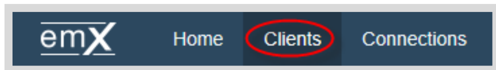
Presentation Center Overview

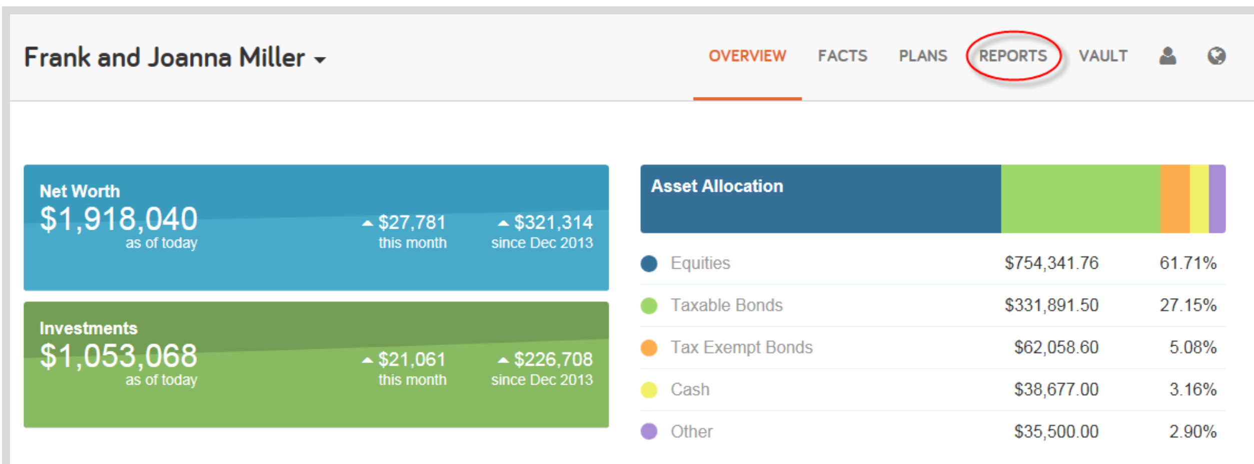
This training guide will demonstrate a Presentation Center Overview.

The presentation center allows the advisor to create a formal presentation of a report (or reports) and/or modify existing presentations.

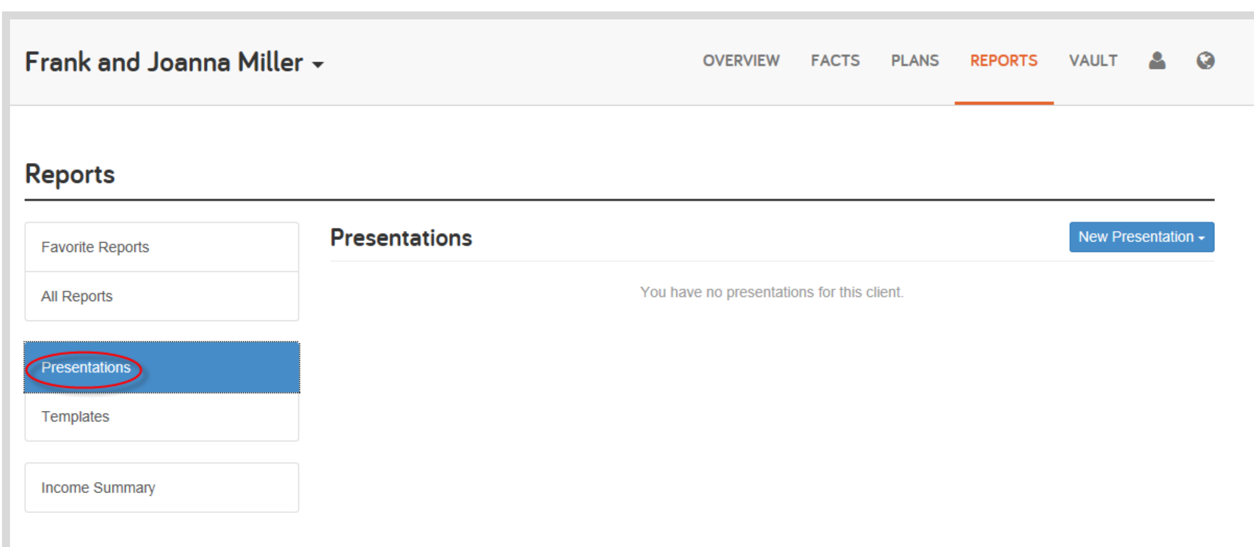
1. Click on **Clients** and choose a client.



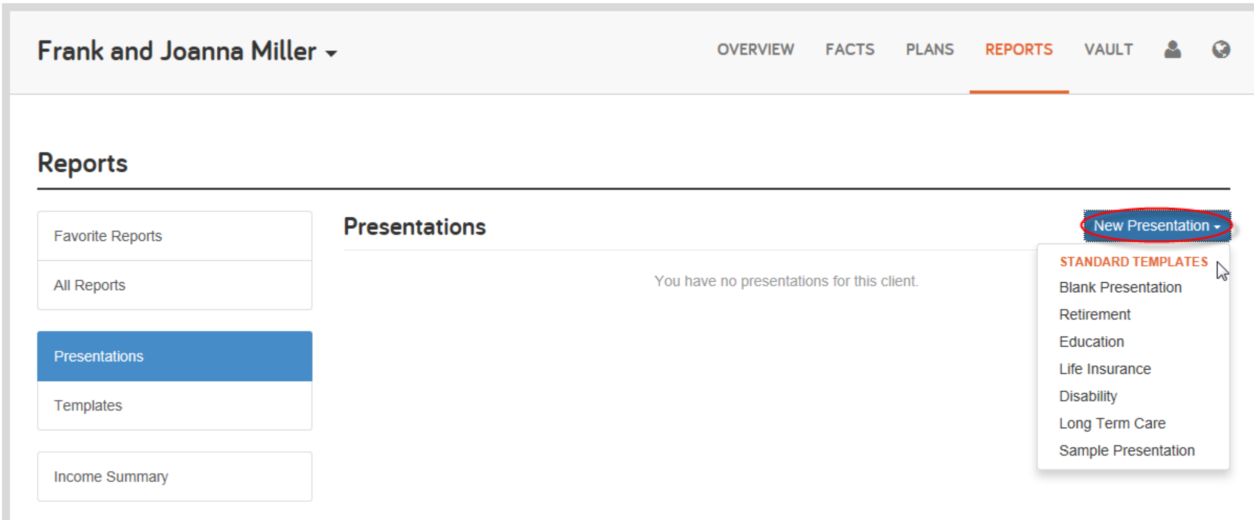
2. From the Client Overview, click **Reports.**



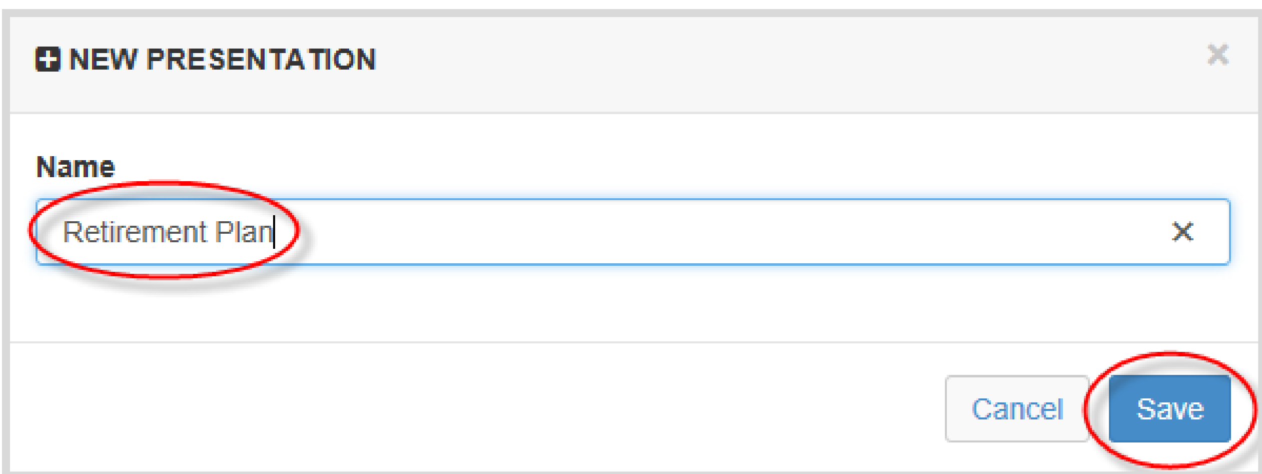
3. Click **Presentations.**



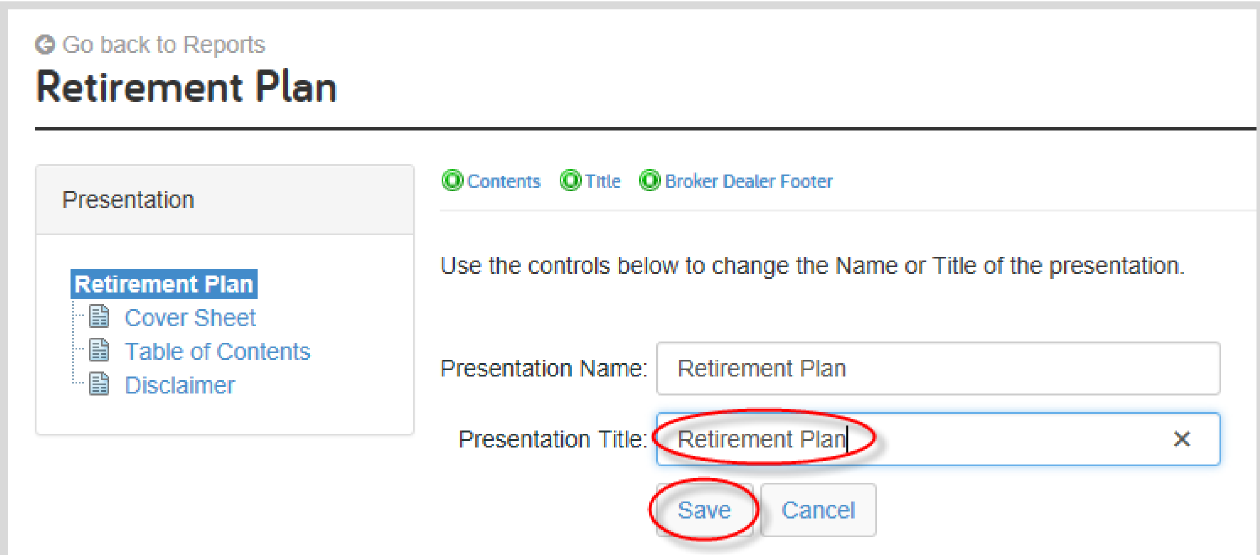
4. To create a New Presentation, click **New Presentation** and select a template from the dropdown menu.



5. Name the presentation and click **Save**.



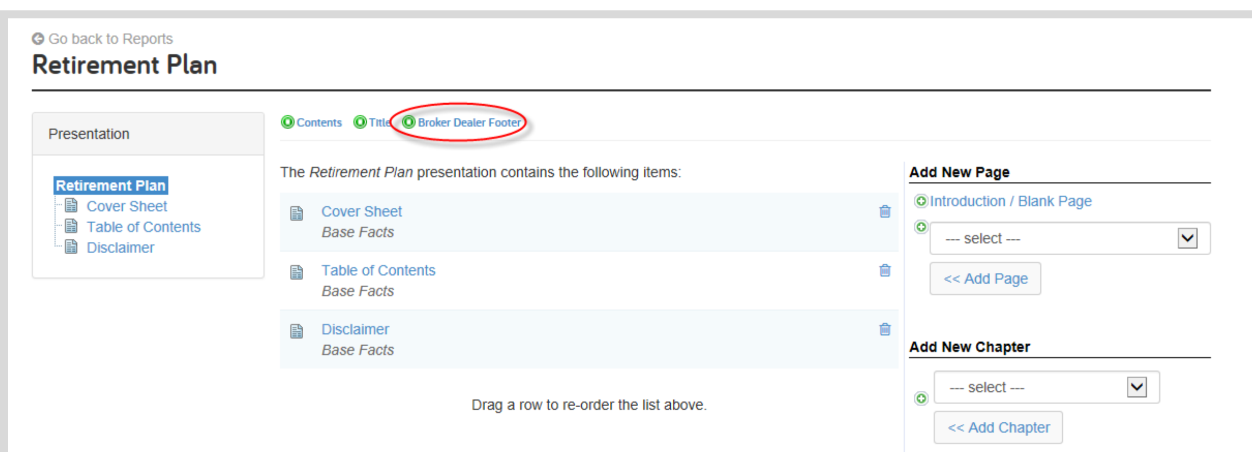
6. Click **Title** and enter a presentation title. Click **Save**.



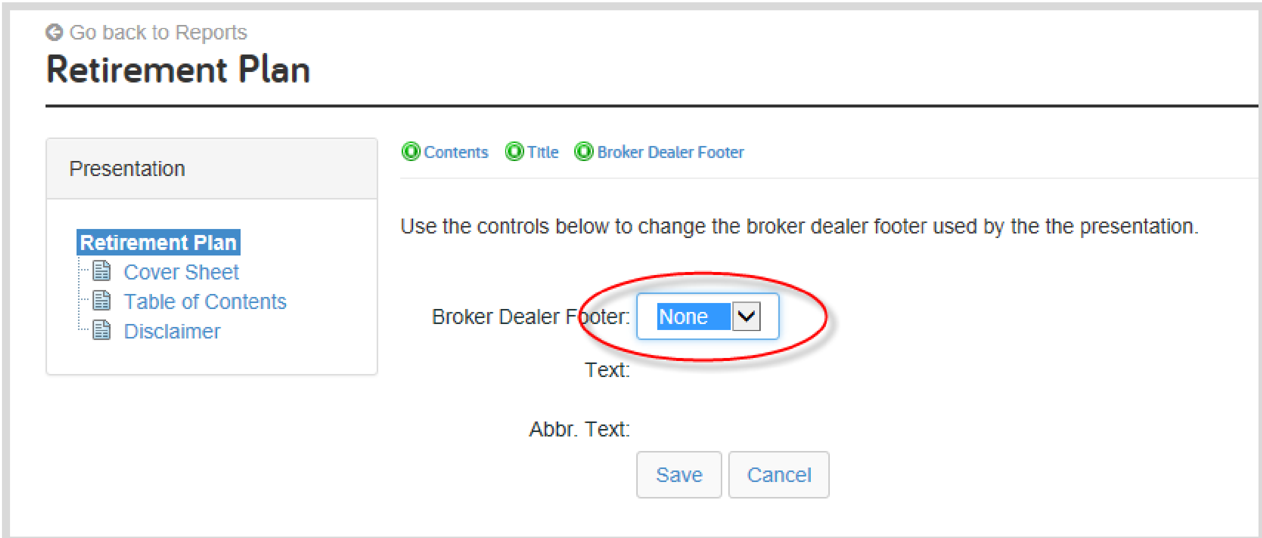
Please Note: Presentation Name is the name of the presentation template that will show in the Vault/Reports folder for the client. Presentation Title is the title that will appear on the cover sheet of presentations generated from this template.

7. To select which broker dealer footer to use, click **Broker Dealer Footer.**

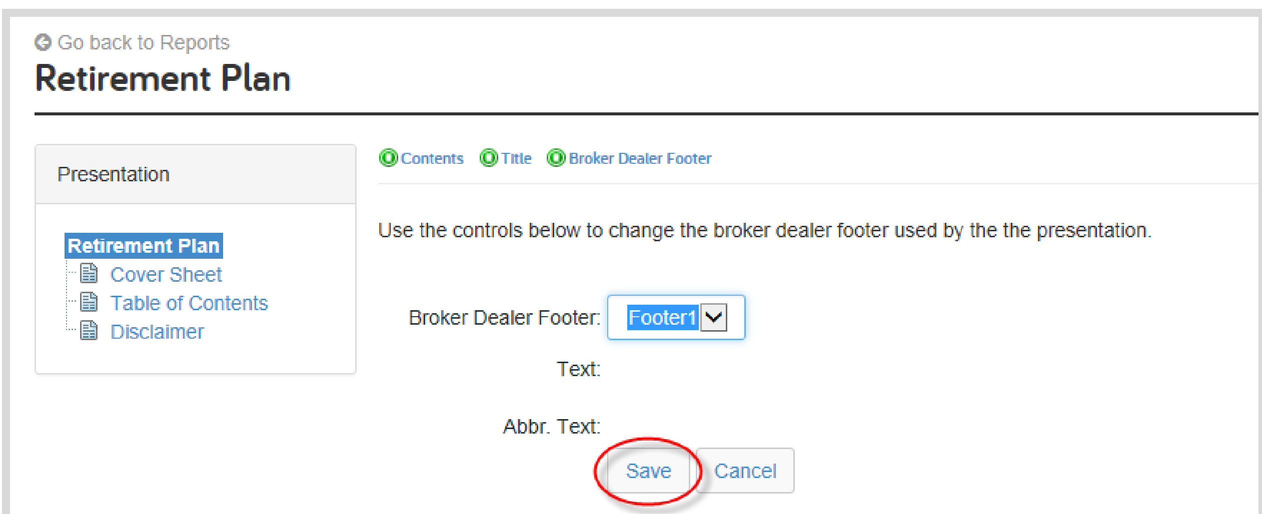
Please Note: The broker dealer footer is entered under the Broker Dealer Tab in Settings



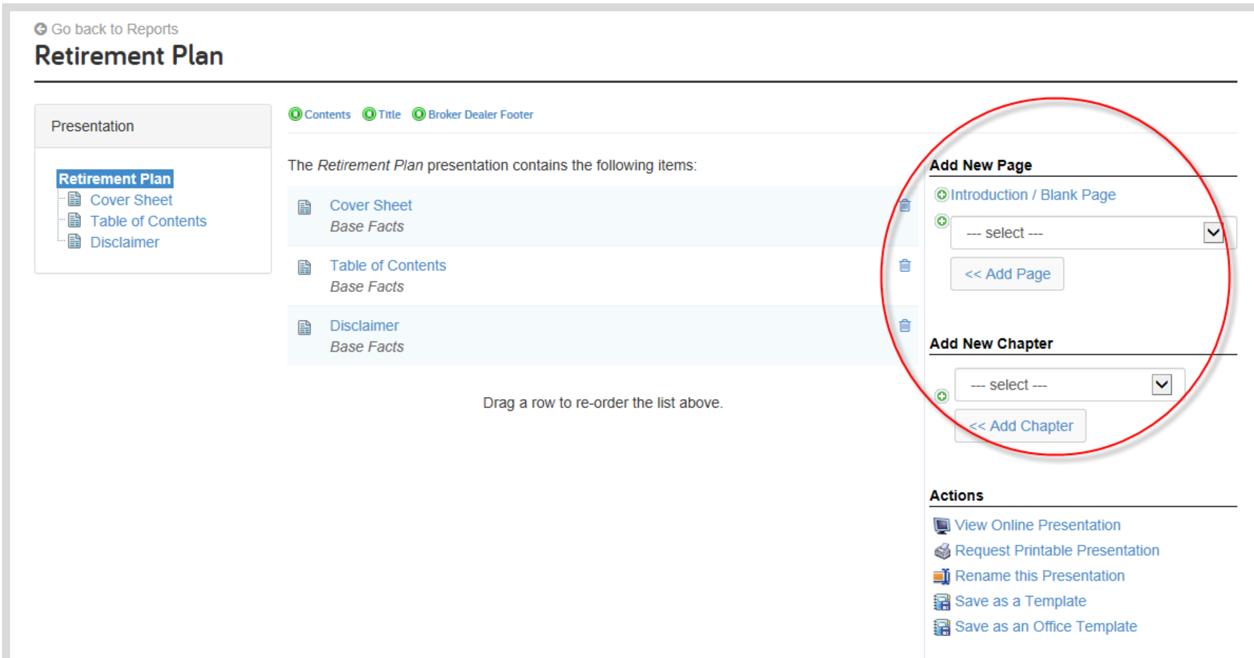
8. Click the dropdown next to Broker Dealer Footer to select **None, Footer 1,** or **Footer 2.**



9. Once the correct footer is chosen, click **Save**. The screen will then show the contents of the presentation.

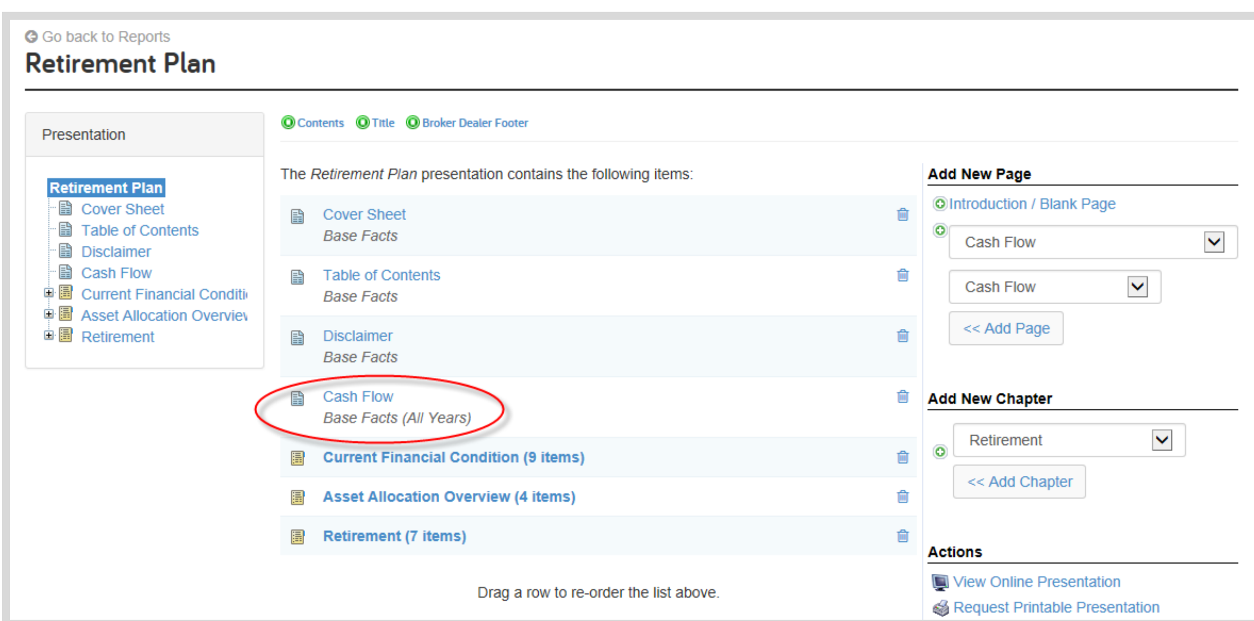


10. Select **Add New Page/Add New Chapter** from the dropdown and click **Add Page/Chapter.**

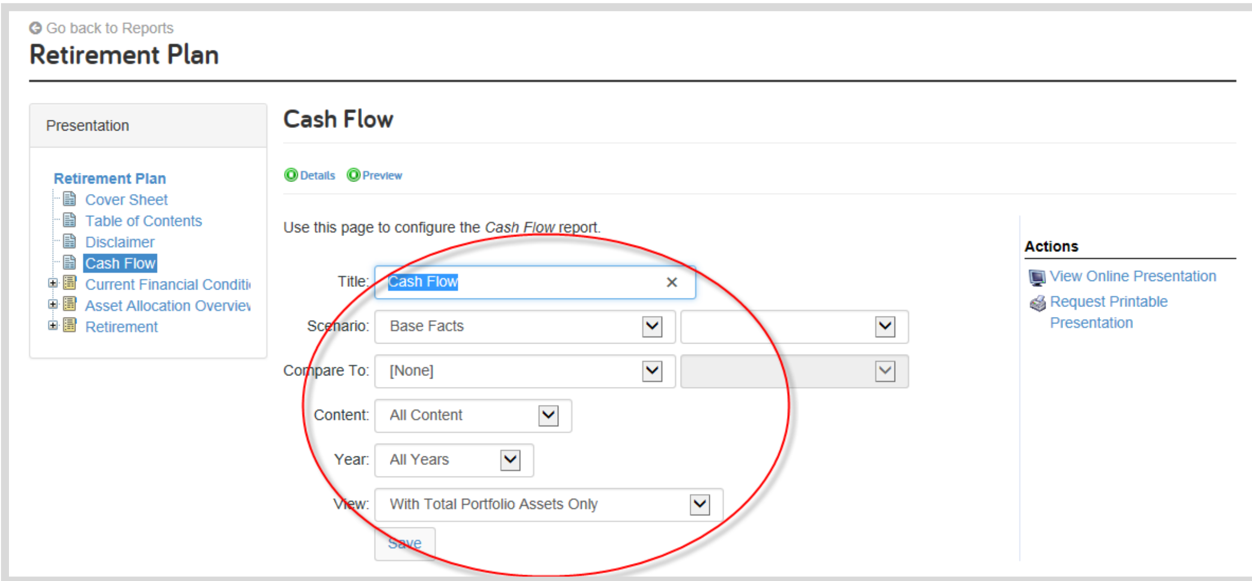


Please Note: Add New Page allows the advisor to include any of the client-facing reports within the Reports Center. Add New Chapter will include a prebuilt chapter consisting of several reports with a similar theme.

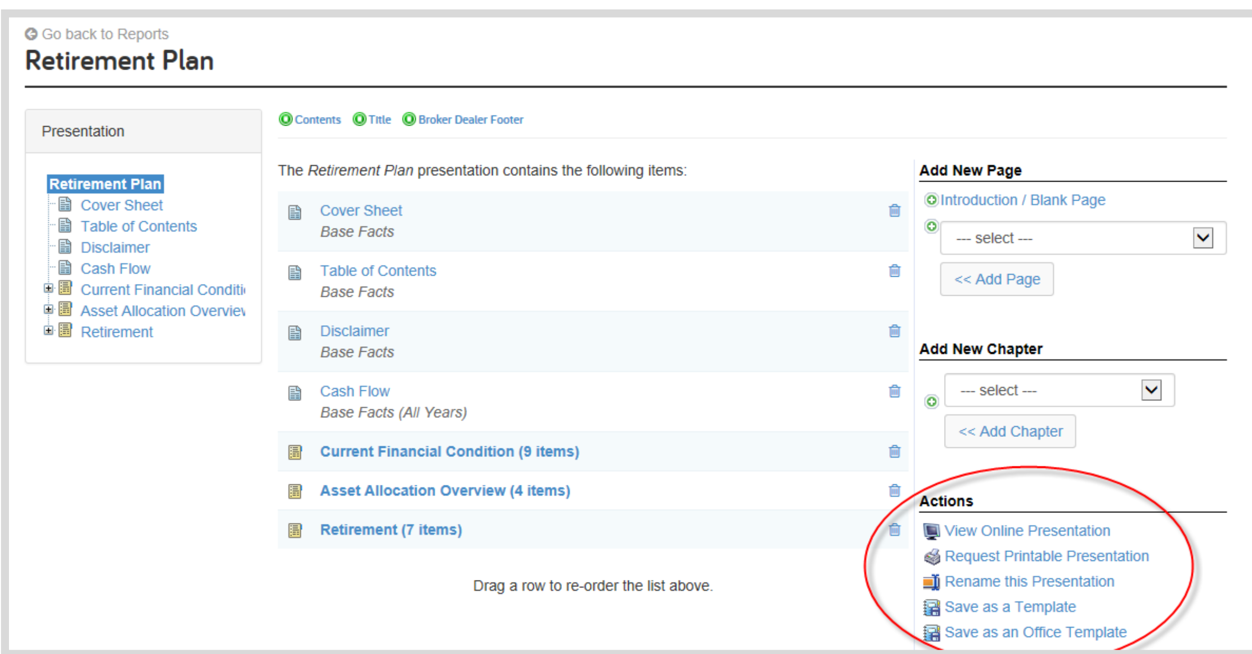
11. Click the **Report Name** to rename the report or change the scenario.



12. From this page, reports can be configured by selecting a Plan, a What-if and/or Compare To Plan or What-if.

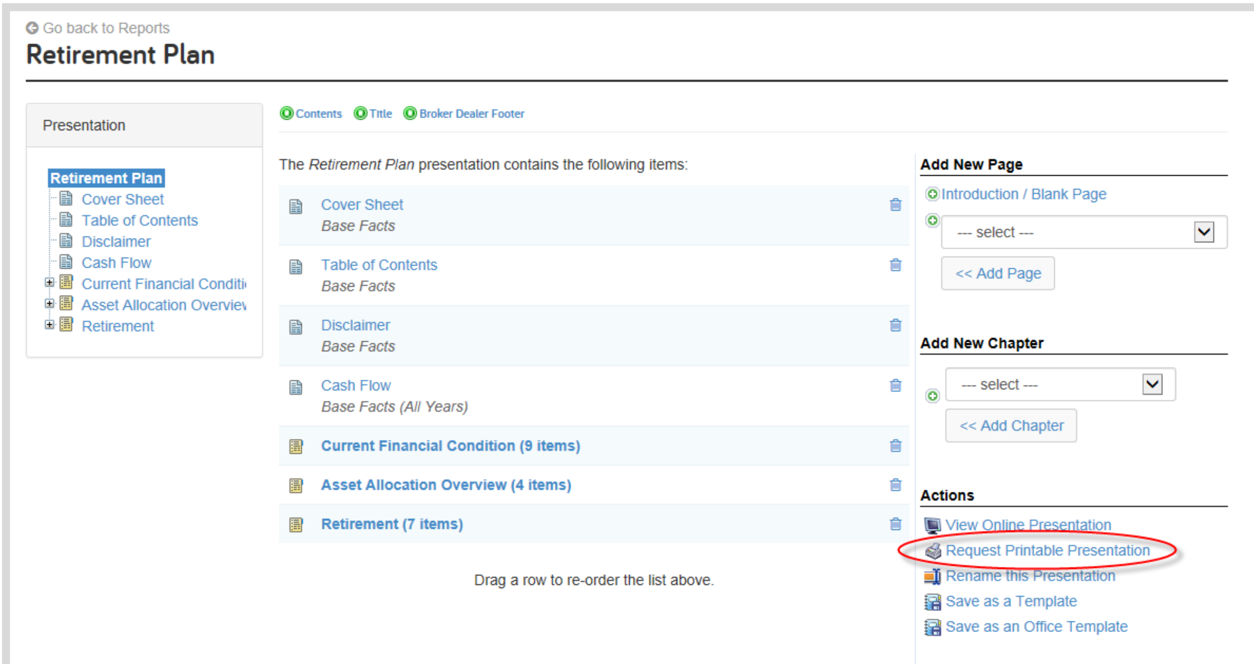


13. To **View an Online Presentation, Request a Printable Presentation, Rename the Presentation**, or **Save as a Template**, click the corresponding links under **Actions.**

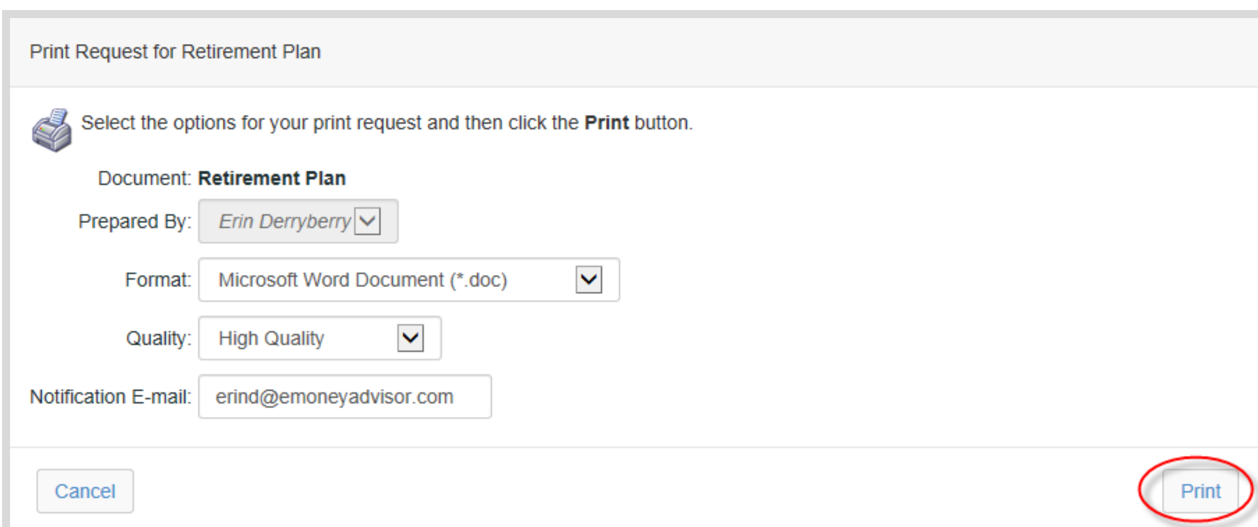


Please Note: To Edit the Order of the Presentation, drag and drop the page icons to a new location in the list.

14. To send this presentation to the Reports folder in the client vault, click **Request Printable Presentation.**



15. Complete the appropriate fields and click **Print.**



16. Once processed, the document will be sent to the client vault in the Reports folder. From the client vault, the file may be downloaded and printed, or it may be made visible to the client.