



REPORT SCHEDULER

Report Scheduler - Microsoft Dynamics CRM

IOTAP's Report Scheduler add-on enables easy scheduling of CRM data which is delivered automatically via email. It works from within CRM and requires no separate server. It allows scheduling of CRM Views (system as well as custom made) and sends them as reports in emails.

FEATURES

With Report Scheduler Add-on, any CRM user can schedule out-of-box System Views as well as user-created Personal Views and have them delivered regularly in their mailboxes on any scheduled day and time.

- Interface to set-up recurring and automated email of CRM data on a periodic basis
- Event Reminder (Birthday \ Anniversary \ Contract expiry \ Opportunity close date approaching, etc.)
- Allows Grouping and Sorting of records
- Scheduled data back-up in the form of .csv or .txt files
- Users can easily receive CRM data in few clicks without any IT support
- No dependency on separate Report Server
- Mobile Friendly (option to have the data sent in the body of the email)
- Direct navigation to CRM records from email via a click link
- Handles scheduling across multiple time-zones
- Takes care of all visibility rules set in Microsoft CRM
- Can send the data even to non-CRM user email addresses
- Secured Distribution allows blocking of any email addresses and any domain from receiving your scheduled reports.
- Customizable email template allows adding of corporate logos, color, typefaces, signatures and other brand related images.
- Microsoft Platform Ready for Microsoft Dynamics CRM 2011
- Using Report Scheduler Add-on, any CRM user can schedule out-of-box System Views as well as user-created Personal Views and have them delivered regularly in their mailboxes on any scheduled day and time.

WORKS WITH

Write to us for [FREE TRIAL](#) or [DEMO](#)

- Dynamics CRM Online
- Dynamics CRM On-Premise (Requires Update Roll-Up 12)
- IFD
- Partner-hosted

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Washington DC ★ Milton Keynes ★ Dubai ★ Muscat ★ Mumbai

SCREENSHOTS

From: [redacted]@padrestotap.onmicrosoft.com
 To: [redacted]
 Subject: [Daily Lead Report][Sunday11:00 AM][Sumeet Ballani]
 Message: [Daily_Lead_Report_3_24_20131100 AM.html (4 KB)]

Report: Daily Lead Report
 Date: 3/24/2013 11:51:34 AM
 Owner: L. A. eed E "su"

Click [here](#) to view the data in CRM

Name	Topic	Status	Reason	Created On
Susanna Stubberod (sample)	Mailed an interest card back (sample)	New		02/03/2013
Nancy Anderson (sample)	New store opened this year - follow up (sample)	New		02/03/2013
Maria Campbell (sample)	Interested in online only store (sample)	New		02/03/2013
Peter Houston (sample)	Good prospect (sample)	New		02/03/2013
Ivan Komashinsky (sample)	Interested in our newer offerings (sample)	New		02/03/2013
Lidman Anna (sample)	Some interest in our products (sample)	New		02/03/2013
Robin Counts (sample)	Likes our products (sample)	New		02/03/2013
Counts Yong (sample)	Follow-up with information regarding our promotions (sample)	New		02/03/2013
Debra Garcia (sample)	Store is expanding - send new literature (sample)	New		02/03/2013
Yvonne McKay (sample)	New store opened this year - follow up (sample)	New		02/03/2013

Regards,
Management

IOTAP Custom Header with Corporate logo

Report: Preview
 Date: 3/24/2013 11:50 PM
 Owner: User
 Comment: Comment lines

Sr. No.	Link	Account Name	Main Phone	Address 1: City	Primary Contact	E-mail (Primary Contact)
1	Link	Account 1	XXX-XXX-XXXX	City1	Contact1	contact1@email.com
2	Link	Account 2	XXX-XXX-XXXX	City2	Contact2	contact2@email.com
3	Link	Account 3	XXX-XXX-XXXX	City3	Contact3	contact3@email.com
4	Link	Account 4	XXX-XXX-XXXX	City4	Contact4	contact4@email.com
5	Link	Account 5	XXX-XXX-XXXX	City5	Contact5	contact5@email.com

Thanks & Regards,
Sumeet Ballani

CRM Implementation: sballani@iotap.com | www.iotap.com | <http://in.linkedin.com/in/sumeetballani>

Custom Footer

Report Scheduler
 [Upcoming Birthdays][Mon - 9:00 AM][Sumeet Ballani]

Select Entity: Contact
 Select View: Upcoming Birthdays
 Additional Filters: Upcoming Birthday Filter
 Filter: Upcoming Birthday Filter
 Next X day's: 7
 Schedule: Sun [], Mon [], Tue [x], Wed [], Thu [], Fri [], Sat []
 Time*: 9:00 AM
 Last run at: 4/28/2013 9:17:48 AM
 Next run at: 4/29/2013 9:00:00 AM
 Delivery Options: Attachment [], Inline [x], Render Format: HTML

Report Scheduler
 New

Select Entity: Lead
 Select View: Daily Leads Report
 Owner*: Non-Admin1 #
 Schedule: Sun [], Mon [], Tue [x], Wed [x], Thu [x], Fri [x], Sat [], Sun []
 Time*: 4:00 PM
 Delivery Options: Attachment [x], Inline [x], Include Link [x], Render Format: CSV

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