Multi-ECR
Report Scheduler

Revised 02/04/2022

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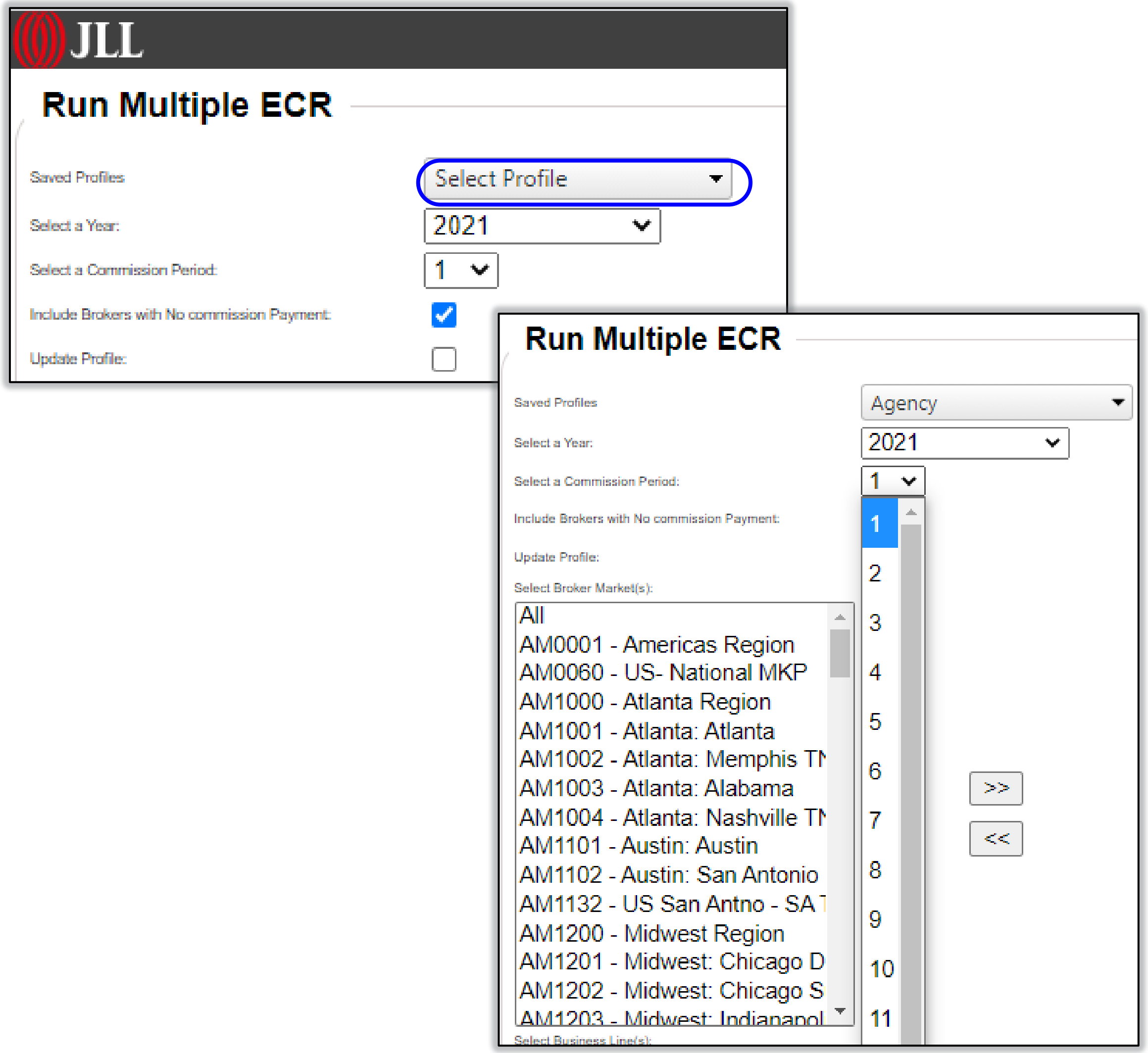
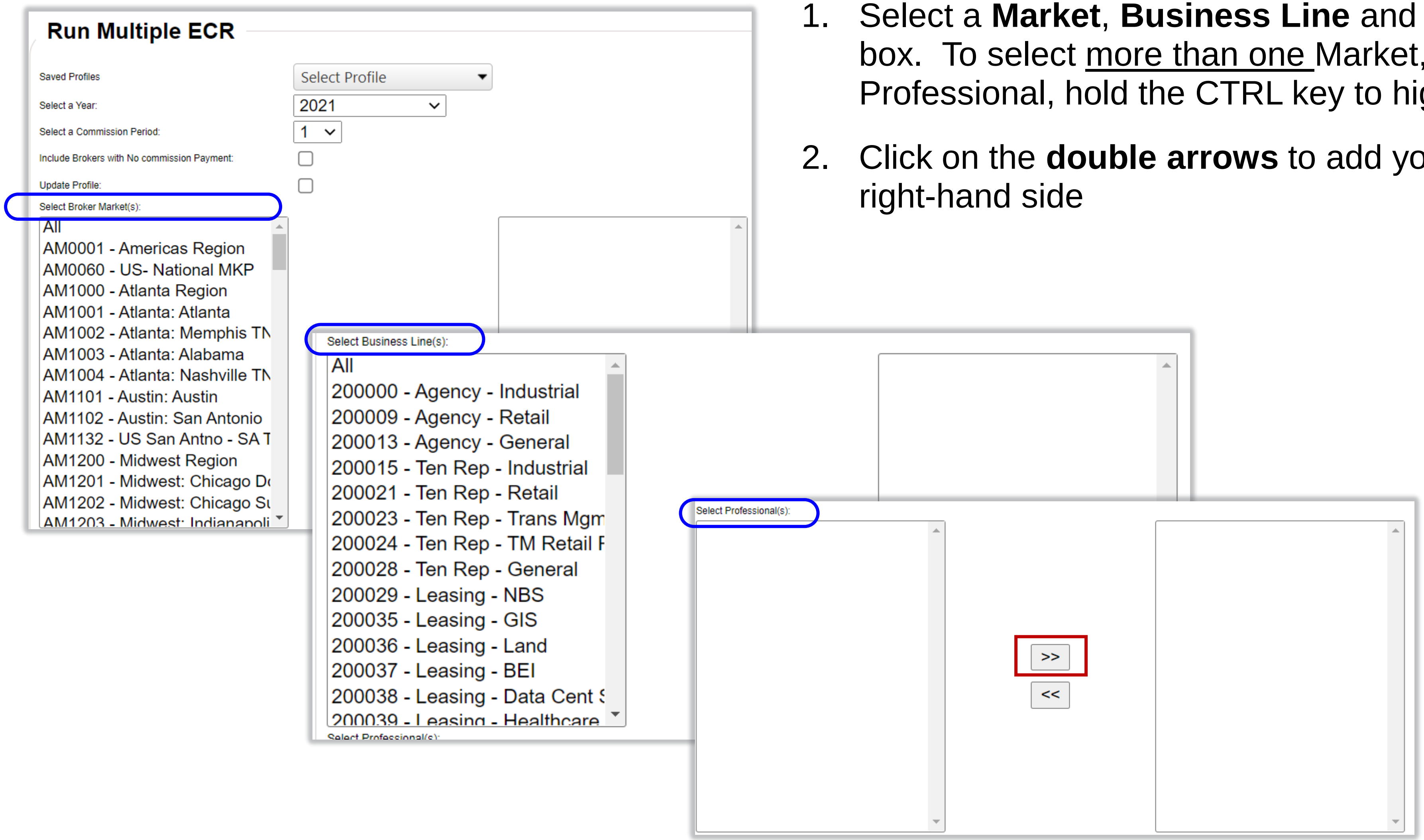
REPORT SCHEDULER

- 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*



CREATING A PROFILE



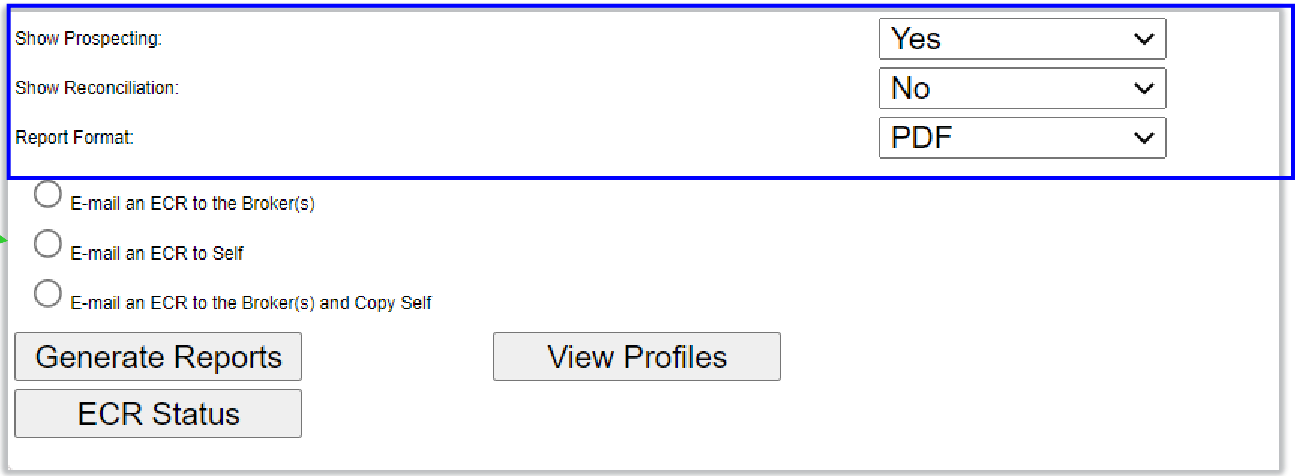
1. Select a **Market**, **Business Line** and **Professional** from the list box. To select more than one Market, Business Line and Professional, hold the CTRL key to highlight.
2. Click on the **double arrows** to add your selection to the box on the right-hand side

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.

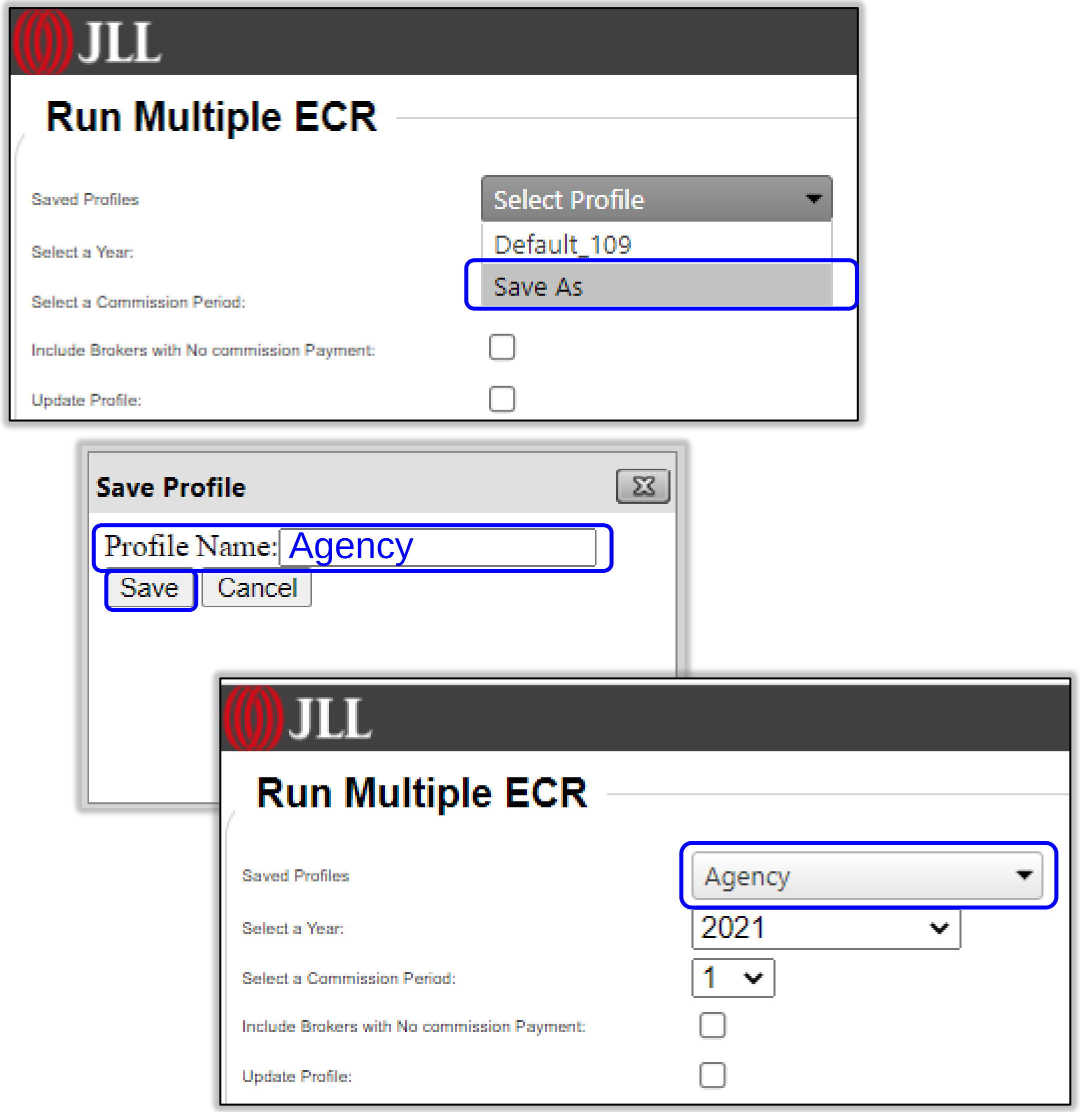


CREATING A PROFILE

5. Go to the Saved Profiles field at the top of the page and from the drop-down menu select **Save As**.

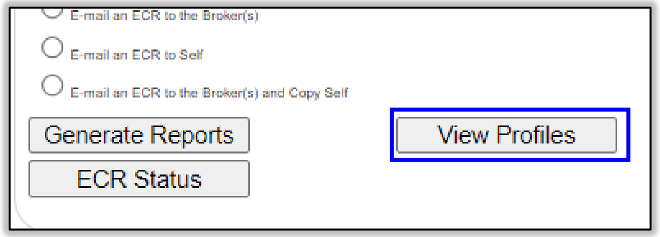
6. Enter a **Profile Name** and click Save.

7. The new profile will now appear in the Saved Profiles drop-down selection.



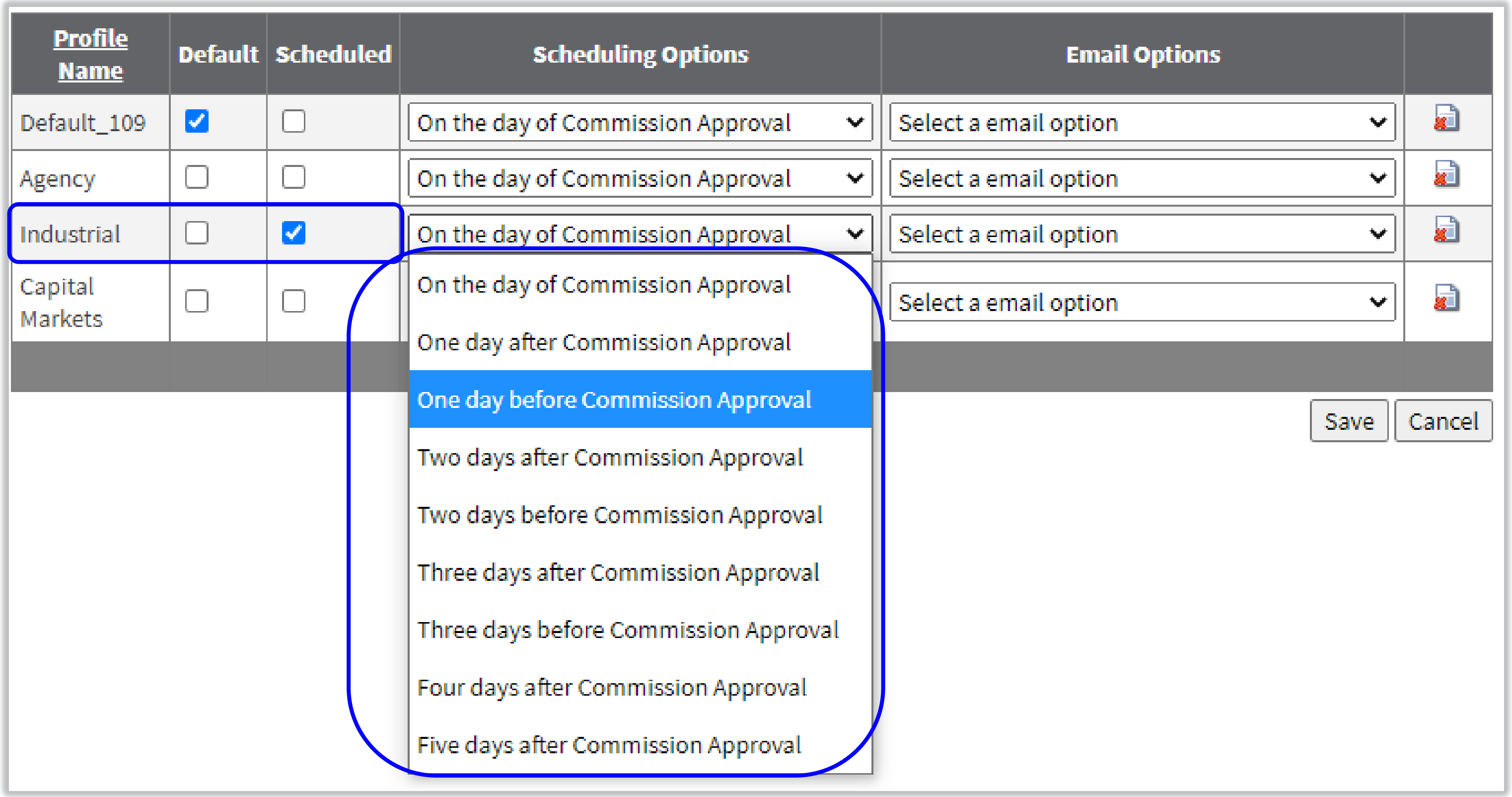
SCHEDULING AND EMAIL OPTIONS

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

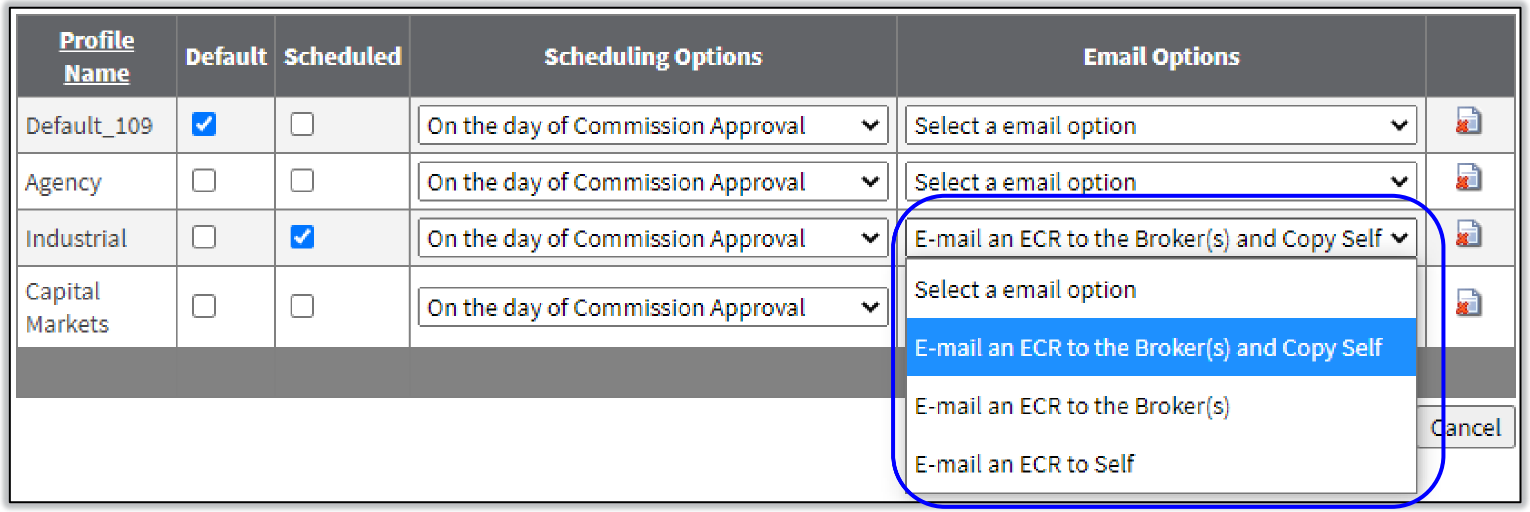


1. To schedule a profile, click on the ☑ in the **Scheduled** column next to the applicable profile name.

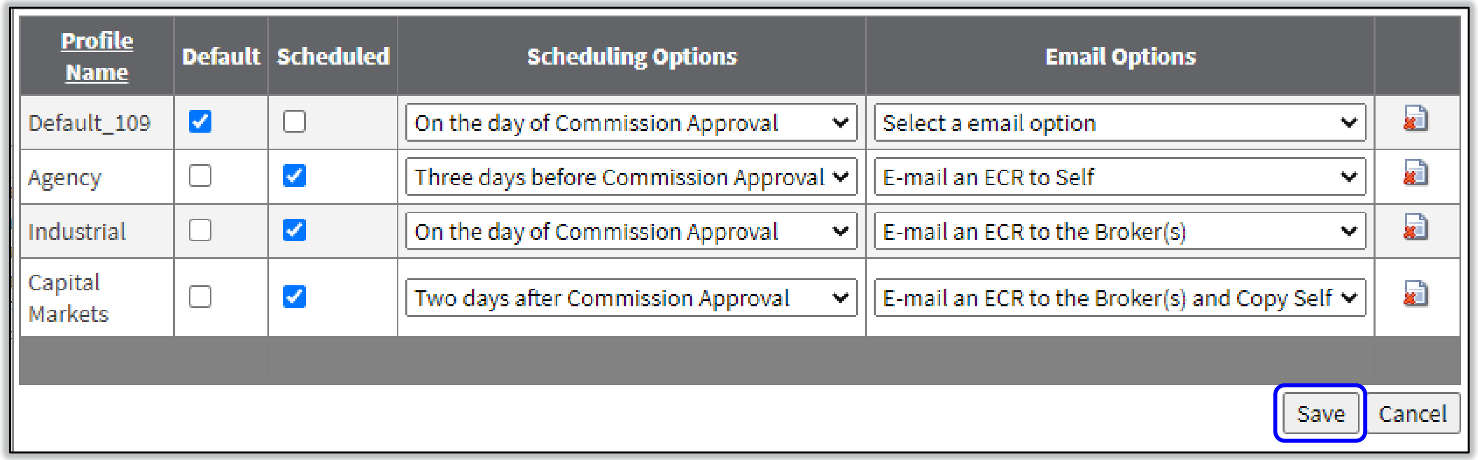
2. In the **Scheduling Options** column, select a schedule from the drop-down menu.



SCHEDULING AND EMAIL OPTIONS



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



4. Click Save .

SCHEDULING AND EMAIL OPTIONS

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

Example

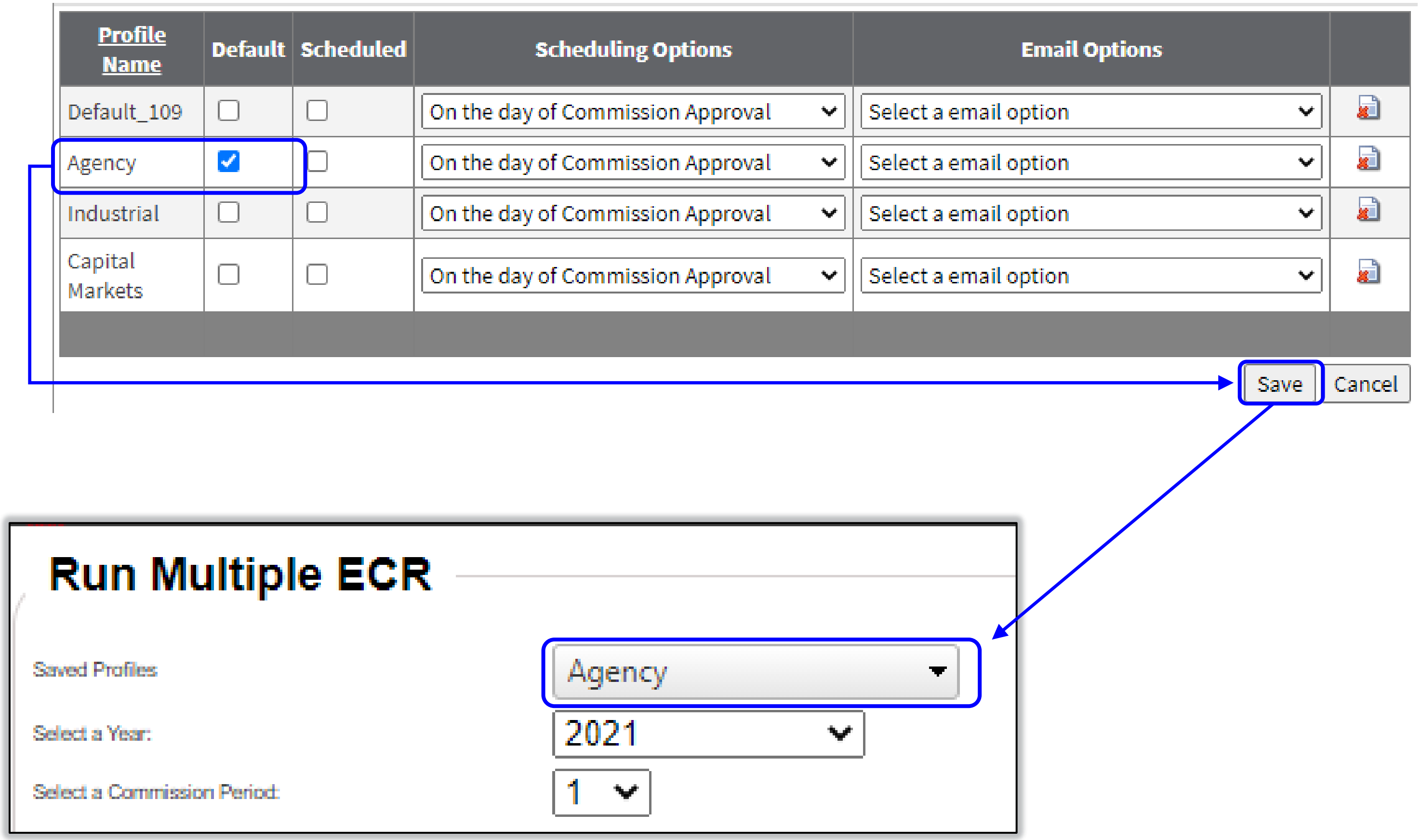
Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Agency	☐	☑	Three days before Commission Approval	E-mail an ECR to Self	
Industrial	☐	☑	On the day of Commission Approval	E-mail an ECR to the Broker(s)	
Capital Markets	☐	☑	Two days after Commission Approval	E-mail an ECR to the Broker(s) and Copy Self	

The Agency profile must be saved four days <u>prior</u> to the <u>Commission Approval day</u> 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

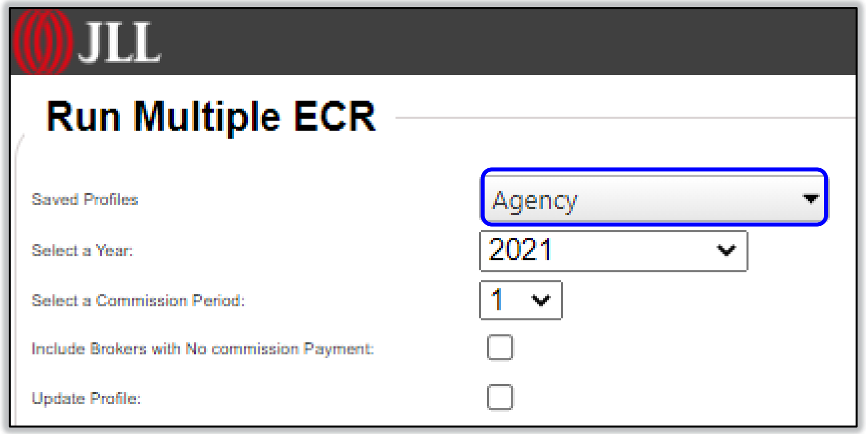
Use the ☑ checkbox in the Default column to select which profile you want to use as your default profile.

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



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.

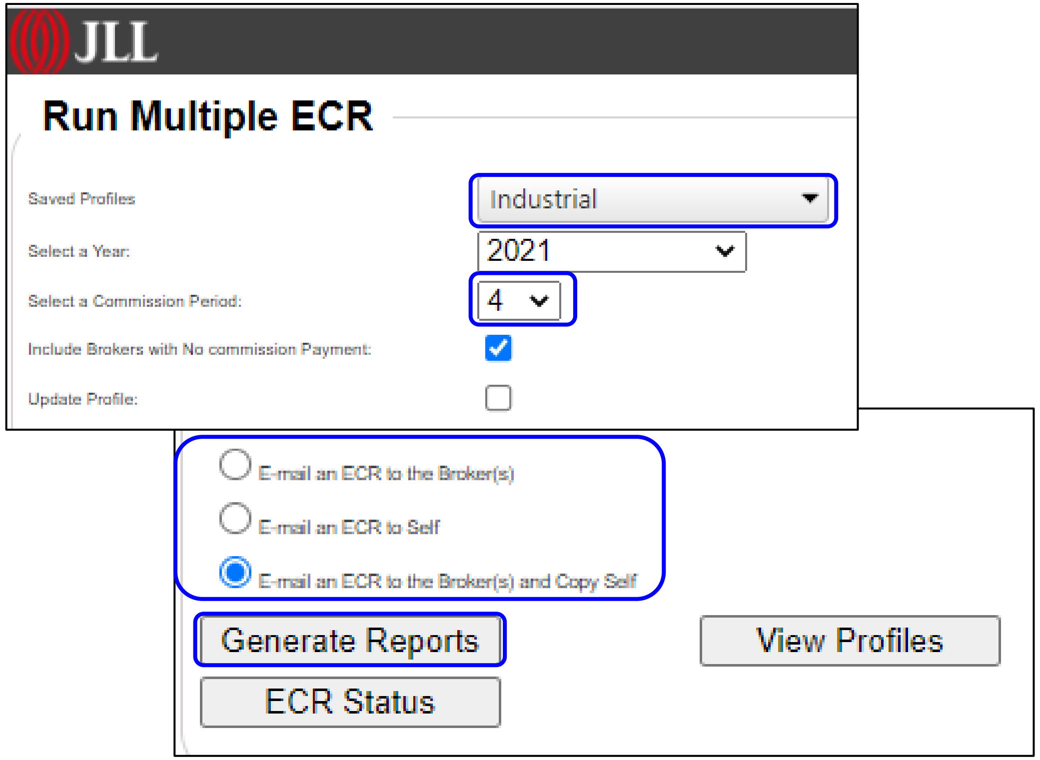
*<u>**The ECR's will be generated when you click Generate Reports**</u>, select "E-mail an ECR to Self" to save the updated profile without sending the ECR's to the brokers. <u>Otherwise</u> plan to update your saved profiles on the day you want to send the ECR's to the brokers.

RUNNING NON-SCHEDULED ECR'S

Saved profiles can be generated without assigning a schedule.

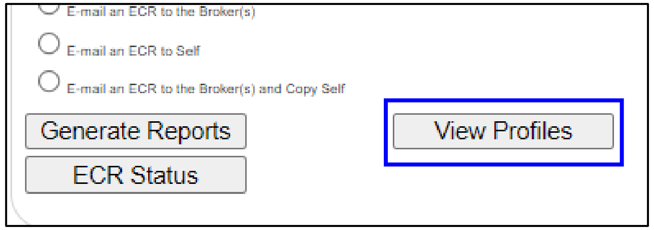
1. Select the saved profile from the Saved Profiles drop-down.
2. Select the **Commission Period**.
3. Use the radio buttons to select the ECR email option.
4. Click on the button.

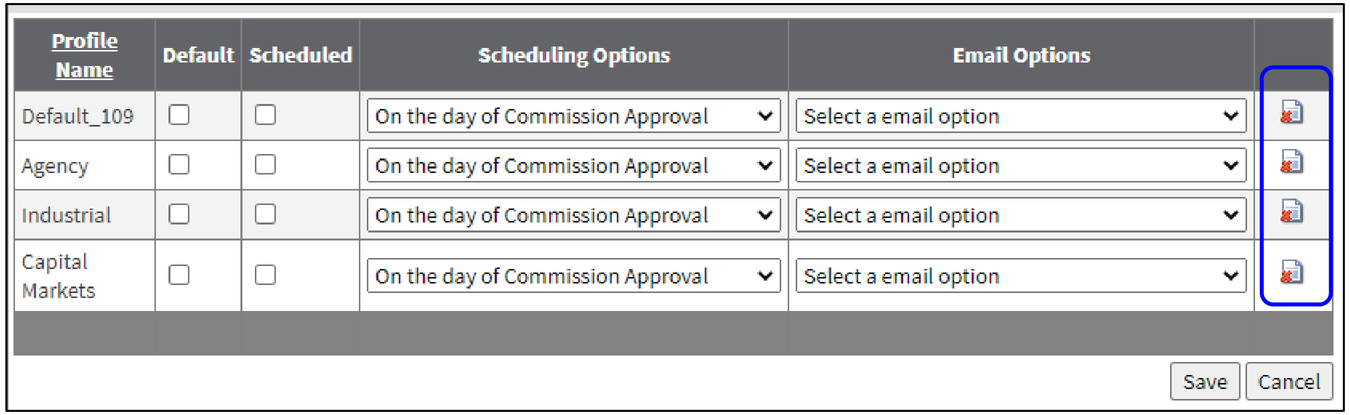
Generate Reports



DELETE A SAVED PROFILE

1. Saved profiles can be deleted by clicking on View Profiles

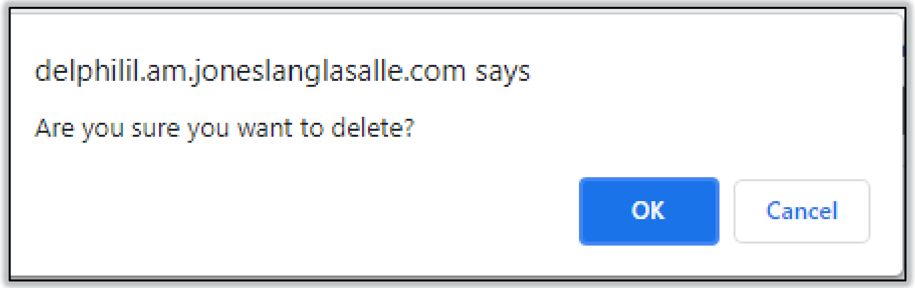




Profile Name	Default	Scheduled	Scheduling Options	Email Options	
Default_109	☐	☐	On the day of Commission Approval	Select a email option	
Agency	☐	☐	On the day of Commission Approval	Select a email option	
Industrial	☐	☐	On the day of Commission Approval	Select a email option	
Capital Markets	☐	☐	On the day of Commission Approval	Select a email option	

Save Cancel

2. Click the delete icon next to the saved profile .



3. Click OK to confirm deletion.