Scheduled Report & Dashboard Emailer

User Guide

Odoo 18 / 19 · Community Edition

Productivity & Automation

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1. Overview

Scheduled Report & Dashboard Emailer automatically emails any saved report or list export to a set of recipients on a recurring schedule — as PDF, XLSX or CSV. Reports that used to be exported and emailed by hand are now delivered without anyone lifting a finger.

Each scheduled report defines its source (a model and saved view / report), an output format, the recipients and a cadence. A run history records every send and the attachment produced.

Who is it for?

Managers and operations teams who regularly distribute the same reports and want them sent automatically and reliably.

Technical name	gb_scheduled_report_dashboard_emailer
Category	Productivity & Automation
Depends on	mail
Edition	Odoo 18 / 19 Community (no Enterprise required)
Licence	LGPL-3

2. Installation

The module installs like any standard Odoo application. You need a user with the Administration / Settings access right to add an app.

- Activate Developer Mode (Settings ▸ General Settings ▸ Developer Tools) if the Apps menu is hidden.
- Open Apps and click Update Apps List so Odoo re-scans the add-ons path.
- Search for “Scheduled Report & Dashboard Emailer” (technical name **gb_scheduled_report_dashboard_emailer**).
- Click Install. Odoo loads the models, security groups, menus and any scheduled actions.
- Refresh the browser; the new top-level menu Report Emailer appears.

Dependencies

This app depends on mail. Odoo installs any missing dependency automatically.

3. Configuration

Create a scheduled report; the built-in cron delivers it on cadence.

Scheduled Reports — Report Emailer ▸ Scheduled Reports

Create a scheduled report (scheduled.report): choose the model and saved report/view, the output format (PDF / XLSX / CSV), the recipients and the schedule.

Recipients

Recipient deliveries (scheduled.report.recipient) track each address; invalid addresses are flagged.

Cron

A scheduled action (_cron_send_due) sends every report that is due on its cadence.

4. Step-by-step Usage Walkthrough

Define once, test, then let it run.

Step	What you do
1. Create	In Scheduled Reports click New, pick the report/view, format and recipients, and set the schedule.
2. Send test	Use the test wizard's Send Test (action_send_test) to email yourself a sample and confirm it looks right.
3. Activate	Save and activate. The cron will now send it on cadence to the recipients.
4. Run now	Use Run Now (action_run_now) to send immediately outside the schedule.
5. Review runs	Open Run History (action_view_runs) to see each send and Download the attachment that was produced.
6. Fix addresses	Recipients with an invalid address are flagged so you can correct them.

Status lifecycle

Each due report is rendered and emailed by the cron; runs and per-recipient deliveries are logged.

5. Feature Reference

Scheduled reports

Any saved report or list export emailed on a recurring cadence.

Multiple formats

Deliver as PDF, XLSX or CSV.

Recipient management

Per-recipient delivery tracking with invalid-address flagging.

Test send

Email yourself a sample before going live.

Run now

Send immediately, independent of the schedule.

Run history

Every send recorded (scheduled.report.run) with the attachment available for download.

6. Tips, Troubleshooting & FAQ

Q. What can I schedule?

A. Any saved report or list export — pick the model and saved report/view on the scheduled report.

Q. Which formats are supported?

A. PDF, XLSX and CSV; choose per scheduled report.

Q. How do I check it before going live?

A. Use Send Test to email yourself a sample copy first.

Q. A recipient isn't receiving it.

A. Check the Run History and the recipient list — invalid addresses are flagged so you can fix them.

Q. Can I send it off-schedule?

A. Yes. Run Now sends immediately without waiting for the cadence.

Q. Where are past sends stored?

A. In Run History, where you can also download the exact attachment that was sent.

7. Support

We provide application support and integration guidance for this module. If you hit an issue, please include your Odoo version (18 or 19), the module version, and a short description with a screenshot.

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Thank you for choosing Scheduled Report & Dashboard Emailer. This guide documents the features as implemented in the module; menu labels and field names match what you see in Odoo.