

# Narrator® Clients v2.3

Release date: November 3, 2017

Advicent has updated Narrator Clients, the NaviPlan® interactive client portal. Narrator Clients enhancements include an improved user experience and "client view" feature, both of which provide an easier way to produce fact finders and view results.

- ["Client view" for Narrator Clients](#)
- [User experience update](#)
- [Streamlined plan publishing](#)

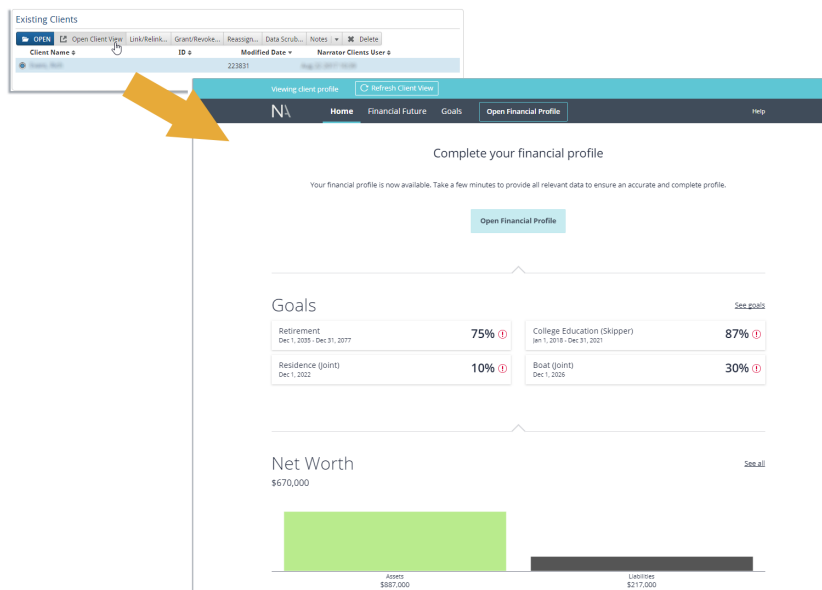
**NOTE:** These features are only available in Narrator Clients. If unavailable, contact [Advicent](#) at (855) 885-7526 for more information.

Here are the details

## "Client view" for Narrator Clients

Monitor clients' progress, answer questions about the portal, and gain the insight necessary to meet client needs with the new "client view" mode in Narrator Clients.

Via the "open client view" button found on the "existing clients" section of the "client list" page, gain access to the selected client's portal and receive an identical view of what your client sees when they access their portal. This feature can be used as part of an in-person meeting, phone call session, or to check any client's progress on your own time. "Client view" synchronization can be completed at any time while in the portal by clicking the "refresh client view" button.



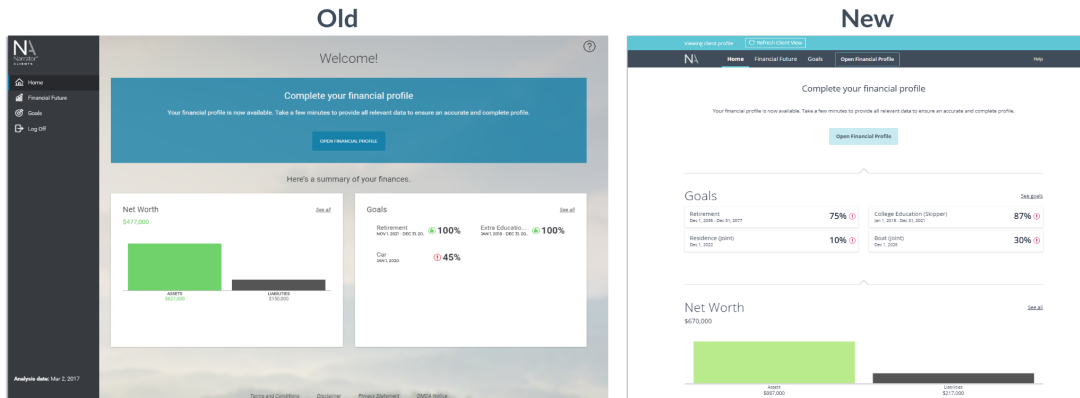
To open the "client view" page, click "existing clients" on the "client list" page.

## User experience update

As part of our ongoing promise to improve the user experience for both you and your clients, the Narrator Clients user interface has been modified.

The navigation panel is now at the top of the page (originally on the side of the page). This change makes the client portal easier to load and read on all devices (personal computer, smartphone, or tablet), making financial adjustments and analysis available anywhere.

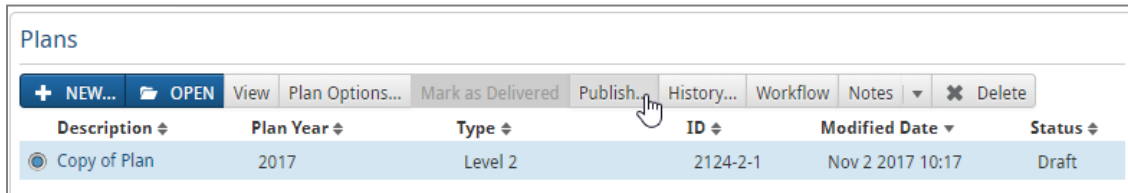
The new interface also places a greater focus on the information presented within each page, drawing the client's eye to the most important data in an easy-to-digest format.



Narrator Clients home page

## Streamlined plan publishing

Save time and effort by publishing draft plans to Narrator Clients in one click with the publish button now found on a clients plan list. Instead of having to use workflow statuses, you can use the publish button to be instantly send a draft plan to your client's portal.



Plan management - plan list

## Supported platforms for Narrator Clients v2.3

Display (computer and mobile):

- 320 x 480 or higher

Browsers:

- Microsoft® Internet Explorer® 11.0
- Microsoft® Edge
- Google® Chrome
- Mozilla Firefox®
- Apple® Safari