


## Create reports with report editor

Create stylistically consistent custom reports that fit your personal voice and need with the client report editor. This additional feature gives the ability to format new reports, edit pre-existing report text, and manage report availability and organization. This document will go over the various practices necessary to create compelling reporting for your client's needs.

**NOTE:** To add the client report editor to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

## Creating new reports

Creating reports can be done by following the below instructions:

1. Click the  icon in the top right of the screen, select "Client Report Console".
2. On the left-side navigation bar, select "Client Reports - Report Page Editor".
3. Click "Start a new report".
4. Enter a report name, description, and choose a layout type. Select report categorization, plan level, and, if applicable, who will have access to the report via the personality and disposition drop-downs.

5. Navigate to the bottom left side of the page to the page section selector. Based on the layout, each segment can be filled with text and/or visual elements. Clicking on the segment will change the "Edit Section" field on the right of the page. Below is a breakdown of what can be included in each segment type:
  - **Report title:** Text only.
  - **Introductory text:** Text only, plan value variables (such as current year net worth) can be included.
  - **Segment slots:** Text (including plan variables), graphs, and tables. A combination of the three can be used within one segment.
6. Click "Save".

**NOTE:** All segments in a custom report must have something within them to proceed.

To preview reports during creation, be sure to access the "Client Report Console" within a client's plan. Report preview feature will be grayed out otherwise.

## Deploying custom reports


To deploy a custom report to be used within a client's presentation follow the below steps:

1. Click the  icon in the top right of the screen, select "Client Report Console".
2. On the left side navigation bar, select "Deployment - Report Pages".
3. Locate the desired custom report with the "Draft Report Pages" section, verify the information listed is accurate, then check the "Deploy" checkbox on the left. If you have multiple custom reports to deploy, you may do this all at once.
4. Click the now clickable "Deploy" button.

The report will now be available for presentation use. If desired, all deployed reports can be deleted on this page.

## Editing pre-existing reports

Pre-existing reports, reports that are available within NaviPlan by default, can also be customized to fit your voice. To customize the introductory text for client reports, follow the below instructions:

1. Click the  icon in the top right of the screen, select "Client Report Console".
2. On the left-side navigation bar, select "Client Reports - Report Page Editor".

3. Within the "Select a Report" tab, navigate to the "Select a category" section. Locate the pre-existing report you wish to edit within its category. Click "Edit".
4. Within the "Edit Report" pop-up, you may change any text within the introductory paragraph. Plan variables may be included. Once your edits are satisfactory, click "Ok".
5. Deploy the edited report, this process is identical to deploying custom reports.

The report with edited text can now be used for client presentations. Any change to a pre-existing report can be reverted back to default at any time.