

Create and Edit Reports

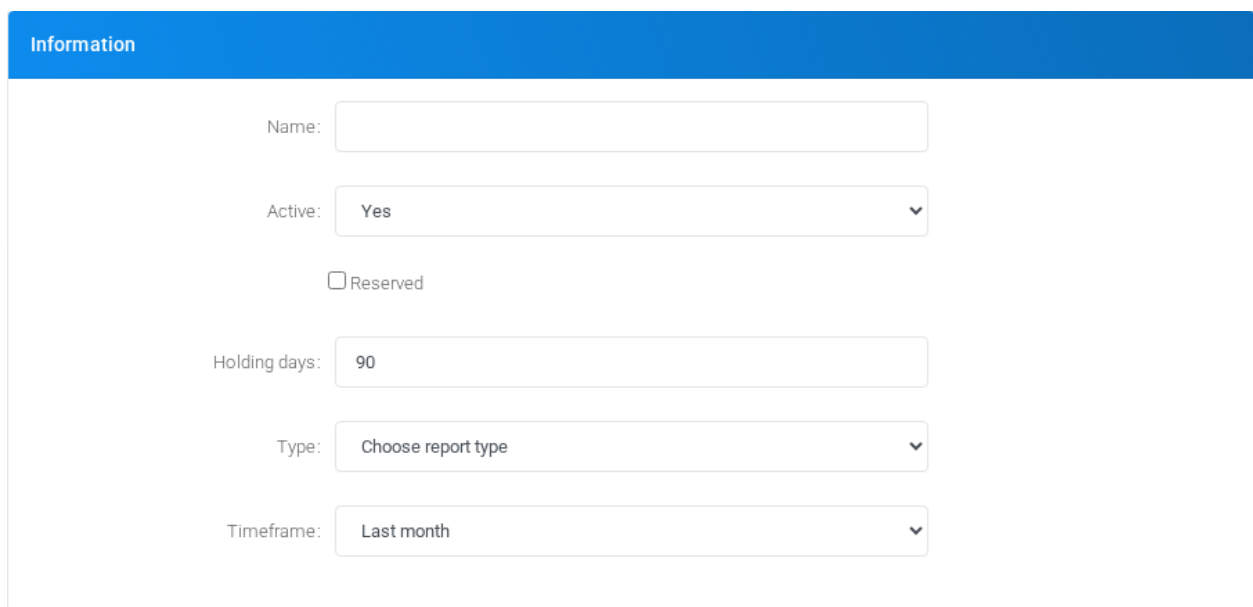
Use this page when creating a new report or editing an existing report from **Configuration > Reports**.

The form screenshots below are separated by block where the application exposes separate sections. Complete the required values, review routing or destination references, and save the record.

Form sections

Section	Description
Information	Core identity and routing fields for the object.
Page	Settings shown in the Page block.
Schedule	Scheduling controls for when the object runs.
Delivery	Email or output delivery settings.

Information



The screenshot shows the 'Information' section of a form. It features a blue header with the text 'Information'. Below the header, there are several input fields: a text field for 'Name', a dropdown menu for 'Active' with 'Yes' selected, a checkbox for 'Reserved', a text field for 'Holding days' with '90' entered, a dropdown menu for 'Type' with 'Choose report type' selected, and a dropdown menu for 'Timeframe' with 'Last month' selected.

Information section on the edit form.

Core identity and routing fields for the object.

Page

Page

Size:

Orientation:

Font size:

Row height:

Top date/time format:

Detail date/time format:

Theme:

Alternate row background color:

Page section on the edit form.

Settings shown in the Page block.

Schedule

Schedule

Year:

Month:

Weekday:

Day:

Hour:

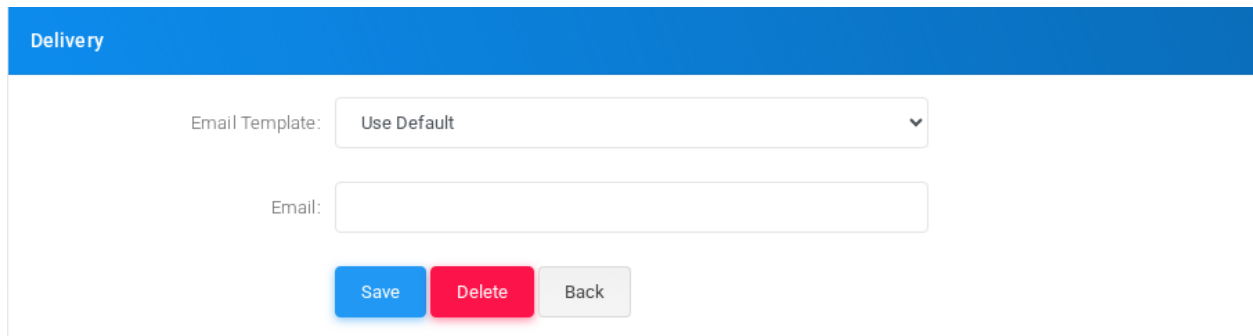
Minute:

Timezone:

Schedule section on the edit form.

Scheduling controls for when the object runs.

Delivery



Delivery section on the edit form.

Email or output delivery settings.

Main fields

Field	Description
Name:	Display name used in lists and references.
Active:	Object setting shown by the form.
Reserved	Object setting shown by the form.
Holding days:	Object setting shown by the form.
Type:	Mode selector that changes the behavior of the object.
Timeframe:	Object setting shown by the form.
Custom timeframe start:	Object setting shown by the form.
Custom timeframe end:	Object setting shown by the form.
Group by:	Object setting shown by the form.
Direction:	Object setting shown by the form.
PIN list:	Credential or PIN value. Treat it as sensitive.
Report calls with cost:	Object setting shown by the form.
Disposition:	Object setting shown by the form.
Order by:	Object setting shown by the form.
Hourly details:	Object setting shown by the form.

Saving and deleting

Task	How to do it
Create	Select the new action from the Reports list, fill the required fields, and select Save.
Edit	Open the existing report, update the needed fields, and select Save.
Delete	Before deleting a report, check call-flow, destination, schedule, report, provisioning, or integration references. Use the row delete action or the form delete action when available, then confirm.

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