Click less, do more

Start the Year with Automation: Schedule Client Reports

Make reporting effortless by automating your clients' reports in just a few steps.

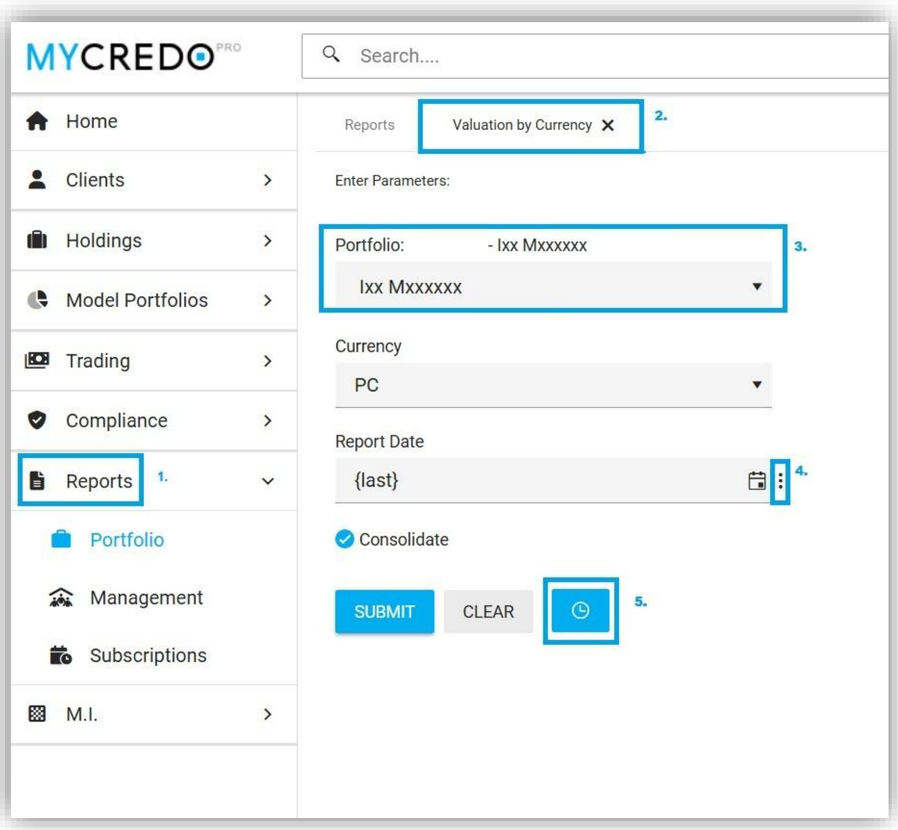
1. **NAVIGATE TO THE REPORTS TAB**
   Access all available reporting options in one place.

2. **SELECT YOUR DESIRED REPORT**
   Choose the report you need from the comprehensive report suite.

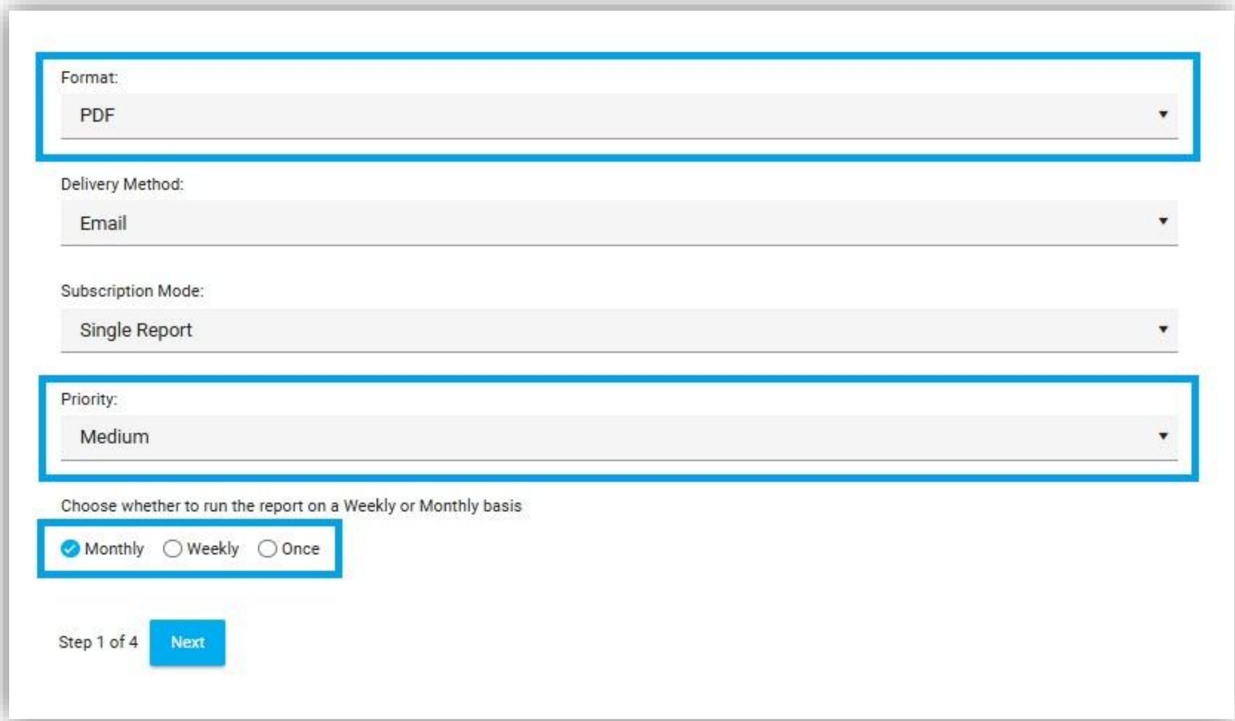
3. **ENTER YOUR PORTFOLIO DETAILS**
   Type in the portfolio name, portfolio number, or custodian account number to ensure the report is tailored correctly.

4. **APPLY A SMART DATE**
   Click the three-dot menu and select a smart date to ensure dynamic, accurate scheduling. N.B. Choosing a date directly from the calendar creates a static schedule, and your report will not update beyond that selected day.

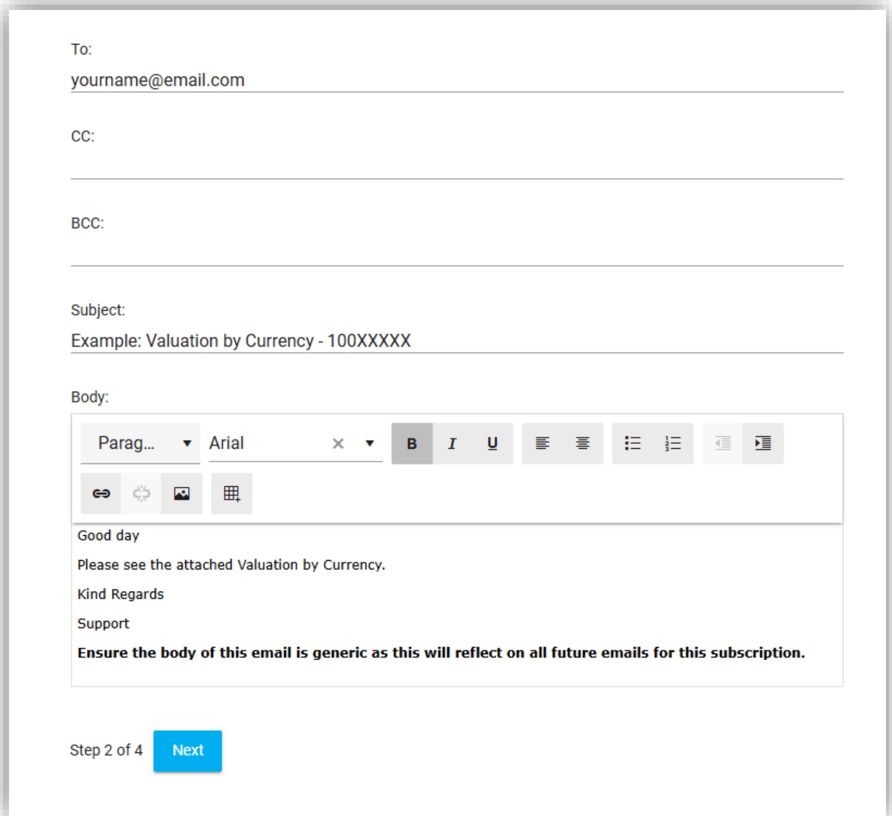
5. **SCHEDULE AUTOMATION**
   Click the clock icon to set your report to run automatically at your preferred intervals.



Choose your Format, Priority & Schedule; Monthly, Weekly, Once.



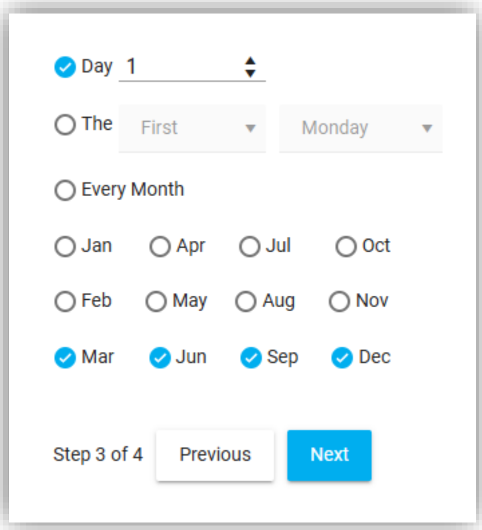
Compose your subscription email by completing the required fields: To, Subject, and Body.



Choose when the report should run.

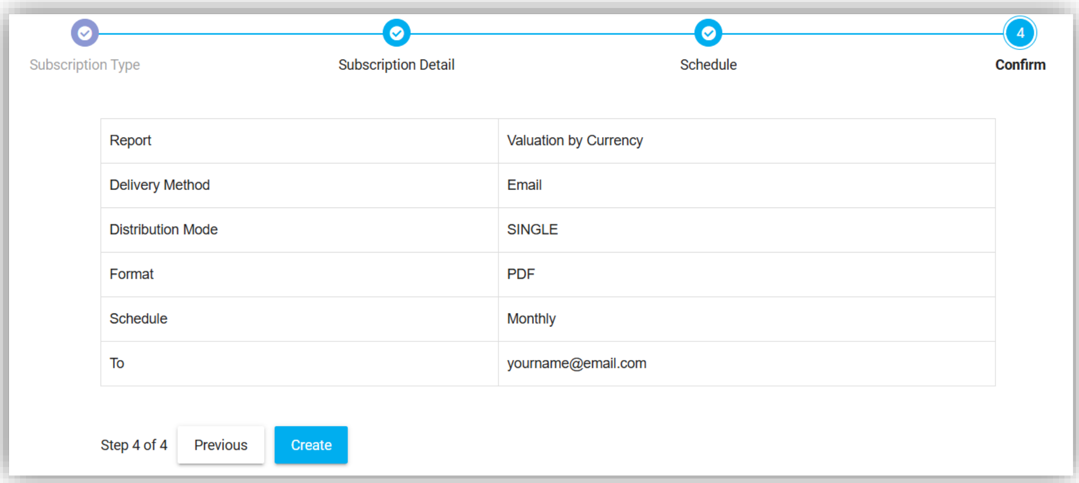
- Specify a day of the month (e.g., day 5), or
- Select a specific weekday (e.g., first Monday), or
- Run it every month, or
- Pick specific months (e.g., quarterly).

For month-end reporting, it's recommended to schedule the report for the 5th day of each month. This ensures coverage of the previous month's reporting period, accounting for the two-day processing delay and weekends.



Review the summary of your subscription settings, including report type, delivery method, format, schedule, and recipient. If everything is correct, click Create to finalize and activate your subscription.

The recipient may expect reports from reports@credogroup.com.



For more information, assistance or to book training on MyCredo, please contact the MyCredo Support team. MyCredo-support@credogroup.com.