# State of Maine
# Dog Licensing Database User Training: Setting up Automatic Reports

# Log in at www.petpoint.com/sms3

This training document covers setting up the monthly report to submit to AWP with your monthly dog licensing payments.

Users can set up any report designated as "5.0" on the Reports Website to auto-send daily, weekly, monthly or annually.

You can utilize the same steps to set up other reports as needed.

Go to Reports, then choose Scheduled Reports from the drop down

Click on the green PLUS icon to begin adding a scheduled report.

## Scheduled Reports

Reports 

| ☑ | Report Name | ▼ | Schedule Name | ▼ | Created | ▼ | Last Updated By | ▼ | Schedule Type | ▼ | Last Run | ▼ | Next Run | ▼ | Last Run Status | ▼ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

A pop up will open.  Before you complete any of the red-indicated fields, click on the magnifying glass icon next to <add existing report>

The Reports website will open.  Open the FINANCE tab, then choose Receipt: Revenue

Schedule

Finance

Licensing

Inventory

Euthanas

Receipt: Cash Balance 5.0 ⓘ

Receipt: Cash Drawer Closing 5.0 ⓘ

Receipt: Cash Drawer Closing Extended 5.0 ⓘ

Receipt: Daily Cash 5.0 ⓘ

Receipt: Discount ⓘ

Receipt: Items ⓘ

Receipt: Receipt Crosstab 5.0 ⓘ

Receipt: Revenue 5.0 ⓘ

Receipt: Revenue Extended 5.0 ⓘ

Receipt: Tax Amount ⓘ

Receipt: Voided ⓘ

You will choose CUSTOM dates:
Receipt Date From: First Day of Last Month
Receipt Date To:  Last Day of Last Month

Choose the following settings:
Site= ALL
Cash Drawer= Your municipality
Group By 1 and Group By 2:  Default is correct
Detail/Summaru= Detail
Click the green submit button

| General | ▲ |
|---|---|

| Receipt Date From | 11/1/2024 12:00 AM | 📅 🕐 | First Day Of Last Month ▾ |
|---|---|---|---|
| Receipt Date To | 11/30/2024 11:59 PM | 📅 🕐 | Last Day Of Last Month ▾ |

Site    --All-- ×

Cash Drawer    --All-- ▾

Group By 1    Item Name ▾

Group By 2    Account Code ▾

Detail/Summary    Detail ▾

| Advanced | ▾ |
|---|---|

Submit

Back at the pop up:
Report Name will enter automatically but you can change it
Schedule Time:  choose a time in the middle of the night for quickest processing
Schedule Type= RECURRENCE, then choose MONTHLY
Repeat Every= 1 month
Repeat on= date of month you would like to receive the monthly report each month
End= Never

## Schedule Report ✕

**Schedule Name**

Receipt: Revenue

**Existing Report**

Receipt: Revenue 🔍

**Schedule Time**

1:30 AM 🕐

**Schedule Type**

○ Once          ● Recurrence

| Daily | Weekly | Monthly | Yearly |

**Repeat every:**

1 ▲▼

month(s)

**Repeat on:**

● Date: 3 ▲▼

○ first ▼   Monday ▼

**End:**

● Never

○ After 1   occurrence(s)

Scroll down
Recipients:  Emails of whomever will receive the report. We recommend at least 2 in case one is out.
Email Subject: User's choice
Email Body: User's choice
Export= PDF
Hit SAVE

# Schedule Report                                                      ✕

○  first ▼  Monday ▼

**End:**

◉ **Never**

○ **After** 1                                                    ▲▼  occurrence(s)

○ **On**  12/23/2024                                                          📅

**Recipients** ❓

**To**                          **CC**                         **BCC**

testperson@pretendmunicipality.com    deputypretendperson@pretendmunicipality.com

**Email Subject**

Monthly Dog License Revenue Report

**Email Body**

This is the monthly report to submit to Animal Welfare with dog license fees.

**Export**

PDF                                              ▼

Save          Close

After you hit SAVE, you will return to the main Scheduled Reports page.  In a minute or two, the new report will show up in the Scheduled Reports list.

# Scheduled Reports

Reports ➕

| | Report Name ▼ | Schedule Name ▼ | Created ▼ | Last Updated By ▼ | Schedule Type ▼ | Last Run ▼ | Next Run ▼ | Last Run Status ▼ | |
|---|---|---|---|---|---|---|---|---|---|
| ▶ | Receipt: Revenue | Receipt: Revenue | 12/23/2024 11:25 AM | TestUser | Monthly | | 01/03/2025 1:30 AM | | 🖊 🗑 |

Questions??

Email to Connor.Egan@Maine.gov