

Topic: **SETTING UP AUTOMATED CLOUD REPORTING**

This tutorial steps through the processes of setting up pre-configured ‘Saved Reports’, creating Cloud Drive connections and configuring Scheduled Jobs to automate the process in Uniwell Lynx.

FAQ: What factors do I need to consider prior to setting up automated cloud reporting?

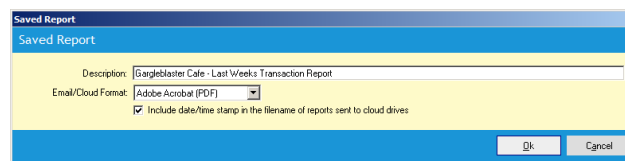
- The reports you want to be sent – including the report type, the standard date range you want to report for, and whether there are any selection criteria you want the report to reflect.
- Who you want to receive the report – do you have a cloud service that both you and they can access?
- How often you want to send out the report.

*Examples:*

- Each night after your café closes (and Sales have been collected from the POS), you want a ‘Dashboard Report’ for that day to be sent to your own cloud drive.
- Every Monday you want a ‘Best Sellers Report’ for the previous week to be sent to both the floor manager and head chef.
- On the first Tuesday of each month, your accountant wants Transaction and Weekly KPI Reports for the previous month.

FAQ: How do I set up a ‘Saved Report’ in Uniwell Lynx?

- Go to the ‘Reports’ screen (Sales, Stock, Manager etc.) and choose the report you wish to send.
- Select a preset date range and choose filters, options and sorting & grouping settings as required.
- Once the report is configured the way you want, click ‘Save’ on the bottom left of the screen.
- Give the Saved Report a descriptive name, select the format and whether you want exported reports date/time stamped (if not selected, each time this report is exported it will overwrite the previous)



FAQ: What is required to set up a ‘Cloud Drive’ connection in Uniwell Lynx?

- If you haven’t already, sign up for a cloud storage service such as Dropbox or Google Drive.
- Create a cloud folder for exported reports.
- In Uniwell Lynx, go to the Setup menu > Cloud Drives and add a Cloud Drive connection – select the local version of the newly created folder for exported reports, and give the connection a description. (eg. ‘C:\Users\[USER]\Dropbox\Uniwell Lynx Reports for Arthur Dent’ – “Reports for Manager”)

FAQ: How can I create a ‘Scheduled Job’ that automatically generates the required reports?

- In Uniwell Lynx, go to the Communications menu > Scheduled Job and add a new job.
- Give the job a name (eg. “Weekly reports for Arthur”), set the initial time for execution, tick “Repeat Schedule” and set the desired frequency.
- In the ‘Email Saved Reports and/or Send to Cloud Drive’ box (lower right section of the screen), select the Cloud Drive connection(s) and Saved Reports you wish to be sent.
- *Note: You do not need to enable any POS communication for this scheduled job to occur.*

FAQ: Once everything is set up, what do I need to do for the automated cloud reporting to work?

- Uniwell Lynx must be running at the time the schedule is set to execute the job – otherwise, the job will be run the next time the software is opened.
- Reports generated by Uniwell Lynx are exported to the local version of cloud folder, and will be synchronised with the cloud when there is an internet connection and the cloud service is enabled.