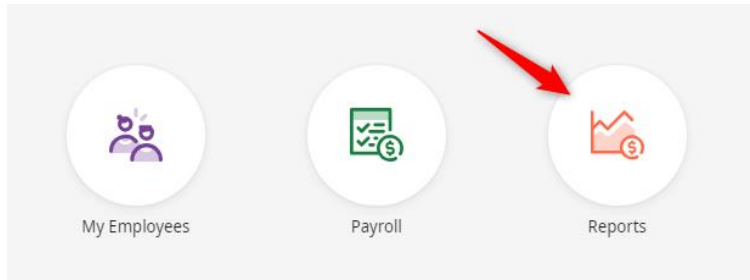


How to: E-mail Reports

1. Navigate to My Saved Reports:



Reports>My Saved Reports

2. Select the Manage Email Schedules icon to the left of the report you would like to e-mail:

Overview My Saved Reports My Completed Reports						
Page 1 of 1 1 - 7 of 7 Rows Saved: Company Reports						
Grouped By				Saved As Name	Report Name	Report Owner
				like	like	=
					payroll	
Report Category						
Payroll						
				Payroll Schedule	Payroll	Test Client Admin

*You will only be able to e-mail reports that you have created or updated/saved into your system

3. Select +Add Schedule to create a new e-mail schedule for the report.

Manage Email Schedules

Email Schedule	Description	Enabled	Date Created	Actions
No Data to Display				

Close



4. Email Schedule Set-up

Create your schedule by populating the fields below—ensuring that you add data to any field that has a red asterisk (required field):

1. Fill in the **Schedule Name** *required field
2. Add a **Description** (if needed)
3. Choose the **Schedule Type** (Weekdays or Days Profile)
4. Select the **Days** to send (M-Sun)
5. Select the **Schedule/Time** (am or pm) *required field

The 'Email Schedule' form includes the following elements:

- Enable Schedule:** A checked toggle switch.
- Schedule Name* (1):** A required text input field.
- Description (2):** A larger text area for additional details.
- Schedule Type (3):** A dropdown menu currently set to 'Weekdays'.
- Days (4):** A row of buttons for days of the week (M, T, W, T, F, S, S), with 'S' (Sunday) highlighted.
- Schedule* (5):** A required time input field showing '08:30 am'.

5. Recipients and E-mail Format:

1. Select **Recipients** *required field
2. Select **Account** or **Group** (you may use the lookup menu to the right to search for accounts) or type in Emails
3. **Add** additional e-mail fields, as needed
4. **View** settings (select Recipients Permissions or My Permissions)
5. Choose **Report Format** (PDF, Excel, CSV, HTML, XML or Text)
6. Optional Password (this will require e-mail recipients to enter password to view)
7. From Email Address (optional for mass e-mails)
8. Message Title (what will appear with the report)
9. Message Body (any message you would like have appear with the e-mailed report)

The 'Recipients and E-mail Format' form includes the following elements:

- Recipients* (1):** A required section header.
- Send To Me:** A checked toggle switch.
- Account (2):** A text input field with a value 'Test Manager' and a lookup icon.
- Group:** A search input field with a lookup icon.
- Emails:** A text input field with a value 'Test@payprocorp.com' and a trash icon.
- + Add (3):** A button to add more email addresses.
- View Emailed Report With (4):** A dropdown menu set to 'Recipients Permissions'.
- Email Section:**
 - Report Format (5):** A dropdown menu set to 'PDF'.
 - Optional Password (6):** A password input field.
 - From Email Address (7):** A text input field with a value 'Test@payprocorp.com'.
 - Display Header/Footer:** A checked toggle switch.
 - Message Title (8):** A text input field with a value 'Weekly Payroll Schedule'.
 - Message Body (9):** A rich text editor containing the text 'Happy Monday! This is the payroll schedule for the week'.
- Buttons (10):** 'Cancel' and 'Save' buttons at the bottom right.

10. Click Save. E-mail report will be forwarded to you by Saashr:

