Getting started with the new Customer Portal: How to schedule a report
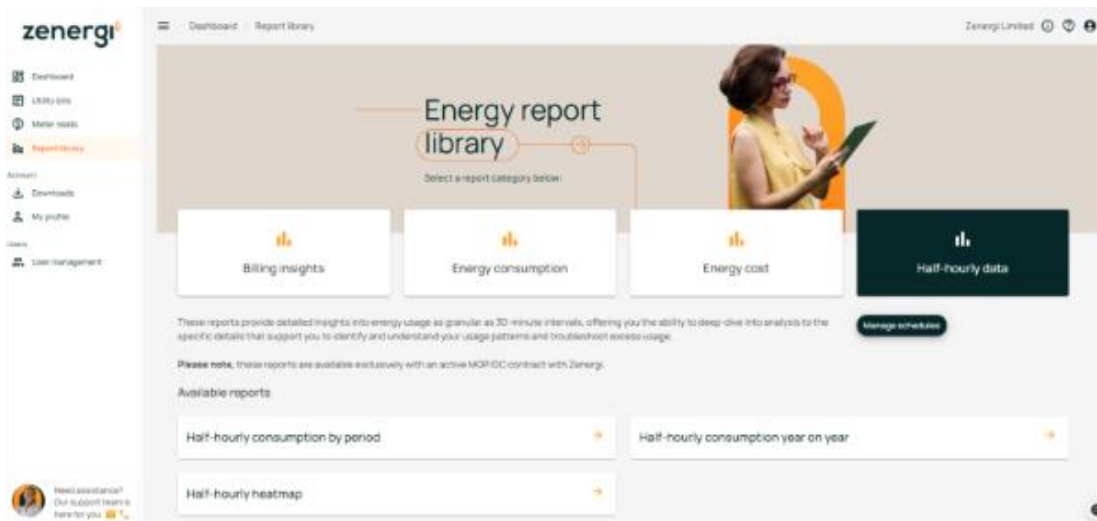
Version: 1.0
Date: 23/07/2025

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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.

![zenergi logo]
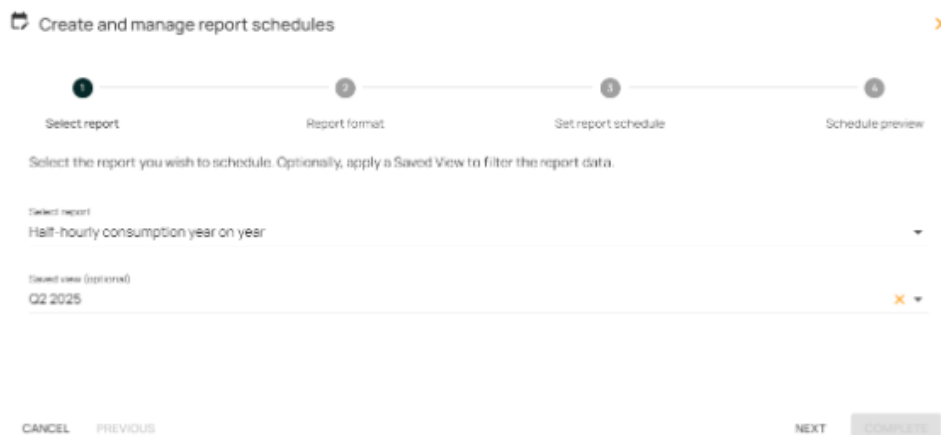
Choose format and frequency

- 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.

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).

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.

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.