Salesman" or "Warehouse Stock Report."
3. **Setting the Schedule:** Defines the delivery frequency, such as daily, weekly, or monthly, along with the delivery time.

4. **Determining Recipients:** Adds one or more recipient email addresses. These can be internal employee emails or external emails.
5. **Setting the Format:** Chooses the format of the report attachment, usually PDF, Excel, or CSV.
6. **Activating the Schedule:** Activates the schedule so the system starts sending reports according to the configuration.

Integrated Workflow and Business Process

- **Consistent Information Dissemination:** Ensures all stakeholders, from the board of directors to operational managers, receive the same report at the same time. This creates a single source of truth for decision-making.
- **Time Savings:** Eliminates the manual and repetitive work of creating and sending reports. The team no longer needs to spend time every morning exporting data and attaching it to emails.
- **Improved Discipline and Monitoring:** With routine reports arriving automatically, it encourages managers to disciplinedly review the performance of their teams and operations.
- **Support for External Customers:** This feature can also be used to send automatic reports to customers or business partners, for example, an inventory status report for consignment customers.

Tips and Important Notes

- **Report Size:** Pay attention to the size of the report to be sent. Very large reports can overload the email server or be rejected by the recipient's email server. Consider filtering the report data to be more concise if possible.
- **Recipient Management:** Always keep the recipient list up-to-date. Remove recipients who are no longer relevant, such as employees who have left, to maintain data confidentiality.
- **Delivery Verification:** After creating a new schedule, perform a verification on the first delivery cycle to ensure the report was successfully sent and received correctly by all recipients.
- Ensure that the system's email server (SMTP) configuration is set up correctly in the relevant settings module, as this module depends on that functionality to work.

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