

Scheduled Tasks

System configuration>Administration> Company Profiles> Schedule setup> Scheduled Tasks

Edit Company Profile Info

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#	Document Type	Template Name	Logo	Terms	Setup
1	Bill Of Materials	wab/Resources/reports/frmPri...			
2	Bill Of Materials Setup	wab/Resources/reports/frmPri...			
3	BOM Work Order	Stationery/BOMWorkOrder.xsl	Left	Inline	
4	BookIn Book Out Document	Stationery/BookOutDocument...	Right		
5	BookIn Receipt	Stationery/BookInReceipt_ANZ...	Right		
6	BookIn Supplier	Stationery/SupplierBookInRece...	Right		
7	Certification	Stationery/Certification.xsl	Left		
8	Credit Note	Stationery/CreditNote_ANZ105...	Left	Below Totals	
9	Creditor Payment Remittance	Stationery/CreditorPaymentRe...	Right		
10	Creditors Age Analysis	wab/Resources/reports/Accou...			
11	Creditors Journal	Stationery/PayablesJournal_AN...	Right		
12	Debtors Age Analysis	wab/Resources/reports/Accou...			
13	Debtors Journal	Stationery/ReceivablesJournal...	Right		
14	Debtors Quote	Stationery/Quote_ANZ105.xsl	Right	Below Totals	
15	Debtors Quote Internal	Stationery/Quote_ANZ.xsl	Right		
16	Debtors Quote Setup	Stationery/Quote_ANZ.xsl	Right		
17	Delivery Note	wab/Resources/reports/Deliver...			
18	Delivery Note CM	Stationery/CMDeliveryNote_AN...	Right		
19	Delivery Note1	Stationery/DeliveryInvoice_AN...	Right		
20	Delivery Note2	Stationery/INVDeliveryNote2.xsl	Right		

Save

Close

Scheduled Tasks

The grid will display all Tasks that have been created for scheduling.
The Active and Status column will indicate whether the Task is currently scheduled or not.

Email notification

The Recipients column will indicate the number of email recipients has been set up for this particular Task.

Please note not all Tasks have an emailing function so therefore the setup Recipients will not receive email from this Task.

Clicking on the button in the Email List column will open the window to select and unselect email recipients for this Task.

The Insert and Delete Schedule buttons are only available for the system's Super User to access, for all other users these buttons are disabled.

The Amend button, however, is available for users to click on, this will open the setup window in a Read-Only format so that the user can see what schedule has been set up for this particular task.

Start and Stop Schedule buttons are as the button names indicate. These buttons allow users to start and stop various tasks as they require them

Scheduled Tasks list

API Stock Import	
Asset Tracker Send Available Return Date Emails	
Asset Tracker Send Available Vehicle Due Date Emails	
Auto Badger Import	
Auto Bulk emailing Processed Invoices	
Automatic Invoicing Process	
Below Max Level Report	Check items below Maximum level
Below Min Level Report	Check items below Minimum level
Below Preferred Qty Level Report	
Below Re-Order Level Report	
Cancel Expired Quotes	Automatically cancel expired quotes

Cancel TrackIT Warranty	Automatically cancel asset and TrackIt item warranties
Change Recurring Transaction Status	
Check PO to GRV Intervals	Check to see Purchase orders to GRV outstanding
Creditors Payment Batch Update	
Customer Account on Hold	
Daily Inventory Valuation Report	Run a daily inventory valuation report. This is saved under the inventory valuation documents. If you are running in stock this should be a required scheduled task.
Daily Stock Control Report (WIP Values)	Run a daily stock control report. This is saved under the inventory valuation documents. If you are running in stock this should be a required scheduled task.
Daily Time Log Figures	Send information on daily time log figures to see if clients are on schedule to budget
Daily WIP Journal	
Debit Order pending message	
Email Daily reminders	Email Daily reminders to users
Email In Progress Sales leads Alerts	Email in progress sales leads to managers
Email Open Service Requests	Email open service requests summary
Emailing Schedule	Activate bulk email scheduling. This will email invoices done on a daily basis out to customers
Escalate outstanding reminders	Email reminders that have been escalated and are outstanding
Exchange Rate Update Fixer	Update the exchange rate on a daily basis using the Fixer API
Export Schedule	Activate the daily export schedule generally used for Power BI data Analytics
Fixed Asset Depreciation Schedule	Run the fixed asset depreciation
Monthly Invoices	(View Details)
Recurring GL Journal Auto Processing	

Recurring GRV Auto Processing	
Retention Invoice Auto Processing	
Retention Invoice Email Notification	
SL Budget Alert	
SL Daily Log Figures	
Time Log Budget Alert	
TimeLog Budget recalculate	
Timelog GPS import	
Timelog GPS Report	
Weather Regions Forecast update	

Monthly Invoices

This schedule will send you a daily email at the end of each day, summarizing the month-to-date sales with a breakdown by day. It will also notify you of any credit notes issued.

January Month to date sales figures - Barcode Products Limited

service@barcodeproducts.co.nz
To: Service

MonthlyInvoiceReport.xlsx
5 KB

Please see attached month to date sales report
Total sales month to date = 17,651.00

Total sales orders open for month = 0.00
Total credit note value processed for month = 84.00

Last year month to date sales = 17,414.50
Variance from last year = (236.50)

Setup Monthly Invoices

System configuration>Administration> Company Profiles> Schedule setup> Scheduled Tasks

Select the Schedule you want to activate, then click **Edit Schedule** at the top

Scheduled Tasks Search						
Add Schedule Edit Schedule Delete Schedule View Schedule Tasks Log Start Schedule Stop Schedule						
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#	Task Name	Task Code	Active	Status	Email List	Recipi
19	Daily Inventory Valuation Report	Daily Inventory Valuation Report	Yes	Currently Running.		
20	Daily Stock Control Report (WIP Values)	Daily Stock Control Report (WIP ...	Yes	Currently Running.		
21	Daily Time Log Figures	Daily Time Log Figures		Has not been schedul...		
22	Daily WIP Journal	Daily WIP Journal		Has not been schedul...		
23	Debit Order pending message	Debit Order pending message		Has not been schedul...		
24	Email Daily Reminders	Email Daily Reminders		Has not been schedul...		
25	Email In Progress Sales Leads Alerts	Email In Progress Sales Leads Ale...		Has not been schedul...		
26	Email Open Service Requests	Email Open Service Requests		Has not been schedul...		
27	Emailing Schedule	Emailing Schedule		Has not been schedul...		
28	Escalate outstanding reminders	Escalation of Reminders		Has not been schedul...		
29	Exchange Rate Update Fixer	Exchange Rate Update Fixer		Has not been schedul...		
30	Export Schedule	Export Schedule	Yes	Currently Running.		
31	Fixed Asset Depreciation Schedule	Fixed Asset Depreciation Schedule		Has not been schedul...		
32	Monthly invoices	Monthly invoices	Yes	Currently Running.		
33	Recurring GL Journal Auto Processing	Recurring GL Journal Auto Proces...		Has not been schedul...		
34	Recurring GRV Auto Processing	Recurring GRV Auto Processing		Has not been schedul...		

Make the changes to suit your requirements for the below:

- Run Task
- Schedule Time
- Schedule Day

Click "**Save**"

Schedule Task Setup

Task Code:

Monthly invoices

Task Description:

Monthly invoices

Task To Be Executed:

do ##class(Debtors.Invoice4).ScheduledSalesReport(57)

Run Task:

☒ Once A Day

☐ More Than Once a Day

☐ Time Period Setup

Schedule Time:

20

Hrs

05

Min

Schedule Days:

Sun:

Mon:

Tue:

Wed:

Thu:

Fri:

Sat:

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 Save

 Close

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