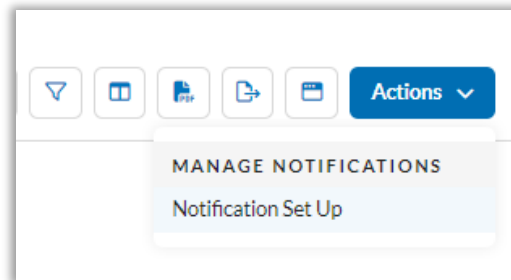
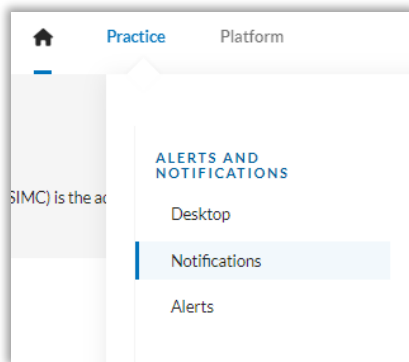




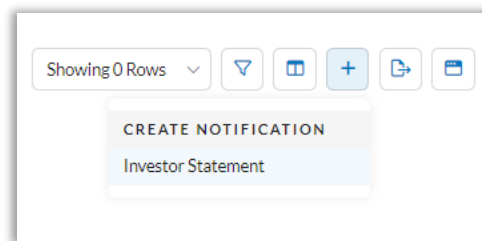
Scheduled Reports (Notifications).

From the Practice view, follow these steps to set up a report to run automatically.

From the Practice menu, select Notifications. Then from the Actions dropdown, select Notification Set Up.

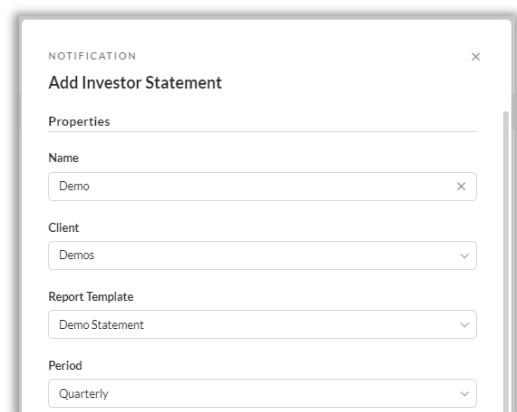


Select the Plus sign icon to Create Notification and then select Investor Statement.



Fill in and select all of the appropriate information needed for the Notification Properties.

- Name (name the notification)
- Client (select an individual client or All Clients)
- Report Template (select the report to run)
- Period (choose the frequency for running the report)



- Day (enter the day of the month that the reports will be run)
- As Of Period (select the option for the report to data as of)
- Start Date (select the date for when the reports will begin to run)
- Stop Date (enter a date to stop or leave this blank to run indefinitely)
- Email (enter all emails that should receive the notification to alert when the report is run)
- Reminder Note (enter any notes to be included in the notification email)
- Auto Publish (Publish to Advisor is the only option applicable for SEI)
- Email Setting (send one email notification for all clients chosen or an email notification for each client)

Once saved, the scheduled template will display within the Notification Setup page. To run the report on demand, access the report from the Notifications page.

Client/Group	Status	Period
Demos,	Not running	Quarterly on the 5th starting 8/1/2023

Access created reports from the Notifications page.

Report	Client	Created ↓	Expires On
Demo-Aug 10, 2023	Demos	Aug 10, 2023	Oct 10, 2023