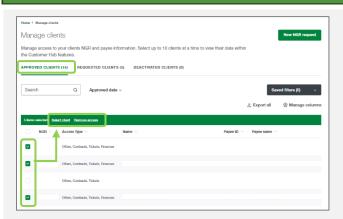


Advisor Reports Guide

You can access a variety of reports in the Customer Hub. The reports available to you will depend on the role type assigned by your admin user; Broker, Accountant, or both. To access reports, sign into the Customer Hub and click the 'Manage Clients' tile.

1. Select the NGRs you want to work with in Manage Clients





- Select the NGRs you want to work with in the table (maximum of 10 at a time) and click 'Select Client' in the green activity bar.
- 2. Click the 'Reports' tile on the home page.

*The available features will depend on the access type the client has approved for the advisor organisation.

2. Reports Dashboard ver (* figets* Reports ver (* figets* reports ver (* figets* ver (* figets

- 1. The reports page has four tabs:
- **Favorites:** Customise favourites to include all the reports you use regularly. Check or uncheck the flag on a report tile in any tab to add/remove reports to the favourites tab.
- Finance: available for users with accountant access
- Tickets / Market Pricing: available for users with broker access

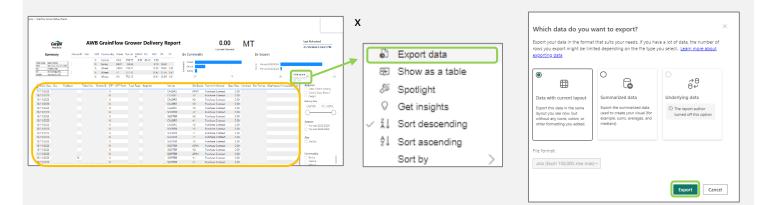
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2. Select the NGR you want to view details for in the top right-hand corner of the screen.

Reports can be filtered as required with the available sliders and check box filters.



3. Exporting Reports



To export a report:

- Click on your data to select it. This is the area with the individual ticket details displayed and outlined in orange above.
- 2. Open the 'More Options' menu by clicking the image of three dots ('...') found on the top right-hand corner of your data, outlined in green above.

*Note: If you click on the More Options icon ('...') anywhere else on the report, the reports details will not download to excel. 3. Select 'Export Data from the pop-out menu 4. Click the 'Export' button.

The data will be downloaded to your device in an excel spreadsheet.