

# Report Scheduling

With flexible scheduling options for reports, administrators can receive the latest data from their fundraising campaigns directly to their inbox. Reports can be scheduled to be sent as a CSV file to a specified email address or preconfigured Dropbox account on a recurring basis.

## Scheduling a report

This feature supports most reports (see below for a complete list). To schedule a report, follow these steps:

1. Log in at [admin.rallybound.com](http://admin.rallybound.com)
2. Navigate to the campaign on which you'd like to schedule your report
3. Click "Reports"
4. Double-click on the report you'd like to schedule
5. Click the button labeled **Schedule Report** in the report toolbar
6. Enter the desired parameters for your report:
  - a. If a Dropbox integration is configured on the campaign, choose whether to email or send to Dropbox
  - b. Email address to send to
  - c. Choose the date and time the report should first be sent
    - Time used here is the user's local time
  - d. How often to send the report (choose a number and an interval period)
  - e. Send full or incremental report
    - Full Report: Every sent report contains all relevant data
    - Incremental Report: Each report contains only new data captured since the last report was generated
7. Click **Schedule Report**
8. Done! Now just sit back and wait for the scheduled report to appear in your inbox or Dropbox!

**Schedule Report**

Schedule this report to be sent as a CSV file on a recurring basis. Please indicate your parameters below.

Email address to send to:

First send date:

Send interval: every

Send full report or only new data since last report?:

## Cancelling a scheduled report

The report recipient may choose to stop receiving scheduled reports by clicking the relevant link within the body of the email:

*To stop receiving this report, please click here.*

For dropbox users, please contact support to request a stoppage for your scheduled report.

## Supported Reports

The following reports support the scheduling functionality. Saved versions and ALL CAMPAIGNS versions of a listed report are also supported.

- Credit Card Payments - ALL CAMPAIGNS
- Donations
- Donations - ALL CAMPAIGNS
- Donations with tribute notifications
- Registrants with Reg Fields, Donation and Contacts Summary
- Registrants with Reg Fields, Donation and Contacts Summary - ALL CAMPAIGNS