



Getting started with the new Customer Portal: How to schedule a report

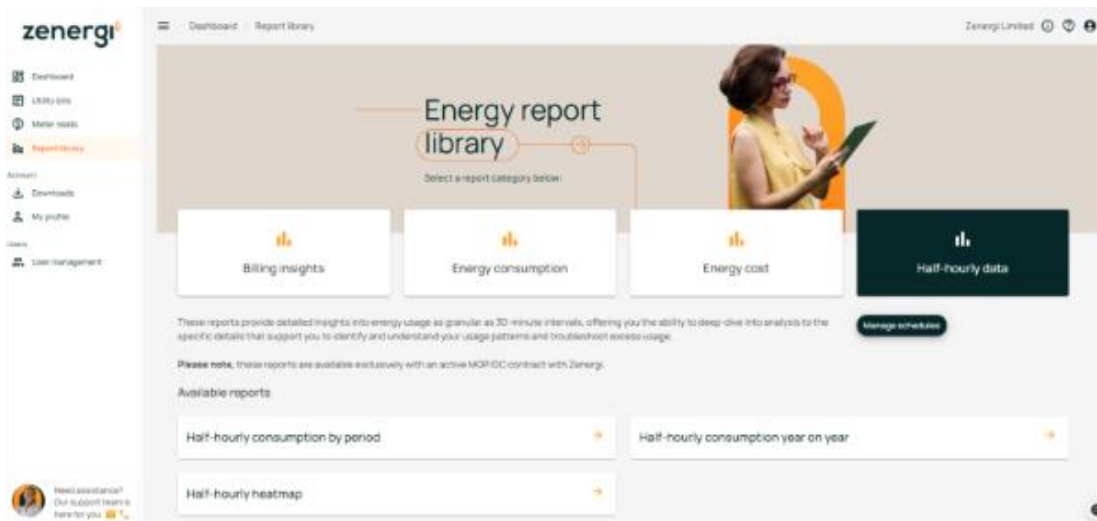
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Getting started with the new Customer Portal: How to schedule a report

You can schedule reports directly from the Report library.
From here, you can either:

- Select 'Manage schedules' to create a new schedule, as well as view and edit existing schedules, or
- Open a specific report, apply filters to save as a new view, and select 'Manage schedules'.

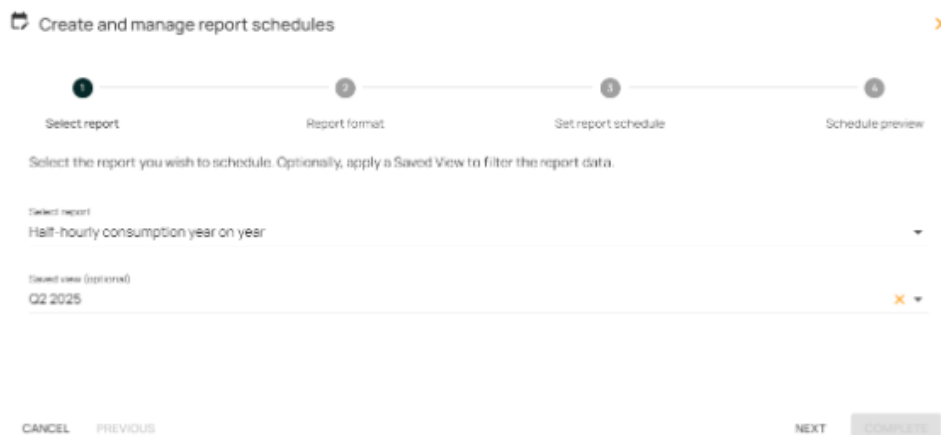


Creating a new schedule

Click 'Create':

- If you're already inside a report, select 'Manage schedules' on the right hand side and then create within the popup. This will default to the current report.
- If you're starting from the Report Library, you'll need to choose the report you want to schedule.

You can also apply a saved view to pre-load your preferred filters. Click [here](#) to learn how to save a report view.



Choose format and frequency

- After selecting 'Next', choose whether you want the report in PDF or PowerPoint.
- Then, set how often you'd like to receive it.
- You can choose from common options (e.g. weekly, monthly), or type your own pattern, our AI tool will turn it into a schedule for you.

Note: Only recurring reports are supported (e.g. "every Monday at 9 a.m."). One-off reports cannot be scheduled.

Create and manage report schedules

1

2

3

4

Select report

Report format

Set report schedule

Schedule preview

Set up your report schedule by describing when you'd like it to run, using plain English. We'll take care of translating that into the correct schedule for you.

When would you like this report to run?

Mondays and Fridays at 9AM

Or select a ready-made example:

Last Friday Monthly e.g. "The last Friday of every month at 4PM"	Monday and Friday Mornings e.g. "Mondays and Fridays at 9AM"
Weekday Evenings e.g. "Every weekday at 6pm"	Quarterly Start e.g. "The first Monday of every quarter"

CANCEL

PREVIOUS

NEXT

COMPLETE

Review and confirm

You'll see a summary of your schedule, including upcoming run times. You can adjust the next scheduled date if needed (e.g. skip a week by pushing the next run to a later date).

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Select report

Report format

Set report schedule

Schedule preview

Your schedule: **The last Friday of every month at 4PM**

Next 7 scheduled runs:

25/07/2025	29/08/2025	26/09/2025	31/10/2025	26/11/2025	26/12/2025	30/01/2026
16:00	16:00	16:00	16:00	16:00	16:00	16:00
Friday	Friday	Friday	Friday	Friday	Friday	Friday

If the schedule looks good, click complete to save, or previous to amend. You can also adjust the timings for your next upcoming report on this page.

CANCEL

PREVIOUS

NEXT

COMPLETE

Click 'Complete' to finish setting it up.

Manage existing schedules

Selecting 'Manage schedules' will show all schedules that are set up. To view schedules for specific reports, use the dropdown menu at the top.

Manage schedules

Report schedules let you automatically generate reports at set times. Use the dropdown below to manage schedules for a specific report.

Select report
Half-hourly consumption year on year

Description	Report name	Next run time	Last run time	Enabled	Actions
Mondays and Fridays at 8AM	Half-hourly consumption year on year	Friday 18th July 2025 at 09:00	-	<input checked="" type="checkbox"/>	
The last Friday of every month at 4PM	Q2 2025	Friday 25th July 2025 at 16:00	-	<input checked="" type="checkbox"/>	

CLOSE CREATE

Edit or turn off a schedule

From 'Manage schedules', you can:

- Toggle off a schedule if you no longer want to receive it
- Edit the saved view, file format, or frequency
- Delete the schedule completely

Need help?

Please take a look at our other guides to get the most out of the tool!

And for more help, reach out to your Customer Success Manager or email us at AskUs@zenergi.co.uk.