

Scheduling Tasks and Reports

Scheduling helps manage the efficient running of *tasks* and *reports*.

You can automatically run sales and inventory reports or process tasks like price updates using scheduling.

In this course, we will add a new *schedule* and learn how *groups* are assigned to manage schedules.

We will also learn how tasks and reports can be scheduled.

Objectives

- Setting Up Schedules
- Using Schedules
- Scheduling a Task

Setting Up Schedules

Create a schedule to identify the time intervals that tasks should run.

From the main menu, select **Utilities** and then select **Scheduling**.

To set up a schedule, click **Schedules**.

Click **Add**.

In the **Add New Schedule** pop-up, enter a schedule name.

Select a start and end date.

The schedule's frequency can be daily, weekly, or monthly.

The **Weekly** option lets you select specific days to run the schedule.

The **Monthly** option lets you select *specific days* or *relative dates* to run the schedule.

Specific days allow you to set the schedule to run based on *the day of the month*.

Relative dates let you set the schedule to run on *different days of the week*.

Select a load time and time zone for the schedule and click **Save**.

The new schedule is displayed in the table.

Using Schedules

You can add various reports or tasks to a *group* and then assign *that* group to a schedule.

This feature is useful to maintain tasks that require *similar* schedule settings.

In the **Scheduling** screen, select **Groups**.

Click **Add**.

In the **Add New Group** pop-up, enter a name for the group.

The **Schedule** drop-down menu displays all existing schedules.

Select a schedule. This group will be assigned to the selected schedule.

Enable the toggle to activate the group.

Click **Save**.

The added group is displayed in the table.

This group is visible in *all* reports and task screens that use scheduling.

For example, when scheduling a report, the **Schedule Task** screen displays a toggle to schedule the report as a *stand-alone task* or in an existing *group*.

Switch the toggle to **Existing Group**.

Now, the **Select Group** drop-down menu displays all existing groups including the one that we just created.

Select the group and click **Save**.

In the **Scheduling** screen, click the **Groups** tab.

Select the group and click **Edit**.

The scheduled *report* is added to the *group*.

Similarly, you can add *tasks* to a group and assign the group to a schedule.

So, when the schedule *runs*, *all the tasks in the group* run.

You can also set a *sequence* for the tasks to run using the **Chain Tasks** button.

The **Unchain Tasks** button erases the sequence.

If required, you can manually run the schedule before the set time using the **Run** button in the **Groups** tab.

Scheduling a Task

The **All Tasks** tab in the **Scheduling** screen displays previously scheduled tasks and reports.

All scheduled tasks and reports appear in the table.

Tasks such as Product Ranking, Order Point Plans, Suggested Order Plans, and Sales Forecast are scheduled using the **Schedule** button.

For example, in the **Product Ranking** screen, click **Add**.

Fill in the required fields and click **Save**.

In the **Ranking Form** screen, click the **Schedule** button.

Now, add a description for the task and add it to a schedule.

Click **Save**.

In **Edit Schedule**, the product ranking task is added to the schedule.

Other tasks, like Price Updates and Price Book Promotions, are scheduled using the **Effective Date** field.

These run as stand-alone tasks.

In the **Scheduling** screen, you can search for specific tasks using the available filters and the **Search** button.

Select a task using the checkbox and click **Export to Excel** to export the task's details.

To edit a task, select it and click the **Edit Group** button.

You can enable or disable the task using this toggle.

You can select a different schedule for the task here.

Click **Save** when you're done.

Note that order point reports are dependent on product ranking reports. So, it's vital to set an order to run reports.

Recap

Scheduling *organizes* and *manages* tasks and the running of critical business reports.

In this course, we added a new schedule and learned how to assign groups to schedules.

We also learned how tasks and reports are scheduled to run.

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