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Using client reporting

Client Reports feature a number of improvements to traditional client reports structure including:

- A new, modern design.
- Increased control over the pages included in your report.
- Improved user interface controls allowing you to preview pages, get summary information, and easily modify the order in which pages appear.

Important terminology in client reporting

- **Report page**: A report page is a single topic. Each tile on the **Build Report** page adds report pages to your report.
- **Report**: A report is a collection of report pages. After you have added each of the report pages you wish to present to your clients on the **Build Report** page, the output is called a report.

- **Template**: A template is a report that has been saved for multiple uses. By saving reports as a template you can present the same set of report pages to all of your clients saving you time and ensuring consistency.

Creating a new report

Follow these steps to create a new Client report :

1. From the **Select Report** page, select **Start a New Report**.

> ### Select a Template or Start a New Report
>
> [**Start a New Report**]   [**Start a New Template**]
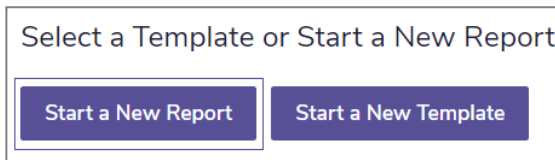
2. Use the **Select a category** menu to display a list of report pages for each category.

3. Report pages are displayed as tiles. Click **Add** for each tile you want to include in your report. To remove a tile, select **Remove**

Report tiles are categorized by the following sections:

- **Content**: Dataless pages that provide an overview of the financial topic at hand. These provide context to reports and relate plans in a way that clients can understand.
- **Summary**: Pages that cover clients' progress toward their goal based on their current

situation. These contain easy to follow graphs and images.

- **Current Plan**: Pages that summarize data for the current plan. These pages are numbers-oriented and often contain projection tables.
- **Proposed Plan**: Pages that summarize data for the proposed plan. These pages are numbers-oriented and often contain projection tables.

Report pages display data for their section. For example, The **Cash Flow Surplus/Deficit** report page displays different data for the **Current Plan** section than when selected for the **Proposed Plan**.

> **Note**: You can include up to two **Alternative Plans** in a report. These plans can be added from the **Scenarios** page (**Results - Analyze Goals** category). To add alternative plan scenarios to Client reports, click **Include Alternatives...** near the top of the **Build Report** page.

4. Review the order of report pages in the **Selected Pages** panel. The order displayed here matches the order in which reports will appear when generated.

   - To edit the position of report pages, drag and drop the page titles into the desired order.

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Note: You can quickly select all report pages on the **Selected Pages** panel by clicking the **Check All** link.

5. When you are satisfied with these options, click **Build Report**.

Note: If you run out of space on the **Select Pages** panel, you can select `«` to enlarge the panel.

Converting Client reports to Microsoft Word

Follow these steps to convert any generated Client report into a Microsoft Word (.docx) export file:

1. Select the pages to include in your report, then click **Build Report**.

2. Once the report is generated a blue bar appears near the top of the page. From this bar, click **Convert to Microsoft Word** to generate the report in Word format.

Adding custom content to your report

Client Reporting allows you to add your own customized PDFs to your report. Your custom content is treated just like any other page and can be moved anywhere in the report.

Follow these steps to add custom content to your report:

1. From the **Build Report** page, select **Custom Content** from the **Custom** section.

2. Click **Choose File** to select your custom PDF.

3. Enter a **Title** for the custom content.

4. When you are satisfied with these options, click **OK**.

Creating a new template

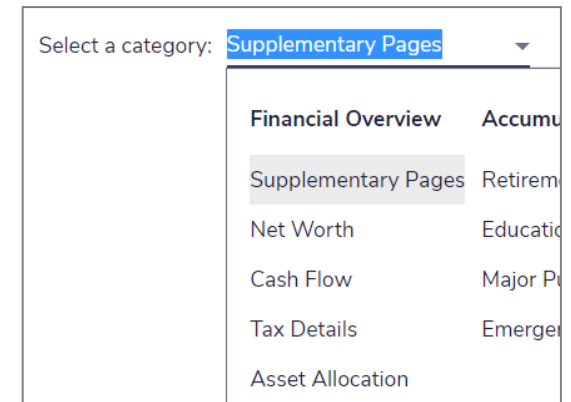Follow these steps to create a new template using Next-Gen Reporting:

1. From the **Select Report** page, select **Start a New Template**.

   Select a Template or Start a New Report

   Start a New Report   **Start a New Template**

2. Select ✎ to enter a name and description for the template.

3. Use the **Select a category** menu to display a list of report pages for a category.

| Select a category:	Supplementary Pages ▼	
	Financial Overview	**Accumu**
	Supplementary Pages	Retirem
	Net Worth	Educatic
	Cash Flow	Major Pu
	Tax Details	Emerger
	Asset Allocation	

4. Report pages are displayed as tiles. Click **Add** for each tile you want to include in your report. To remove a tile, select **Remove**.

Report tiles are categorized by the following sections:

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- **Summary**: Pages that cover clients' progress toward achieving their goal based on their current situation. These contain easy follow graphs and images.

- **Current Plan**: Pages that summarize data for the current plan. These pages are numbers-oriented and often contain projection tables.

- **Proposed Plan**: Pages that summarize data for the proposed plan. These pages are

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numbers-oriented and often contain projection tables.

Report pages display data for their section. For example, The **Cash Flow Surplus/Deficit** report page displays different data for the **Current Plan** section than when selected for the **Proposed Plan**.

Tip: You can view the report page tiles in summary view. To switch views, select ▦ or ▦ from the **View** section.

5. Review the order of report pages in the **Selected Pages** panel. The order displayed here matches the order in which reports will appear when generated.
   - To edit the position of report pages, drag and drop the page titles into the desired order.

6. When you are satisfied with these options, select **Save**.
   - If you have not yet entered a name for your template, you will be prompted to do so.

Using a template to create a report

Follow these steps to generate a report using an existing template:

1. From the **Select Report** page, find the template you want to use to create a report and select **Use**.
2. When you are satisfied with these options, select **Build Report**.

Frequently Asked Questions

How do I edit an existing template?

Find the desired template on the **Select Report** page and select **Edit** from the **More** menu.

How do I save my changes to a template?

When you have completed work on a template, select **Save** from the **Selected Pages** panel.

How do I save my changes to a report?

NaviPlan saves reports automatically!

Each time you make changes or navigate away from the Next-Gen Reporting category NaviPlan will save the status of your report.

How do I see the details of a saved template?

Find the desired template on the **Select Report** page, and choose **View Details** from the **More** menu. NaviPlan will display the name, description, and order of all included report pages.

How do I delete an existing template?

Find the desired template on the **Select Report** page, and select **Delete** from the **More** menu.

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