

HOW TO SETUP AUTOMATED PROCESSING JOBS IN AGILITY

The Automated Processing tool, also known as Auto Processing, allows you to run routine Agility processes automatically without user intervention. The example we will use will be to setup your reorder calculations to be run each month.

Setting Up Jobs

Go to System Administration > Restricted Processing > Automated Processing > Queue Maintenance.

Click the New Job icon. In Job name, type in Reorder Calculations Forward. Type in the Job description.

Click the Add Task button.

Queue Maintenance -- [TYLERO] [v551 Devel]

File Edit Options View Window Go To Help

Jobs | Queues |

Search by Job name Beginning with

Search for

Job name Job description

Quiddlist- Connor	Quote Reprice
RALSTON - PV Batch	RALSTON - PV Batch
Receive Appian	
Reorder Calc	Runnin Reorder Calculations for Carolyn
Reorder Calculations	Reorder Calculations
Reorder Calculations Backward	Reorder calcs
Reorder Calculations Lab	Reorder Calculations Lab
Reprint PO and send to doc storage	
Reprint PO to Doc Storage	
Retail Invoice Printing	Retail customer invoice printing
Retail Update	
RobertCommissionViewer	RobertCommissionViewer
RobertCQ	Testing QDirector code
RobertDispatchViewer	RobertDispatchViewer
RobertDWUpdate	DW Update
RobertEmail	Test Email Delivery
RobertInventoryViewer	RobertInventoryViewer
RobertItemActivityViewer	RobertItemActivityViewer
RobertPOViewer	RobertPOViewer
RobertRemainViewer	RobertRemainViewer
RobertSFTP	Testing SFTP Delivery
RobertSOViewer	RobertSOViewer
Rollbase Dump	
ROP	
ROP - ElizK All/All Back 3	Reorder Calculations Backward

Job description Runnin Reorder Calculations for Carolyn

☐ On hold

Skip until / /

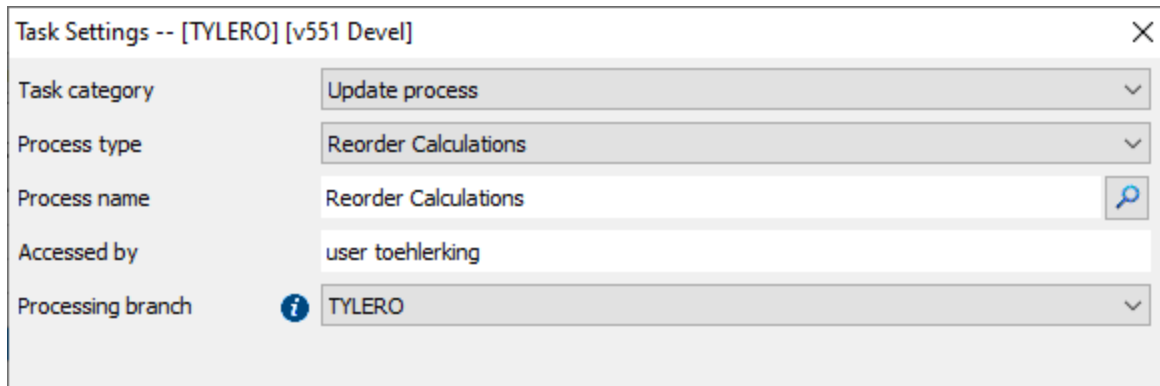
Run these tasks in this order

Processing branch	Task name	Task type
CAROLYN	Reorder Calculations	Reorder Calculation

Move Up Move Down

Under Task Category, choose Update Process. The Process Type will be Reorder Calculations. Under the Process Name, click the magnifying glass to open the saved Reorder Calculations you just set up. Choose the first Forward

Calculation that was set up and click OK. Verify the processing branch is correct and click OK.



Task Settings -- [TYLERO] [v551 Devel]

Task category: Update process

Process type: Reorder Calculations

Process name: Reorder Calculations

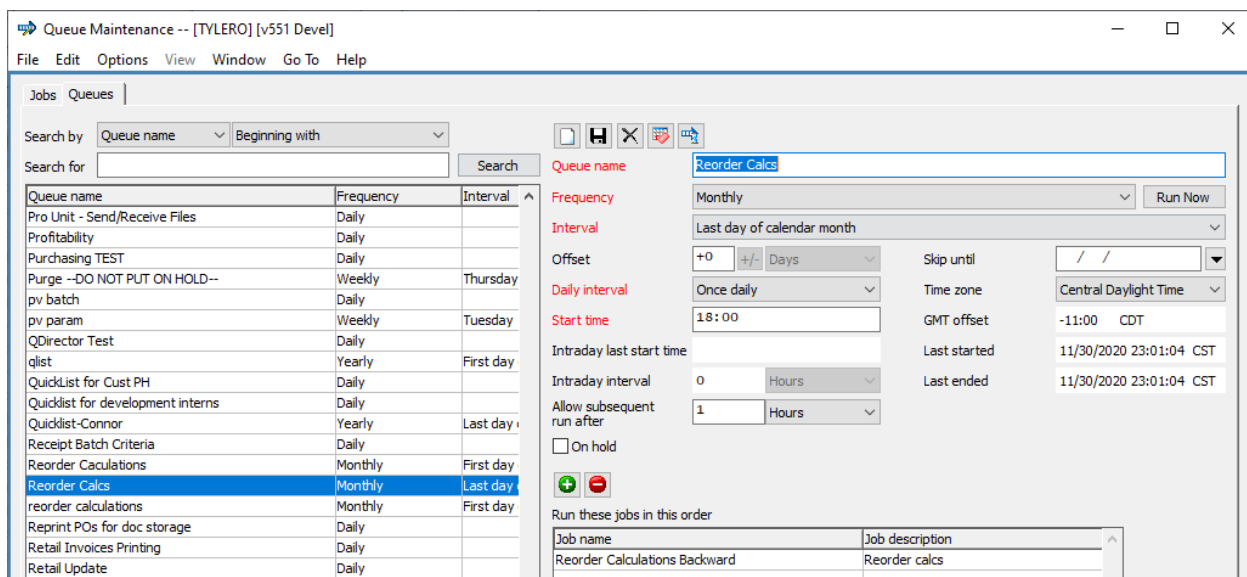
Accessed by: user toehlerking

Processing branch: TYLERO

When finished, click the Save Job button.

Setting up a Queue

Click on the Queue tab. Click on the Create Queue tab. In the Queue Name, type in Reorder Calculations Forward. For Frequency, choose Monthly. In the Interval, choose Last day of calendar month. Your Daily interval will be Once daily. Set the Start time sometime after the end of business. Start time is in military hours, so 6 pm would actually be 18:00. Click Add Job and choose your Job of Reorder Calculations Backward. When finished, click the Save Queue button.



Queue Maintenance -- [TYLERO] [v551 Devel]

File Edit Options View Window Go To Help

Jobs Queues

Search by: Queue name Beginning with

Search for:

Queue name	Frequency	Interval
Pro Unit - Send/Receive Files	Daily	
Profitability	Daily	
Purchasing TEST	Daily	
Purge --DO NOT PUT ON HOLD--	Weekly	Thursday
pv batch	Daily	
pv param	Weekly	Tuesday
QDirector Test	Daily	
qlist	Yearly	First day
QuickList for Cust PH	Daily	
Quicklist for development interns	Daily	
Quicklist-Connor	Yearly	Last day
Receipt Batch Criteria	Daily	
Reorder Calculations	Monthly	First day
Reorder Calcs	Monthly	Last day
reorder calculations	Monthly	First day
Reprint POs for doc storage	Daily	
Retail Invoices Printing	Daily	
Retail Update	Daily	

Queue name: Reorder Calcs

Frequency: Monthly

Interval: Last day of calendar month

Offset: +0 Days

Daily interval: Once daily

Start time: 18:00

Intraday last start time:

Intraday interval: 0 Hours

Allow subsequent run after: 1 Hours

On hold: ☐

Run these jobs in this order

Job name	Job description
Reorder Calculations Backward	Reorder calcs

Run Now

Skip until: / /

Time zone: Central Daylight Time

GMT offset: -11:00 CDT

Last started: 11/30/2020 23:01:04 CST

Last ended: 11/30/2020 23:01:04 CST

Agility will run the jobs automatically at the times specified.

Listed below are tasks that can be run via automated processing:

Custom Cyberquery reports	<p>Automated processing supports scheduling reports with .eq and .mf extensions. If the report query cannot be located or if the report will not compile due to a syntax error, the system</p> <ul style="list-style-type: none"> •sends an email that the report task failed. <p>To email the report output, define the output format (such as PDF or .xls) on the Automated Processing job task. If there is no output format defined, automated processing emails the file</p> <ul style="list-style-type: none"> •with the .cqe extension.
External Interface	<ul style="list-style-type: none"> •A/R ACH Processing •Billtrust Invoice •Billtrust Statement •Send/Receive EDI Files •Process Incoming EDI Files •Process Millwork Development Orders •Process TMS Cost Packets •Routing – Export Final File •Routing – Export Preliminary File
Forms	<ul style="list-style-type: none"> •Acknowledgments <p>This automated process emails/faxes order and/or credit acknowledgments based on the customer ship-to or customer branch ship-to laser control settings.</p> <ul style="list-style-type: none"> •Invoices <p>This automated process prints/emails/faxes invoices, finance charge invoices, and credit memos based on saved criteria settings in the Print Invoices window.</p> <ul style="list-style-type: none"> •Billtrust Account Statements <p>This automated process generates xml files for account statements based on criteria saved on the Print Account Statements with a setting of Process via Billtrust. This option is only available if your system is licensed and active for the Billtrust Interface.</p>
Standard reports	<ul style="list-style-type: none"> •A/P Aged Open Payables Report •A/P Recon Register •A/R Aged Trial Balance Report •A/R Lien Reminder Report •A/R Tax Summary/Detail Report

	<ul style="list-style-type: none"> •Cash Drawer Balancing and Payments •G/L Subsidiary Balancing Report •Inventory Valuation Report •Potential Stock Outage Report •Sales Analysis Report •SO Profitability Report •Inventory Usage/Purchase Comparison Report
Update processes	<ul style="list-style-type: none"> •A/R Finance Charge Application •ABC Classification •Automated purges •Batch criteria •Cost mass update •Create pick file •Customer item quicklist •Data warehouse update •KPI update •Post unposted activity •Reorder calculations •Shipment update •Tax interface invoice error processing •Transaction Analysis •WMS monitor
Viewer	<ul style="list-style-type: none"> •Commission Viewer •Dispatch Viewer •Inventory Viewer •Item Activity Viewer •PO Viewer •Reman Viewer •SO Viewer <p>These automated process emails viewer results in .csv format based on the viewer's saved criteria.</p>