

R3TX TrulinX Report Automation

TrulinX provides powerful data for your company – R3TX delivers that data efficiently and effectively, with no need to run repetitive manual reports and queries. TrulinX Reports and custom SQL query results are delivered right on schedule, sent to your employee email inboxes for easy access. Reduce your printing costs!

TrulinX Report emails

- Any existing TrulinX application report can be defined, scheduled, and saved.
- Any available report criteria can be defined and saved along with the report.
- Multiple variations of the same report can be configured.
- Existing report definitions can be modified and re-saved with the updated criteria.
- Reports can be set to run per the TrulinX options – daily, weekday, weekly, monthly – updated as needed.
- Reports are delivered as PDF attachments to an email message in the same format as the printed reports.

The screenshot shows the configuration window for a report titled "Quote Report by Sales Rep". The interface includes a menu bar (File, Edit, View, Go, Window, Help) and a toolbar. The "Identity" section contains "Report ID: QRD-BW" and a name field "Daily New Quotes". The "Select" section includes "Selling location: MAIN", "Customer ship-to:", "Written by:", "Sales rep: BW", and "Ben Watts". The "Tickle date from:" and "Date entered from:" are set to "\$TO-1", while "Tickle date to:" and "Date entered to:" are set to "\$TO". The "Sort" section has "Option: Sales rep, Cust ship-to, Quote r". The "Status" section shows "Printer: Win2PDF-Report" and "Number of copies: 1".

In this example, this report will print the existing TrulinX report of daily quotes for sales rep BW. The date range is from yesterday to today; the report is scheduled to run every Tuesday thru Saturday mornings.

This report is saved for rep BW; the same report can be run for each sales rep with a new name.

The schedule is set on the TrulinX Server and runs from that server.

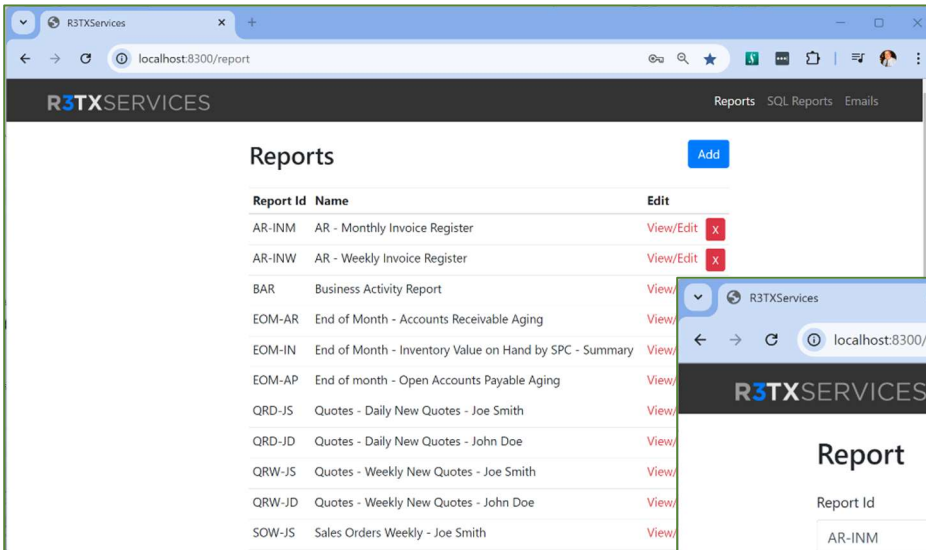
The report PDF is placed in a watched folder and is emailed from the server to the recipients. Each report can have as many email recipients as needed.

This is a sample of an emailed TrulinX Report where the email calls out the name and content of the report.

The screenshot shows an email interface with the subject "End of Month - Inventory Value on Hand by SPC". The email body includes the sender "R3TX <no-reply@trulinxmail.com> to me, Byron" and a PDF attachment named "EOM-IN.pdf". The report content is as follows:

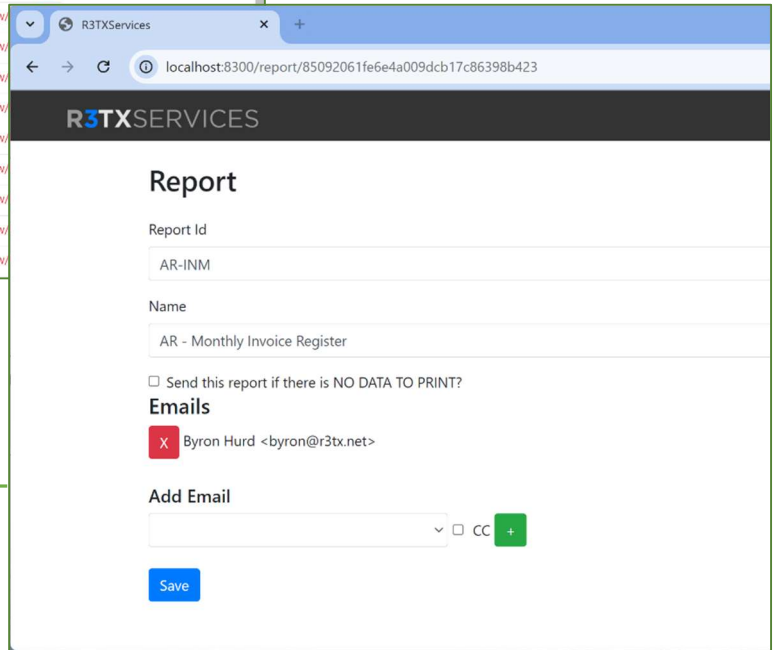
Rapid Control Service Inventory Valuation Report		PAGE: 1 OF 3
LOCATION: MAIN Rapid Control Service		
ON HAND ITEMS:		
Total ON HAND value for CHEPAR:		\$2,995.13
Total ON HAND value for CBIMBA:		\$1,428.01
Total ON HAND value for CCVCYL:		\$545.74
Total ON HAND value for CGDYEA:		\$7,860.36
Total ON HAND value for CVCYCL:		\$1,710.96
Total ON HAND value for CHISCF:		\$7,120.66
Total ON HAND value for CRACYL:		\$635.13
Total ON HAND value for CMCYCL:		\$110,364.25
Total ON HAND value for CMBOM:		\$112.04
Total ON HAND value for CTCYCL:		\$7,821.75
Total ON HAND value for DDPBRAT:		\$999.36
Total ON HAND value for DDDOUT:		\$11,243.34
Total ON HAND value for DFABRI:		\$5,463.40
Total ON HAND value for DMBARAT:		\$7,588.60
Total ON HAND value for DPEEVO:		\$1,308.05
Total ON HAND value for DDEBAT:		\$25,632.16
Total ON HAND value for DSBURNE:		\$11,574.00
Total ON HAND value for FAFKIT:		\$1,038.63
Total ON HAND value for PHEBET:		\$6,890.73
Total ON HAND value for PMSICF:		\$86.55
Total ON HAND value for PFRFIT:		\$1,038.21
Total ON HAND value for FEMFIT:		\$53,170.42
Total ON HAND value for HGDYEA:		\$2,172.28
Total ON HAND value for HMCYCL:		\$15.73
Total ON HAND value for LARMUF:		\$1,886.99
Total ON HAND value for LEMBOM:		\$133.66
Total ON HAND value for LMISCF:		\$2,446.19
Total ON HAND value for LEMFAC:		\$152,363.00
Total ON HAND value for MATTEC:		\$1,867.57
Total ON HAND value for MEMBOM:		-\$433.56
Total ON HAND value for MHSICF:		\$570.80
Total ON HAND value for COMFAC:		\$1,561.38
Total ON HAND value for OVACCN:		\$10,241.35
Total ON HAND value for OVICAB:		\$452.05
Total ON HAND value for PACCOO:		\$94.50
Total ON HAND value for PARAGE:		\$4,000.15
Total ON HAND value for PARFLO:		\$1,338.45
Total ON HAND value for PARFLO:		\$108.09
Total ON HAND value for FRACOM:		\$829.96
Total ON HAND value for FRAXTX:		\$35,597.73
Total ON HAND value for PCHACC:		\$1,005.62
Total ON HAND value for PDESHE:		\$881.14
Total ON HAND value for PEXDIR:		\$140.24
Total ON HAND value for PEXAIR:		\$226.95
Total ON HAND value for PGUAGE:		\$3,998.25
Total ON HAND value for PMSICF:		\$96,553.67
Total ON HAND value for PWFLO:		\$26,195.74

The attached report opens as a PDF file, which can be printed or saved as needed.



The TrulinX report emails are controlled via a simple web page where new reports can be added once they have been defined and scheduled in TrulinX.

Each report can be sent to multiple recipients, even outside the organization if needed. The R3TX system sends the report emails based on the schedule set up within TrulinX.



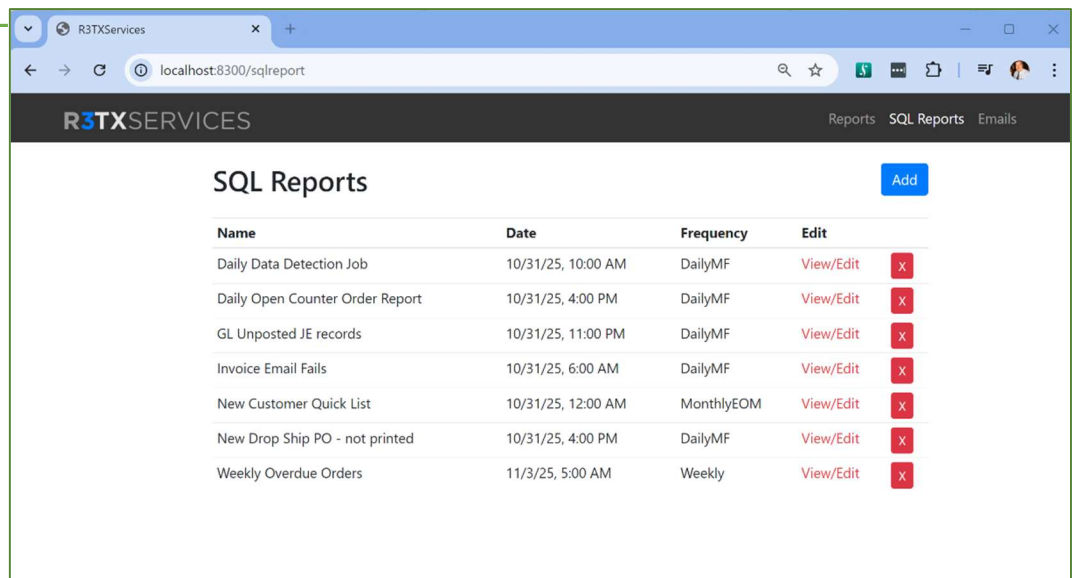
The TrulinX report ID matches the control record in the R3TX system.

TrulinX Custom SQL Reports

R3TX SQL Custom Reports allow the use of simple or complex data queries to find critical TrulinX data and send that data by email in an attached Excel file which can be easily opened in Excel at the user's workstation.

SQL allows data from multiple related files to be 'joined' into a single output file.

These SQL reports work well for 'exception' reports – if no data found, no report is sent. Works well for data reviews and missed procedures.



Each custom SQL report can be sent to as many internal or external email addresses as needed. The SQL reports can be scheduled on a daily, weekday, weekly, or monthly schedule.

The left screenshot shows the 'SQL Report' configuration page. Fields include:

- Name: Daily Data Detection Job
- Email Subject (optionally use <DATE>): Daily Data Detection - <DATE>
- Email Body: The system data detection job is scheduled to run night... This report shows any data issues - bad inventory UOM,
- Filename (optionally use <DATE>): Daily-Data-<DATE>
- Frequency: Daily (M-F)
- Start Date: 10/31/2025
- Time of day to run: (empty)

The right screenshot shows the configuration details:

- Time of day to run: 10:00 AM
- SQL: SELECT TOP (500) [JobNumber], [MessageNumber], [JobType], [MessageType], [MessageCode], [MessageText], [UserIdAdded], [DateAdded], [UserIdMod], [DateMod]
- Password: (masked)
- Emails: Byron Hurd <byron@r3tx.net>
- Buttons: Save, Save & Run

This is a sample email sent from the SQL Custom Report tool:

Jon - Open Quotes - Last 7 days - 10-29-24 External Inbox x R3TX-Byron x

R3TX <no-reply@trulinxmail.com> 8:22 AM (2 minutes ago)

to Byron ▾

Jon, these are your quotes from the last 7 days which have not been converted to orders. Each quote should be reviewed and followed up with the customer. The attached file can be opened in Excel on your workstation. If you wish to save this read-only file for later use, save the file on your workstation. To change the rules for this report, see the system administrator.

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sent with r3tx.net

for support, please email support@r3tx.net

One attachment • Scanned by Gmail

Job Number	Message Number	Job Type	Message Type	Message Code	Message Text	Date Added	User ID Added	Date Mod	User ID Mod
00000001	000001	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000002	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000003	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000004	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000005	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000006	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000007	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000008	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000009	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000010	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000011	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000012	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000013	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000014	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000015	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000016	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000017	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000018	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000019	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000020	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000021	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000022	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000023	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000024	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000025	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000026	SALES	QUOTE		SALES QUOTE	10/29/2024			
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00000001	000030	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000031	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000032	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000033	SALES	QUOTE		SALES QUOTE	10/29/2024			
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00000001	000079	SALES	QUOTE		SALES QUOTE	10/29/2024			
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00000001	000092	SALES	QUOTE		SALES QUOTE	10/29/2024			
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00000001	000096	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000097	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000098	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000099	SALES	QUOTE		SALES QUOTE	10/29/2024			
00000001	000100	SALES	QUOTE		SALES QUOTE	10/29/2024			

tmp/OpenQuotes ...

The attached file is in Excel format and can be saved on the user's workstation if needed. Columns can be quickly auto-formatted for readability.

QuoteNumber	Customer	ShipToName	SONumber	Customer MarkNum	WrittenBy	OKToConv	InvoiceMe	Territory	ShipToAddress	ShipToCity	DateQuot	DateRequ	DateProm	ContactFir	ContactLa	ContactPh	ContactEn	DateAd
111076	DNCG3041				JON	TRUE	EMAIL	BW	295 N Bee GRAND H		#####	#####	20221107	MIKE	_LN_		mike@gl	2022-11
111082	DRCA3201				JON	TRUE	EMAIL	HS	2909 PEAC GRAND R		#####	#####	20221107	MIKE	WASS		mike@at-	2022-11
111088	ADMC828				JON	TRUE	EMAIL	DW	743 MAIN COOPERS		#####	#####	20221107	WESLEY	DEVRIES	6.17E+09	wdevries	(2022-11
111095	CNCM209				JON	TRUE	EMAIL	NM	2336 WILS JENISON		#####	#####	20221108	REGAN	SCHAEFFER		rschaeffe	2022-11
111104	DOM3307				JON	TRUE	EMAIL	NM	7298 NOR BELDING		#####	#####	20221108	STACEY	KIRBY	6.17E+09	stacey.kir	2022-11
111132	ADMC828				JON	TRUE	EMAIL	DW	743 MAIN COOPERS		#####	#####	20221109	BRITTANY	BEAN	6.17E+09	bbean@cc	2022-11
111141	DDCM536				JON	TRUE	EMAIL	HS	4404 CENT HUDSONV		#####	#####	20221109	MARK	REDMOND		mredmon	2022-11
111146	ADC11655				JON	TRUE	EMAIL	DW	2740 PRAI WYOMINC		#####	#####	20221110	LINDSEY	LIPSCOME	6.17E+09	llipscomb	2022-11
111147	4				JON	TRUE	EMAIL	HS	5506 36TH GRAND R		#####	#####	20221110	BOB	VALLES	616-437-9	bvalles@t	2022-11
111122	ADCT5501				JON	TRUE	EMAIL	DW	2751 COUI GRAND R		#####	#####	20221109	ERIC	_LN_		eoldenbu	2022-11
111161	ANC11814				JON	TRUE	EMAIL	DW	2555 OAK GRAND R		#####	#####	20221111	DOUG	JOHNSON		djohnson	2022-11
111166	CRCSS951				JON	TRUE	EMAIL	DW	3965 44TH GRAND R		#####	#####	20221111	TREY	HERBLET	6.17E+09	therblet@	2022-11
111175	CDMM703				JON	TRUE	EMAIL	BW	5621 AIRLI FRUITPOR		#####	#####	20221111	GABE	ST.AMOUR		gstamouri	2022-11
111179	CDMA095				JON	TRUE	EMAIL	BW	2001 PEAC WHITEHA		#####	#####	20221111	LISA	BOERSEM	2.32E+09	lisa.boers	2022-11

R3TX is configured for best-practice security on your network. R3TX consists of a secure Windows application installed on each TrulinX server that will send reports, and a private email server hosted at AWS. We configure R3TX with a unique Windows user login which only has SELECT privileges; no data updates can be performed from the R3TX SQL system. Access to R3TX can be provided to key staff on a password-protected basis.

Pricing for installation and support:

Pricing is based on the number of licensed users in the TrulinX system. Pricing is available upon request. The system requires a modest annual support fee to cover hosting and maintenance.

Pricing includes coordination with your IT resources to explain the system requirements and operations. R3TX engineers will meet with your IT resources and verify that security standards will be maintained.

Pricing includes up to four (4) hours of online training for appropriate staff members. Additional training and custom query definitions are available at our standard hourly rate.

R3TX, LLC is a Michigan Limited Liability Company.

Our informational website is www.r3tx.net, which includes a video demonstration.

For inquiries, contact byron@r3tx.net.