Locally: Creating Scheduled Report

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Notices

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# Overview

Gearfire Retail provides this document as a high-level guide to creating an inventory scheduled report within AXIS. Base knowledge of AXIS is assumed.

Scheduling a Report

For use with the program Locally, a Dealer will want to schedule a Value on Hand (VoH) report from within AXIS. This will then be used to send an emailed export to Locally using the individual Dealer’s upload email provided to them from within Locally.

### Locally

Dealer should sign into Locally [here](https://locallyus.us.auth0.com/u/login?state=hKFo2SBUTV9vMjliSjVmQmNTSVNlcWpsS2lxS1Zxc3NaT3BkWKFur3VuaXZlcnNhbC1sb2dpbqN0aWTZIEQ1cFFQVGxyMGUtVXhxZ2tEVjFUcF9YdmowUGtCanJqo2NpZNkgaDVGOEwyQVM4cGZ1ZHJHWlNYV1BHbDlhSkFBaHdSUDg)

Select Inventory from left hand menu

Select Inventory Feed Setup

Choose Email Method

This will provide the Dealer with their Locally feed email to input into AXIS

 Copy the feed email and put it somewhere safe until its entered into AXIS

 It should be in the format of feeds.xxxxxx.xxxxxxxxxx@robot.locally.com.

### AXIS

Login to Datacenter

Select Reports

Select Inventory Reports > Value on Hand from sub-menu

Select the Calendar Icon next to the Custom View window

Select Grid Export

Click Add New

Give it a name and description

 Recommend name contains Locally so it is known what the view is for

Leave the default time for Today

Submit to save changes

Select Close to go back to the VoH Report

From Reports > Scheduled Reports

Select Scheduled Reports

Click Add Report

Select newly created report for Locally Feed

Select Submit

Select Edit on the Report > Schedule

Select Recurrence Pattern > Hourly

Fill in the Hourly on minute to schedule the actual time hourly the report will run

Tab or click out of box to activate Submit button

Select Submit

Select Edit on the Report > Emails

Top window of Email Addresses

Fill in email gained from Dealer Locally site for file upload of inventory

 Fill in any other emails wanting the hourly report

Click Add Emails

Click Submit

Click the Active checkbox next to the Report to activate the scheduled report to run

At the time scheduled for the report, please ensure that the report runs as intended and the Dealer should check their locally feed to show that the inventory is being uploaded.

 This should be found in Locally under Inventory > Upload History