# Automated Report Scheduling

20 Steps

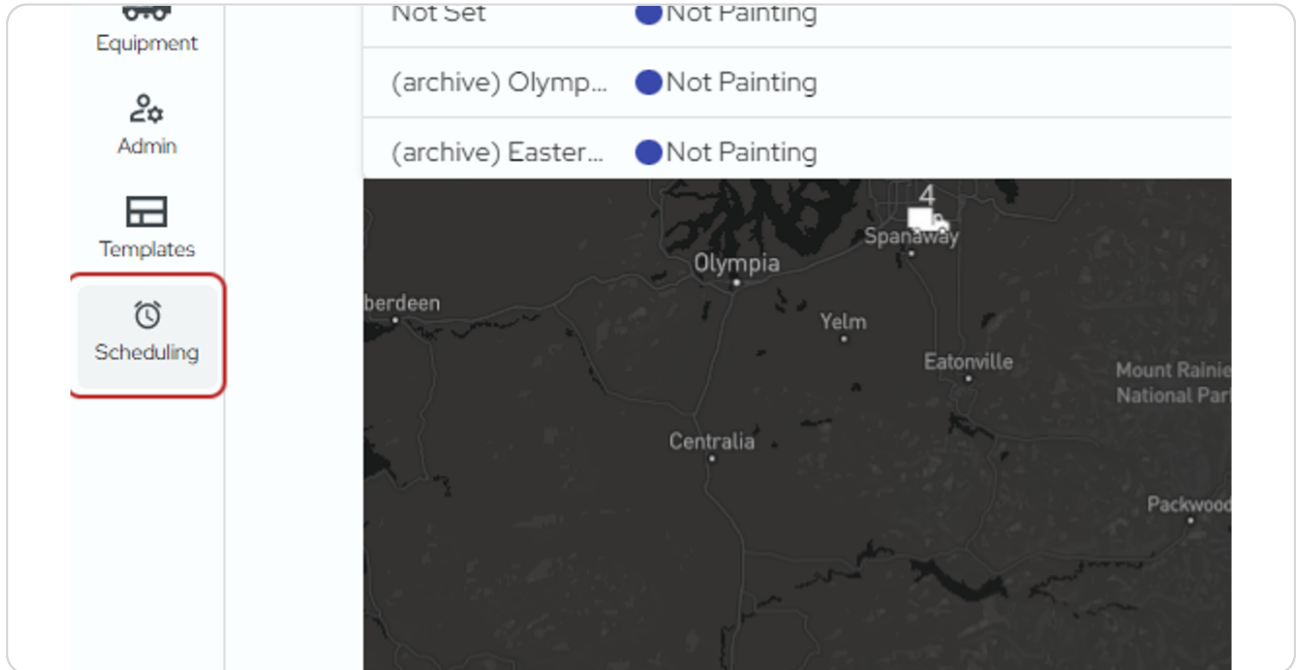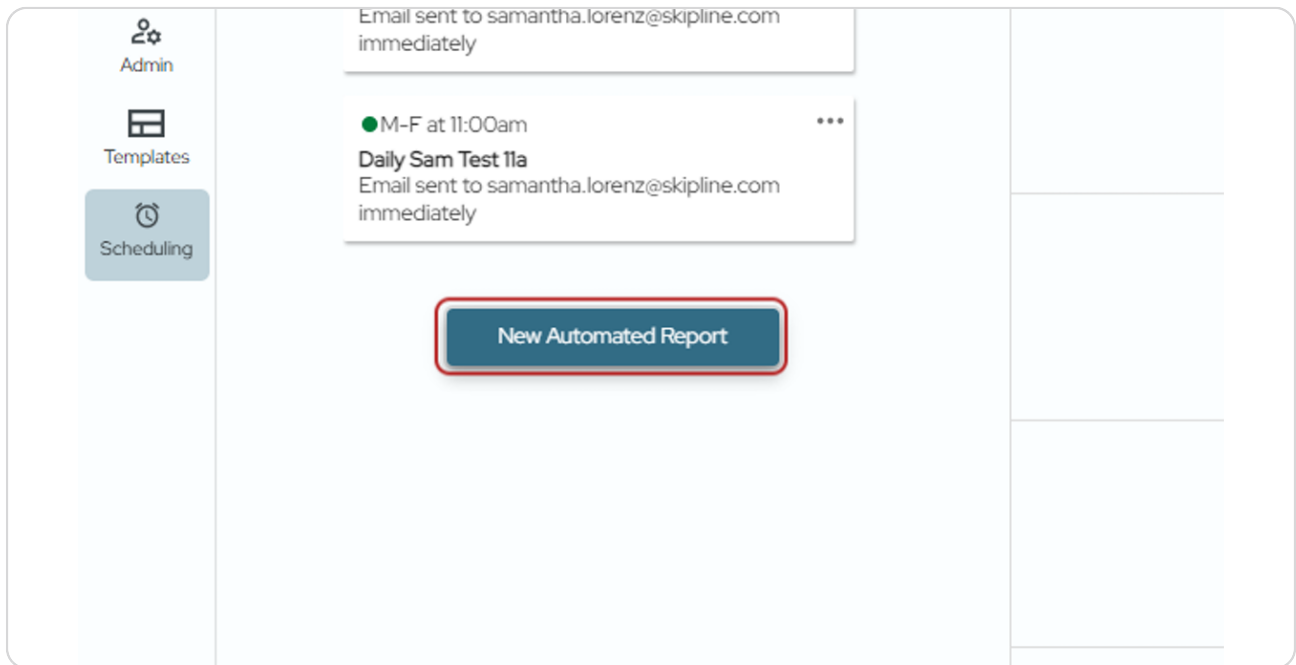| Created by | Creation Date | Last Updated |
|---|---|---|
| Samantha Lorenz | July 11, 2022 | July 11, 2022 |

**Go to Spec-Rite Online**
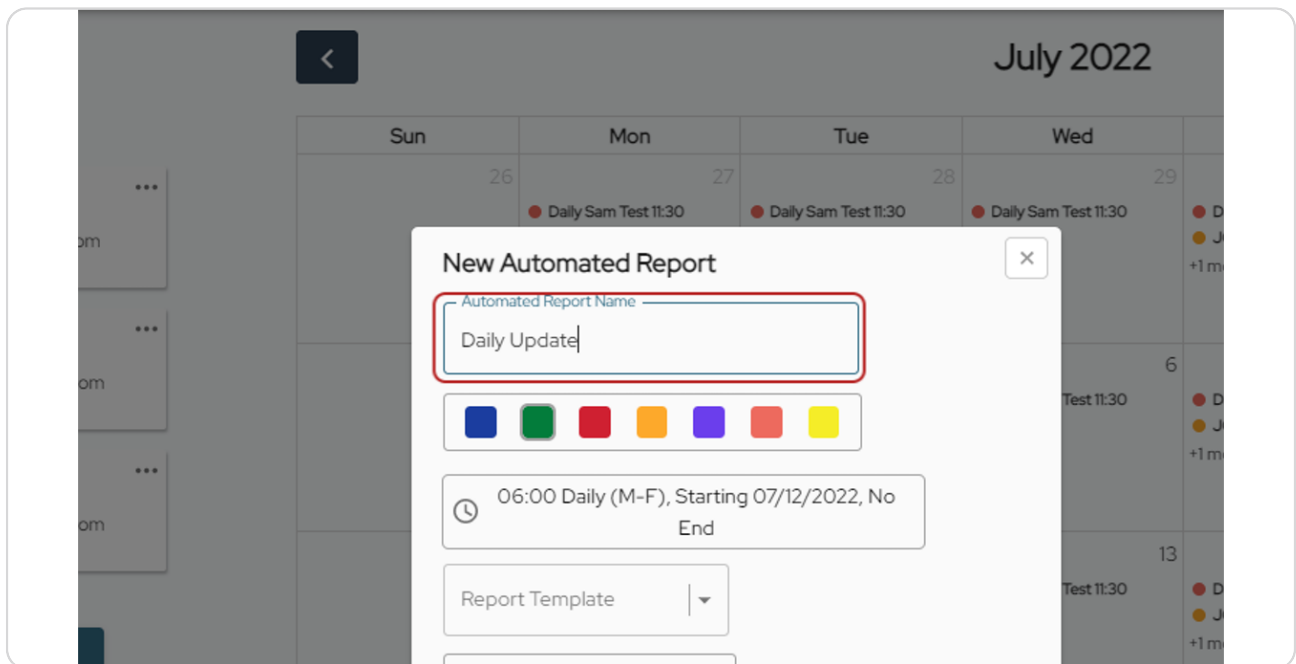
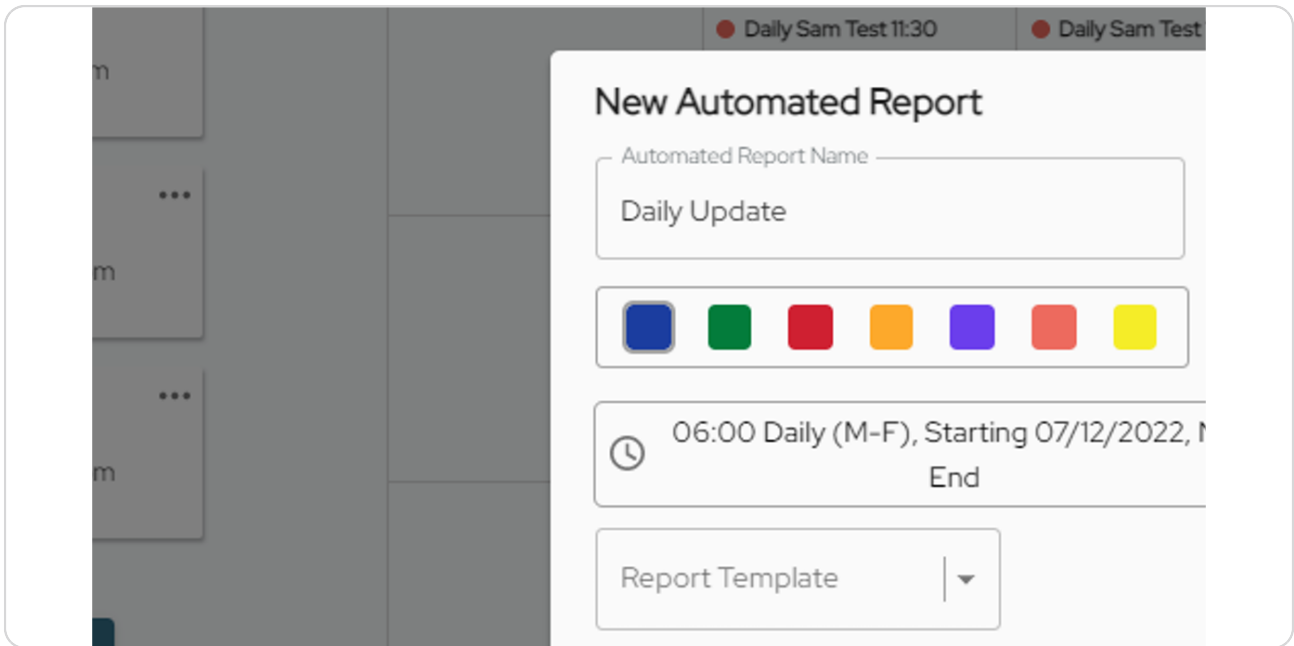**Click on Scheduling**

STEP 3

## Click on New Automated Report



STEP 4

## Give your automated report a name
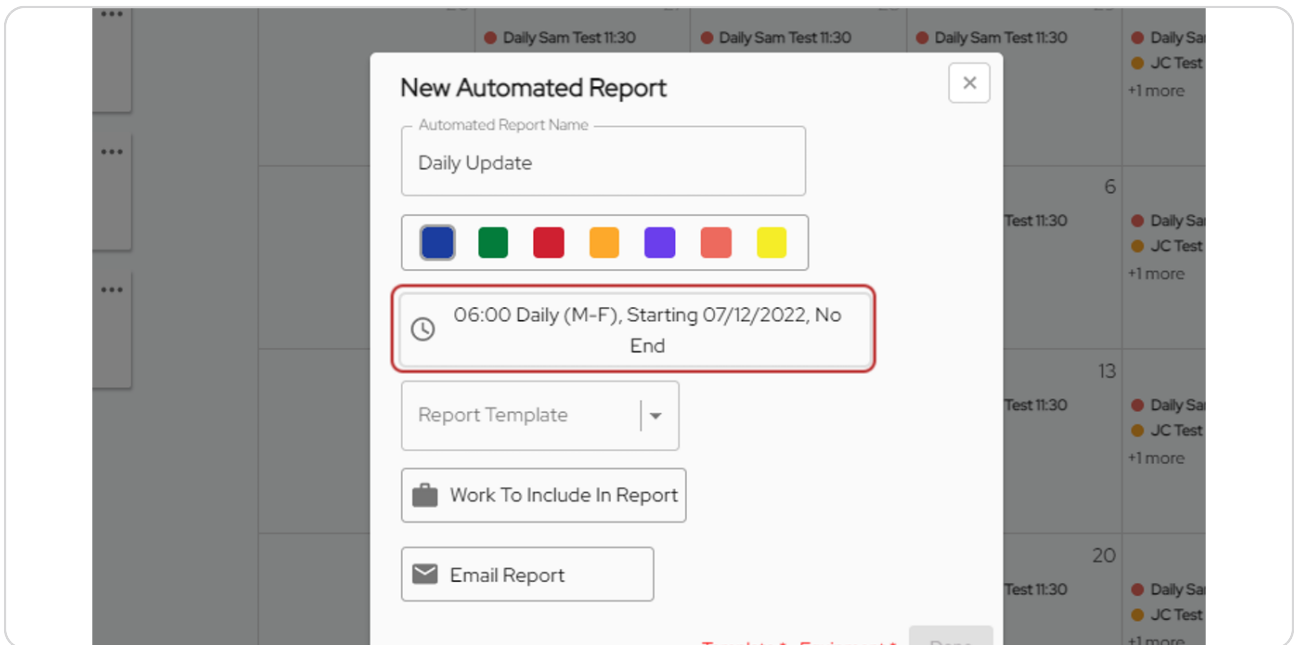
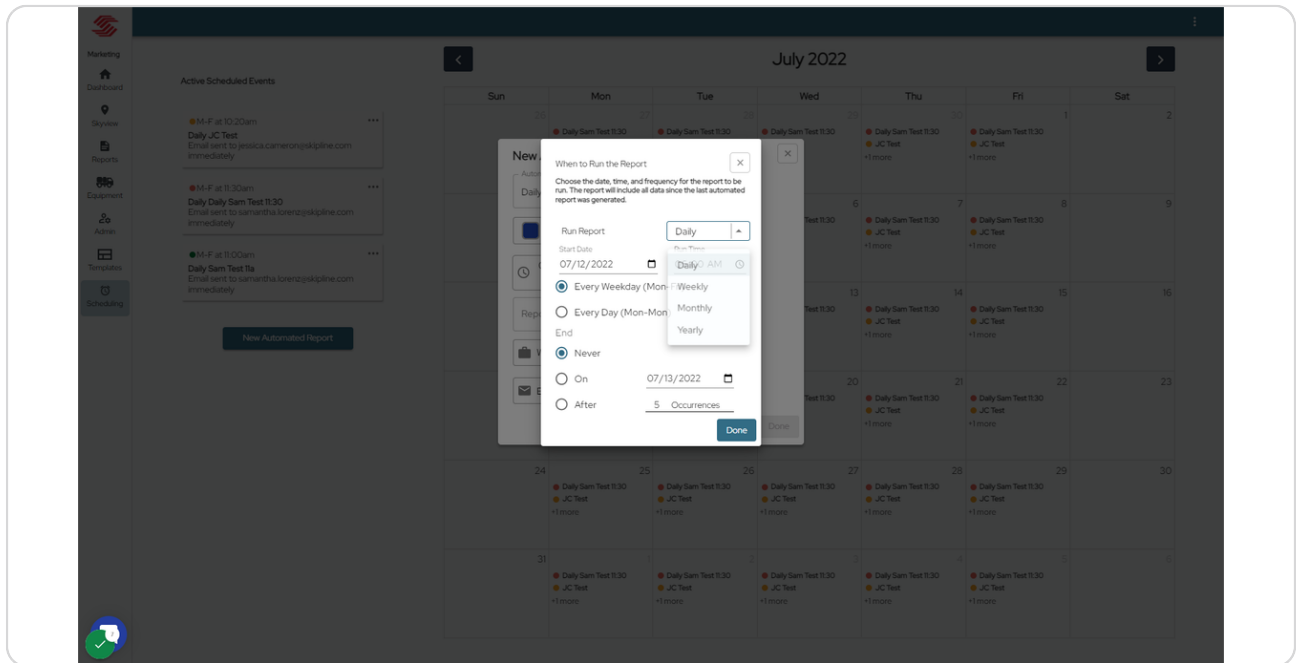**Select a color for your automated report. This will allow you multiple ways to organize your schedule reports.**
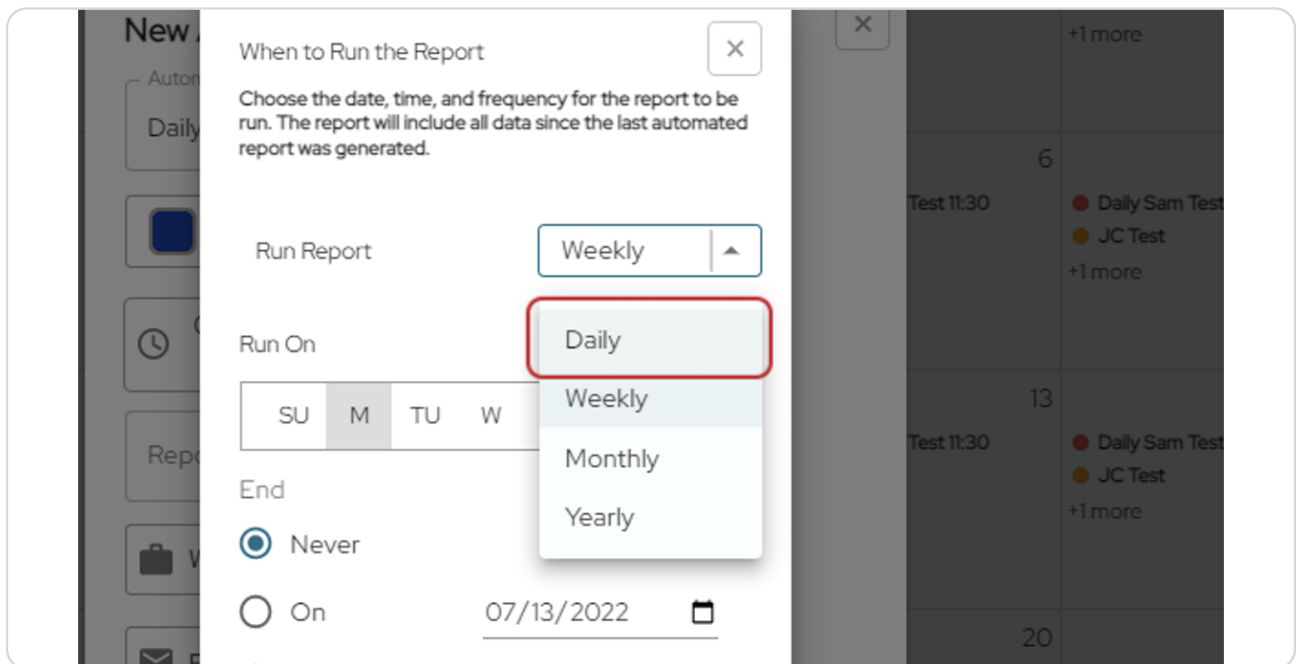
**Click on time and date to make changes.**
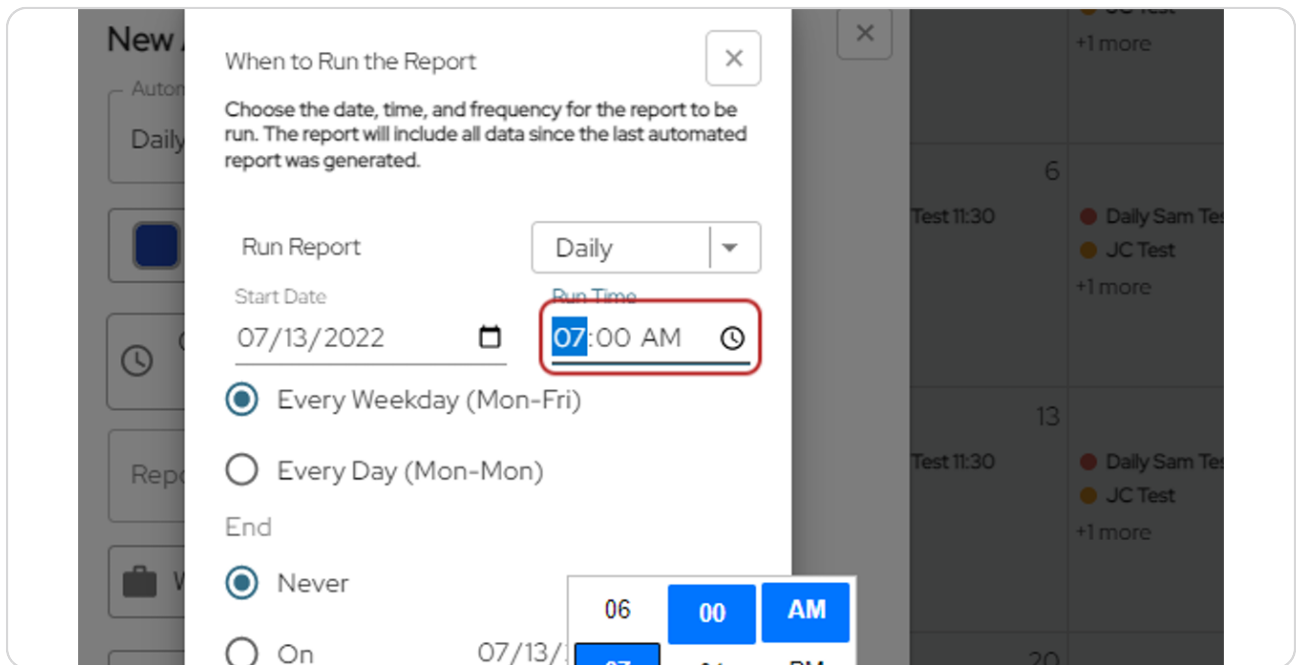
STEP 7

**A new window will open up.**



STEP 8

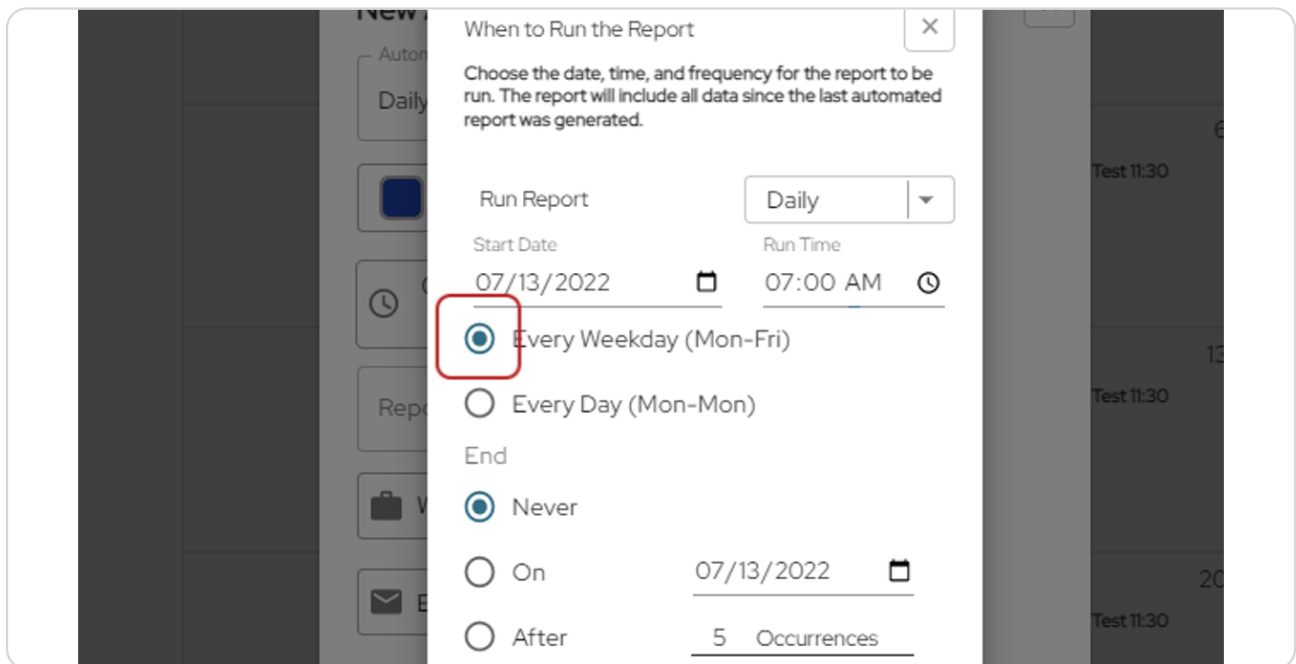**This allows you to choose daily, weekly, monthly or yearly reports.**
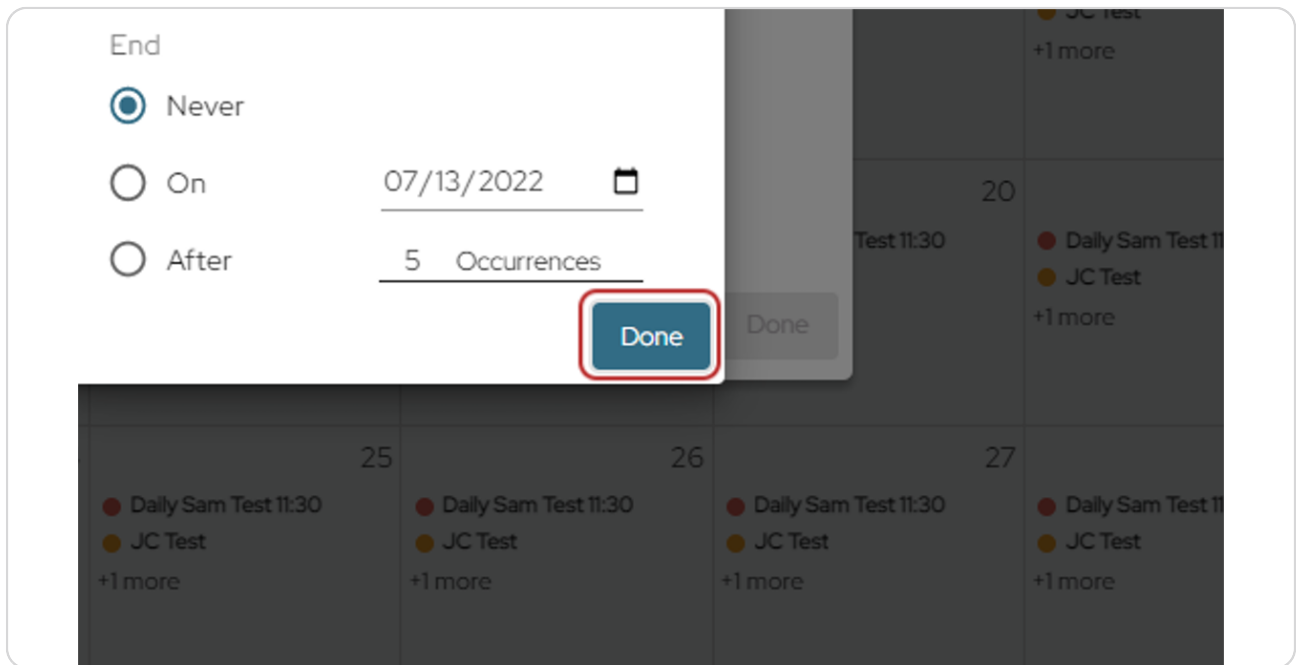
**Select your start date and the time**

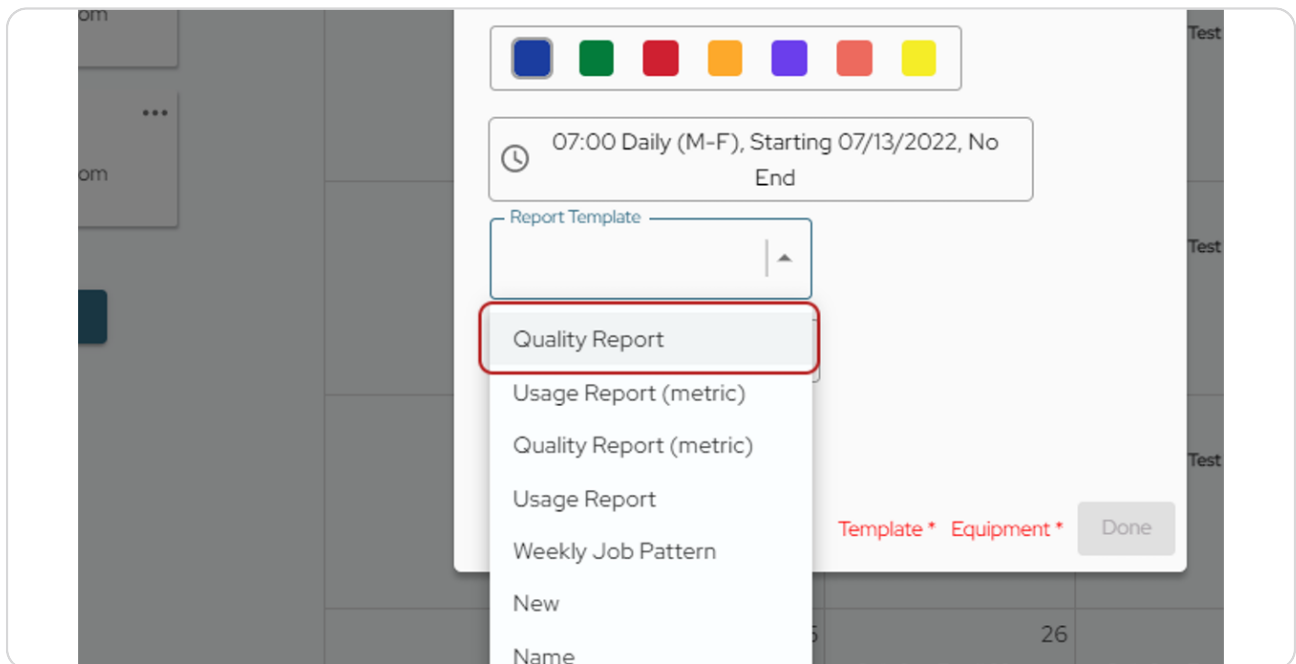**Choose whether you want your daily report delivered Mon–Fri or Mon–Mon**
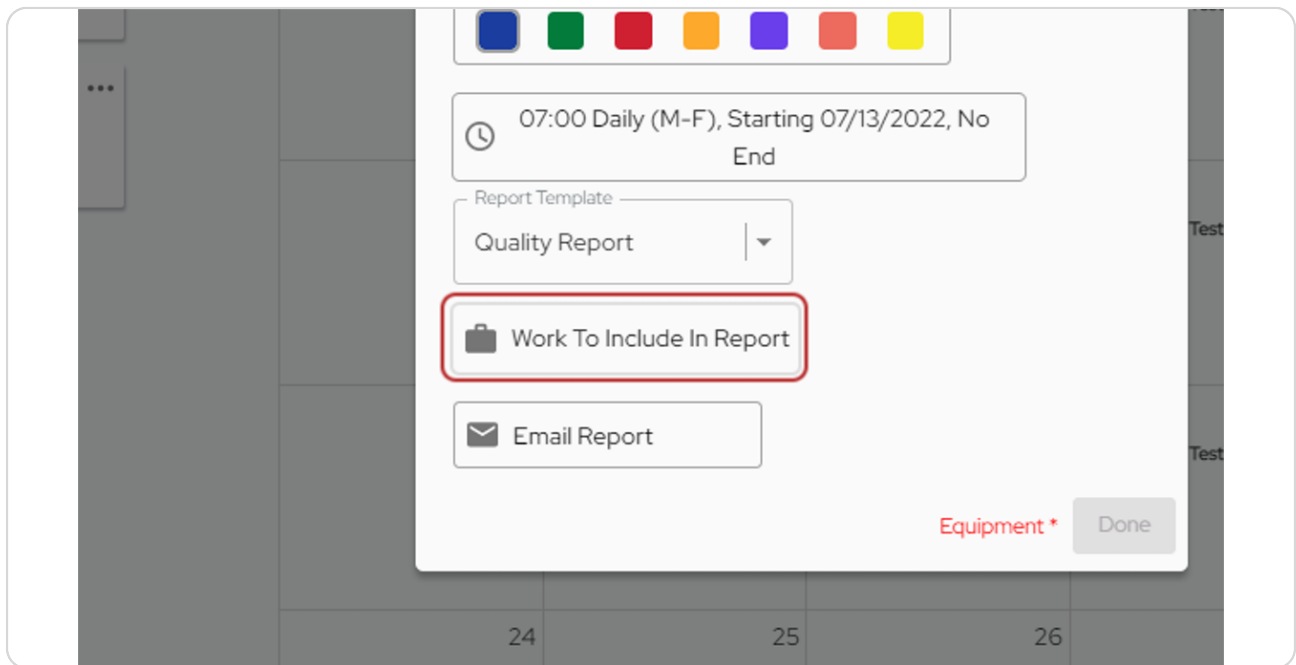
STEP 11

**Click on Done**



STEP 12

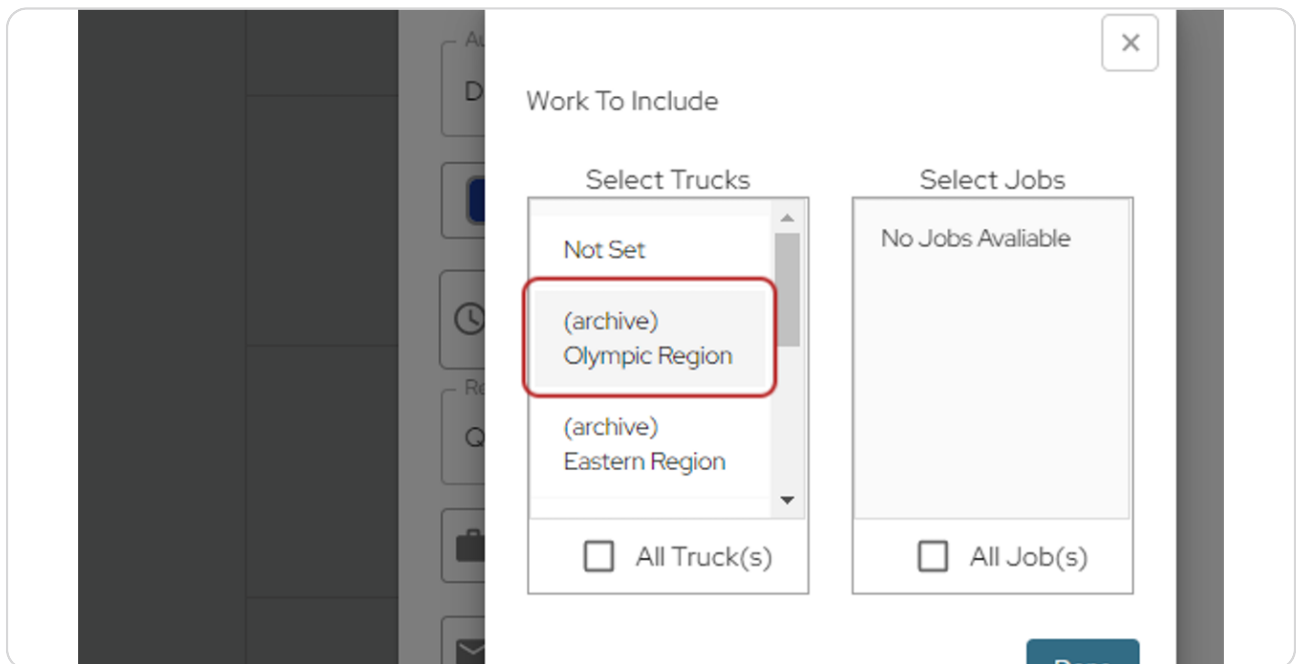**Next choose the report template you wish to run.**

STEP 13

**Then you will choose the work you want to include in the report.**
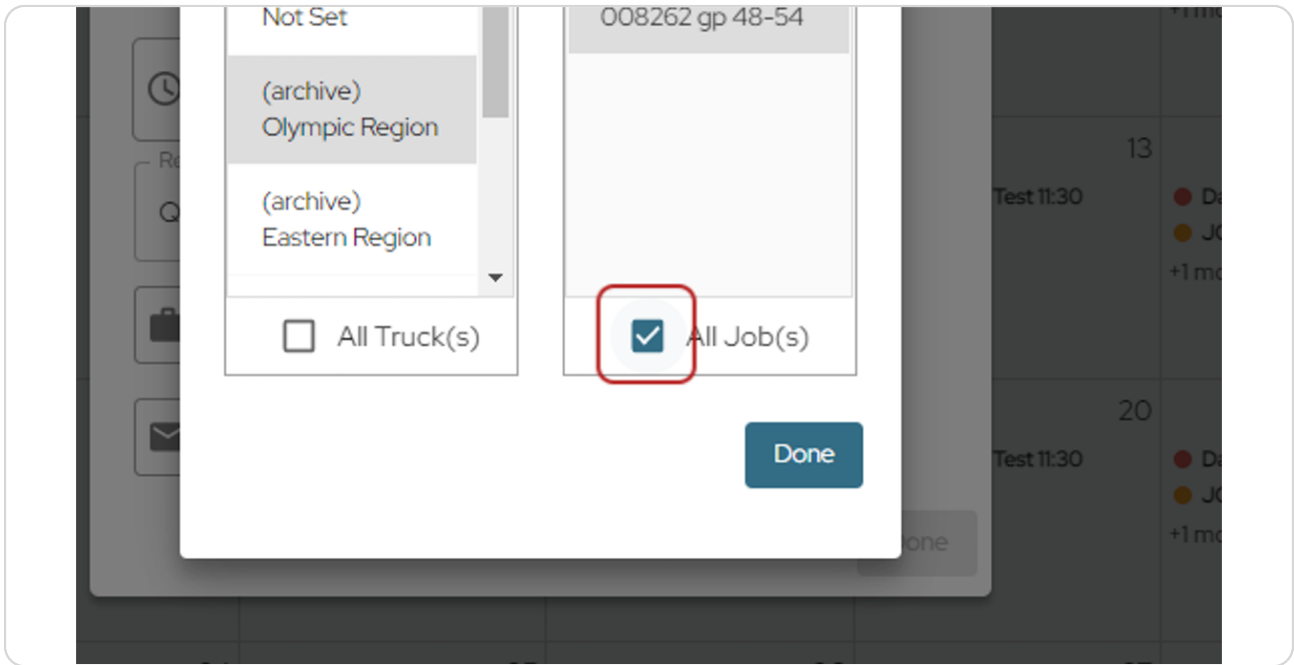


STEP 14

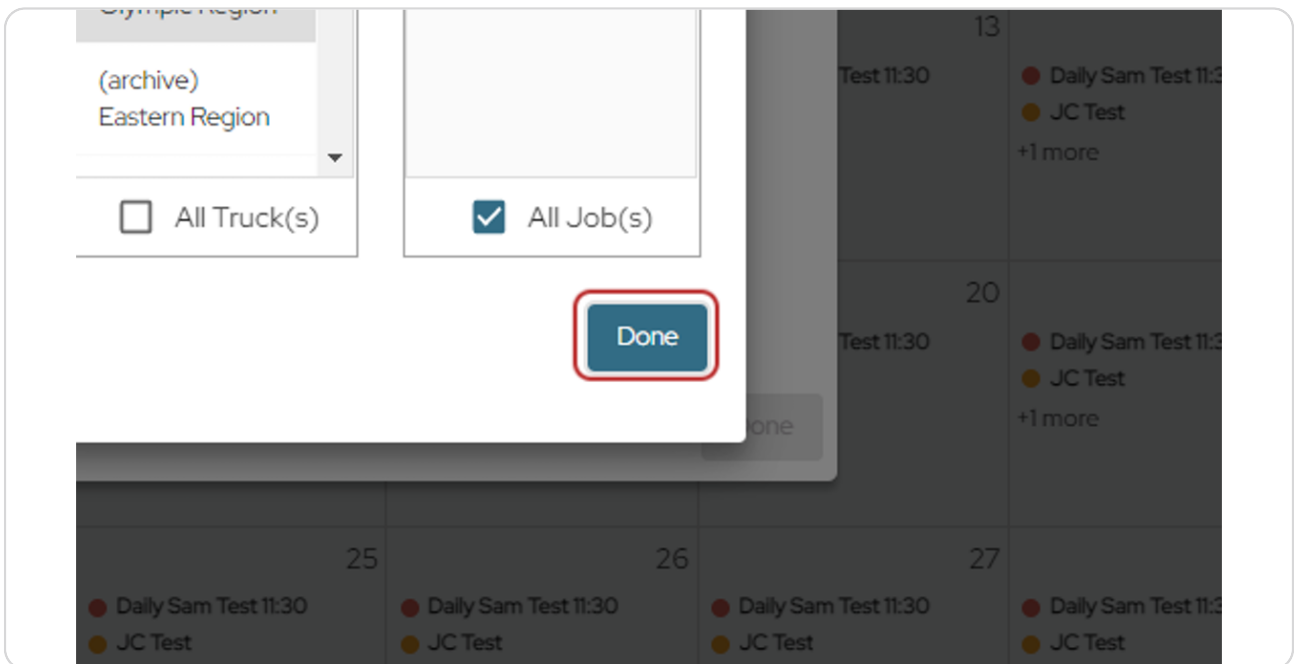**You can select a specific truck or select all trucks.**

STEP 15

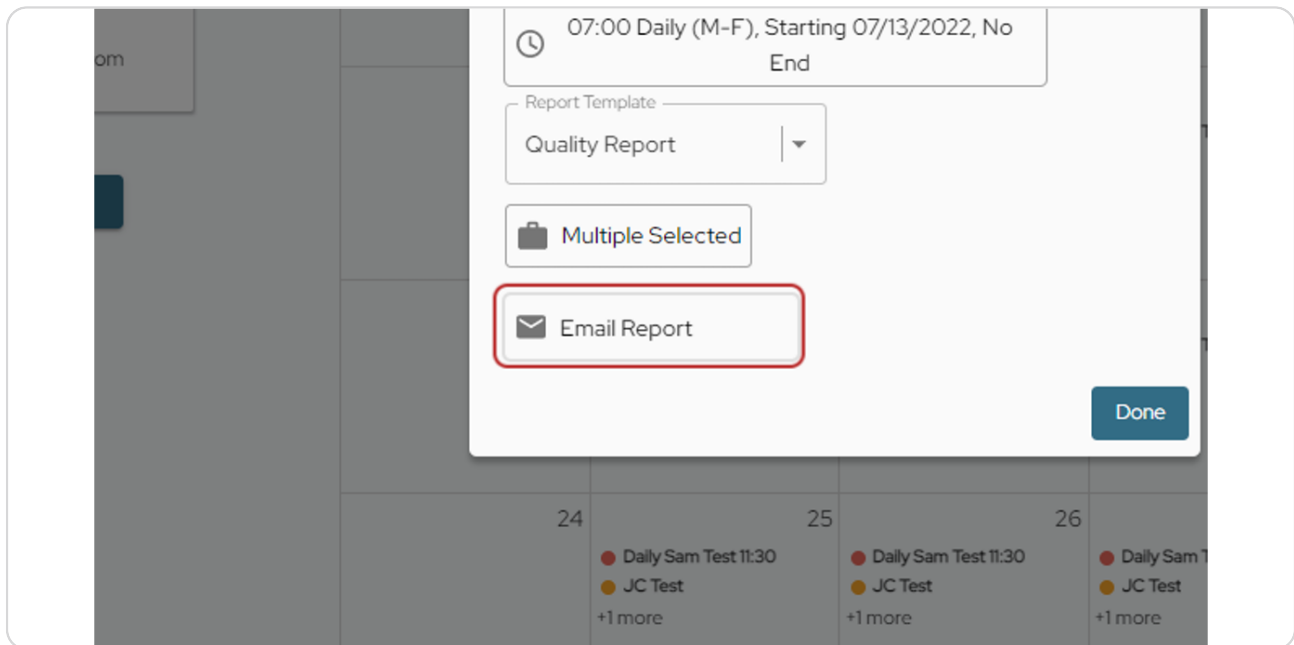**From there you can select a specific job or select all jobs.**
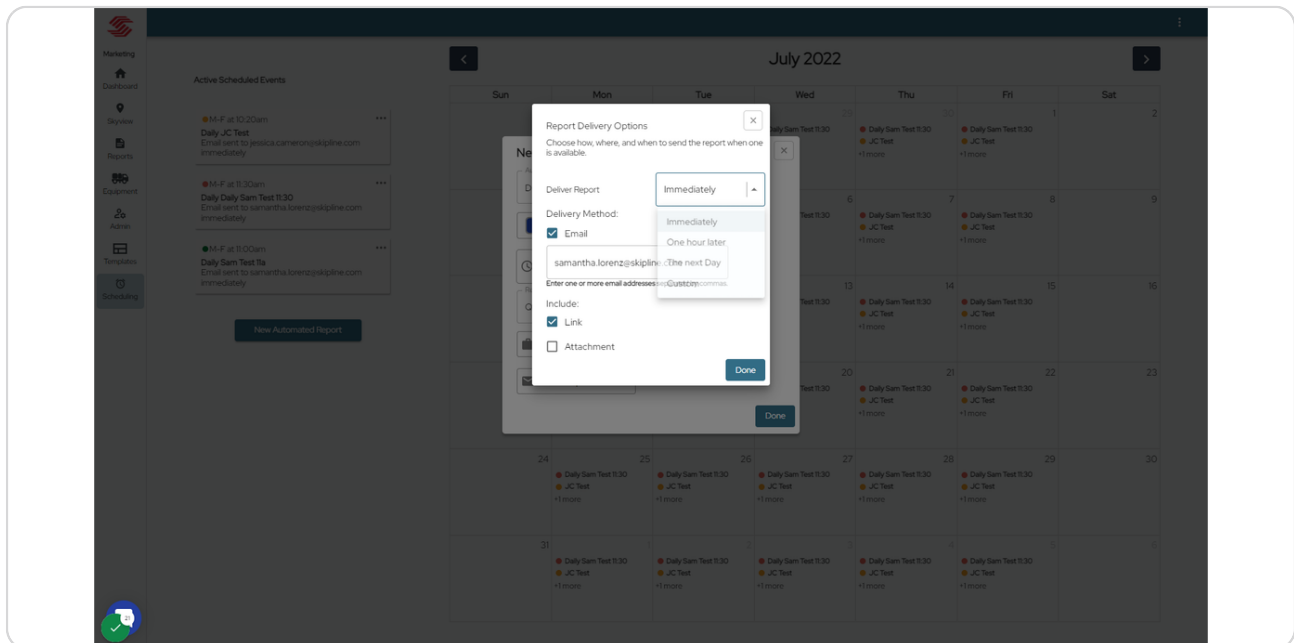


STEP 16

**Click on Done**

STEP 17

**Last, you will choose how you want to receive your report.**
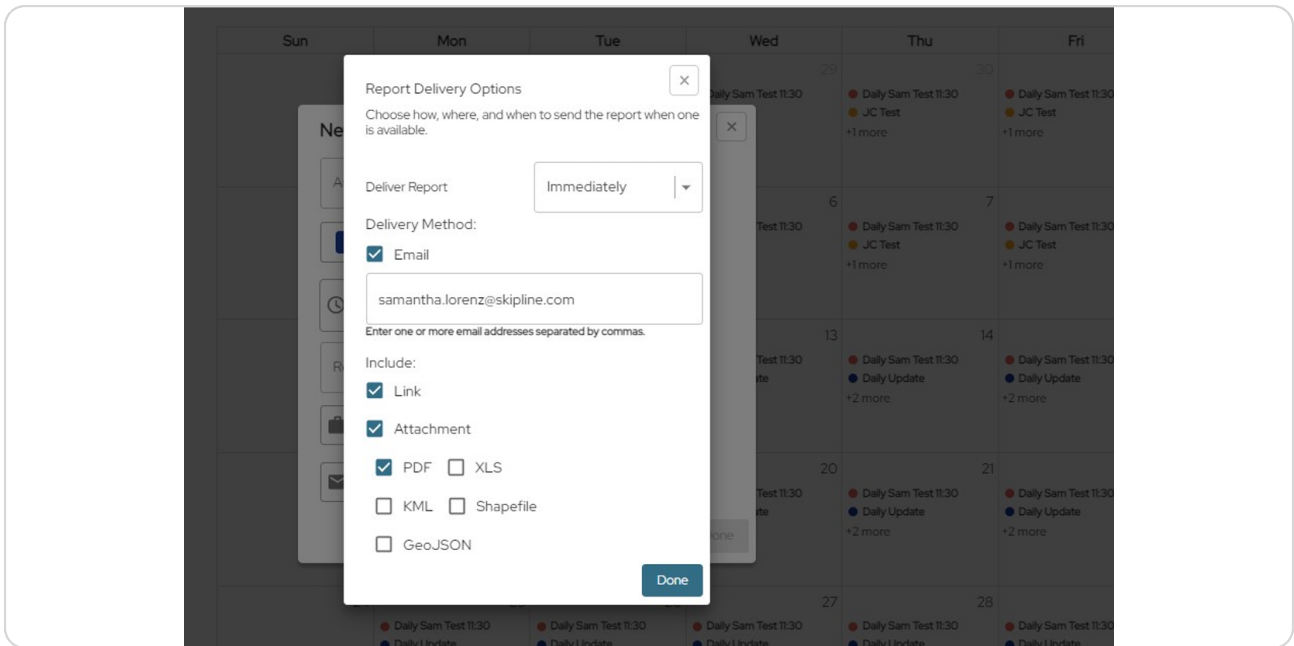


STEP 18

**You can choose to receive it immediately after it's generated or have it delayed.**

STEP 19

**Choose the email address(es) you would like the report sent to and whether you want it sent as a link or an attachment.**



STEP 20

**Click on Done**

**SPEC-RITE ONLINE**