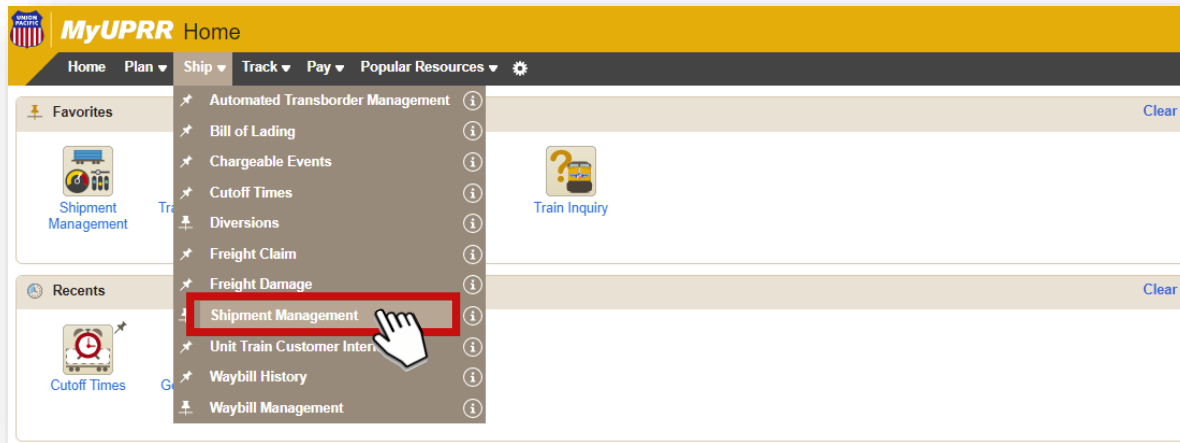# UTILIZING TEMPLATES TO CREATE A REPORT
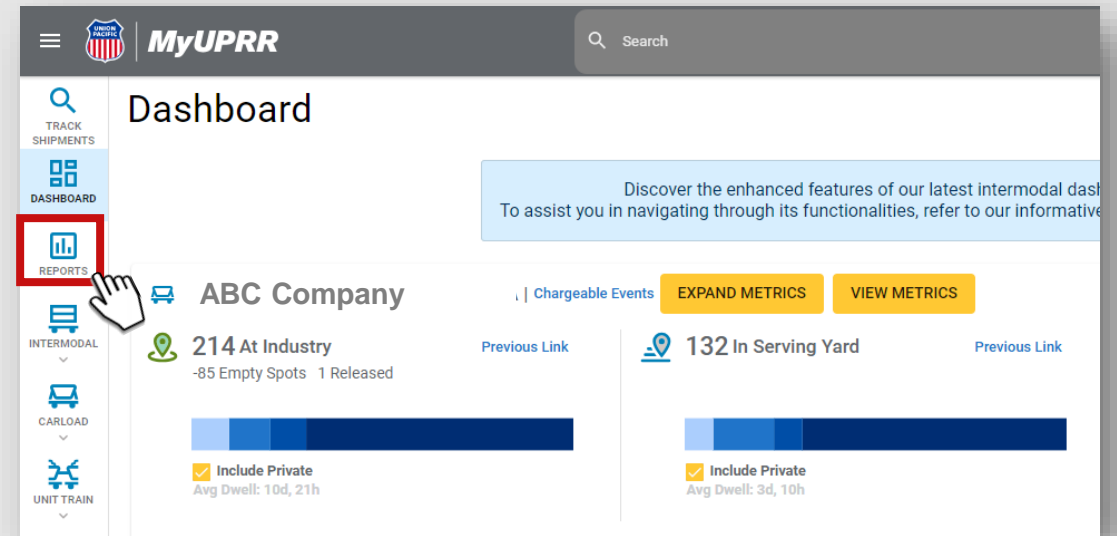
Access Reports with Ease

To access Reports, select **Shipment Management** on the Ship dropdown menu.

After accessing Shipment Management, navigate to **Reports** on the menu and click on it.
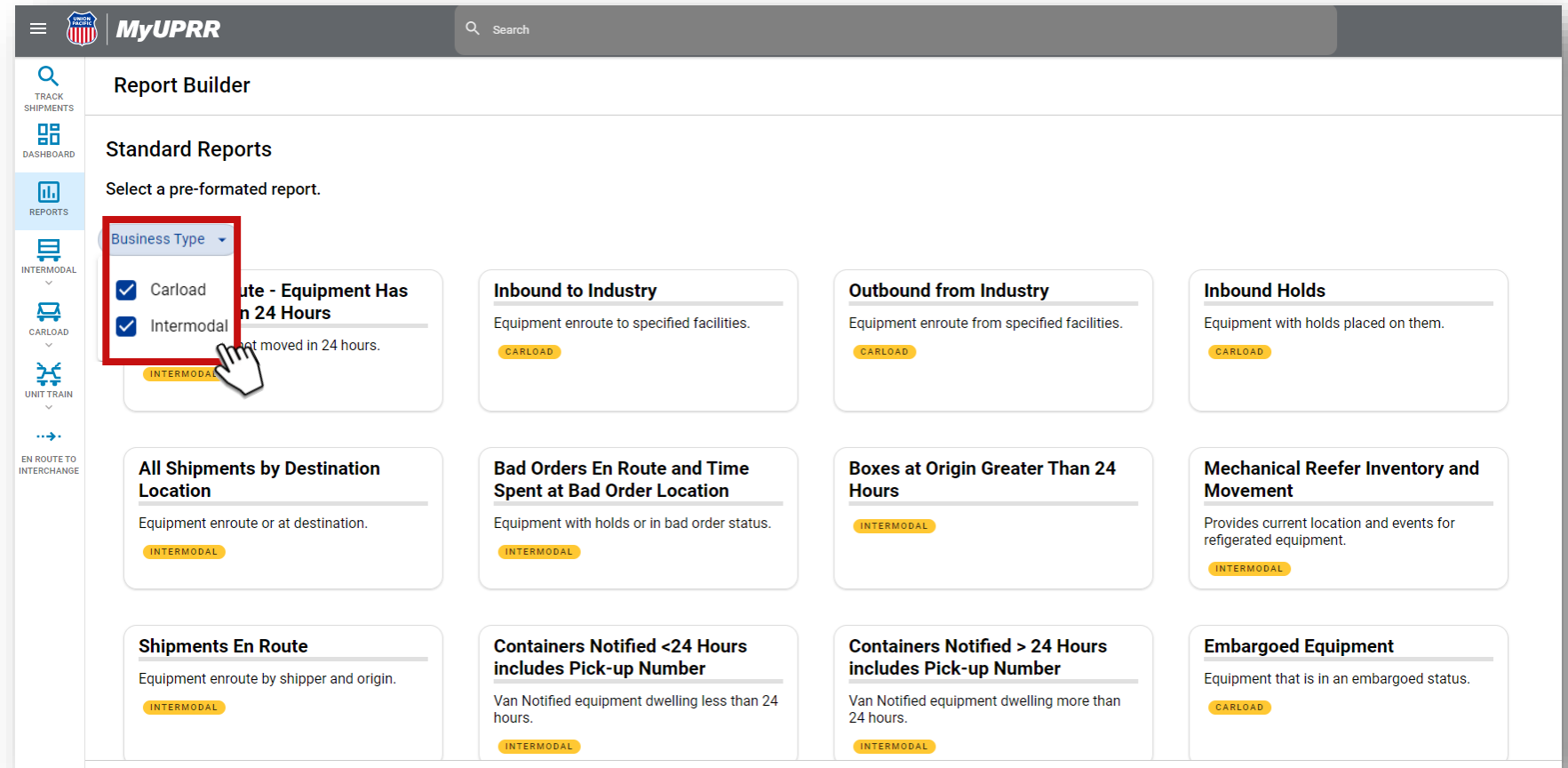
Effortlessly Create a New Report Utilizing Templates

To streamline the process of creating a report, we have developed report templates that simplify the task at hand. Getting started is as easy as clicking on the **New Report** button located in the right-hand corner.
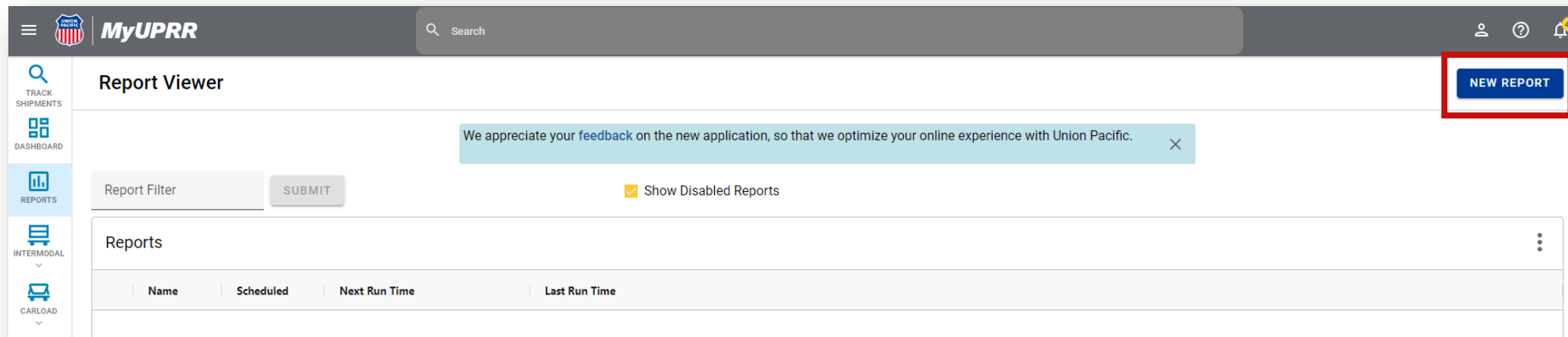
Effortlessly Create a New Report Utilizing Templates

By leveraging templates, you can save time and effort while ensuring consistency and quality in your reports. Click on the template you want to use.
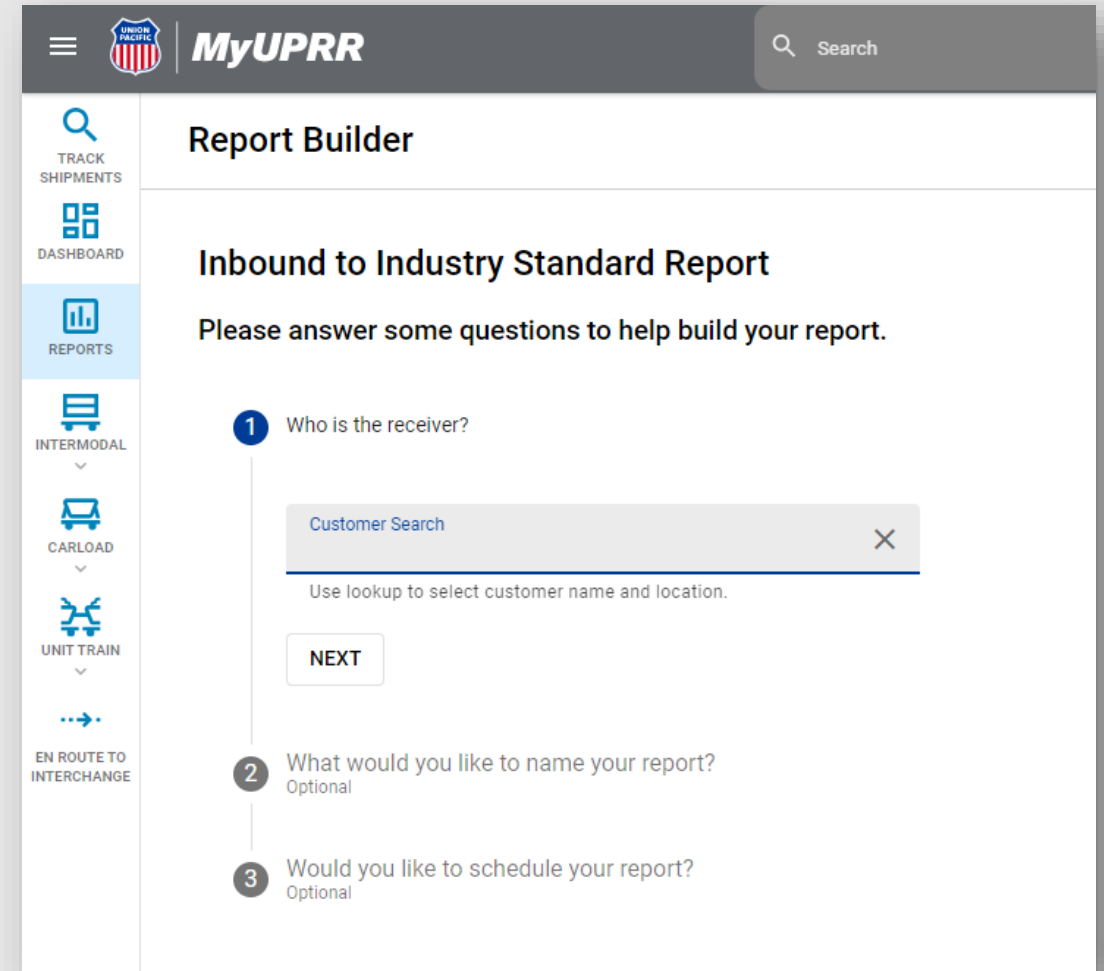
💡 Utilize the **Business Type** filter to easily narrow down the available templates to those that are specifically relevant to your business group.

Personalizing Your Report

- Once you have chosen a template, proceed to answer the provided set of questions to create and customize your report.

- After answering each question, click on the **Next** button to proceed.

Scheduling Your Report

Here are some useful tips to consider when scheduling your report:

- When selecting the days of the week, you have three options to choose from:
  - Weekdays
  - Everyday
  - Custom

- Selecting weekdays or everyday will automatically check the corresponding days.

- If you opt for the custom option, you will need to manually select the specific days of the week.

Scheduling Your Report

- Select the desired time for receiving your report. The following are two common scenarios:

  1. To receive the report once a day:
     - Start Time = the time you want to receive the report (e.g., 8:00 AM)
     - Send Every = 24 hours
     - End Time = the time you want to receive the report (e.g., 8:00 AM)

  2. To receive the report multiple times a day:
     - Start Time = the time you want to start receiving reports (e.g., 8:00 AM)
     - Send Every = the hours between reports (e.g., 4 hours)
     - End Time = the time you want to stop receiving reports (e.g., 5:00 PM)

Scheduling Your Report

- Choose the desired format for receiving the report:

- CSV

- HTML

- EXCEL

- Your user ID and email address will automatically populate in the corresponding fields.

- Once you have made your selection, click on the **SUBMIT** button to proceed.

Reviewing Your Report Selections

If you wish to make any changes, select the **EDIT** option in the corresponding section.

Click the **BACK** button to navigate to the previous page.

Click on the **PREVIEW** button to display a preview of the report before running or generating it. This allows you to preview the layout, formatting, and data to ensure it meets your expectations.

Click the **SAVE** button to save your report, preserving all the selected settings and configurations.

Click on the **SAVE AND CLOSE** button to save your report and close the editing interface. You will be directed back to the main Reports page.

Report Creation Success!

Congratulations on successfully creating your report!

You can now find your report conveniently listed on the Report Viewer page.

This page serves as a central hub where you can easily access and manage your reports.

Next Run Time shows the date and time when the next scheduled run of the report will occur.

Last Run Time indicates the date and time when the report was last generated.

Understanding the Report Viewer

Find reports easily by entering characters from the report name and submit.

Uncheck box to remove the disabled reports from your view.

By clicking the dropdown arrow next to the report name, a list of actions will appear. Here's a breakdown of the actions you can perform:

Run: Manually execute the report, and the results will be delivered directly to your email.

Clone: Share a copy of the report with your co-workers.

Edit: Make changes to your existing report.

Preview: display a preview of the report before running or generating it.

Disable/Enable: If you no longer wish to receive automated delivery of the report, you can choose to disable it. Conversely, selecting enable will resume the automated delivery.

Delete: If you no longer require the report, you have the option to permanently delete it. Please exercise caution when using this action, as it cannot be undone.