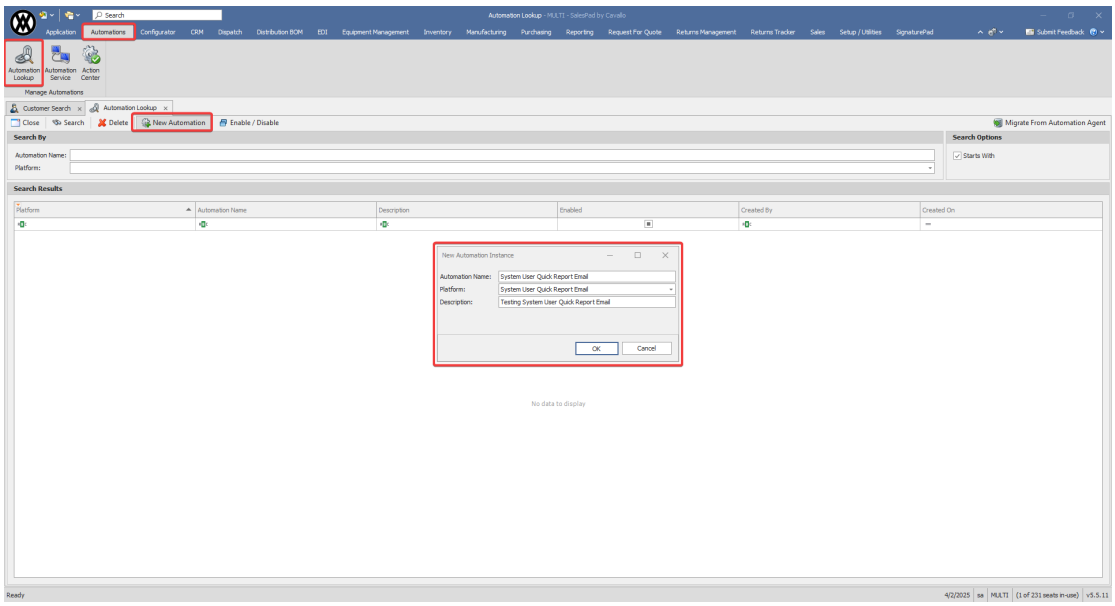
System User Quick Report Email

Trevor Morehead - 2025-06-12 - Miscellaneous

Overview

This documentation goes over the configuration of the *System User Quick Report Email* platform in Automation Agent.

To create a new *System User Quick Report Email* automation, select the Automations tab on the ribbon and then Automation Lookup. Click the New Automation button, enter the name of the automation, and select the *System User Quick Report Email* platform. Click the OK button to create the automation.



Available: 5.3.12

For more information on how to create automations, please refer to the **AutomationAgent** documentation.

The primary use case for this job is to either send emails to individual system users or a static list of emails. The ***Send Individual System User Emails*** setting drives this functionality.

Settings

Once the System User Quick Report Email automation has been created, select the Settings tab to view available settings.

Required Settings

From Email - Required Email Address to send email through the Email Server. The Email Server User must have access to this email.

Quick Reports - The quick reports that will be attached.

Email Options

Send Individual System User Emails - When disabled, there will be one email sent with all emails used in the To/CC/BCC address settings and/or via the script. **NOTE:** Email templates will not be able to replace System User field key words.

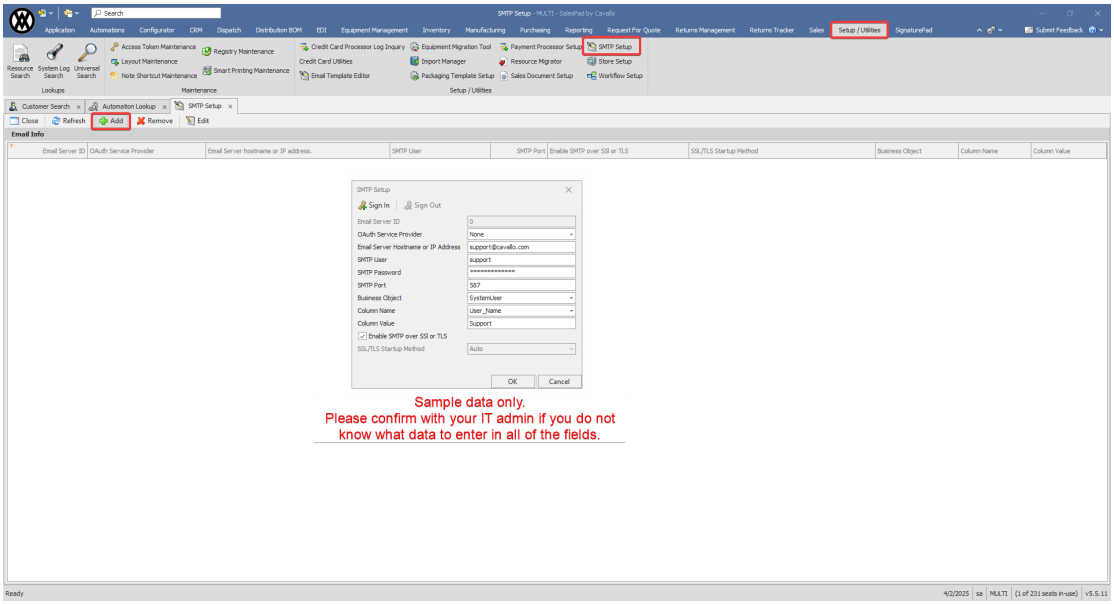
Security Groups or System Users to Email - Each Security Group or User that will receive the Quick Report email. The **Send Individual System User Emails** setting must be true. NOTE: System User templates will replace key words.

Quick Report User Name Search Fields - When emailing individual System Users, the Quick Report Search Field(s) that will receive the System User's User Name as an argument, in order to filter data down to the specific user. ex: select top 10 * from spv3SalesDocument where Created_By = 'my_user_name_here'.
Email Field - System User email field that contains the email address to which the email will be sent.
Email Template - Specify the System User email template that will be used for email subject line and body. NOTE: This template will not replace key words when the Send Individual System User Emails setting is false.
Email From Name - Optional display name. If left blank, the mail server will use the default stored on the server itself.

List of To Emails - A semi-colon delimited list of To emails. Only used when Send Individual Emails is false. NOTE: Email templates will not be able to replace System User field key words.
List of Cc Emails - A semi-colon delimited list of Cc emails. Only used when Send Individual Emails is false. NOTE: Email templates will not be able to replace System User field key words.
List of Bcc Emails - A semi-colon delimited list of Bcc emails. Only used when Send Individual Emails is false. NOTE: Email templates will not be able to replace System User field key words.
Get Email Lists Script - C# script hook that allows for a custom list of email addresses. Only used when Send Individual Emails is false. TIP: Use 'emailToList.Add(string);' or 'emailToList.UnionWith(anotherHashSet);' Only used when Send Individual Emails is false. NOTE: Email templates will not be able to replace System User field key words.
Send As HTML - If enabled, the email body will be formatted in HTML.

SMTP Setup

You can use the SMTP Setup screen to configure email for each system user. To access the SMTP Setup screen, go to Modules -> Setup / Utilities -> SMTP Setup. Make sure each field is populated and click OK to save your changes.



For more information on the SMTP Setup screen, please refer to the **SMTP Simple Mail Transfer Protocol SMTP Setup Setup** documentation.

Email Templates

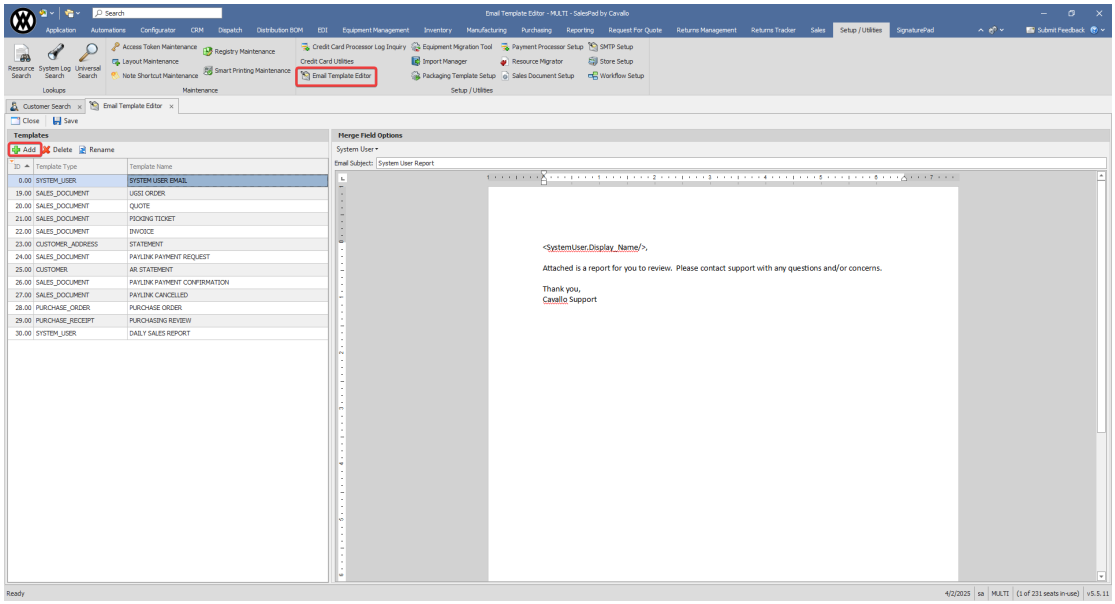
The Email Template Editor screen can be used to create email templates that will be used when generating emails. To access the Email Template Editor, go to Modules -> Setup / Utilities -> Email Template Editor.

Supported template types are:

- System_User

NOTE: If the ***Send Individual System User Emails*** *is disabled, keywords in templates will not be replaced.*

NOTE: Templates are not required for e-mailing.

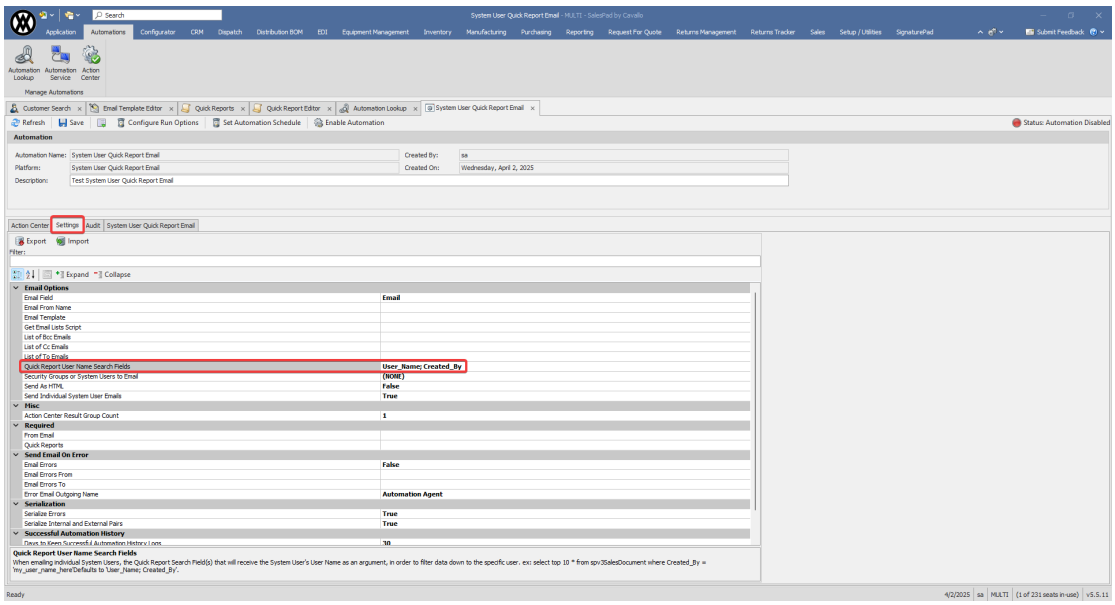


For more information on how to create an email template, please refer to the **Emailing and Email Templates** documentation.

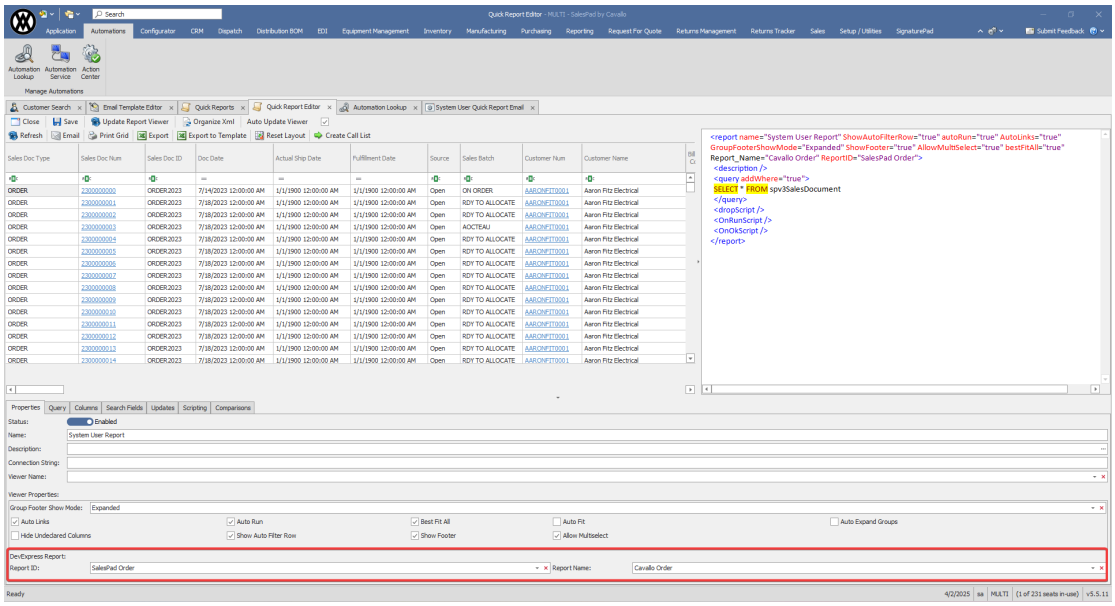
Quick Reports

To create a new quick report using the Quick Report Editor, go to Modules -> Reporting -> Quick Reports, select the Reports tab, and click the New button.

The ***Quick Report User Name Search Fields*** setting allows the System User "User Name" field to be passed as a search clause to the corresponding field defined.



If a quick report is configured as a printed report, it will be sent as a PDF document instead of an Excel spreadsheet. To configure a quick report as a printed report in the Quick Report Editor, set the *Report ID* and *Report Name* fields to an existing printed report.



For more information on how to create quick reports, please refer to the **Quick Report Designer** documentation.