

# Sharing & Schedule Send Reports



Keep your team informed and streamline reporting by sharing or scheduling reports to send automatically. Saved reports can be distributed to Tripleseat users or discussion groups either manually or on a recurring schedule with a selected date and time.

Scheduled reports include a direct link to view the report in Tripleseat, along with the option to download the report data as a CSV file. [View a short video on Schedule Send here.](#)

## Sharing Reports

This option shares the report by adding it to another user's reporting page. There is no email notification when a report is saved, and the user must log in to Tripleseat to view it.

### Save a report when:

- The recipient has reporting access in Tripleseat.
- The recipient frequently logs into Tripleseat and checks their reports.

## Schedule Send

This option sends an email with a link to the report in Tripleseat and a downloadable CSV file. Schedule a send when:

- The recipient does not have reporting access in Tripleseat.
- The recipient does not log into Tripleseat often (i.e., an owner who only needs periodic updates).
- You want to ensure the report is seen and not overlooked by sending an email notification.

**We recommend you choose one option to share reports with your users, not both. Regardless of which option you choose to share reports, all reports will update dynamically:**

- If your report uses a relative date range (i.e., "Next 3 Months"), it will dynamically update each time you open it.
- If your report uses specific dates (i.e., "March 1 - May 31"), it will always show that exact date range without changes.

## To schedule send a report:

- Navigate to Reports section from the left-hand navigation menu.
- Click to create a new report or open a previously saved report.
- Save report (if not already saved). Report must be saved first to enable the scheduled send button.
- Click Schedule Send.

Name	Status	Date	Start Time	End Time	Location	Event Style	Rooms	Guests	Type	Owner	Managers	Contact	Event F&B Min	Deposit	Event Actual	Event Grand Total	Amount Due
Team Dinner	DEFINITE	2/7/2025	12:30 PM	2:30 PM	Lakeview Portland	On-Premise Event	Main Dining Room	20		Teresa Belmonte		Teresa Belmonte		\$2,080.00	\$1,600.00	\$2,080.00	\$2,080.00
Westminster Brunch	DEFINITE	2/10/2025	11:30 AM	2:30 PM	Lakeview Portland	On-Premise Event	Main Dining Room	85		Holly Morris		Vito Puggington		\$4,976.65	\$6,290.00	\$9,545.70	\$9,545.70



- Choose frequency:
  - First Send Date: Date and time must be in the future.
  - Send Frequency: One-time, daily, weekly, monthly, or custom.
  - Custom Frequency: Select Day, Week, Month, or Year to create a flexible recurring schedule.
    - Day: Choose how often the report sends by number of days.
    - Week: Choose how often the report sends by week and select one or more weekdays.
    - Month: Choose how often the report sends by month and select the day rule.
    - Year: Choose how often the report sends by year and select the month and day.
  - Ends: Choose Never, On a specific date, or After a set number of occurrences.
- The schedule summary will display in plain language based on the selected frequency, such as:
  - Occurs every day.
  - Occurs every week on Wednesday.
  - Occurs every month on the 13th day of the month.
  - Occurs every year on the 13th May.

Click Next.

Schedule Report Send ✕

1 Frequency / 2 Email / 3 Recipients

Configure when and how often it's sent

First Send  13.05.2026  at  09:30  EDT

Repeats  Custom

Every  1  Week on  S  M  T  W  T  F  S

Occurs every week on Wednesday.

Ends  Never

On  dd.mm.yyyy

After  10 Occurrences

Cancel  Next



## Personalize the Email

- The system will generate a message based on the send frequency.
- The email subject will auto-populate with the saved report name.
- You can edit the body and subject line to add any relevant details.
- The email will always contain a link to the report in Tripleseat and an option to download as a CSV file.
  - The CSV file link will not appear in the draft message.
  - A message below the email field confirms that a downloadable CSV version will be included with each scheduled send.
- The downloadable CSV file is named after the saved report and prefixed with the send date.
- Click Next.

The screenshot shows the 'Schedule Report Send' dialog box with a close button (X) in the top right corner. At the top, there are three steps: 1 Frequency, 2 Email (highlighted), and 3 Recipients. Below this, the 'Email subject & message' section is visible. The 'Subject' field contains 'Event Details for 30.7.2019 - 1.10.2019 by Month'. Below the subject field is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Formats, Lists, Font Sizes, Text color, Background color, Link, Unlink, Text color, Text background color, Bold, Italic, Underline, Text color, Background color, Link, Unlink, Text color, Background color, and an image icon. The text area contains: 'This is a one-time report send. Link to live report in Tripleseat: [Report Link - Event Details for 30.7.2019 - 1.10.2019 by Month](#)'. Below the text area is a checked checkbox labeled 'Include Signature'. At the bottom, there are three buttons: 'Previous', 'Next', and 'Cancel'.

## Add Recipients

- Add recipients:
  - Start typing a name to add any Tripleseat users or discussion groups.
  - You will be included as a recipient by default but can remove yourself if needed.
- Click Schedule to finalize.

**Pro-Tip:** Set up discussion groups when sending reports to multiple people

The screenshot shows the 'Select Recipients' dialog box. It has a title bar 'Select Recipients' and a close button (X) in the top right corner. Below the title bar, there is a text input field with the placeholder text 'Which staff should receive the report?'. Below the input field is a checked checkbox labeled 'Include me as a recipient'. At the bottom, there are three buttons: 'Previous', 'Schedule', and 'Cancel'.



## Once a report is scheduled, you will see two new icons next to the report:

- Scheduled Send Status:
  - Send Active: The report is scheduled and will send as planned.
  - Send Inactive: The schedule has ended, was deactivated, or the primary user/account was deactivated.
- Envelope Icon:
  - Click to see schedule details and track past sends (up to 50 instances).
  - View pending and past send details.

## Saved Reports

Report Name	Schedule Status	Actions
<a href="#">Lead Conversions</a> by Ally Dettorre	Send Inactive	Delete
<a href="#">Lead Conversions</a> by Holly Morris	Send Active	Delete

## To stop a scheduled report:

- Click the envelope icon.
- Click the trash icon next to the Scheduled Send Status.
  - Confirm your action in the pop-up window.
    - This action is irreversible.
    - Deleting the scheduled send will not delete the report.

To delete both the saved report and its scheduled send:

- Click the trash icon under Actions next to the report name.

## Recipient Experience

Once the scheduled report has been sent, recipients will receive an email.

- The email contains:
  - A link to view the report in Tripleseat (permissions apply).
  - An option to download the data as a CSV file.

Note: If a user does not have access to reporting or specific locations in the report, they may see a limited version in Tripleseat but can still download the full CSV file.

Hi Team!

This is a monthly scheduled report.

Please find the requested report at the link below:

[Report Link- Event Details Report for 2/13/2025 - 5/1/2025 by Day](#)

[Click here to download your report](#)

Note: Add [@tripleseat.com](mailto:@tripleseat.com) to your safe-senders list to ensure you receive our messages.

Click here to [unsubscribe](#) or manage your email preferences.