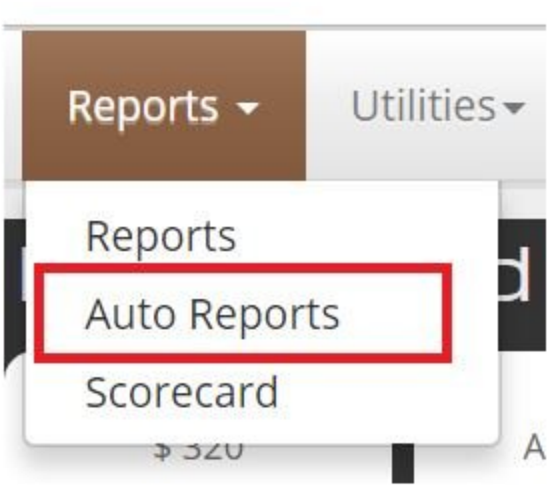
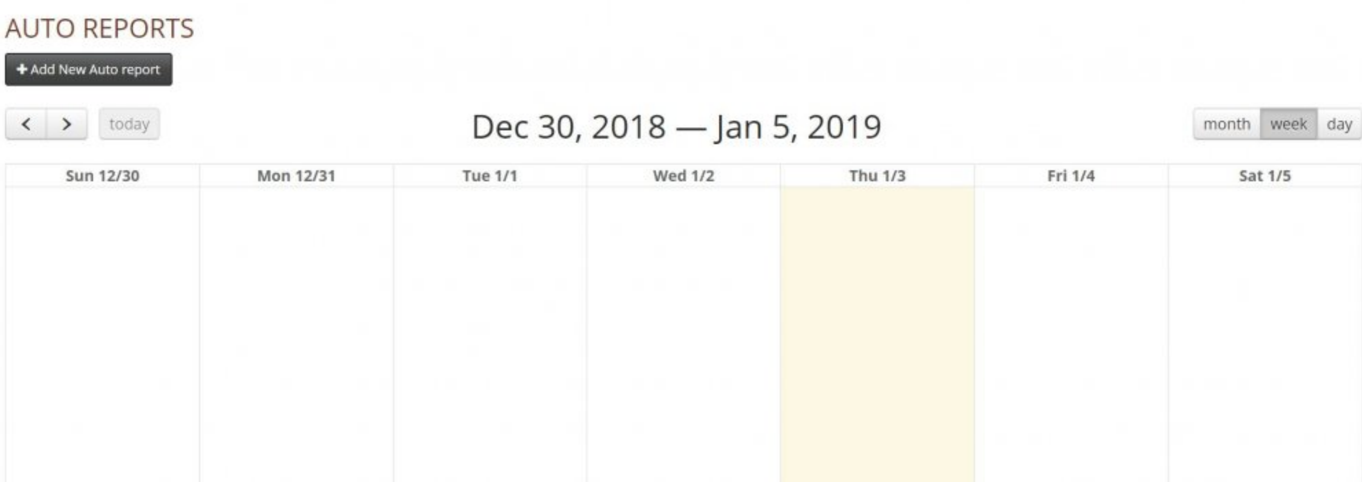
Auto Reports



We have redesigned our Auto Reports feature. It is now located in its own section under the Reports Tab.The newly designed dashboard will allow for further customization and timing of reports. The site admin will have access to all reports created within the site. Staff users will only see the reports they create.

Once the page is open, the view will default to a week's schedule and appear as a calendar. This can be changed to a day or month calendar view by using the buttons in the top right.

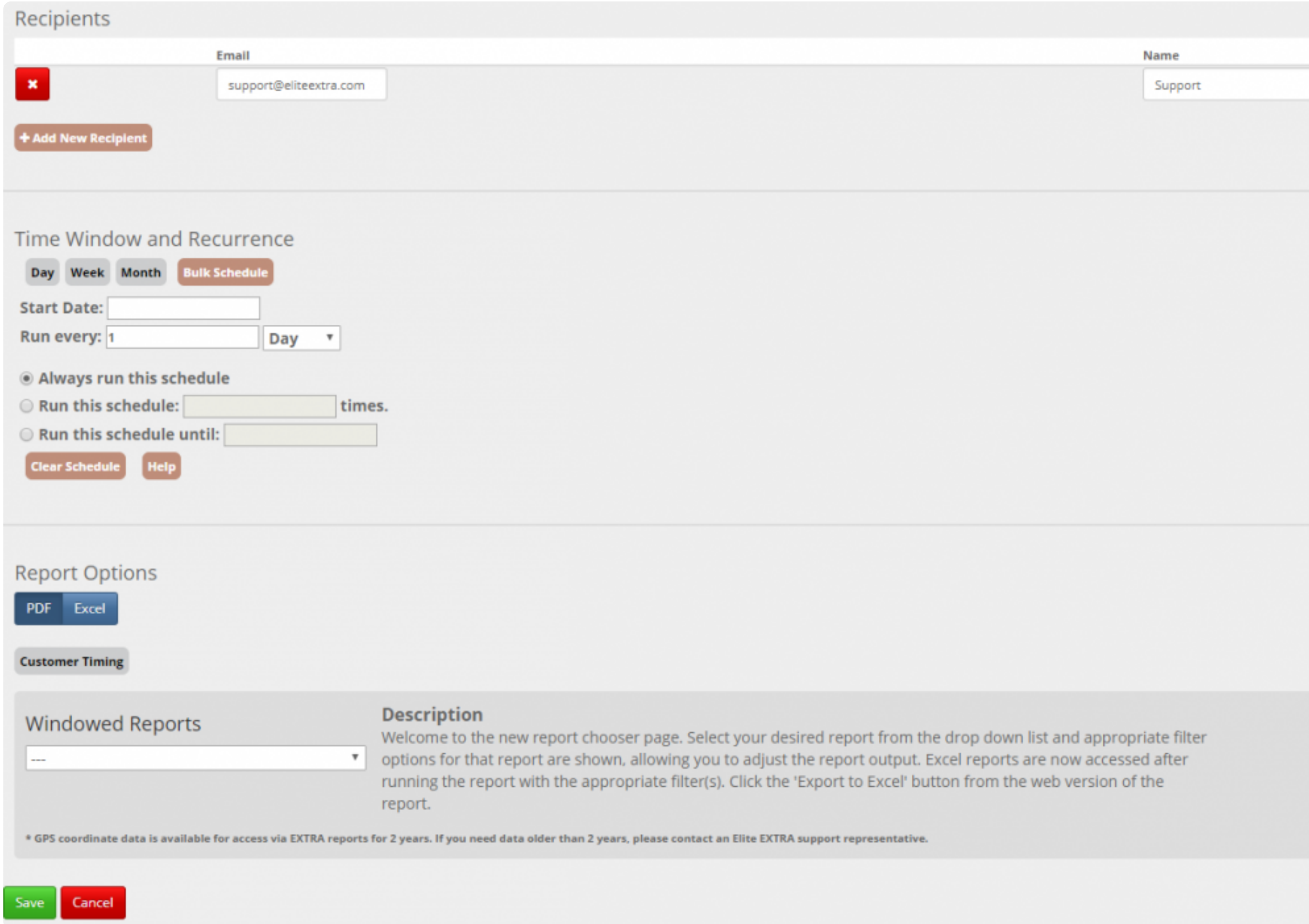


To add a new report, follow these steps:

1. Click the +Add New Auto report button on the top left of the page.
2. Click the +Add New Recipient button. This can be yourself and/or another employee you want to

have the report(s) sent to. Ex: Set up two or more email addresses to receive the same report. *Note:* Different additional reports will need to be set up separately, even for the same recipients.

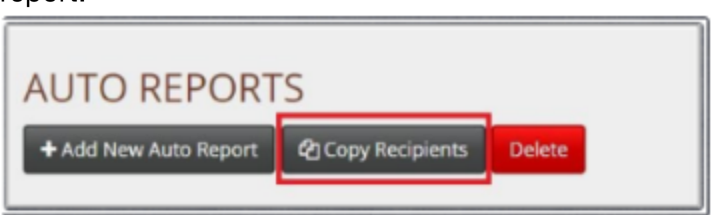
3. Set the interval(s) in which you want to receive the report.
    a. Time Window & Recurrence: Set a more static rhythm option by selecting a start date (must be current day or date in the future). Next, enter a number in Run Every box and select day, week, or month. (Ex: This allows for bi-weekly or quarterly reporting, as well as every day, week, and/or month.) Next, select Always run this schedule for ongoing emails or select a finite end to the emails with one of the other options. **To schedule a report for a week, set the start date for a Saturday.**
    b. Bulk Scheduling can be used to specify which day(s) of the week a report gets sent. If you select Monday, you will only receive data from Mondays activity (ex: I only want to see Mondays DRDbD report). You still need to select a start date and can select Run every X Day, Run this Schedule X Times, or Run this schedule until X date.
4. Select your report option: PDF or Excel attachment(s).
5. Customer Timing (optional) – Customer Timing can now be customized by any filter(s) that exist in the web reporting area. Click the Customer Timing button to open those options. If no options are selected, the report will return all results for the time frame indicated.
6. Select your desired report from the Windowed Reports area. Reports have the same filter options that they do within the web version (locations, drivers, etc). Select any additional filters you wish to apply or if no filters are applied, the report will return all results from the selected time frame.
   Click SAVE to finalize and schedule the report.



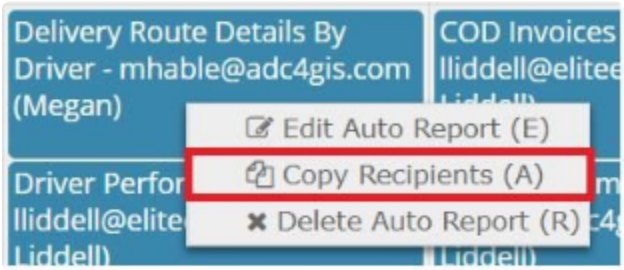
To copy recipients:

There are two ways you can copy a recipient when creating a new report.

- Option 1: Click on the Copy Recipients button located at the top of the page after saving your report.

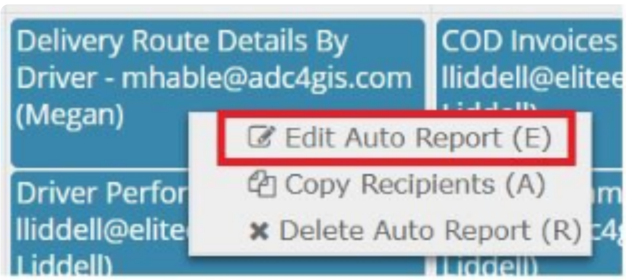


- Option 2: Locate an existing scheduled report, right click on it and select “Copy Recipients”. This will open a new tab with the email/contact information pre-populated to more easily create another schedule.



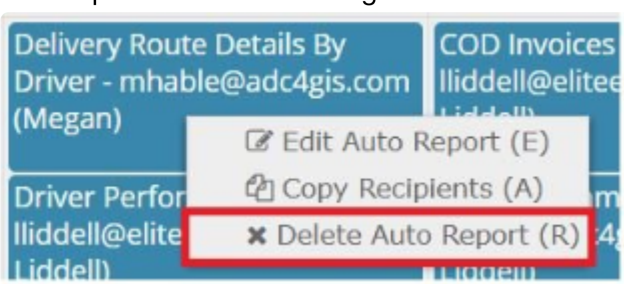
To edit an existing report:

To edit an existing auto report, from the calendar view locate the report you wish to edit. Right click on the report and click Edit Auto Report. Make necessary changes and click Save when complete.



To remove an existing report:

To remove a scheduled report, right-click and select Delete Auto Report. A second warning will pop-up to complete the removal or go back.



Dashboard: Reports and Scorecard

Windowed Reports