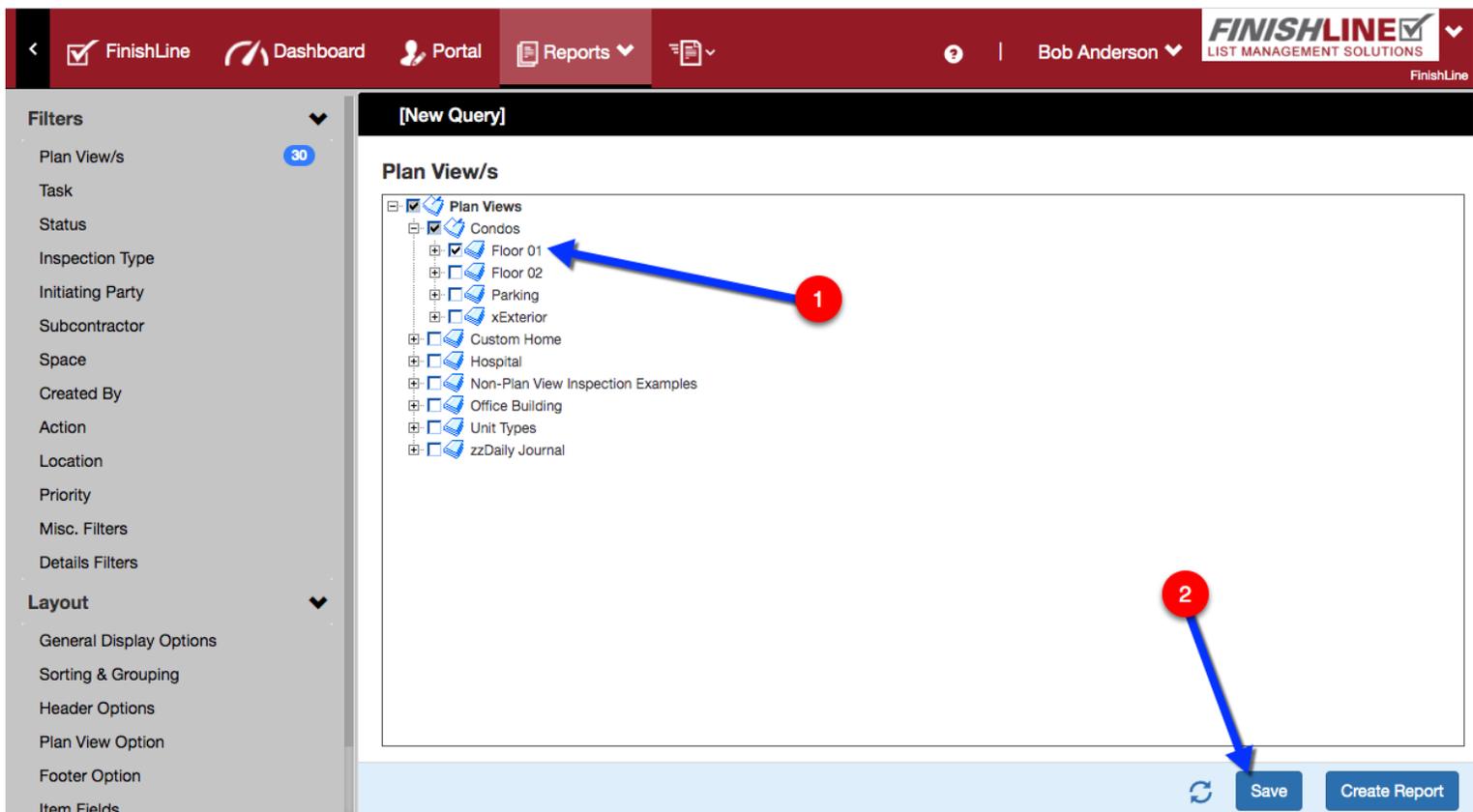


From the Dashboard, click “Create New Report” in the Reports dropdown menu.



1) Select the area for the automatic report

2) Then click “Save”

SAVE REPORT: [NEW]

Report Name: Waterfront condo

Description: First floor of condo

Active:

Projects: FinishLine

Quick Report?

Save as Template?

Access Settings: Private Group

Default Email Options

Options: Single Report to: Divided Report to Involved Subs

CC:

Subject: Waterfront Condo

Body: Please see your items.

Default Procure Options

Folder: Current Folder: Select...

Automatic Notifications

Turn On Automatic Notifications:

Upload to Procure?: Yes No

Send via Email?: Yes No

Send from: Bob Anderson (general@generic.co)

Start On: 02/28/2020 5:00 pm

Interval: Every Week

Request Acknowledgement?: Yes No

Note: Acknowledgement is recommended only for reports that are sent on a short interval. Once a report is acknowledged, any item contained in the report will not be emailed again through the automatic notifications system.

Save

- 1) Name the report and add a description
- 2) Click the button to “Divide Report to Involved Subs”
- 3) Add default email options (Subject and body text)
- 4) Check the box to Turn on Automatic Notifications
- 5) Select the intervals for sending reports (*daily, weekly, etc.*)
- 6) Save it

The screenshot shows the top navigation bar of the FinishLine application. The 'Reports' menu is open, displaying a dropdown with the following options: 'Create New Report', 'New Report from Template', 'Saved Reports', 'Metrics Reports', and 'Email Tracking Report'. A blue arrow points to the 'Saved Reports' option. On the left, a 'Filters' sidebar is visible with a '30' badge next to the 'Plan View/s' filter. The user's name 'Bob Anderson' is displayed in the top right corner.

Report will be accessible in "Saved Reports"

The screenshot shows the 'SAVED REPORTS' page. At the top left, there is a '+ New Report' button. Below the title, there is a 'Show 50 entries' dropdown and a search box containing the text 'water'. A table lists the saved reports with columns for 'Report Name', 'Report Style', and 'Access Type'. A blue arrow points to the first entry, 'Waterfront condo'. Below the table, it says 'Showing 1 to 1 of 1 entries (filtered from 16 total entries)'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

Report Name	Report Style	Access Type					
Waterfront condo	CustomReport	Private					

There is the new Saved Report!