

Account Reporting Users: Three Reasons to Start Using Report Generator

This article offers compelling reasons to use Report Generator: streamlined client reviewing process, access to high-quality, comprehensive reports with the convenience of customizations when needed, and the ability to create custom account groups.

What's Report Generator?

Report Generator delivers a streamlined report-creation process through its ease and flexibility. The main application is accessible through Main Menu > Clients > Report Generator, which offers full-feature functionality (e.g. manage default settings, create packages, etc.). The application is also integrated with Account Center via Account Center's Reporting tab to meet your on-demand reporting needs.

You can access Report Generator from:

- **Main Menu > Clients > Client-Approved Reports > Report Generator** (main application).
- **Main Menu > Clients > Client Accounts > Account Center**. In Account Center, click the **Reporting** tab to access the list of available reports.

Tip: While the Reporting tab in Account Center enables you to easily run on-demand reports and report packages, for full-feature Report Generator functionality you must use the Report Generator main application.

Account Reporting and Report Generator both provide client-approved reports that display performance information about your clients' portfolios. If you are not currently using Report Generator, here are a few advantages it offers.

1. Streamline your client review process

With Report Generator, you can improve your client review process in the following ways:

- Instead of going to many different systems to get the information you need, you can get it all in one place. What used to take several hours to prepare, you can now prepare in just few minutes!
- You can create a customized report package designed to meet a specific client's needs or based on how you segment your book, and then create an automated recurring schedule for that package so that it's ready when you need it.
- You can generate high-quality reports that are not only comprehensive, but well-designed and easy-to-read. See the sample [Model Allocation Report](#).
- You can create your own custom overview reports using the Custom Report Creator, and you can upload PDF documents to add to reports and report packages using the Supplemental Content feature.

2. Choose from a variety of benchmarks

Like Account Reporting, Report Generator enables you to choose from several different benchmarks. Report Generator also enables you to choose from 11 firm-defined blended benchmarks or create your own blends, absolutes, and targets.

In Report Generator, you can select benchmarks from the Report Settings or Default Settings screen. To select benchmarks from the Default Settings:

The screenshot shows the 'Report Generator' interface. At the top, there are three buttons: 'Default Settings', 'Create Groups', and 'Supplemental Content'. A callout box with the number '1' points to the 'Default Settings' button, with the text 'Click the **Default Settings** button.'

Below this, the 'Default Settings' screen is shown. It has three sections for benchmark selection, each with two dropdown menus. A callout box with the number '2' points to the first section, with the text 'Scroll down to the Benchmark Selection settings and select the benchmarks you want to include.'

At the bottom right of the screen, there are 'Cancel' and 'Save' buttons. A callout box with the number '3' points to the 'Save' button, with the text 'Click **Save**.'

3. Create account groupings outside of a standard relationship

In Report Generator, you can run reports on an entire relationship, or you can pick and choose which accounts you would like from the Account drop-down menu. You also have the ability to create a custom grouping of accounts outside of a standard relationship.

In Account Reporting, you may notice that the “Combined Accounts” category in your Account List looks different. That’s because when the Account Merging application was retired, the “Combined Accounts” switched from household links to relationship links.

Note: If you want to run reports in Account Reporting on your old household links, you need to recreate them in Link Management Center or Report Generator as reporting groups. For more information on creating reporting groups, see the [Report Generator: Creating Reporting Groups Quick Reference Guide](#).

Transitioning to Report Generator

For a side-by-side comparison of each Account Reporting report and its Report Generator equivalents, see the [Report Generator: Comparing with Account Reporting Transition Guide](#).