

How to Create Scheduled Reporting for Dashboards and Reports

You can configure reports to send according to a predefined schedule. This guide shows how to do this in the Schedule Report window.

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What are the benefits of creating scheduled reports?

MSPbots offers a scheduled reporting feature that enables users to set specific conditions such as a specific time and schedule. Users can automatically receive the latest dashboard or report at the scheduled time. Depending on the mapping between email and company, users can choose to display unfiltered data or company-specific data in the scheduled report.

Automating scheduled reports to be sent according to a preferred schedule helps MSPs become time-efficient by eliminating the need for manual report generation and distribution. Also, when reports are generated and sent at regular intervals, you ensure clients receive updates in a timely and predictable manner.

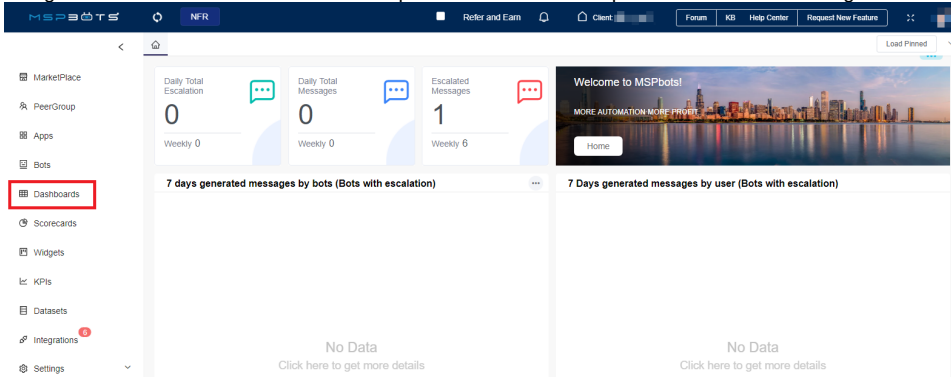
Required integrations and permissions


You can set up dashboards and reports for all [MSPbots apps](#), [BI packages](#), and applicable [integrations](#). Only users with admin permissions can create dashboards and reports. If you don't have enough permissions, contact your administrator for help.

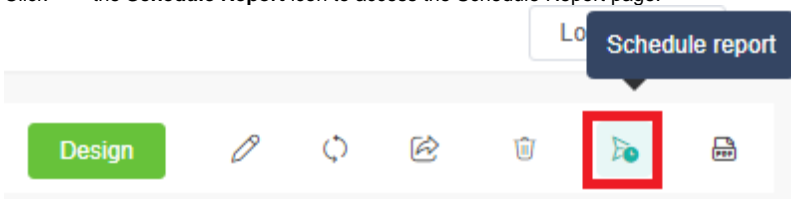
How to set up a scheduled report

Follow these steps:

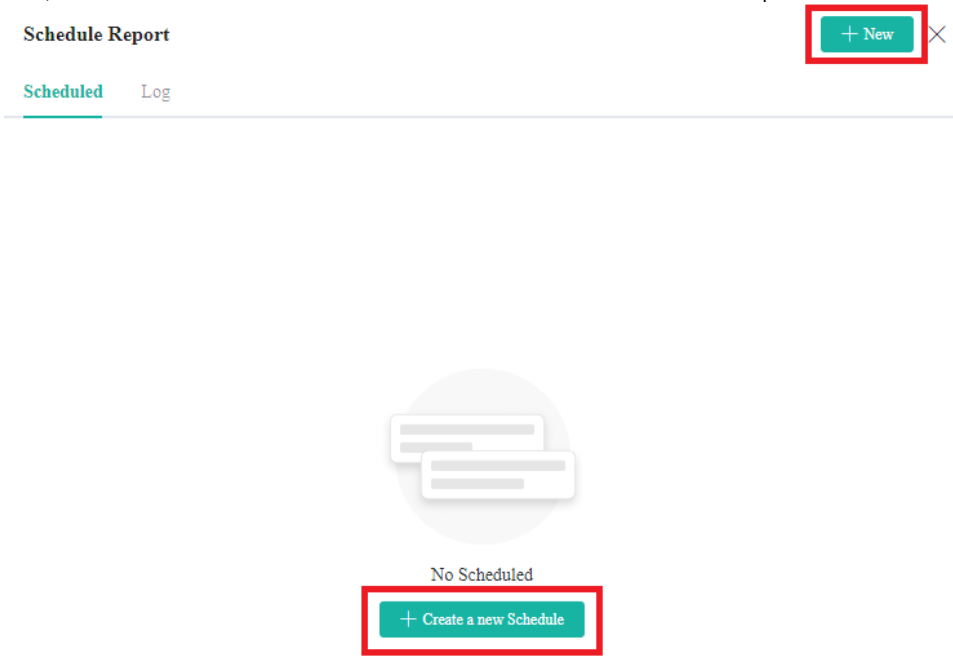
1. Open the **MSPbots** app as administrator.
2. Navigate to **Dashboards** on the menu and open the dashboard or report that needs to be configured for a new schedule.



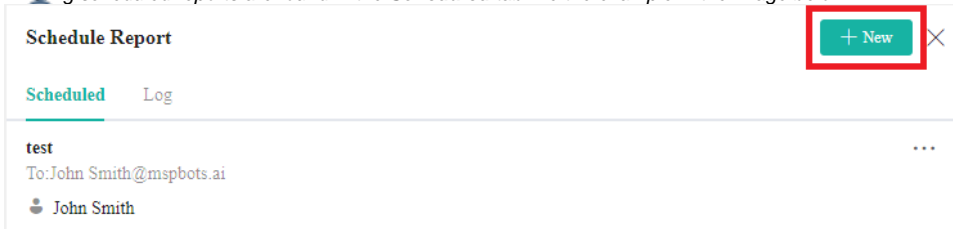
3. Click  the **Schedule Report** icon to access the Schedule Report page.



4. Next, click the **+New** button or the **Create a New Schedule** button. Both actions will open the New Schedule window.



Existing scheduled reports are found in the **Scheduled** tab like the example in the image below.



- Enter a unique **Schedule Name** in the New Schedule window. The recipient's name is used as the default Schedule Name when the field is left blank.

←

New Schedule

×

Schedule Name

Optional - Recipients would be used as name if left blank.

Delivery options

☒ Email

Email recipient(s)

Enter recipient emails

CC BCC

☒ Send filtered dashboard for the associated company of each recipient.

PSA

Frequency

America/Chicago

Starting at

12-09-2023

10:15:12

Repeat every

1

Hour

Repeat every

1

Hours

from hour

to

on day of week

Select

Advanced Scheduler

Setting →

Attachment

The default delivery option is to send via email. There is no support for other options or customization at this time.

- Go to the **Email recipient(s)** dropdown menu and select the emails of the recipients. You can select multiple email addresses.
 - Send carbon copies or blind carbon copies of your report by clicking the **CC** or **BCC** links. You can also select multiple email addresses from these dropdown lists.
 - Optional: Select the option **Send filtered dashboard for the associated company of each recipient** if you want to send scheduled reports with filters for the recipients' mapped company. This option appears only when there is a slicer with QueryParams="Company" in the dashboard. If selected, you need to configure the PSA by selecting **Autotask**, **ConnectWise**, **Kaseya**, **Syncro**, or **Halo**. For the complete prerequisite information for sending filtered dashboards, go to the section on [prerequisites for using the company's PSA](#).
 - Optional: Enable **Save Slicer** to apply the selected slicers to the scheduled reports. This option only appears when your dashboard has slicers except the Company Slicer.

Save Slicer

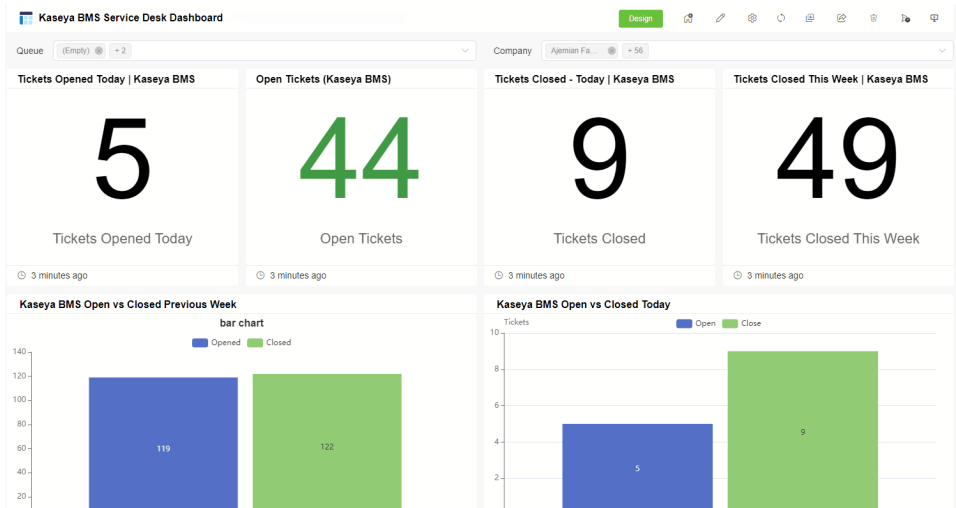
Save current slicer(s) selection and apply in scheduled reports.

Kaseya BMS Queue Slicer

Queue

(Empty) + 2

The **Save Slicer** option is enabled by default. When enabled, the current slicer list will be applied to scheduled reports. The slicers on this list are those you added when you created your report and dashboard. If you need to modify the slicers, go to the dashboard and click **Design > Add Widget** to add or delete slicers.



7. Set the **Frequency** for sending the report.
- If needed, customize the time zone according to different locations and preferences worldwide.
 - Select **Advanced Scheduler** > **Setting** to configure how often you want to send your report.


The 'New Schedule' window shows the following configuration:

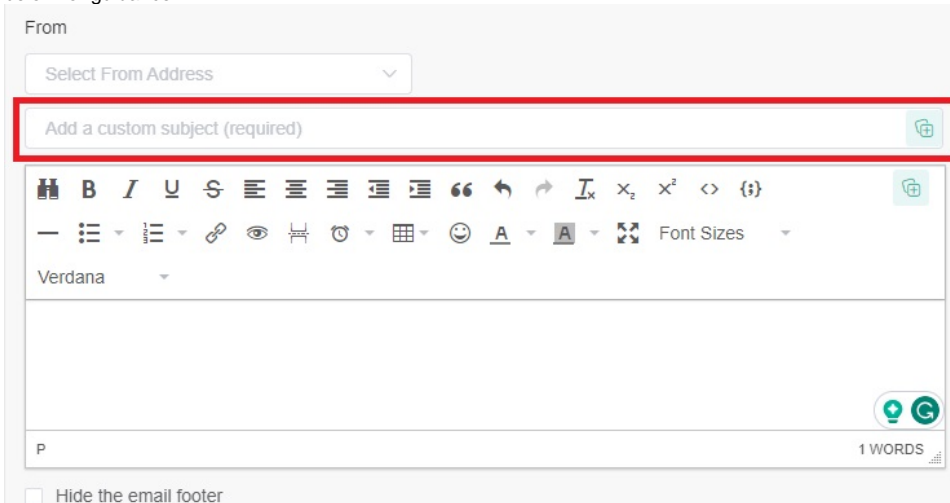
- Starting at:** 2023-10-16, 18:32:28
- Repeat every:** 1 Hour
- Repeat every:** 1 Hours
- from hour:** [empty] **to:** [empty] **on day of week:** Select
- Advanced Scheduler** (selected) with a **Setting →** link.

8. Next, select the sender's email from the **From** dropdown list.


The email composition window shows the following elements:

- From:** A dropdown menu with 'Select From Address' highlighted.
- Add a custom subject (required):** A text input field.
- Rich Text Editor:** Includes bold, italic, underline, link, unlink, list, indent, outdent, quote, unquote, undo, redo, text color, background color, font size, and font family (Verdana) options.
- Footer:** A checkbox to 'Hide the email footer'.


9. Then, type an appropriate subject in the **Add a custom subject** field, and click the  add token icon. You can refer to the token descriptions below for guidance.

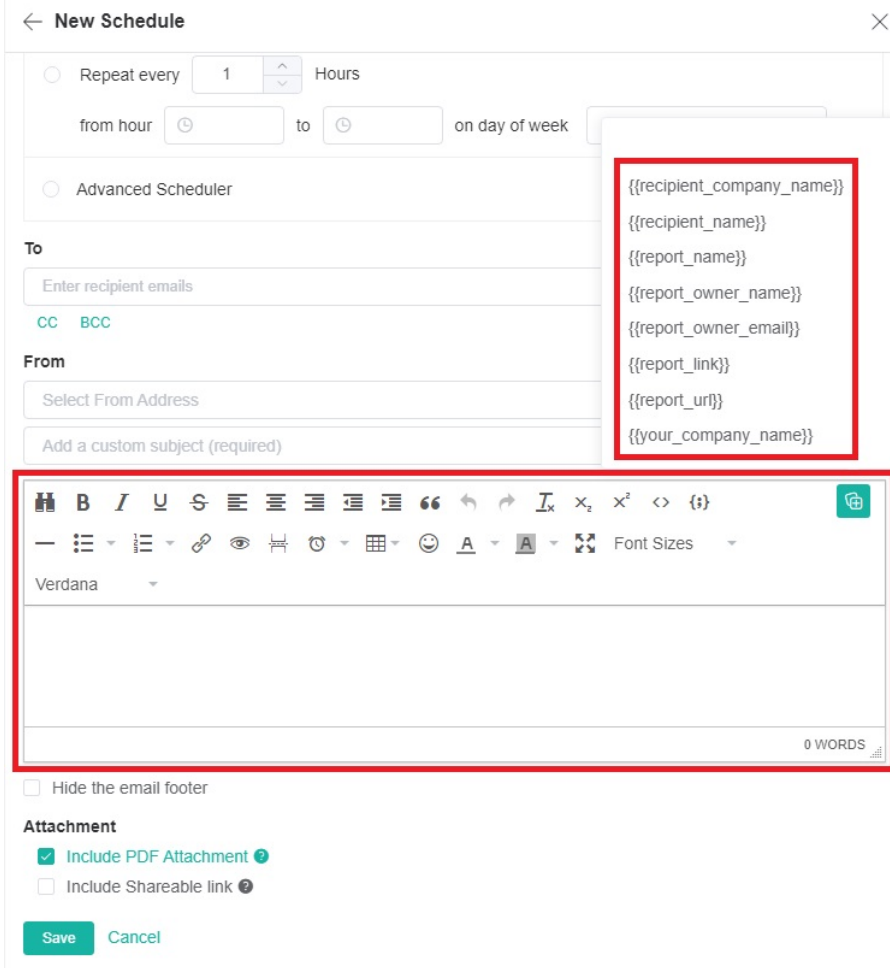


- **{{recipient_company_name}}** is for the recipient's company name.
- **{{recipient_name}}** is for the recipient's full name. Use first name and last name if the full name is not available.
- **{{report_name}}** is for the dashboard's name.
- **{{report_owner_name}}** is for the dashboard owner's name.
- **{{report_owner_email}}** is for the dashboard owner's email address.
- **{{report_link}}** is for the dashboard link. This link in the email is clickable; when you click on it, you will be directly taken to the dashboard.
- **{{report_url}}** is for the dashboard's plain text URL. This URL in the email cannot be directly clicked to redirect to the dashboard. If you need to access it, you will need to copy the URL and open it in a browser.
- **{{your_company_name}}** is for the sender's company name. Select a token for the email subject from the list.



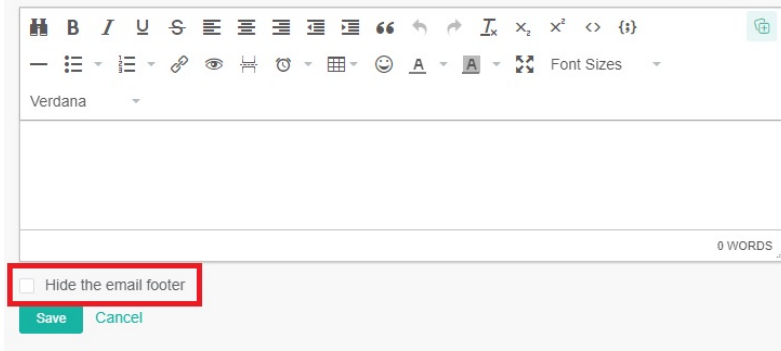
- If your PSA is selected, you can get the values for **{{recipient_company_name}}** and **{{recipient_name}}** from the contact data in Autotask, ConnectWise, Kaseya, Syncro, or Halo.
- If your PSA is not selected or the values for **{{recipient_company_name}}** and **{{recipient_name}}** cannot be obtained, set these values to null.

10. Next, type the report body and click  to add a token. Refer to the descriptions above as a guide.



The screenshot shows the 'New Schedule' form. The 'To' field is highlighted with a red box, and a dropdown menu is open showing a list of tokens: {{recipient_company_name}}, {{recipient_name}}, {{report_name}}, {{report_owner_name}}, {{report_owner_email}}, {{report_link}}, {{report_url}}, and {{your_company_name}}. The 'From' field is also highlighted with a red box. The 'Attachment' section is visible at the bottom, with 'Include PDF Attachment' checked. The 'Hide the email footer' checkbox is also visible and highlighted with a red box.

11. Optional: Click on the **Hide the email footer** checkbox to hide the footer on the email.



The screenshot shows the 'New Schedule' form with the 'Hide the email footer' checkbox highlighted by a red box. The 'Attachment' section is visible at the bottom, with 'Include PDF Attachment' checked. The 'Save' and 'Cancel' buttons are also visible.

12. Move down to the **Attachment** section and select an option for your reporting requirement:

- **Include PDF Attachment** - Select this option to send your report in PDF format. This is the default selection.

- **Include Shareable link** - Select this option to automatically add the `{{report_link}}` token to attach your dashboard's link to the email. The placeholder `{{report_link}}` represents the actual dashboard link.

New Schedule

Starting at: 2023-10-16 18:32:28

Repeat every: 1 Hour

Repeat every: 1 Hours

from hour: to: on day of week: Select

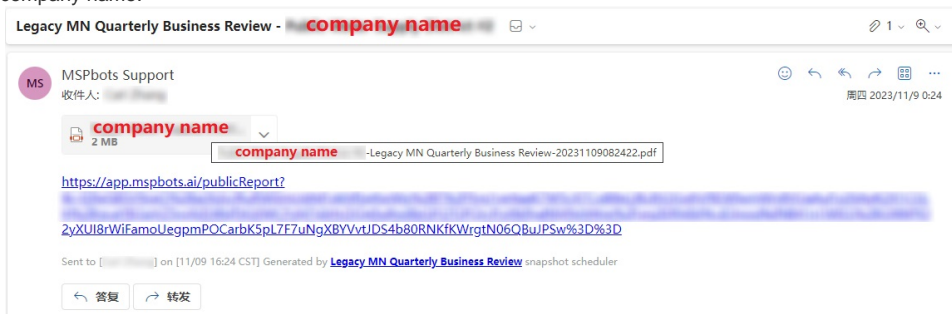
Advanced Scheduler: 0 30 * ? * 2/1 *

Attachment:

- ☒ Include PDF Attachment
- ☐ Include Shareable link

13. Click **Save** to keep the settings.
14. The recipients will receive schedule report emails according to the frequency you have set. If the dashboard contains a slicer with `QueryParams="Company"`, in order for the recipients to clearly identify the source of the scheduled reports regarding dashboards or reports sent via email, both the email subject and the PDF report file name include the company name obtained from the slicer with `QueryParams="Company"`.

If the dashboard does not include a slicer with `QueryParams="Company"`, the scheduled report received by recipients does not display the company name.



- After successful creation, the **Scheduled** tab displays the following information.
 - Report Name
 - Last Sent Timestamp
 - Frequency
 - Next Scheduled Time
 - Recipients
 - Saved Slicer(s)

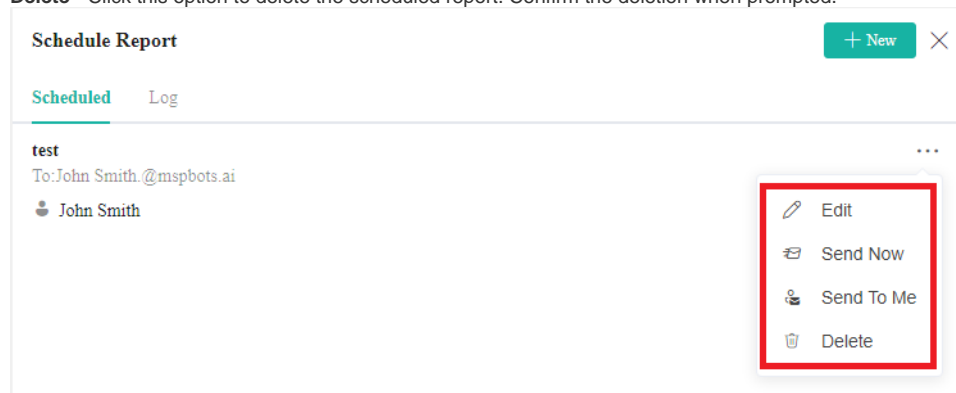
Schedule Report

Scheduled Log

Report Name	Last Sent Timestamp	Frequency	Next Scheduled Time	Recipients	Saved Slicer(s)
test	To: John Smith@mspbots.ai	John Smith			

- If you need to configure the report schedule, click the **...** ellipsis button on the right to see the available actions.
 - **Edit** - Click this option to modify the information of the scheduled report. When you're done, click **Save**.
 - **Send Now** - Click this option to send the scheduled report email to the recipients.
 - **Send To Me** - Click this option to send the scheduled report to your email. You can use this option to preview the report before it is sent to clients or teams.

- **Delete** - Click this option to delete the scheduled report. Confirm the deletion when prompted.



How to share a filtered dashboard with company-specific data

The PSA feature lets you share company-specific data using your company's PSA. To share a filtered dashboard:

1. Follow the steps for How to set up a scheduled report.
2. In [Step 6](#), select the option **Send filtered dashboard for the associated company of each recipient**.
3. Complete the steps as described and save.


The PSA feature will only work if the following prerequisites are satisfied:

1. The user utilizes **Autotask**, **ConnectWise**, **Kaseya**, **Syncro**, or **Halo** for ticket handling.

2. The field for **company_name**, **account_name**, or **name** is added to the columns display for the Dataset of the dashboard slicer.

Dataset ×









Dataset:

ConnectWise Manage / ConnectWise Manage Contacts - API ⌵ 

Show datasource name as


Columns Display:

Select All Clear All ☐ Keep Column

Column Name		Alias	Business Type	
id	fx	Id	Number	 
tenant_code	fx	Tenant Code	Number	 
contacts_id	fx	Contacts Id	Number	 
company_name	fx	Company Name	Text	 

Dataset ×







Dataset:

Kaseya BMS / Kaseya BMS Contacts Emails - API ⌵ 

Show datasource name as


Columns Display:

Select All Clear All ☐ Keep Column



Column Name		Alias	Business Type	
id	fx	Id	Number	 
tenant_code	fx	Tenant Code	Number	 
account_name	fx	Account Name	Text	 

3. The client has a mapping relationship between the email and company or account name using the datasets below. MSPbots uses this mapping to sync the data from the client's PSA account.



- Dataset for Connectwise: **ConnectWise Manage Contacts - API**

 **ConnectWise Manage Contacts - API** ?

Detail Data Fields Linked Widgets (0) Linked Bots (0) Logs

Data Grid view  

Drag a column header here to group its column

 PDF Export  CSV Export

email	company_name

- Dataset for Autotask: **Autotask Contacts - API**

Autotask Contacts - API

Detail **Data** Fields Linked Widgets (1) Linked Bots (0) Logs

Data Grid view

Drag a column header here to group its column

PDF Export CSV Export

email_address	additional_address_information	phone	company_name

- Dataset for Kaseya: **Kaseya BMS Contacts Emails - API**

Kaseya BMS Contacts Emails - API

Detail **Data** Fields Linked Widgets (0) Linked Bots (0) Logs

Data Grid view

Drag a column header here to group its

Excel Export PDF Export CSV Export

created_by	email_address	created_on	account_name
		2021-08-10T16:32:49Z	
		2023-04-30T17:48:06Z	
		2022-04-20T12:06:45Z	

- Dataset for Syncro: **Syncromsp Contacts - API**

Syncromsp Contacts - API

Detail **Data** Fields Linked Widgets (0) Linked Bots (0) Logs

Data Grid view

Drag a column header here to group its column

PDF Export CSV Export

id	state	email	account_id	phone	name
118		@mspbots.ai			
106		@126.com			

- Dataset for Halo: **Halo Users - API**

Halo Users - API

Detail **Data** Fields Linked Widgets (0) Linked Bots (0) Logs

Data Grid view

First 100 Row Filter Default Sort

Drag a column header here to group its column


PDF Export CSV Export


initials	telpref	sitephonenumber	site_name	colour	email_address	name	site_id	neversendemails
GU	0	Unknown	Unknown	#E27300		General User	1	false
GU	0	01234 567 890	Main	#f0c400		General User	2	false
U1	0		Main	#e83c4a	@halopsa.com	User	18	false
GU	0		Main	#e83c4a		General User	18	false
AW	0		Main	#e83c4a	@mspbots.ai		18	false


The Scheduled Report feature will not send a report to the email addresses if the company is not mapped in the dataset.


4. In the dashboard slicer's Widget Builder window, the user must input the word "Company" (case-sensitive) in the **QueryParams** field under the config tab.

Widget Builder









Text

Company Name

Value

Company Name

QueryParams

Company

Related Topics

- [How to Create and Use Dashboards in MSPbots](#)
- [How to Create and Use Reports in MSPbots](#)
- [How to Add Your Screen to the MSPbots Device List](#)
- [How to Share Financial Dashboards with Non-financial Admin Roles](#)
- [How to Share A Dashboard Using the Embed Function \(HTML\)](#)
- [Presenting Dashboards Using the Rotating Dashboard View](#)
- [How to Share a Dashboard Using the Shareable Link Function](#)