

Franchise Operations – Standard Operating Procedure

01. Operations - Report Schedule

SET – 017

Overview

The Property Management System (PMS) includes the function to schedule reports, so that the reports will be e-mailed to a specified account on a scheduled routine basis.

Standard

Ensuring all properties, and respective employees, are adhering to the expected guidelines to maintain data integrity throughout the network, whilst performing operational duties.

Procedure

Properties are able to schedule reports by adhering to following operational procedure.

- Select the *specified report* under the '**Reports**' menu
- Select '**Schedule**'



Report Options

Schedule Build Exit

AR Transfer Between

 This Month (01 Aug 2023 - 31 Aug 2023)

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- Identify all the necessary parameters of the report
- Enter the report name under **'Schedule Name'**
- Select the **'Starting Date'**
- Select the **'Schedule Time'**
- Select the **'Schedule Time Zone'**
- Select the **'Export Options'**
- Select the **'Schedule Day'** and frequency
- Select the **'User'** whom will receive the report

Report Schedule Options

Schedule Name

AR Postings

Starting Date

02 Aug 2023

Schedule Time

12:00 PM

Schedule Time Zone

(UTC+10:00) Canberra, Melbourne, Sydney

Export Options

PDF

Schedule Day

☒ Daily

☐ Weekly

On

Monday

☐ Monthly

Select Day

Select Users

Select Users

Select Security Groups

Select Security Groups

Note: When creating a schedule report it is imperative that a 'Security Group' is not selected as this will send the report to all users associated.

Version Control

Version	Issue Date	Developer	Approval	SLT Meeting Review
01	2 August 2023	Business Transitions	Sarah Begbie	