



Multi-ECR Report Scheduler

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REPORT SCHEDULER

- Users have the option to create and save more than one profile to the Employee Commission (Multi-2010+) report. See [CREATING A PROFILE](#)
- Profiles can be created for specific markets, business lines and/or brokers.
- Saved profiles are not specific to commission periods and can be used for any commission period.
- Profiles can also be scheduled to automatically generate reports. See [SCHEDULING AND EMAIL OPTIONS](#)

The image displays two screenshots of the JLL 'Run Multiple ECR' report scheduler interface.

Top Screenshot: Basic Configuration

- Header:** JLL logo and 'Run Multiple ECR' title.
- Fields:**
 - Saved Profiles:** A dropdown menu labeled 'Select Profile'.
 - Select a Year:** A dropdown menu set to '2021'.
 - Select a Commission Period:** A dropdown menu set to '1'.
 - Include Brokers with No commission Payment:** A checked checkbox.
 - Update Profile:** An unchecked checkbox.

Bottom Screenshot: Expanded Selections

- Header:** 'Run Multiple ECR' title.
- Fields:**
 - Saved Profiles:** A dropdown menu labeled 'Agency'.
 - Select a Year:** A dropdown menu set to '2021'.
 - Select a Commission Period:** A dropdown menu set to '1'.
 - Include Brokers with No commission Payment:** A checked checkbox.
 - Update Profile:** An unchecked checkbox.
 - Select Broker Market(s):** A list box containing the following options:
 - All
 - AM0001 - Americas Region
 - AM0060 - US- National MKP
 - AM1000 - Atlanta Region
 - AM1001 - Atlanta: Atlanta
 - AM1002 - Atlanta: Memphis TN
 - AM1003 - Atlanta: Alabama
 - AM1004 - Atlanta: Nashville TN
 - AM1101 - Austin: Austin
 - AM1102 - Austin: San Antonio
 - AM1132 - US San Antno - SA T
 - AM1200 - Midwest Region
 - AM1201 - Midwest: Chicago D
 - AM1202 - Midwest: Chicago S
 - AM1203 - Midwest: Indianapolis
 - Select Business Line(s):** A partially visible dropdown menu at the bottom.
- Navigation:** A vertical scrollbar on the right side of the list box, and '>>' and '<<' buttons for navigating between pages of results.

CREATING A PROFILE

Run Multiple ECR

Saved Profiles:

Select a Year:

Select a Commission Period:

Include Brokers with No commission Payment: ☐

Update Profile: ☐

Select Broker Market(s):

- All
- AM0001 - Americas Region
- AM0060 - US- National MKP
- AM1000 - Atlanta Region
- AM1001 - Atlanta: Atlanta
- AM1002 - Atlanta: Memphis TN
- AM1003 - Atlanta: Alabama
- AM1004 - Atlanta: Nashville TN
- AM1101 - Austin: Austin
- AM1102 - Austin: San Antonio
- AM1132 - US San Antno - SA T
- AM1200 - Midwest Region
- AM1201 - Midwest: Chicago Dr
- AM1202 - Midwest: Chicago St
- AM1203 - Midwest: Indianapoli

Select Business Line(s):

- All
- 200000 - Agency - Industrial
- 200009 - Agency - Retail
- 200013 - Agency - General
- 200015 - Ten Rep - Industrial
- 200021 - Ten Rep - Retail
- 200023 - Ten Rep - Trans Mgm
- 200024 - Ten Rep - TM Retail F
- 200028 - Ten Rep - General
- 200029 - Leasing - NBS
- 200035 - Leasing - GIS
- 200036 - Leasing - Land
- 200037 - Leasing - BEI
- 200038 - Leasing - Data Cent S
- 200039 - Leasing - Healthcare

Select Professional(s):

Select Professional(s):

>>

<<

1. Select a **Market**, **Business Line** and **Professional** from the list box. To select more than one Market, Business Line and Professional, hold the CTRL key to highlight.
2. Click on the **double arrows** to add your selection to the box on the right-hand side

CREATING A PROFILE

3. Select the “Yes” or “No” option from the **Show Prospecting** and **Show Reconciliation** drop-downs.
4. Select “PDF” or “Excel” option from the **Report Format** drop-down.

Note: Do not include any email options when creating the profile. These options are selected along with the scheduling options in the View Profile menu found on page 6.

Show Prospecting: Yes ▼

Show Reconciliation: No ▼

Report Format: PDF ▼

☐ E-mail an ECR to the Broker(s)

☐ E-mail an ECR to Self

☐ E-mail an ECR to the Broker(s) and Copy Self

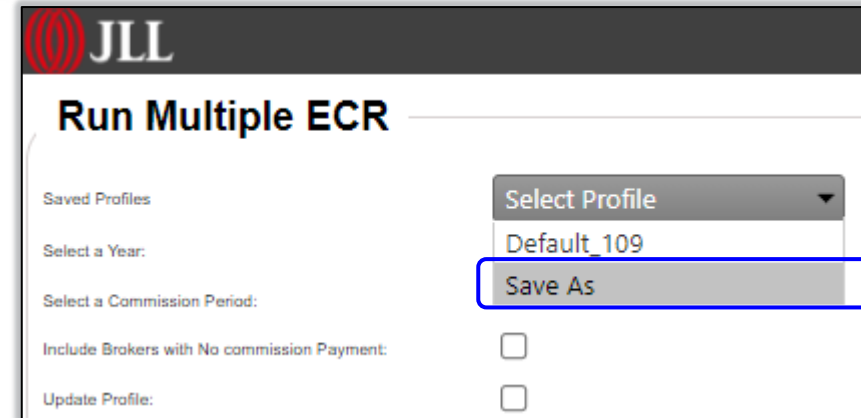
Generate Reports

View Profiles

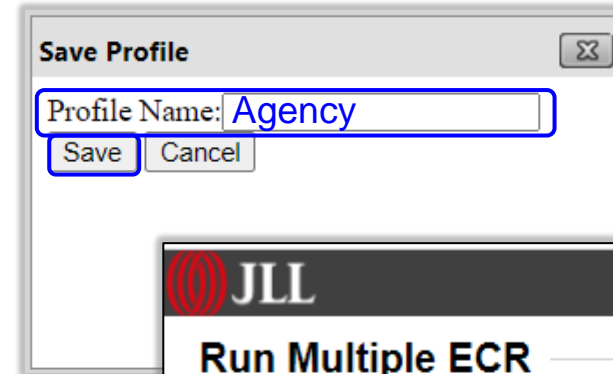
ECR Status

CREATING A PROFILE

5. Go to the Saved Profiles field at the top of the page and from the drop-down menu select **Save As**.
6. Enter a **Profile Name** and click **Save**.
7. The new profile will now appear in the Saved Profiles drop-down selection.



The screenshot shows the 'Run Multiple ECR' form. The 'Saved Profiles' dropdown menu is open, and the 'Save As' option is highlighted with a blue box. Other options visible are 'Default_109'. The form also includes fields for 'Select a Year:', 'Select a Commission Period:', and checkboxes for 'Include Brokers with No commission Payment:' and 'Update Profile:'.



The screenshot shows a 'Save Profile' dialog box. The 'Profile Name' field contains the text 'Agency', which is highlighted with a blue box. Below the field are 'Save' and 'Cancel' buttons. The 'Save' button is also highlighted with a blue box.




The screenshot shows the 'Run Multiple ECR' form after the profile has been saved. The 'Saved Profiles' dropdown menu now shows 'Agency' as the selected option, highlighted with a blue box. The 'Select a Year:' dropdown is set to '2021', and the 'Select a Commission Period:' dropdown is set to '1'. The checkboxes for 'Include Brokers with No commission Payment:' and 'Update Profile:' are still present.





SCHEDULING AND EMAIL OPTIONS

Schedule and email options can be assigned to saved profiles by clicking on the **View Profiles** button located at the bottom of the page.

☐ E-mail an ECR to the Broker(s)
☐ E-mail an ECR to Self
☐ E-mail an ECR to the Broker(s) and Copy Self

Generate Reports **View Profiles**
ECR Status

1. To schedule a profile, click on the  in the **Scheduled** column next to the applicable profile name.
2. In the **Scheduling Options** column, select a schedule from the drop-down menu.

Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Default_109	<input checked="" type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval	Select a email option	
Agency	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval	Select a email option	
Industrial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On the day of Commission Approval	Select a email option	
Capital Markets	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval	Select a email option	
			One day after Commission Approval		
			One day before Commission Approval		
			Two days after Commission Approval		
			Two days before Commission Approval		
			Three days after Commission Approval		
			Three days before Commission Approval		
			Four days after Commission Approval		
			Five days after Commission Approval		
					Save Cancel

SCHEDULING AND EMAIL OPTIONS

Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Default_109	<input checked="" type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Agency	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Industrial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On the day of Commission Approval ▼	E-mail an ECR to the Broker(s) and Copy Self ▼	
Capital Markets	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	

Select a email option
 E-mail an ECR to the Broker(s) and Copy Self
 E-mail an ECR to the Broker(s)
 E-mail an ECR to Self

Cancel

3. Select the email option from the **Email Options** drop-down menu.

Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Default_109	<input checked="" type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Agency	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Three days before Commission Approval ▼	E-mail an ECR to Self ▼	
Industrial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On the day of Commission Approval ▼	E-mail an ECR to the Broker(s) ▼	
Capital Markets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Two days after Commission Approval ▼	E-mail an ECR to the Broker(s) and Copy Self ▼	




Save Cancel

4. Click **Save**.

SCHEDULING AND EMAIL OPTIONS

Creating new and modifying existing scheduled profiles must be completed and saved 24 hours prior to the profiles selected schedule for the reports to be automatically generated.

Example

<u>Profile Name</u>	Default	Scheduled	Scheduling Options	Email Options	
Agency	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Three days before Commission Approval ▼	E-mail an ECR to Self ▼	
Industrial	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On the day of Commission Approval ▼	E-mail an ECR to the Broker(s) ▼	
Capital Markets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Two days after Commission Approval ▼	E-mail an ECR to the Broker(s) and Copy Self ▼	

The Agency profile must be saved four days prior to the Commission Approval day for the reports to automatically be generated, while the Industrial profile must be saved 24 hours prior to the Commission Approval day.

SETTING A DEFAULT PROFILE

Use the ☒ checkbox in the Default column to select which profile you want to use as your default profile.

Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Default_109	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Industrial	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	
Capital Markets	<input type="checkbox"/>	<input type="checkbox"/>	On the day of Commission Approval ▼	Select a email option ▼	

Save Cancel

The default profile will be the option displayed in the Saved Profiles drop-down.

Run Multiple ECR

Saved Profiles

Agency ▼

Select a Year:

2021 ▼

Select a Commission Period:

1 ▼

UPDATING A SAVED PROFILE

1. Use the drop-down menu to select the profile to update.
2. Select the commission period in which the update becomes effective.
3. Check the Update Profile checkbox.
4. Update markets, business lines, professionals, and/or report options.

IMPORTANT

5. To save the profile changes select one of the *Report Formats and click the **Generate Reports** button.

***The ECR's will be generated when you click Generate Reports**, select "E-mail an ECR to Self" to save the updated profile without sending the ECR's to the brokers. Otherwise plan to update your saved profiles on the day you want to send the ECR's to the brokers.



JLL

Run Multiple ECR

Saved Profiles: Agency

Select a Year: 2021

Select a Commission Period: 1

Include Brokers with No commission Payment: ☐

Update Profile: ☐



Show Prospecting:

Show Reconciliation:

Report Format:

☐ E-mail an ECR to the Broker(s)

☒ E-mail an ECR to Self

☐ E-mail an ECR to the Broker(s) and Copy Self


Generate Reports

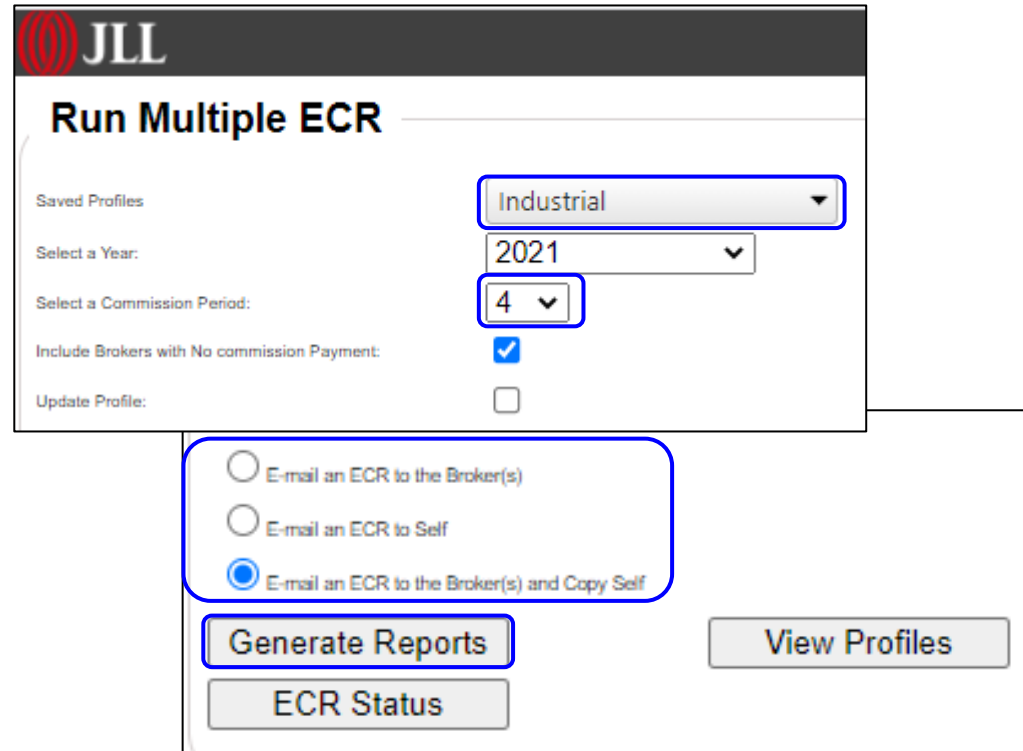
View Profiles

ECR Status

RUNNING NON-SCHEDULED ECR'S

Saved profiles can be generated without assigning a schedule.

1. Select the saved profile from the Saved Profiles drop-down.
2. Select the **Commission Period**.
3. Use the radio buttons to select the ECR email option.
4. Click on the  button.



The screenshot shows the JLL 'Run Multiple ECR' form. The 'Saved Profiles' dropdown is set to 'Industrial'. The 'Select a Year' dropdown is set to '2021'. The 'Select a Commission Period' dropdown is set to '4'. The 'Include Brokers with No commission Payment' checkbox is checked. The 'Update Profile' checkbox is unchecked. Below the form, there are three radio button options: 'E-mail an ECR to the Broker(s)', 'E-mail an ECR to Self', and 'E-mail an ECR to the Broker(s) and Copy Self'. The third option is selected. At the bottom, there are three buttons: 'Generate Reports', 'ECR Status', and 'View Profiles'.

JLL

Run Multiple ECR

Saved Profiles: Industrial

Select a Year: 2021

Select a Commission Period: 4

Include Brokers with No commission Payment: ☒

Update Profile: ☐

☐ E-mail an ECR to the Broker(s)

☐ E-mail an ECR to Self

☒ E-mail an ECR to the Broker(s) and Copy Self

Generate Reports

ECR Status

View Profiles

