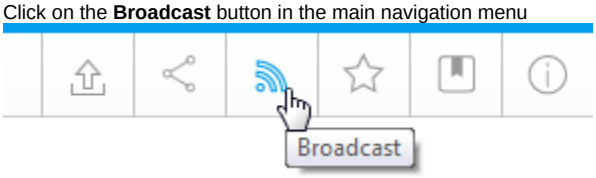
FTP Schedule

- Overview
- File Name & Type
- FTP Details
- Filters
- Delivery Rule
- Schedule
- Save

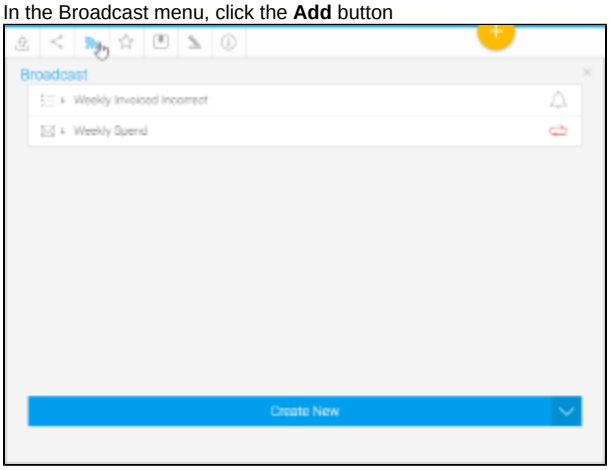
Overview

top

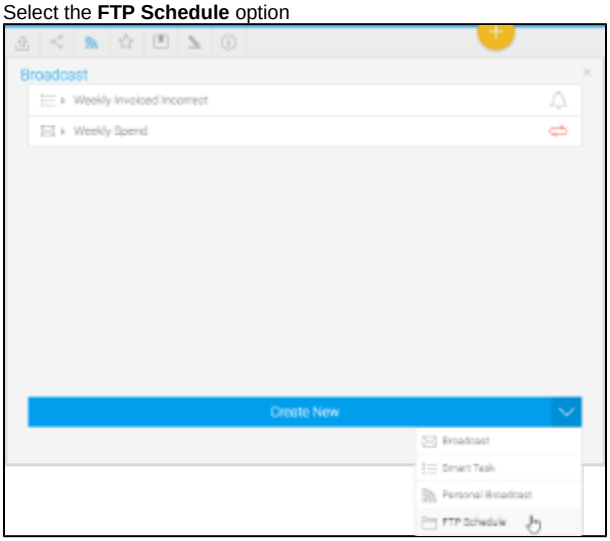
1. Ensure your report is Active (not in Draft Mode)
2. Click on the **Broadcast** button in the main navigation menu



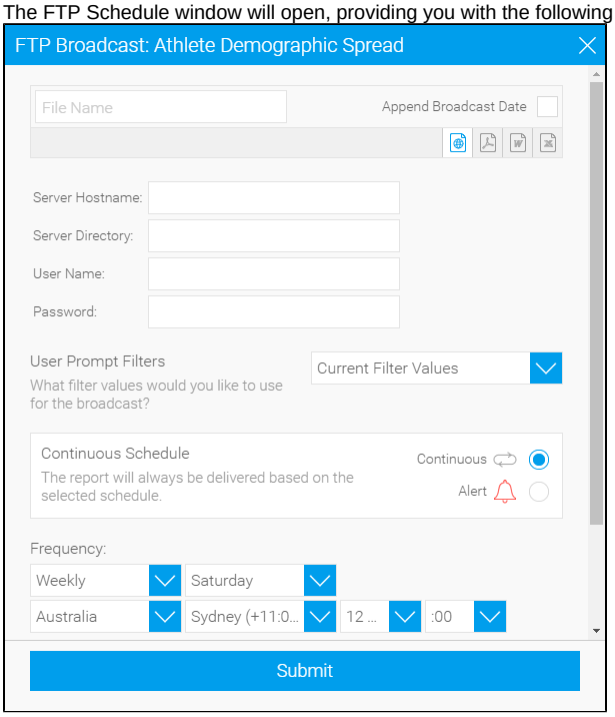
3. In the Broadcast menu, click the **Add** button



4. Select the **FTP Schedule** option



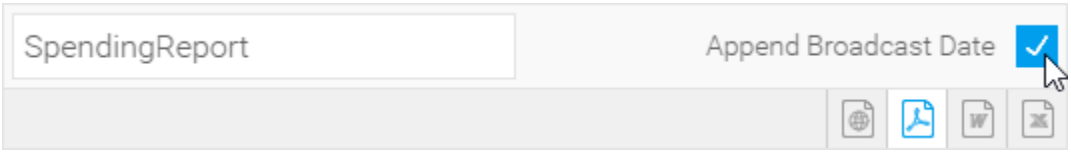
5. The FTP Schedule window will open, providing you with the following options:



File Name & Type

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1. Select the format you wish the report to be sent as, from the list of; **HTML**, **PDF**, **DOCX**, **XLSX**.
2. Provide a file name (no file extension required, just the name, eg. SampleReport)
3. Tick the **Attach Broadcast Date** if you wish this to be included in the file name



FTP Details

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The following details are required to send a report via FTP:

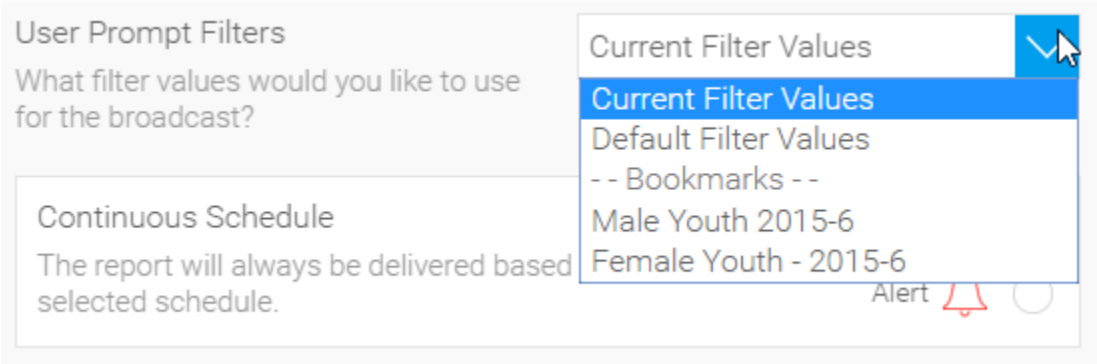
Server Address	This is the address in which the server you are uploading the report to sits
Server Directory	This is the directory where you want the report to be sent to on the server.
User Name	This is the username of the server you are trying to access.
Password	This is the password of the server you are trying to access.



Filters

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If your report contains filters you will have the option to select which of these are applied to the FTP Report. The options include:

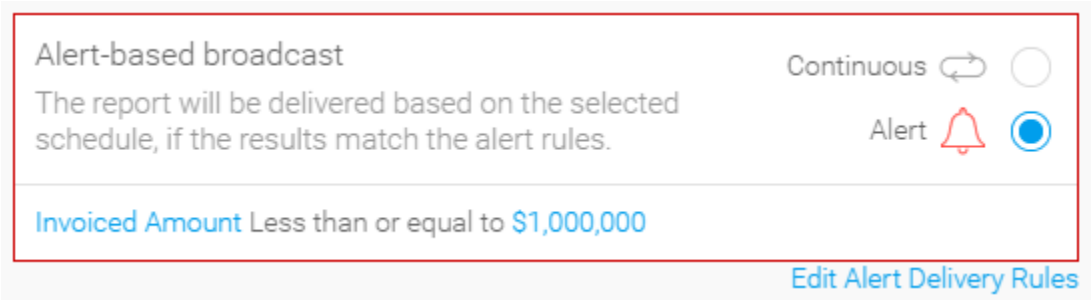
1. Current Filter Values
2. Default Filter Values
3. Saved Filter Set Values (there will be a list of available sets displayed)



Delivery Rule

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A Delivery Rule is used for exception reporting. If you wish to send a report only if it meets certain criteria (for example: Revenue is less than 100,000) then you will need to add a rule.

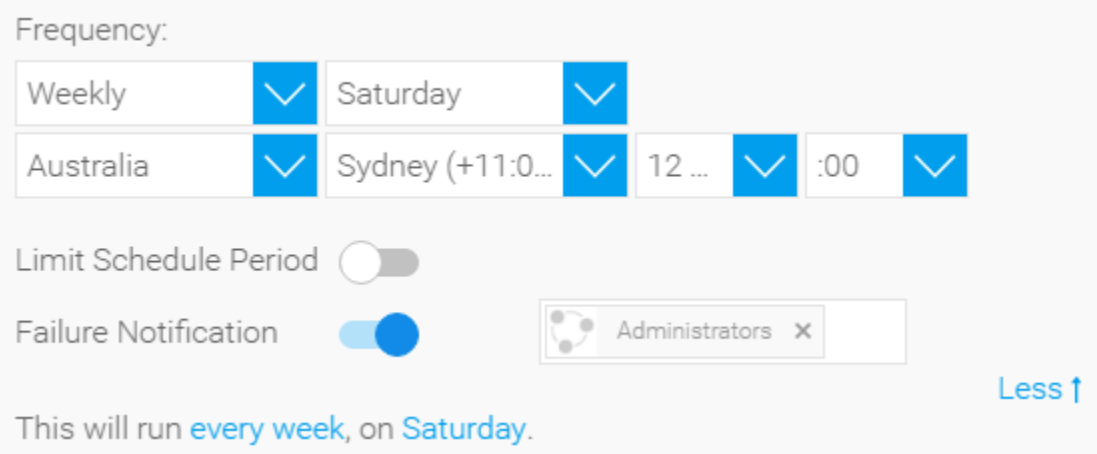
1. Change the **Always Send** drop down list to **Only if Delivery Rule met**
2. Click on the **Click here to add rule** link
3. You will now have the choice of building a rule based on:
    a. If one or more rows match the rule (e.g. is there a transaction less than $1000) OR
    b. If the totals for the report match the rule (e.g. are the total sales less than $100000)
4. Select the field you wish to apply the condition on, click **Add**, and apply your condition. Click **Update** to save it. You can add multiple conditions here if required.
5. Click **Save & Close** to apply your condition(s)
6. Your rule will now be displayed on the FTP Schedule window



Schedule

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The last step is to define the schedule for your Broadcast

1. Select the frequency.
   Depending on the option selected here, you may be required to provide further details. For example, if Fortnightly is selected, you will be prompted to select either the first or second week of the fortnight to send in, as well as the day of the week.
2. Apply Advanced Settings (if required)
   Sometimes you may find you need to set the Time Zone, and local time for delivery. This can be accomplished by selecting the **Advanced** check box and defining the time.

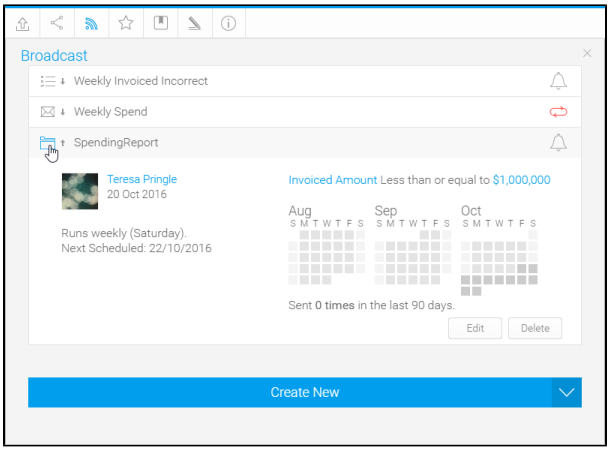


Save

top
Click on the Save button to complete the Broadcast set up.



You will now be able to view your schedule through the main menu.



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