

Scheduled Reports Troubleshooting Checklist for Admins

- **Use this checklist before escalating a scheduled report issue to Support**
- **Move through each section in order**
- **Validate – don't assume**

SECTION 1: Access & Permissions Validation

Confirm User Permissions

- ❑ User has access to the **Reports module**
- ❑ User has permission to **schedule a report**
- ❑ User has access to all modules included in the report
- ❑ User's role allows access to all report fields

Important: If a user cannot see a module or field, the scheduled report may generate incomplete or empty results.

SECTION 2: Report Ownership & Delivery Behavior

- **2.1 Confirm Report Owner**

- ❑ Who owns the report? (Admin? End user? Former employee?)
- ❑ Is the owner still active?
- ❑ Has ownership changed recently?

Important: Scheduled reports run as the **report owner**, not the recipient.

- **2.2 Confirm Recipient Configuration**

- ❑ Are all recipients active internal Sugar users?
- ❑ Do recipients have valid email addresses on their user profiles?
- ❑ Were recipients added manually or inherited from a previous report owner?

Important: Ownership affects data visibility, email sending behavior, and report results.

SECTION 3: Schedule Status & Deactivation Triggers

- **3.1 Confirm Schedule Status**

- ❑ Schedule is marked **Active**
- ❑ Schedule date and time are correct
- ❑ Frequency is correctly configured (Hourly/Daily / Weekly / Monthly)

Important: Make sure you activate the **Run Report Generation Scheduled Tasks** scheduler, which is inactive by default, and set it to run at the right **intervals**.

- **3.2 Check for Automatic Deactivation**

- ❑ Has the report failed repeatedly?
- ❑ Was the report owner deactivated?
- ❑ Was the report deleted and recreated?

Important: Scheduled reports may automatically deactivate after repeated failures.

SECTION 4: Email & SMTP Configuration

- **4.1 System-Level Email Configuration**

- ❑ Outbound email is configured in Admin > Email Settings
- ❑ SMTP credentials are valid
- ❑ No recent password changes
- ❑ Test email sends successfully

- **4.2 User-Level Email Settings**

- ❑ Report owner has a valid email address
- ❑ Email address is confirmed
- ❑ No email suppression flags on the user record

Important: If the outbound email is misconfigured, reports may generate but fail to deliver.

SECTION 5: Duplicate Report Delivery

If recipients are receiving duplicate reports:

- ❑ Are multiple schedules created for the same report?
- ❑ Are there duplicate copies of the report?
- ❑ Is more than one admin scheduling the same report?
- ❑ Has report ownership been transferred, but the old schedule remains active?

Important: Duplicate deliveries are usually caused by duplicate schedules — not system errors.

SECTION 6: Attachment vs Link Behavior

- **6.1 Confirm Delivery Type**

- ❑ Is the report set to send as **an attachment (CSV and PDF)**?
- ❑ Is the report configured to send as an **email embed**?

- **6.2 Validate Expected Behavior**

- ❑ Attachments include snapshot data at send time.
- ❑ Reports exceeding 200 rows will not be embedded but will be attached as a CSV unless the report has no data.

Important: Users may expect static data but may receive dynamic results via the report link if they choose the “Embed report in email” option.

SECTION 7: Structured Troubleshooting Before Escalation

Before contacting Support, confirm:

- ❑ Reproduced the issue manually
- ❑ Tested the report without scheduling
- ❑ Reviewed report filters for unintended restrictions
- ❑ Confirmed no recent role or team changes
- ❑ Verified system email logs
- ❑ Checked instance logs (if accessible)

Escalation Readiness Checklist

If opening a Support case is still necessary, include:

- Report name
- Report owner
- Schedule frequency
- Expected behavior and actual behavior
- Date and time of last occurrence
- Screenshot of schedule configuration
- Email logs (if available)

Outcome

This promotes methodical validation instead of reactive troubleshooting. After completing this checklist, we have:

- ✓ Verified required permissions before scheduling a report
- ✓ Confirmed report ownership vs recipient behavior
- ✓ Validated schedule status and deactivation triggers
- ✓ Confirmed SMTP/email configuration dependencies
- ✓ Identified causes of duplicate report delivery
- ✓ Distinguished between attachment vs link delivery behavior
- ✓ Performed structured troubleshooting before escalating to Support



**Good Work! Now you're
ready to schedule
reports!**

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Thank you for watching!