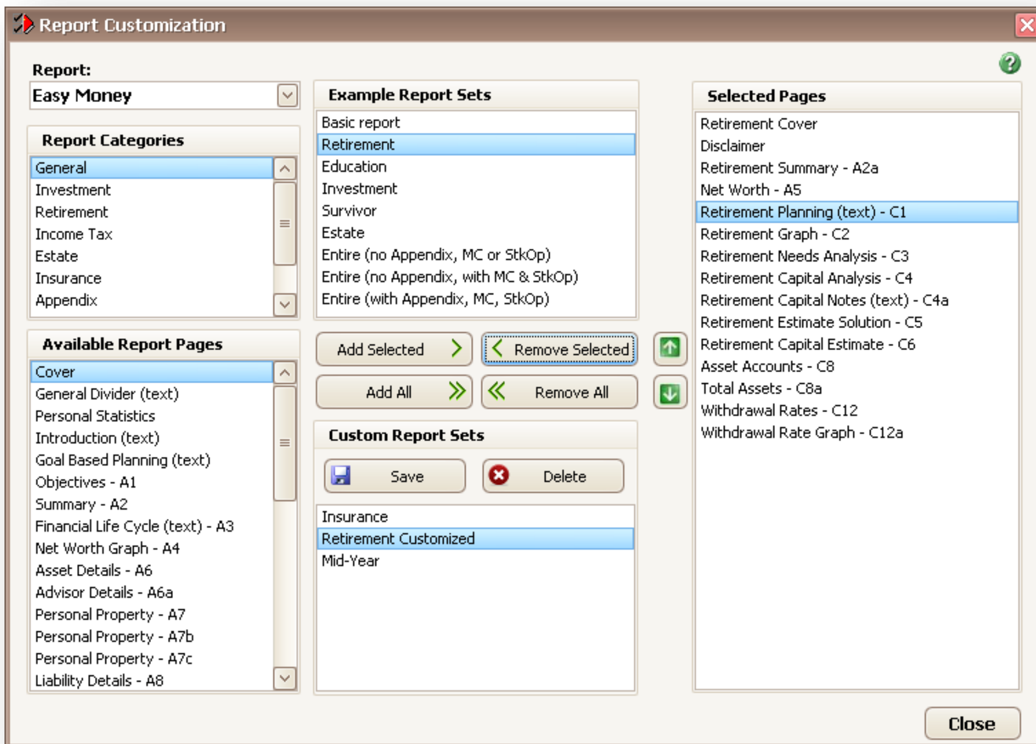
Viewing, Customizing, & Printing Reports
TOTAL Planning Suite
Tutorial



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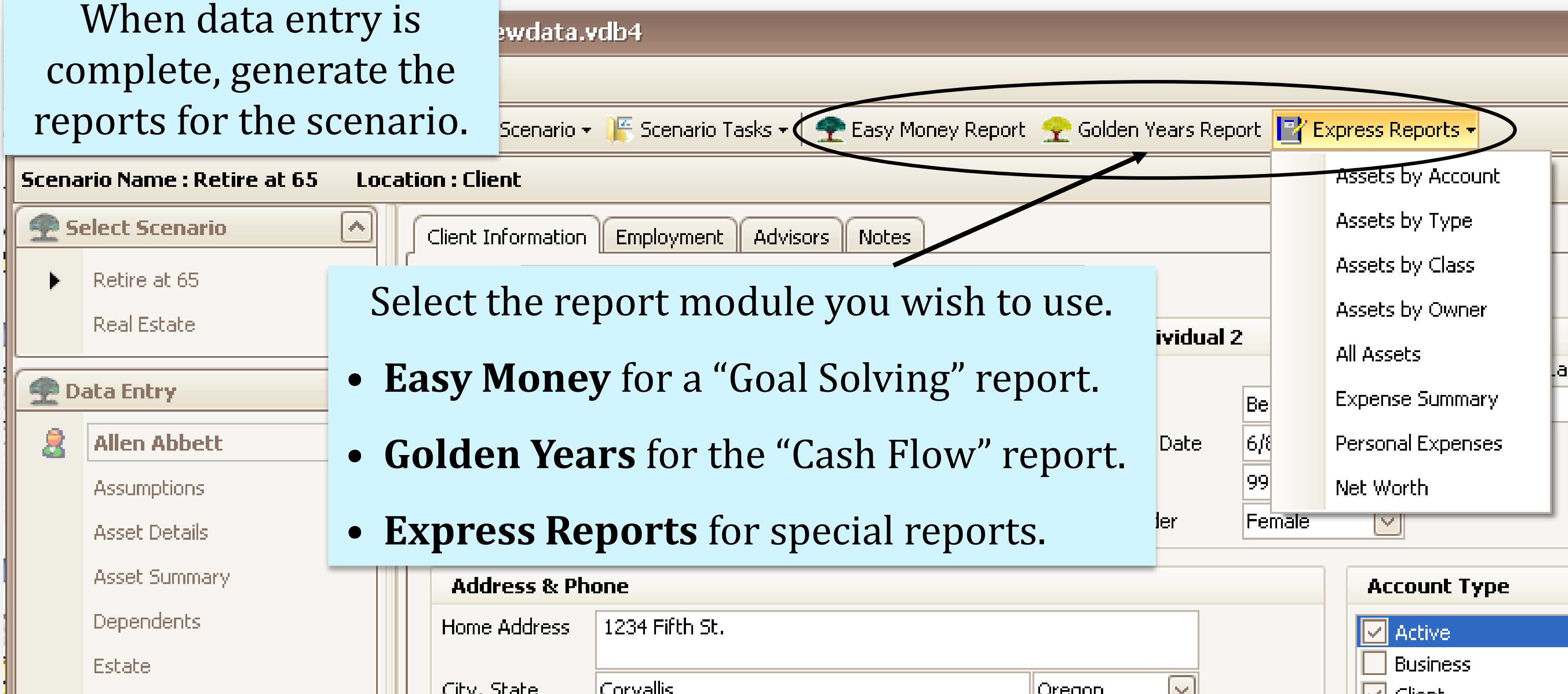
Generating Reports

When data entry is complete, generate the reports for the scenario.



Select the report module you wish to use.

- **Easy Money** for a "Goal Solving" report.
- **Golden Years** for the "Cash Flow" report.
- **Express Reports** for special reports.

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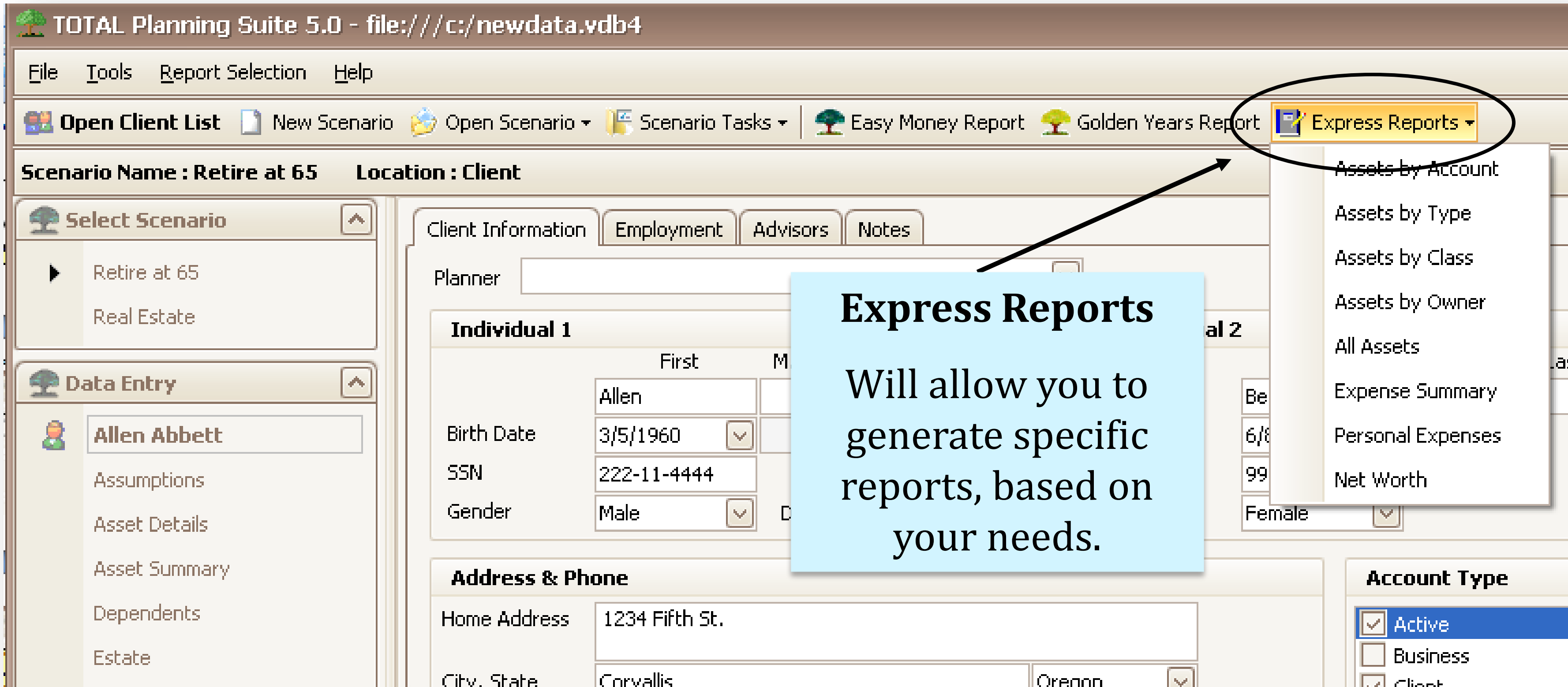
Generating Express Reports



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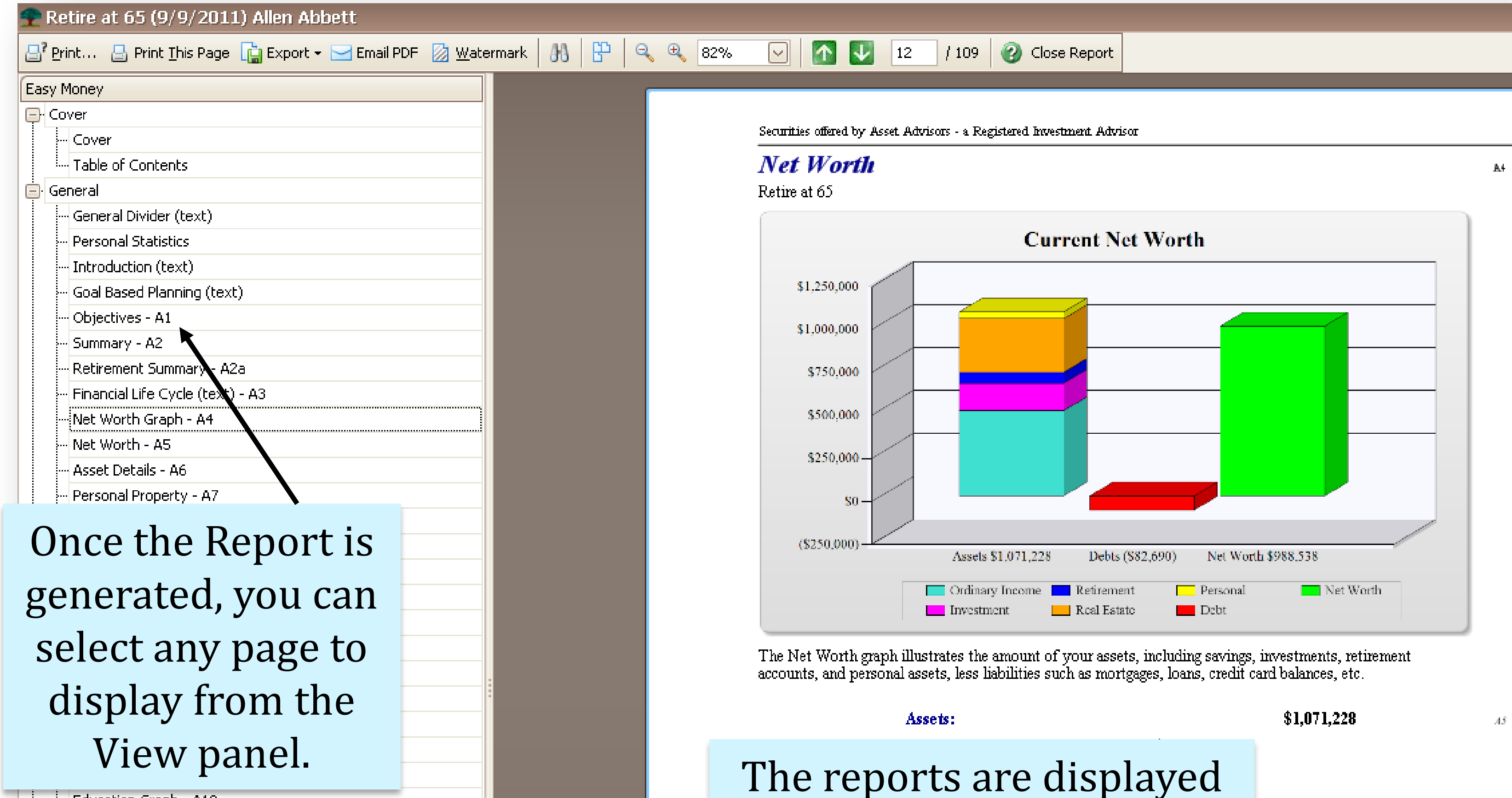
Viewing the reports



Once the Report is generated, you can select any page to display from the View panel.

The reports are displayed exactly as they will print.

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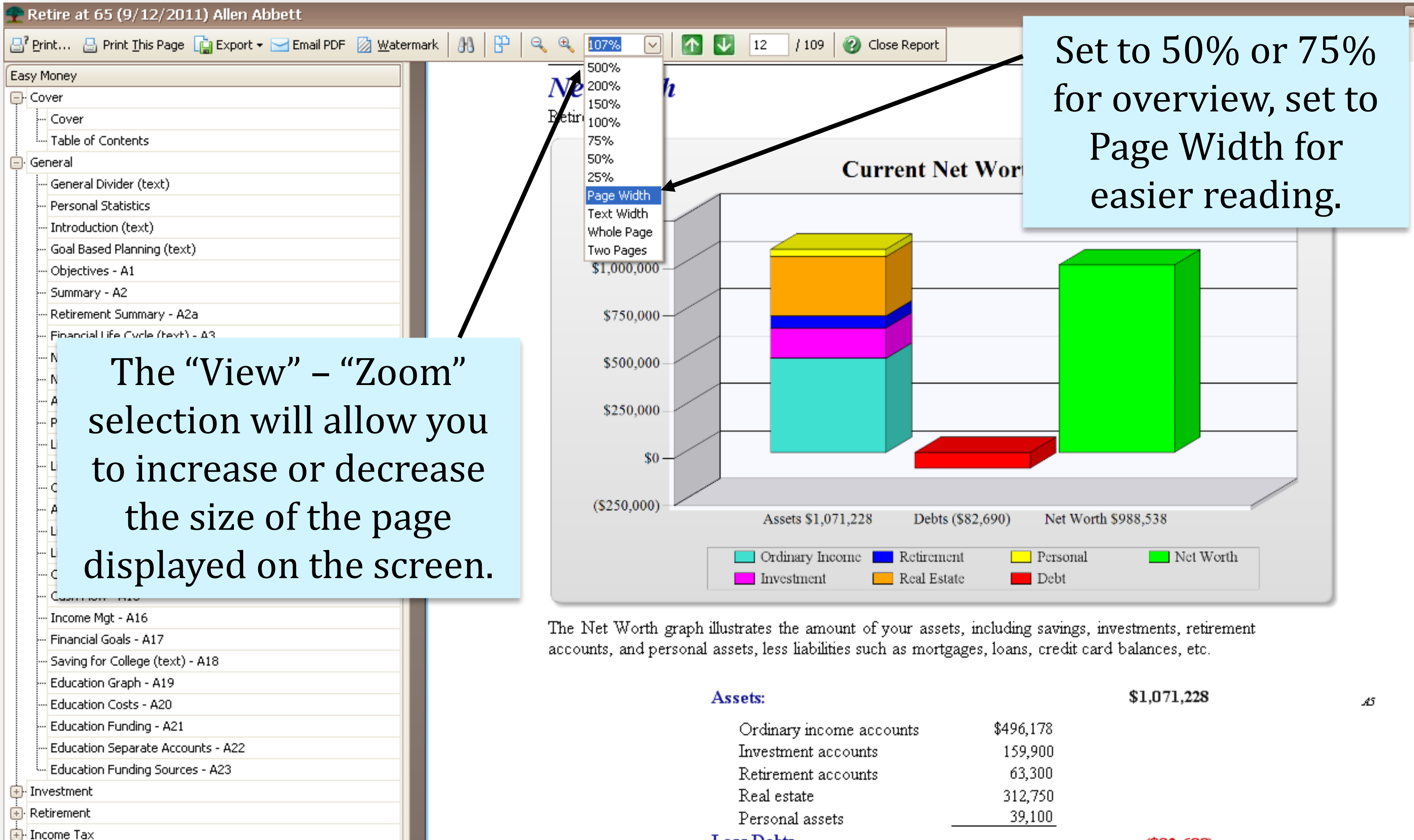
Changing the View Scale



Set to 50% or 75% for overview, set to Page Width for easier reading.

The "View" – "Zoom" selection will allow you to increase or decrease the size of the page displayed on the screen.

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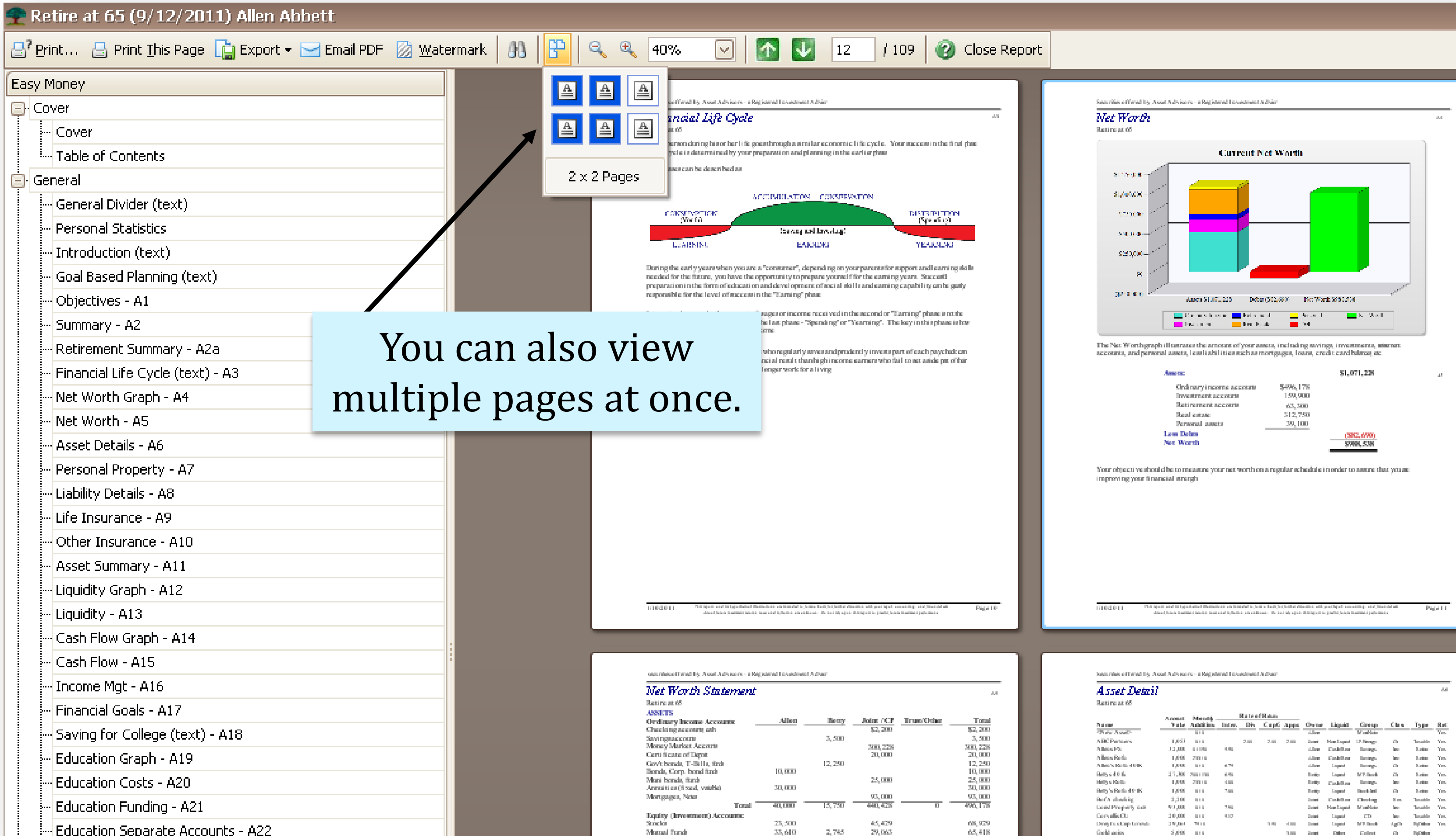
Changing the View



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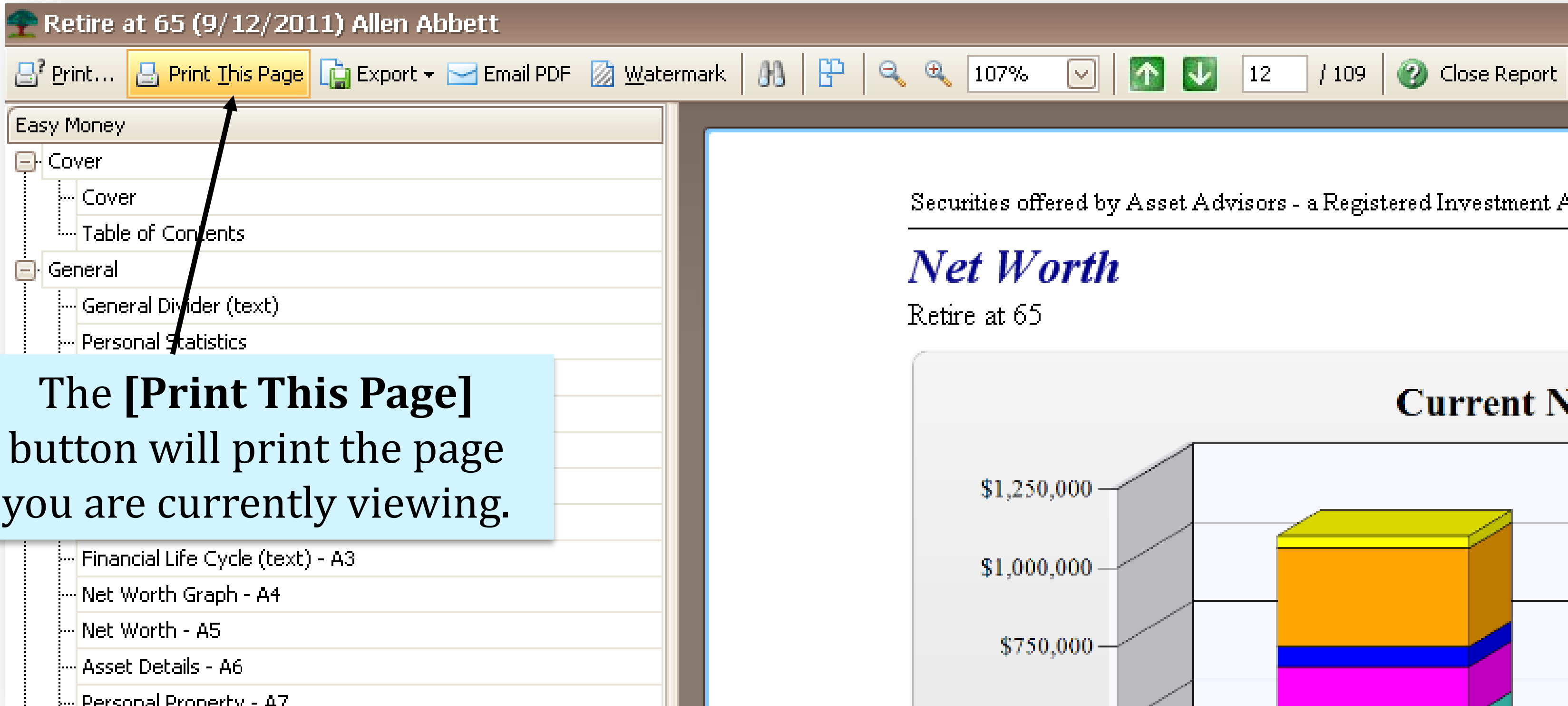
Print the current page



The **[Print This Page]** button will print the page you are currently viewing.

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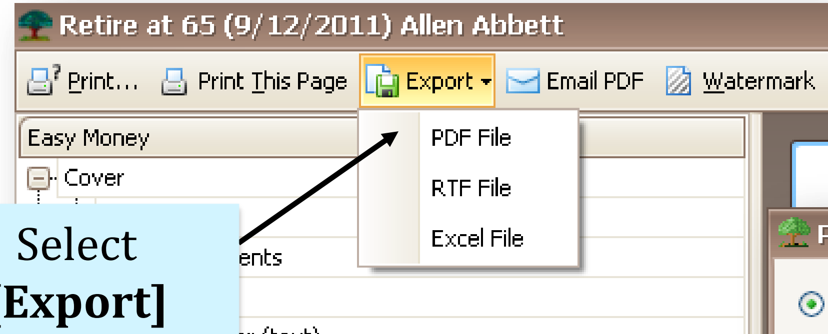
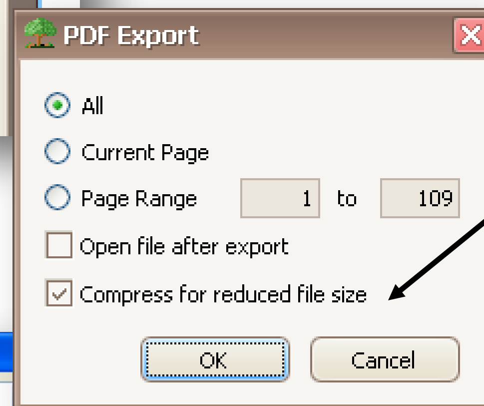
Exporting files to PDF, RTF or XLS

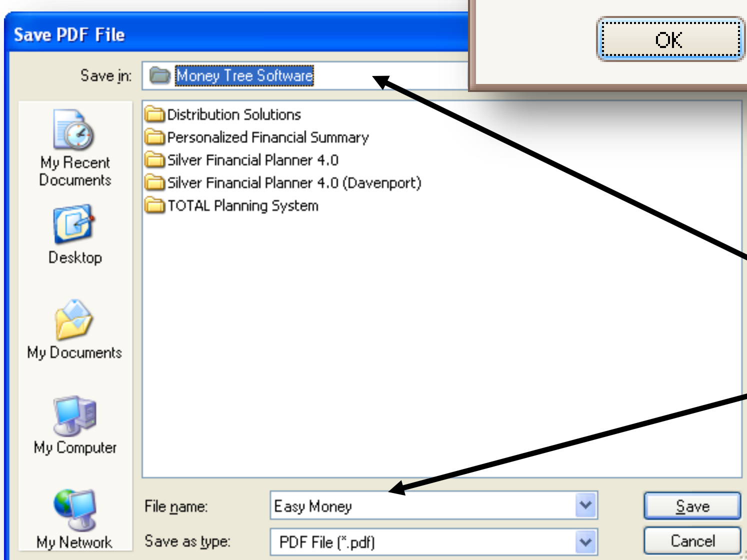


Select **[Export]**

Then select PDF, RTF, or Excel file type to export.



Select All, or part of the report to export, click **[OK]**.



In the **Save** window, select the location and filename for your newly exported file.

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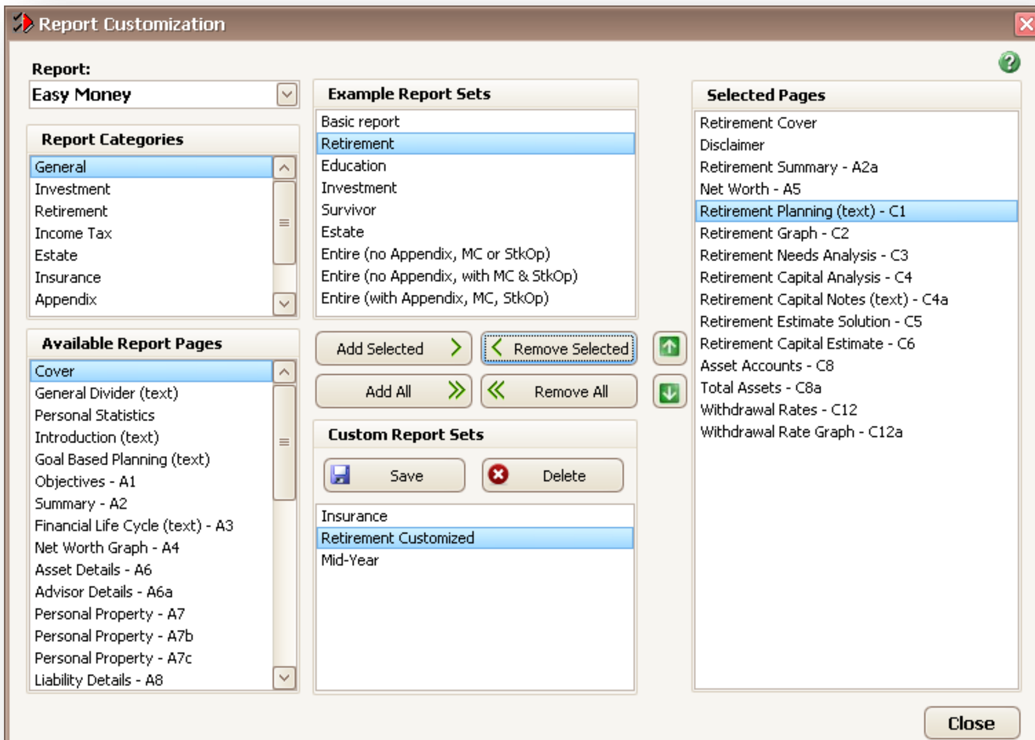
Custom Templates

- This allows you to create your own list of reports that can be called up at any time.
- You may create an unlimited number of templates.
- Separate lists are maintained for Easy Money and Golden Years.



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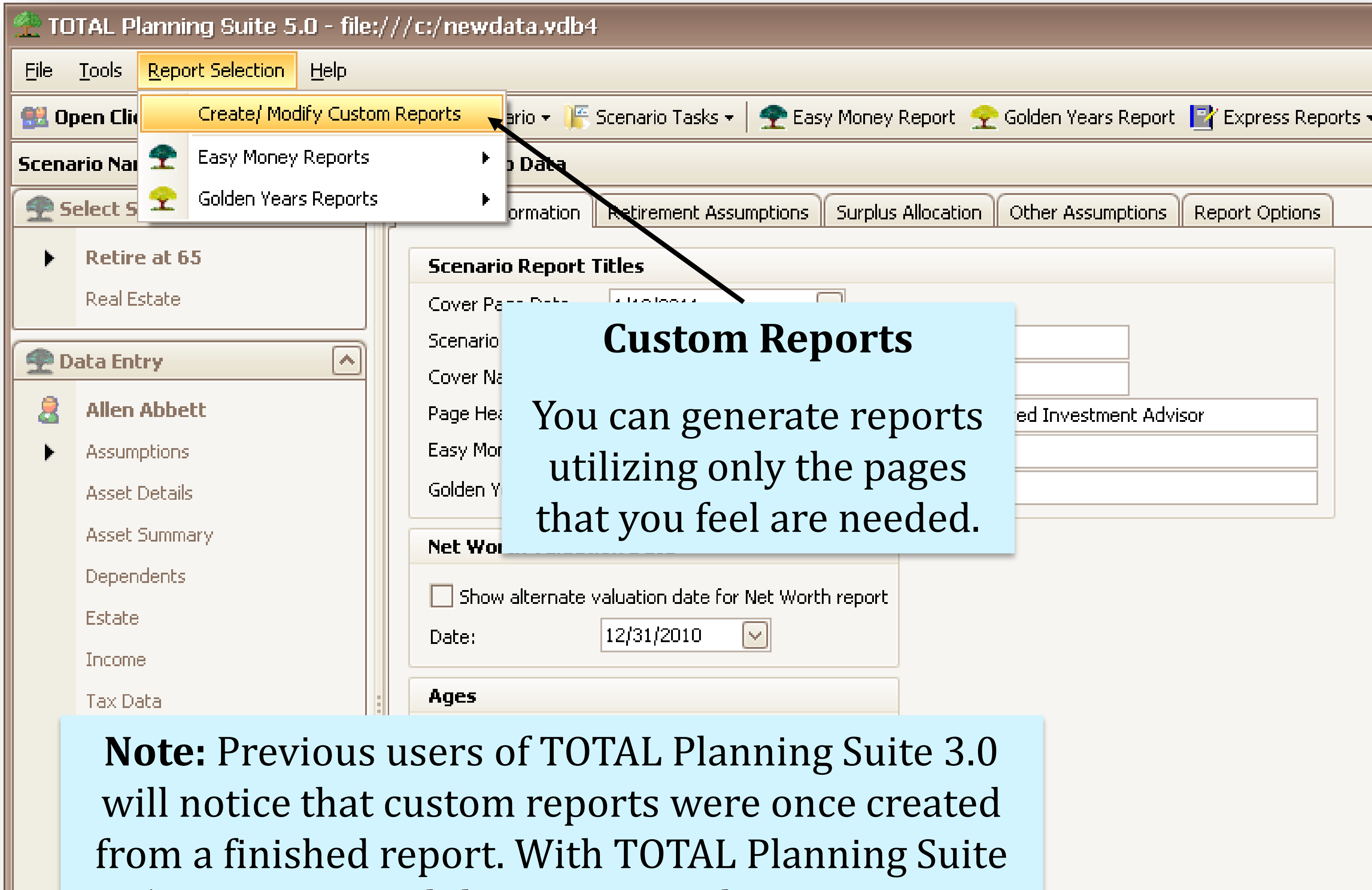
Selecting Custom Reports



Custom Reports

You can generate reports utilizing only the pages that you feel are needed.

Note: Previous users of TOTAL Planning Suite 3.0 will notice that custom reports were once created from a finished report. With TOTAL Planning Suite 5.0 we improved the process and now you can create custom reports BEFORE generating.

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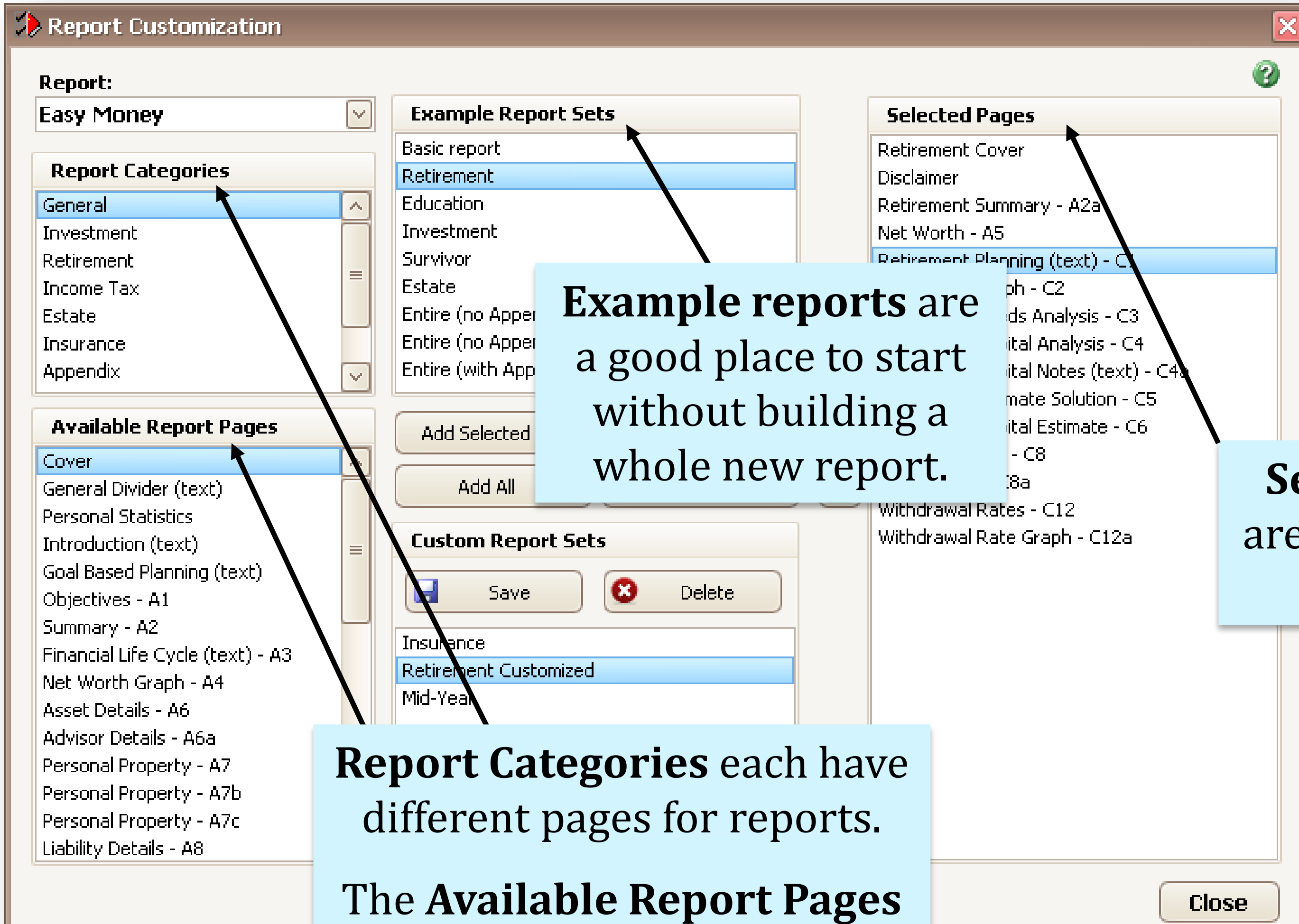
Report Customization



Example reports are a good place to start without building a whole new report.

Selected Pages are ready for your final report.

Report Categories each have different pages for reports.

The **Available Report Pages** will change when you select another report category.

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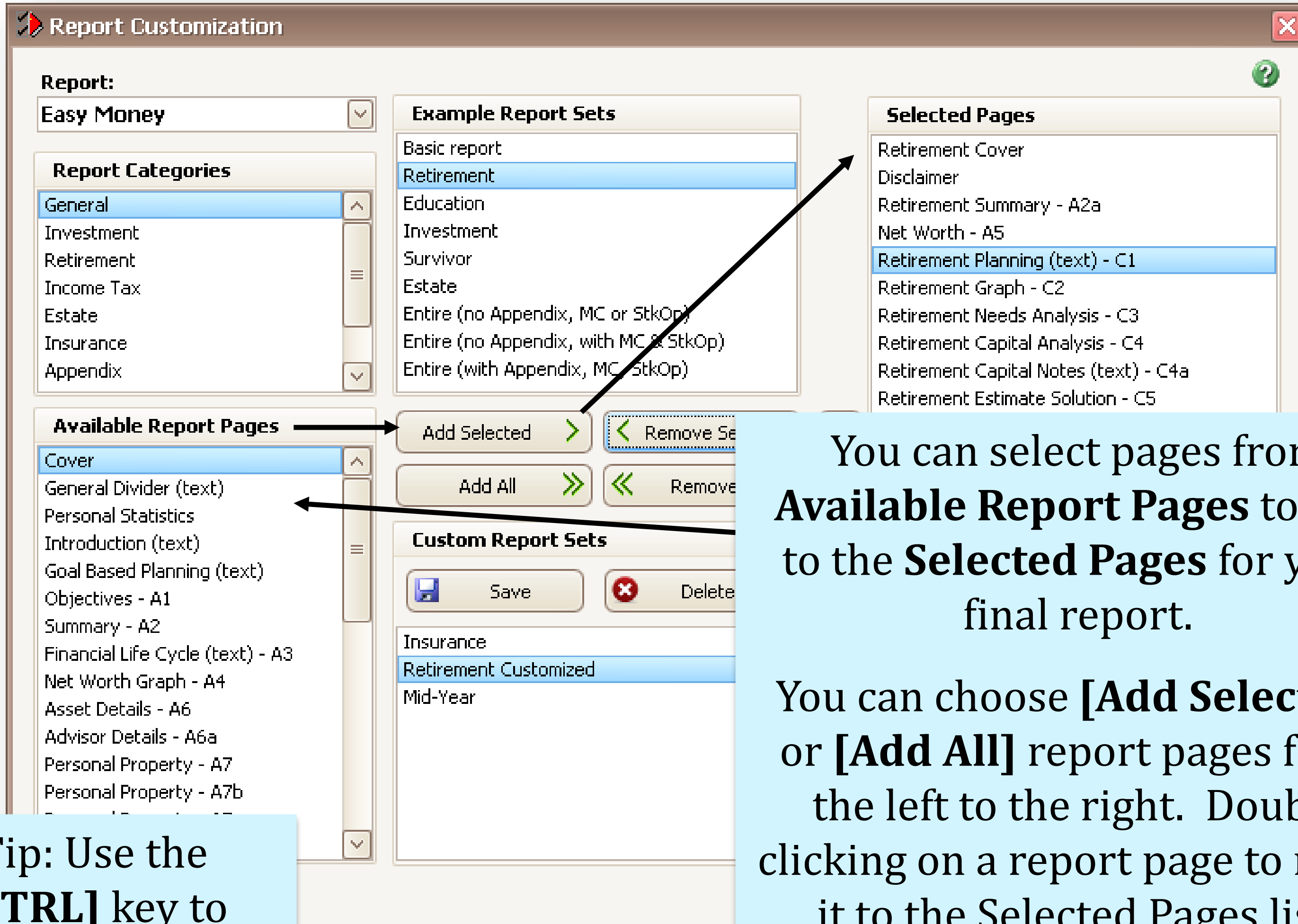
Add Reports to Selected Pages



You can select pages from **Available Report Pages** to add to the **Selected Pages** for your final report.

You can choose **[Add Selected]** or **[Add All]** report pages from the left to the right. Double clicking on a report page to move it to the Selected Pages list.

Tip: Use the **[CTRL]** key to select multiple pages at once.

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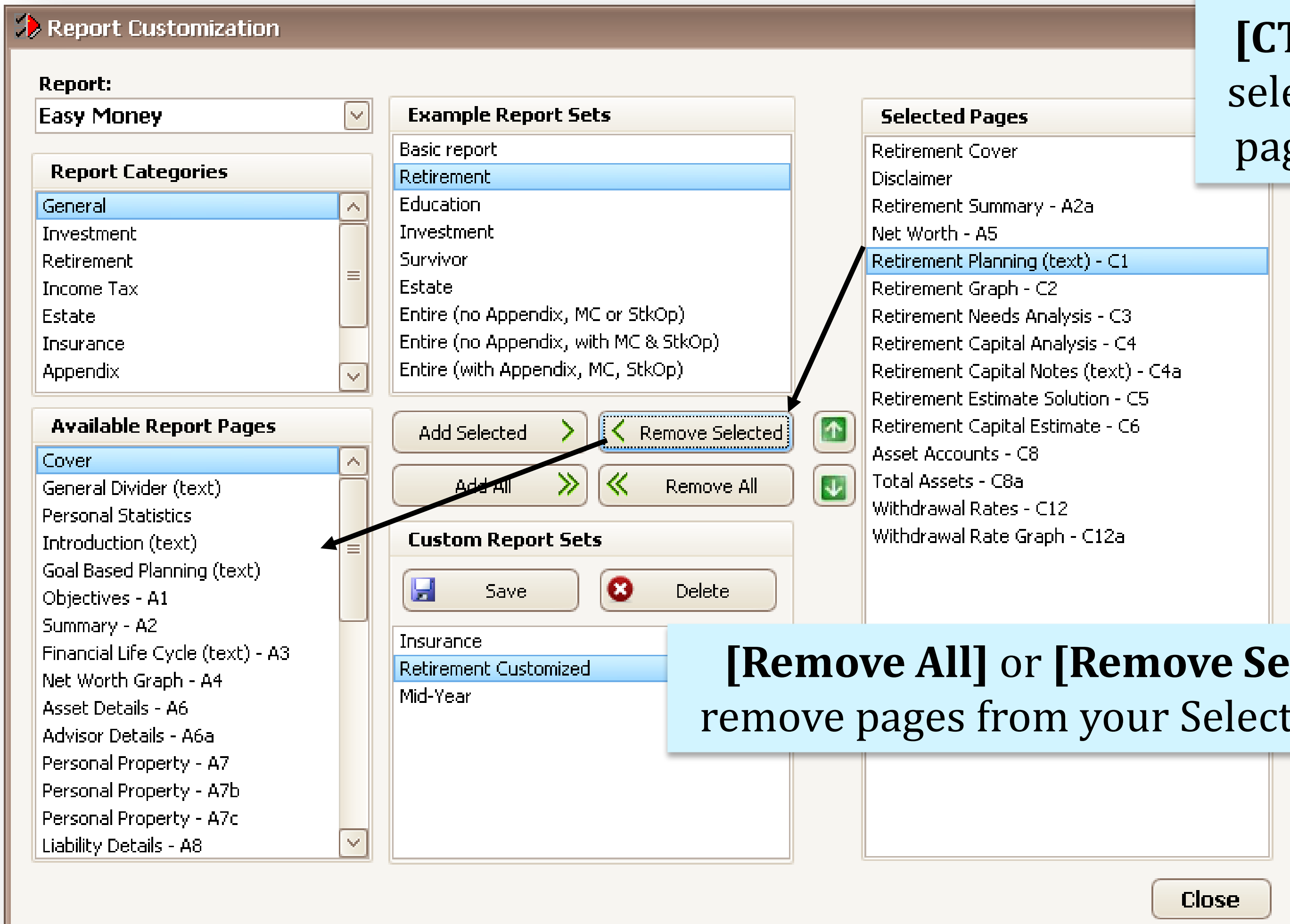
Remove Selected Pages



Tip: Use the **[CTRL]** key to select multiple pages at once.

[Remove All] or **[Remove Selected]** will remove pages from your Selected Pages list.

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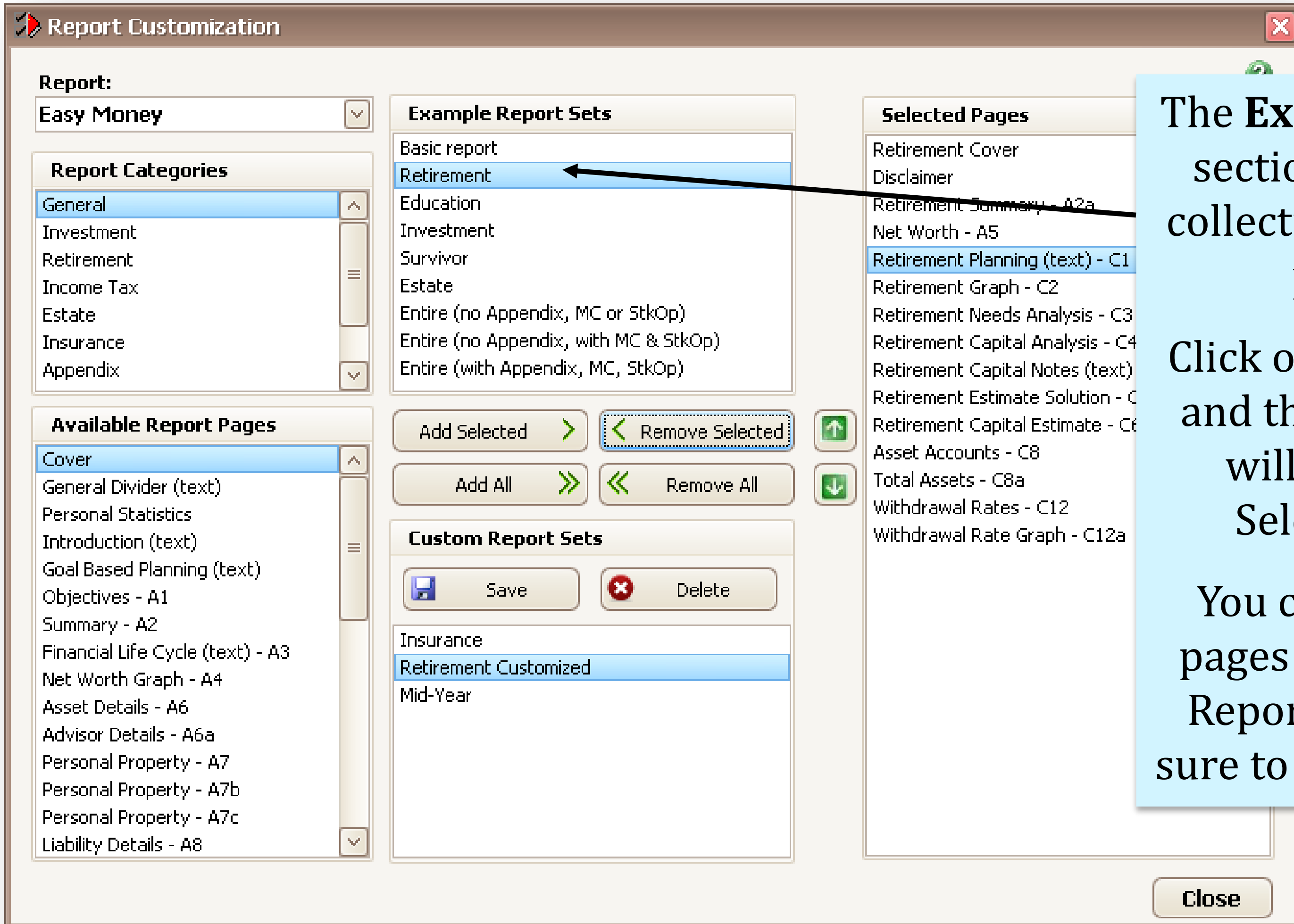
Default Templates



The **Example Report Sets** section contains report collections that have been pre-selected.

Click one of the templates and the group of reports will be added to the Selected Pages list.

You can add additional pages from the Available Report Pages list. Make sure to save when finished.

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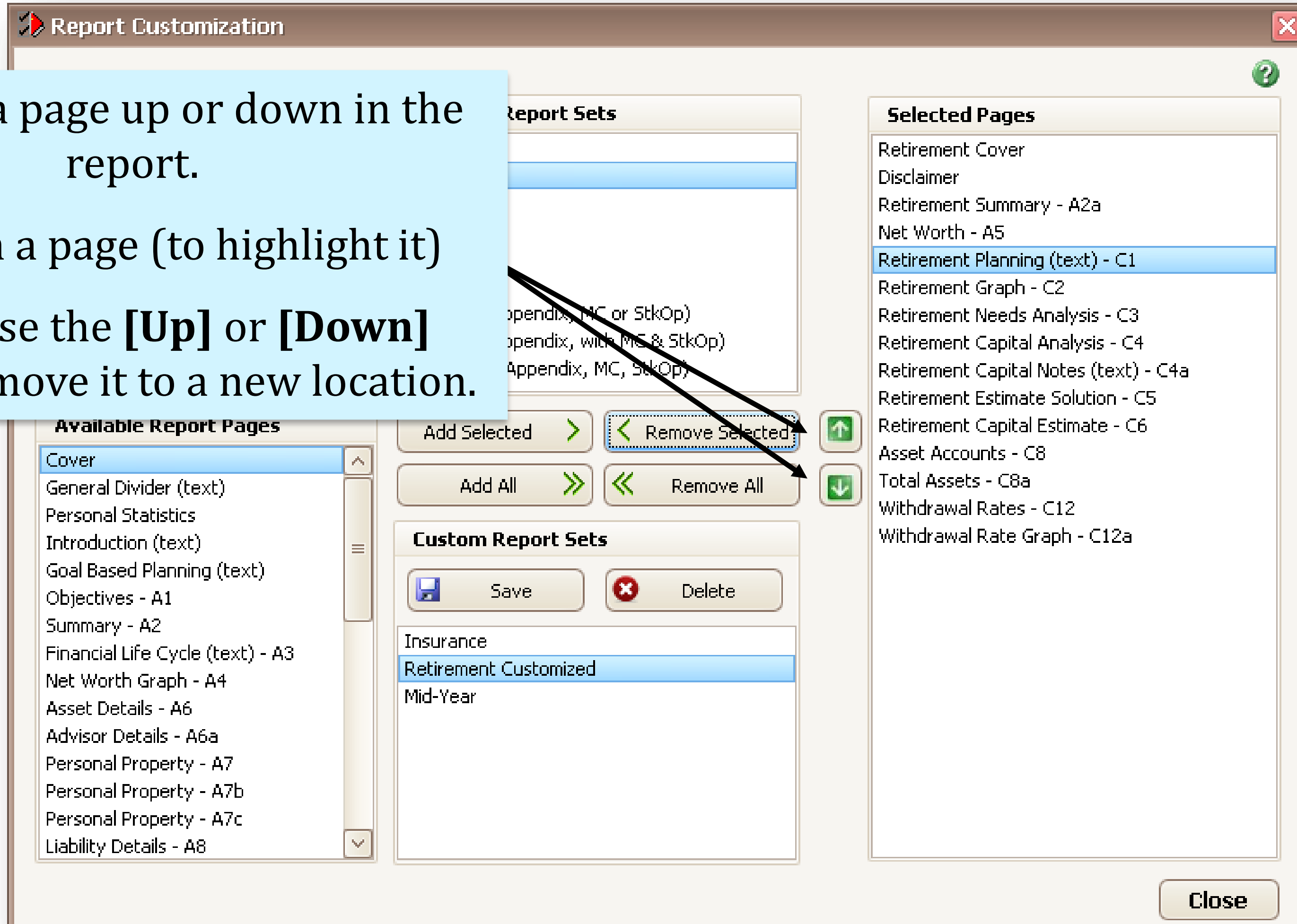
Changing the order of Selected Pages

To MOVE a page up or down in the report.

• Click on a page (to highlight it)

• Then use the **[Up]** or **[Down]** arrows to move it to a new location.



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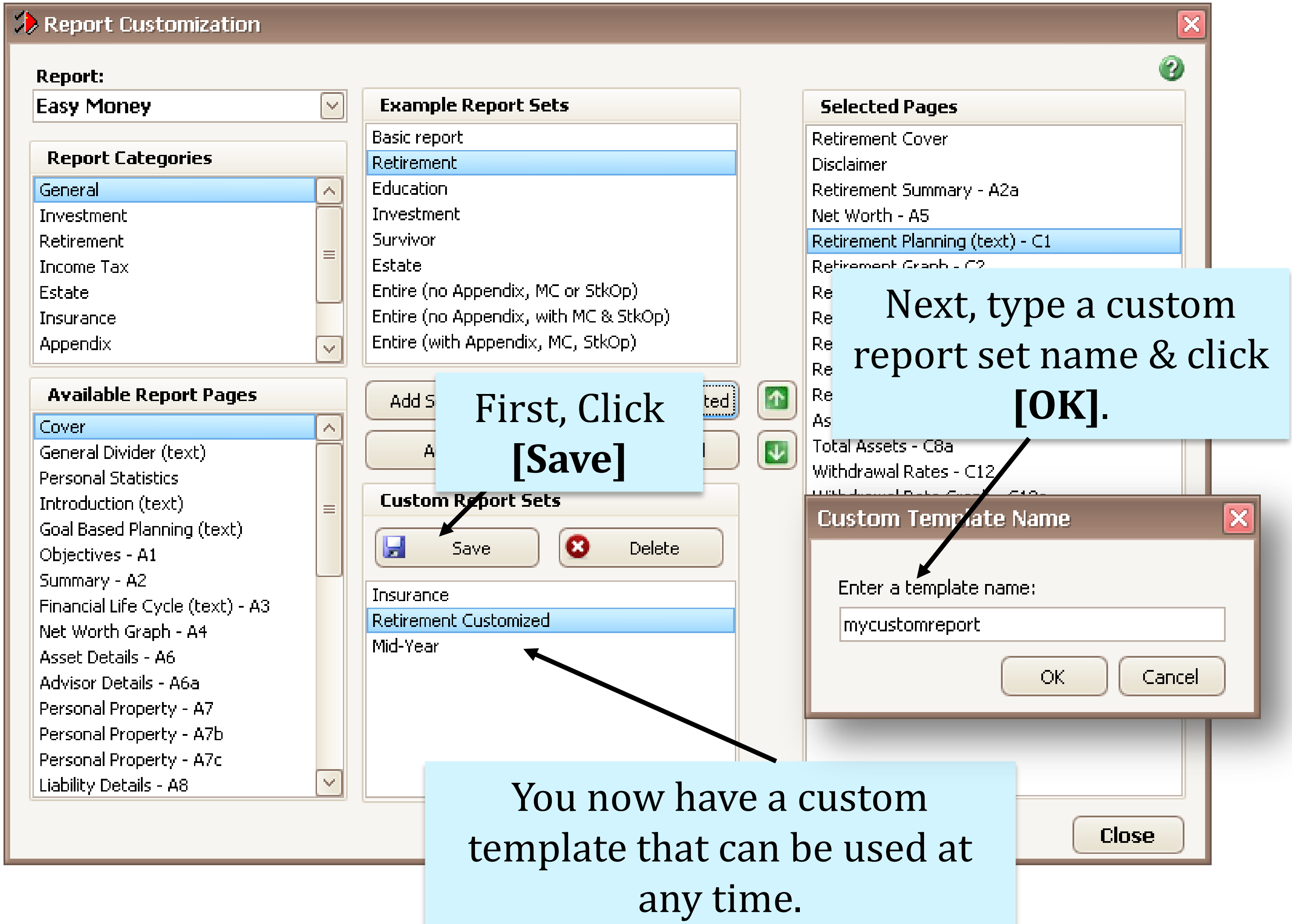
Saving a Custom List



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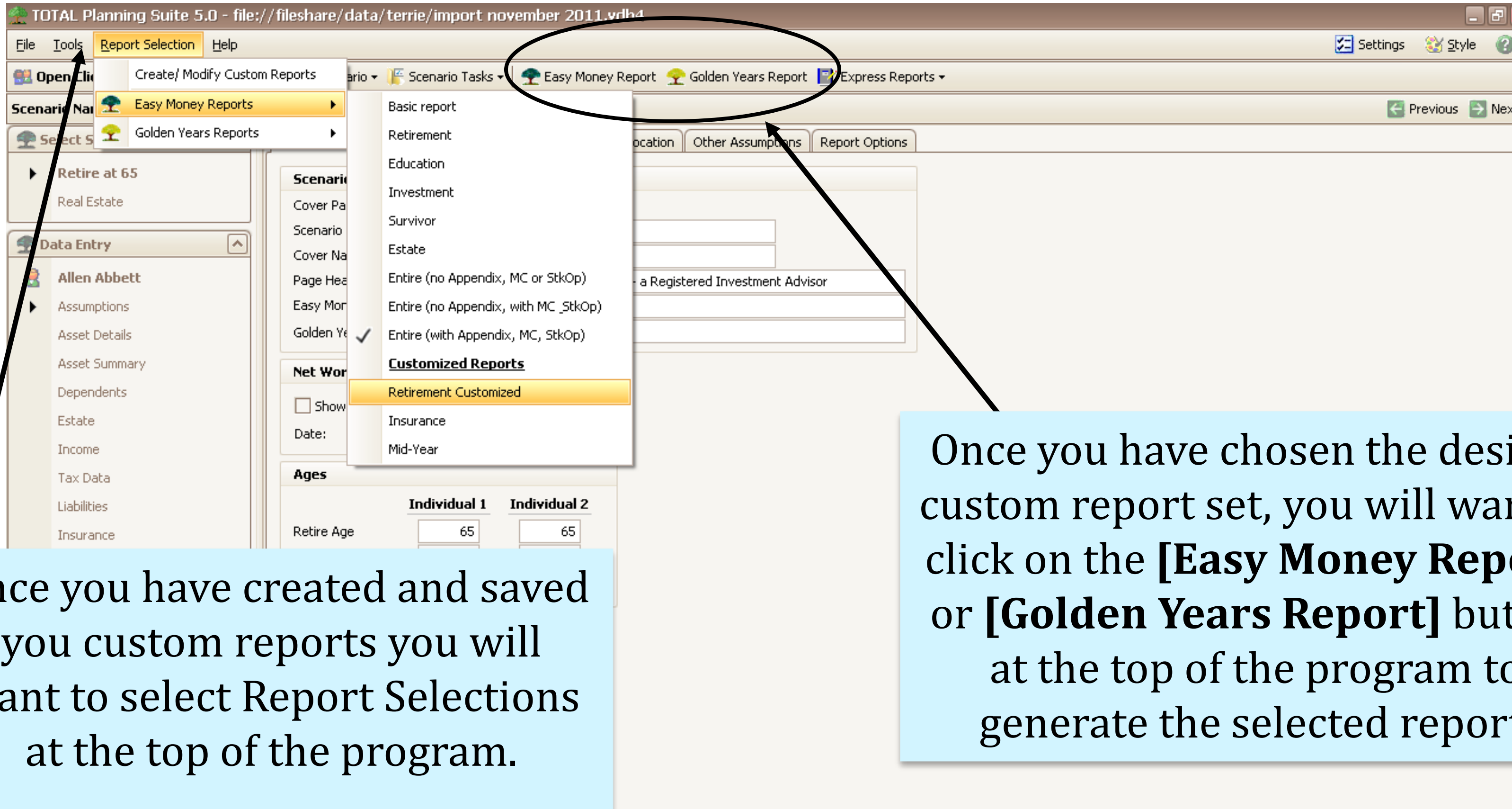
Generating a Custom Report



Once you have created and saved you custom reports you will want to select Report Selections at the top of the program.

Then choose either Easy Money or Golden Years. You will now be able to select the desired custom report set from the list.

Once you have chosen the desired custom report set, you will want to click on the **[Easy Money Report]** or **[Golden Years Report]** button at the top of the program to generate the selected report.

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End of
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