

# Scheduling Email Reports

The following instructions guide you through the steps to set up KeyAdvantage reports to be automatically generated and emailed on a regular basis.

## Enter Email (SMTP) Server Information

1. Login to the KeyAdvantage software as a CSA-level user on the KeyAdvantage server.
2. Select **Administrator > Configuration**.
3. Select the **Customer Site Options** tab.
4. Enter the SMTP address. The SMTP address is either the IP address or the SMTP server name of the company's email server. Example: smtp.aol.com
5. Enter the **User Name** and **Password** and **Confirm Password**. The User Name and Password are the domain login and password for the email server. Example: AOL screen name and password.
6. Enter the email address for the person to receive all emailed reports in the **E-mail Address for Automatic Notifications** field.
7. Click the **Save** icon to save the information.

KeyAdvantage-->Configuration-->[Auto SuperStore]

Customer Name: Auto SuperStore System Code: 00001043

Customer Details | Option Setting | Dealership Group Dealership Department | **Customer Site Options**

Assign KeyPads to Key Holders

Corporate Customer

Time Zone: [(GMT -08:00)]

SMTP Settings

SMTP Address: 172.17.1.5

User Name: brian.hauge Password: [REDACTED] Confirm Password: [REDACTED]

E-mail Address For Automatic Notifications: brian.hauge@fs.utc.com

Database Connection Settings

Server Name / IP Address: SLE2PQTD41

Close

## Create a Windows Scheduled Task

1. In Windows, click **Start > Settings > Control Panel > Scheduled Tasks > Add Scheduled Task**.
2. The Scheduled Task wizard launches. Click **Next** to continue.
3. When the list of applications is displayed, click **Browse**.

Scheduled Task Wizard

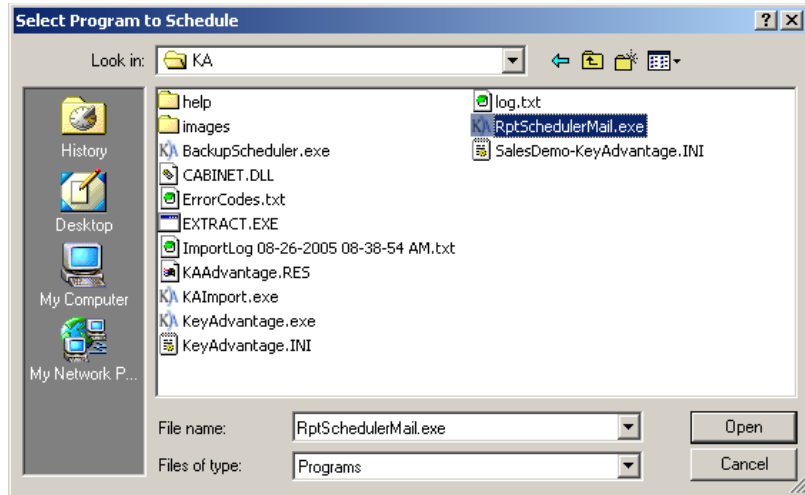
Click the program you want Windows to run.  
To see more programs, click Browse.

Application	Version
Accessibility Wizard	5.00.2195.66...
Acrobat Assistant	6.0.0.200305...
Acrobat Distiller 6.0	
Acrobat Reader 5.0	5.0.1.200103...
Address Book	6.00.2800.11...
Adobe Acrobat 6.0 Standard	
Adobe Download Manager	2.0.0.42

Browse...

< Back Next > Cancel

- 4. Browse to C:\Program Files\Supra\KeyAdvantage\KA folder.
- 5. Select the program **RptSchedulerMail.exe** and click **Open**.



- 6. Select to perform the task **Daily** and click **Next**.



- 7. For the Start Time select a value that is earlier than when the first scheduled report is to be generated.
- 8. Select to perform this task **Every Day**.
- 9. Click **Next** to continue.



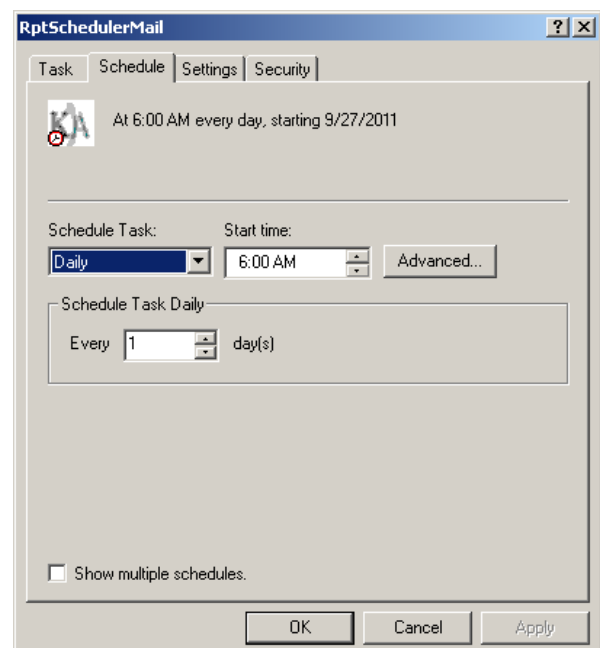
- For the user name and password, enter a valid domain login and password for the KeyAdvantage server machine that is running the scheduled task.
- Click **Next** to continue.



- Check to **Open advanced properties for this task when I click Finish.**
- Click **Finish.**

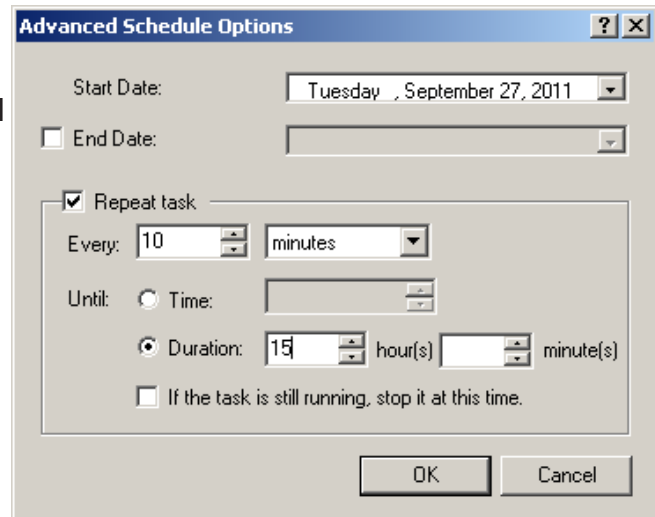


- Select the **Schedule** tab.
- Click the **Advanced** button.



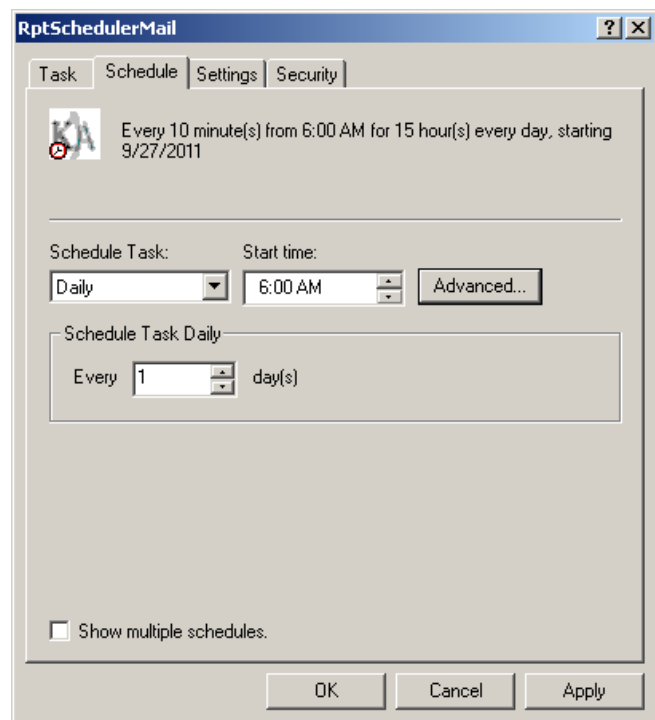
16. Check the **Repeat task** box and set the value to every 10 or 15 minutes.

17. Set the **Duration** to be enough time for all scheduled email reports to be generated.



18. Review the final settings indicated at the top of the **Schedule** tab and make any necessary adjustments.

19. Click **OK**.



## Set Up a Scheduled Report to be Emailed

1. Login to KeyAdvantage and select a report you would like to have automatically generated and emailed on a regular basis.

KeyAdvantage-->KeyBox Inventory Report-->[Auto SuperStore]

Report Criteria

Select by: KeyBox S/N  Select all in list

- 80007793
- 80024508
- 80024509
- 80032901

Inventory Status

- Active
- Inactive
- Lost

Battery Status

- All
- OK
- Low

Sort By: [Dropdown]  Descending

then by: [Dropdown]  Descending

then by: [Dropdown]  Descending

Schedule this report for email distribution View Error Log

Schedule

Description: KeyBox Inventory - Daily Format: Standard Report

Frequency: Daily Day/Date: [Dropdown] Time: 08:00 AM

Recipients: brian.hauge@fs.utc.com Add... Remove

All Schedules for this Report

#	Description	Frequency	Sort Option	Status
1	KeyBox Inventory - Daily	Daily		Queue