



Narrator[®] Clients

December 2017 release

Advicent has updated Narrator Clients, the interactive client portal powered by NaviPlan[®], to include enhancements to both user experience and client navigation.

- [User experience update](#)
- [Client navigation update](#)

NOTE: To add Narrator Clients to your current NaviPlan experience, contact [Advicent](#) at (855) 885-7526.

Here are the details

User experience update



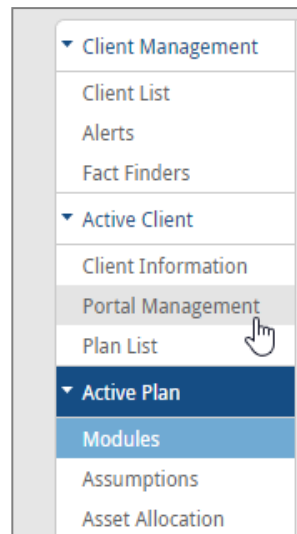
As part of our commitment to deliver a high-quality user experience for both you and your clients, Advicent has updated the client portal with a modern, simplistic interface

The new interface, including asset value bars in the "financial profile" and updated graph designs within "goals" and "cash flow," enable clients to gain a deeper understanding of their financial information.

New graph designs featured on the "home" page

Client navigation update

The NaviPlan navigation adjustments allow users to access all client-related actions within the context of a client file, including Narrator Clients portal user setup. While in a client's plan or plan list, the left side navigation bar now includes an "active client" section that houses access to client information, the client's plan list, and the Narrator Clients portal user setup. This reorganization centralizes all actions related to a client file into one simple menu.



Navigation side bar - "active client"

Supported platforms for Narrator Clients v2.4

Display (computer and mobile):

- 320 x 480 or higher

Browsers:

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