Locally: Creating Scheduled Report

December 2023

Notices

Publication Date: December 2023

Copyright © 2020 Gearfire Retail.

940 Industrial Drive, Suite 111

Sauk Rapids, MN 56379 1-800-547-7120

All rights reserved.

### General

No part of this document may be reproduced, distributed, performed, displayed, or used to prepare a derivative work without the prior and express written consent of Gearfire Retail. The software described in this document is furnished under a license agreement and may be used only in accordance with the terms and conditions of the license agreement. Information in this document is subject to change without notice, and Gearfire Retail assumes no responsibility for errors.

### Trademarks and Credits

AXIS, AXIS Retail Management System (AXIS RMS), AXIS Data Center, AXIS Register, and AXIS E4473 are trademarks of Gearfire Retail and shall not be used without the express written permission of Gearfire Retail.

Other trademarks, such as QuickBooks, are not being used as a trademark herein and are the property of the respective owners.

### Legal Counsel

This program, printed documentation, and documents should not be used as a substitute for professional advice in specific situations. The procedures, images, and examples in this document are for illustrative purposes only and may not be applicable in your setting due to differences in preference, settings, and/or state and local regulations.

The following notice is required by law:

**Gearfire Retail products and services are not a substitute for the advice of an Attorney.**

**You are encouraged to seek the advice of your own attorney concerning the use and legality of this program, documentation, and forms.**

Contents

[General 2](#_Toc153267650)

[Trademarks and Credits 2](#_Toc153267651)

[Legal Counsel 2](#_Toc153267652)

[Overview 4](#_Toc153267653)

[Scheduling a Report 5](#_Toc153267654)

[Locally 5](#_Toc153267655)

[AXIS 5](#_Toc153267656)

# Overview

Gearfire Retail provides this document as a high-level guide to creating an inventory scheduled report within AXIS. Base knowledge of AXIS is assumed.

Scheduling a Report

For use with the program Locally, a Dealer will want to schedule a Value on Hand (VoH) report from within AXIS. This will then be used to send an emailed export to Locally using the individual Dealer’s upload email provided to them from within Locally.

### Locally

Dealer should sign into Locally [here](https://locallyus.us.auth0.com/u/login?state=hKFo2SBUTV9vMjliSjVmQmNTSVNlcWpsS2lxS1Zxc3NaT3BkWKFur3VuaXZlcnNhbC1sb2dpbqN0aWTZIEQ1cFFQVGxyMGUtVXhxZ2tEVjFUcF9YdmowUGtCanJqo2NpZNkgaDVGOEwyQVM4cGZ1ZHJHWlNYV1BHbDlhSkFBaHdSUDg)

Select Inventory from left hand menu

Select Inventory Feed Setup

Choose Email Method

This will provide the Dealer with their Locally feed email to input into AXIS

Copy the feed email and put it somewhere safe until its entered into AXIS

It should be in the format of feeds.xxxxxx.xxxxxxxxxx@robot.locally.com.

### AXIS

Login to Datacenter

Select Reports

Select Inventory Reports > Value on Hand from sub-menu

Select the Calendar Icon next to the Custom View window

Select Grid Export

Click Add New

Give it a name and description

Recommend name contains Locally so it is known what the view is for

Leave the default time for Today

Submit to save changes

Select Close to go back to the VoH Report

From Reports > Scheduled Reports

Select Scheduled Reports

Click Add Report

Select newly created report for Locally Feed

Select Submit

Select Edit on the Report > Schedule

Select Recurrence Pattern > Hourly

Fill in the Hourly on minute to schedule the actual time hourly the report will run

Tab or click out of box to activate Submit button

Select Submit

Select Edit on the Report > Emails

Top window of Email Addresses

Fill in email gained from Dealer Locally site for file upload of inventory

Fill in any other emails wanting the hourly report

Click Add Emails

Click Submit

Click the Active checkbox next to the Report to activate the scheduled report to run

At the time scheduled for the report, please ensure that the report runs as intended and the Dealer should check their locally feed to show that the inventory is being uploaded.

This should be found in Locally under Inventory > Upload History