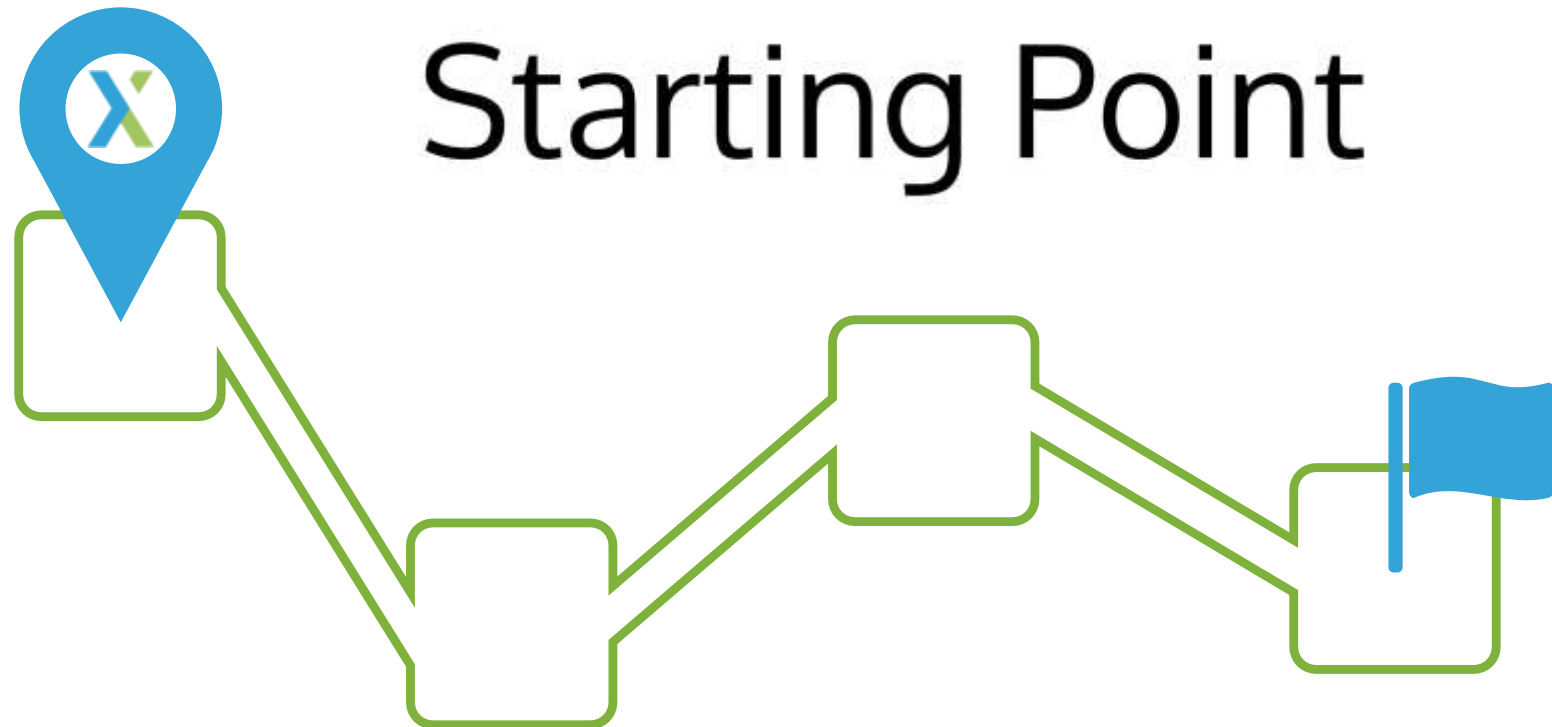


Session 4

Grids and Searching



The Who and the What

Searching Tools



Reporting Tools



- Why do I need to use Grid Templates?
- Grid Filters
- Building Grid Templates
- Quick and Advanced Searching
- Report Assistant
- Pre-Built Reports



Grid Basics

0 items selected [Select All](#) [Select Page](#) [Select None](#) # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z - ALL

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

	Record Name	Phone Primary Record	Email Record	Advisor 1	AUM	Last Action Date
+ <input type="checkbox"/>	ABC 401k Plan	(432) 555-4545	jjones@abc401kplan.com	Beverly Satterfield	\$26,750,000.00	6/11/2018
+ <input type="checkbox"/>	Andrews - George & Sally	(555) 666-7878	bubandrews@gmail.com	John Haas	\$13,172,454.66	8/10/2018
+ <input type="checkbox"/>	Andrews - Jeff	(555) 555-4321	JeffAndrews@email.com	Julie Cochrane	\$162,500.00	8/8/2018
+ <input type="checkbox"/>	Andrews Family Trust			John Haas	\$20,000,000.00	3/8/2018
+ <input type="checkbox"/>	Andrews Tools	(555) 555-1212	gandrews@andrewstools.com	John Haas	\$0.00	12/12/2017
+ <input type="checkbox"/>	Barnes - Deborah	(555) 555-9876	DBarnes@email.com	John Haas	\$0.00	7/25/2018
+ <input type="checkbox"/>	Barnes - Richard	(919) 846-7187		Beverly Satterfield	\$2,500,000.00	5/29/2018
+ <input type="checkbox"/>	Beason - Bill and Sarah	(555) 555-2323	Bill@Net.net	Chris Graeber	\$0.00	7/23/2018
+ <input type="checkbox"/>	Billings - Rick and Judy	5555551313	CBillings@net.net	John Haas	\$650,000.00	8/10/2018

Navigation: [Grid Icon] [Refresh] 1 2 [Next] [Next]

Displaying items 1 - 50 of 68

- 50
- 5
- 10
- 20
- 50



Grid Basics

Click here to group by that column

Email Record	Advisor 1	AUM	Last Action Date
jjones@abc401kplan.com	Beverly Satterfield	\$26,750,00	
bubandrews@gmail.com	John Haas	\$13,172	
JeffAndrews@email.com	Julie Cochrane		
	John Haas		
gandrews@andrewstools.com	John Haas	\$0.00	12/12/2017
DBarnes@email.com	John Haas	\$0.00	7/25/2018
	Beverly Satterfield	\$2,500,000.00	5/29/2018
Bill@Net.net	Chris Graeber	\$0.00	7/23/2018
CBillings@net.net	John Haas	\$650,000.00	8/10/2018

Export to Excel

Save as Template

Load Saved Template

Field/Column Chooser

Displaying items 1 - 50 of 68

50



Grid Basics

0 items selected [Select All](#) [Select Page](#) [Select None](#) # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z - ALL

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

	Record Name	Phone Primary Record	Email Record	Advisor 1	AUM	Last Action Date
+ <input type="checkbox"/>	ABC 401k Plan	(432) 555-4545	jjones@abc401kplan.com	Beverly Satterfield	\$26,750,000.00	6/11/2018
+ <input type="checkbox"/>	Andrews - George & Sally	(555) 666-7878	bubandrews@gmail.com	John Haas	\$13,172,454.66	8/10/2018
+ <input type="checkbox"/>	Andrews - Jeff	(555) 555-4321	JeffAndrews@email.com	Julie Cochrane	\$162,500.00	8/8/2018
+ <input type="checkbox"/>					\$20,000,000.00	3/8/2018
+ <input type="checkbox"/>					\$0.00	12/12/2017
+ <input type="checkbox"/>					\$0.00	7/25/2018
+ <input type="checkbox"/>				Beverly Satterfield	\$2,500,000.00	5/29/2018
+ <input type="checkbox"/>				er	\$0.00	7/23/2018
+ <input type="checkbox"/>					\$650,000.00	8/10/2018
+ <input type="checkbox"/>	Beverly Satterfield					
+ <input type="checkbox"/>	John Haas					
+ <input type="checkbox"/>	John Haas					
+ <input type="checkbox"/>						
+ <input type="checkbox"/>	Beverly Satterfield					
+ <input type="checkbox"/>	John Haas					
+ <input type="checkbox"/>	John Haas				\$0.00	1/22/2018
+ <input type="checkbox"/>	Chris Graeber				\$5,255,000.00	3/3/2016
+ <input type="checkbox"/>					\$0.00	

Displaying items 1 - 50 of 68

50
5
10
20
50

Advisor 1

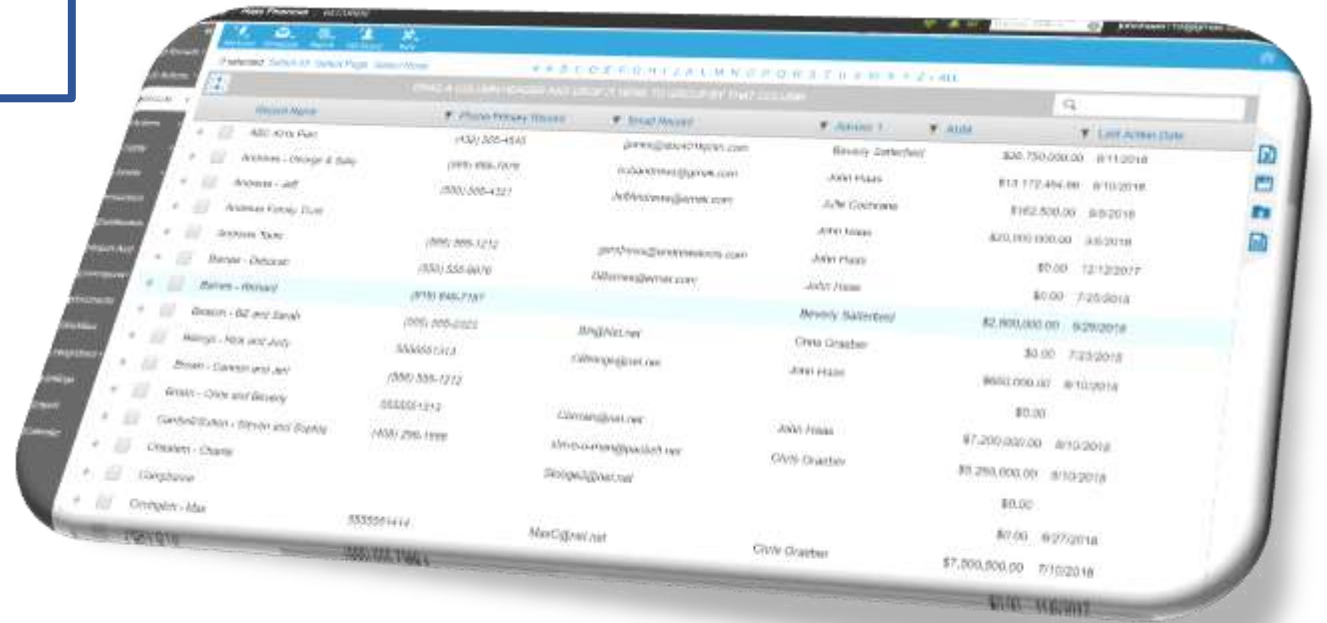
Show rows with value that

- Is equal to
- Is equal to**
- Is not equal to
- Starts with
- Contains
- Ends with
- Is Blank
- Is Not Blank



Building Grid Templates

1. Select your columns
2. Reorder your columns
3. Apply filters if needed
4. Save it as a template



Quick Search - for the Who

The screenshot shows a software interface with a search bar at the top. Below the search bar, a dropdown menu is open, listing several search options. The option 'Quick Search' is highlighted with a red rectangular box. To the right of the dropdown menu, there is a vertical toolbar with four icons: a document with an 'X', a document with a plus sign, a folder with an upward arrow, and a document with a grid pattern. In the background, a table is partially visible with columns for monetary values and dates.

\$26,750	
\$13,172	
\$162,000.00	3/8/2018
\$20,000,000.00	3/8/2018



Quick Search - for the Who

The screenshot shows a 'Quick Search' window with the following elements:

- Header: (555) 555-4321, JeffAndrews@email.com, John Haas
- Section: Quick Search
- Form: Load Saved Search: [dropdown], Save this Search: [input] [Save this Search]
- Action: Delete Saved Search
- Section: And
- Classifications: Center of Influence, Client, Client-Child, Email, Employee
- Interests: Baseball, Basketball, Camping, Fishing, Football
- Tags: 401k, Accumulation Phase, Annual Gifting, Asset Management, Attorney - Divorce
- Action: Apply Results
- Footer: (555) 234-6039, Sheriff@net.net, John Haas

Annotations: A large blue arrow points from the 'And' section down to the 'Or' section. The word 'Or' is positioned to the right of the arrow.



Advanced Search - for the Who

The screenshot shows a software interface with a search bar at the top. Below the search bar, a dropdown menu is open, displaying several search options. The option 'Advanced Search' is highlighted with a red rectangular box. To the right of the dropdown menu, there is a vertical toolbar with four icons: a document with an 'X', a document with a checkmark, a folder with an upward arrow, and a document with a grid pattern. The background of the interface shows a table with financial data, including values like '\$26,750', '\$13,172', '\$162,000.00', and '\$20,000,000.00'.

\$26,750	RMD Age Person 1
\$13,172	Client Records - All
\$162,000.00	Quick Search
\$20,000,000.00	Advanced Search
	3/8/2018



Advanced Search - for the Who

Advanced Search

Select Existing Search of + Create New Search

DRAG A COLUMN HEADER

Name

actions for me

Advisors to the

All Accounts

All action types

All Compliance related actions

Created By

Haas, John

Haas, John

Haas, John

Haas, John

Haas, John

Haas, John

00

Select the type of search you are wanting to build:

- Records
- Actions
- Assets & Liabilities
- Opportunities
- Insurance

< Back Next > X Cancel

Where will my information be displayed?



Advanced Search - for the Who

Choose Criteria Clear All Criteria

Logical Operator:

- Actions
- Assets & Liabilities
- Insurance
- Opportunities
- Record

Content area cards

Back Cancel Apply Save & Apply



Advanced Search - for the Who

Choose Criteria Clear All Criteria

Logical Operator: and or

Expanding content area cards reveals the list of fields in that area

Opportunities

Record

Address State Person1

Address State Person2

Address State Record

Advisor 1

Advisor 2

Classifications

Client

Coolfield

Created By

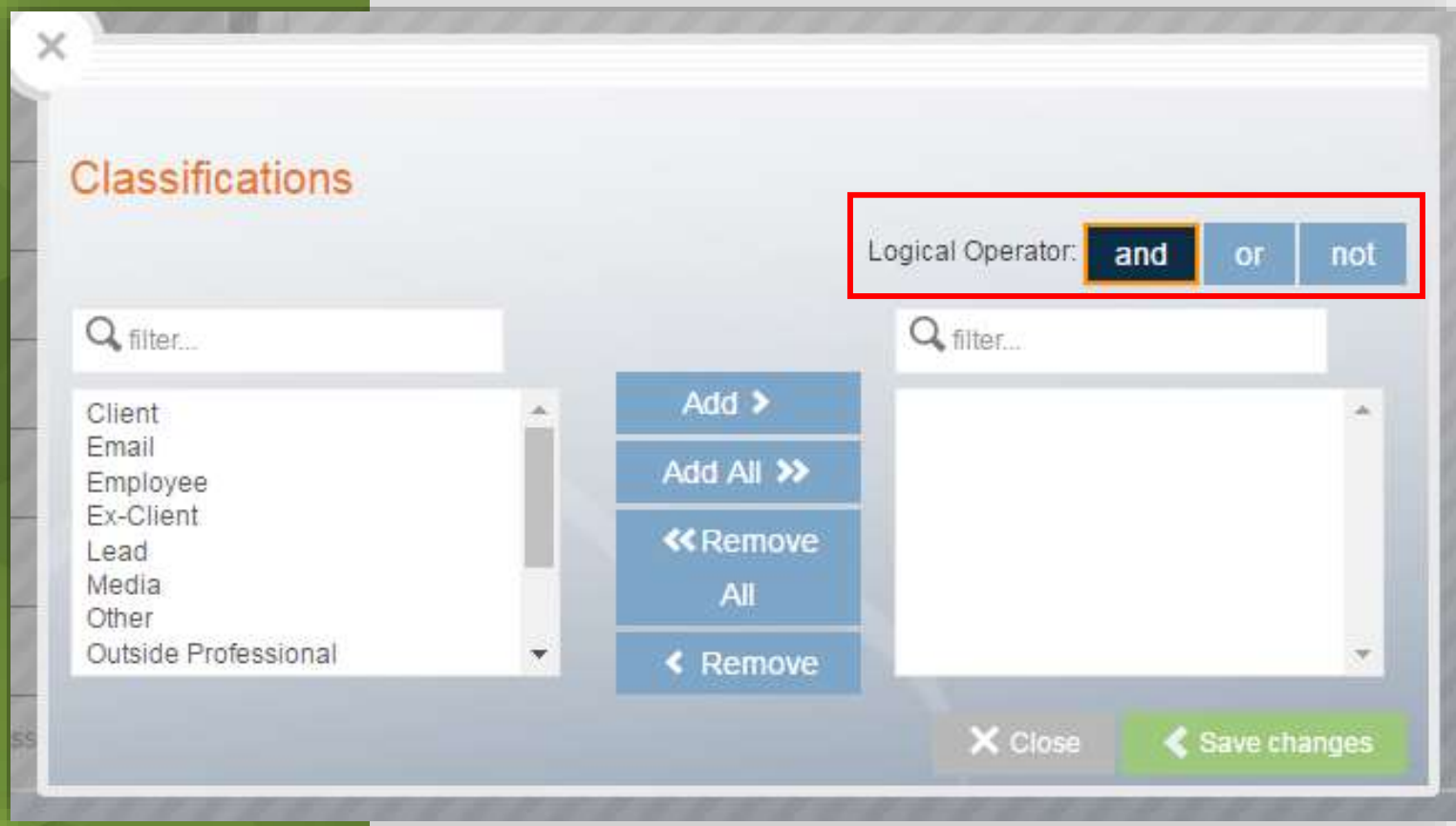
CSR

Drivers License Issuing State Person1

Back Cancel Apply Save & Apply



Advanced Search - for the Who



Display for fields
that contain a
list of items



Advanced Search - for the Who

Record - Record Fields

Logical Operator: **and** **or** +

DOB Person 1 ▼

Before ▼

7/1/1946

-

X Close ✓ Save changes

Display for fields that are single data points



Report Assistant

Where the **Who** and the **What** come together

1. What type of information is needed?
2. **Who** do you want information about?
3. **What** information do you need?
4. How do you want it displayed?



Report Assistant

The dashboard is organized into a grid of modules. The top row includes 'Actions' (blue), 'Opportunities' (blue), 'Records' (green), and 'Dashboards' (grey). The second row contains 'Assets' (blue), 'Insurance' (green), and three partner logos: 'Ameritrade Institutional', 'Charles Schwab Advisor Center', and 'Finance Logix'. The bottom row features 'Report Assistant' (grey, highlighted with a red border), 'Correspond' (grey), 'Document Workspace' (grey), and 'Workflow Management' (grey). Each module displays specific data points and navigation options.

Module	Color	Icon	Key Data/Text
Actions	Blue	Lightning bolt	157 My Past Due and Due Today Actions 162 My Pending Actions Last 20 Actions ▶
Opportunities	Blue	Line graph with arrow	6 Open Opportunities 10 My Opportunities Last 20 Opportunities ▶
Records	Green	Two people icons	Last 20 Records ▶
Assets	Blue	Stack of money	Last 20 Assets ▶
Insurance	Green	Umbrella	
Report Assistant	Grey	Document icon	
Correspond	Grey	Envelope	Multi-record Emails Correspondence History ▶
Document Workspace	Grey	Folder	Document Templates ▶
Workflow Management	Grey	Flowchart	



Report Assistant

Report Assistant

Select the area you would like to report on

I would like to report on:

- Actions
- Assets
- Insurance
- Opportunities
- Records

Report Assistant

Select a saved Report or build a new report

- Saved report
- Build new report

Categories

All
Client Service
Compliance
Firm Related
Portfolio/Trading
Reporting

Saved Report

Clients with Advisor
Records with phone
numbers



Report Assistant

Who

Financial : REPORT ASSISTANT



46

Record Search



johnhaas110@gmail.com



Report Assistant

Select or Create an Advanced Search

To build a new report you need to have an **advanced search** associated with it. You can either:

1. Create a **new advanced search**
2. Use a previously **saved advanced search**
3. Edit an existing **saved advanced search** and save it with the same name
4. Edit an existing **saved advanced search** and save it with a new name

Create a New Advanced Search

[New Advanced Search](#)

Note: When you save your new advanced search it will be automatically selected for you in the "Select an Advanced Search" drop down below. Just hit next to continue.

Available Saved Advanced Searches

Select a Category

Select an Advanced Search

[Edit Selected Advanced Search](#)

[← Back](#)

[Next →](#)



Report Assistant

What

Financial :: REPORT ASSISTANT Record Search johnhaas110@gmail.com

Report Assistant

Select the Report Format

Portrait (up to 6 fields) Landscape (up to 8 fields) Export to Excel (unlimited fields)

Select the Fields to include in your report

Filter ✕

- Investment Policy Date
- Last Action Date
- Additional Form Date
- Date Verified
- Financial Planning Contract Date
- Investment Management Contract Date
- Termination Date
- Date Created
- Referred By Date
- Risk Questionnaire Date
- Date of Death Person 1
- Date of Death Person 2
- Drivers License Expiration Date Person 1
- Drivers License Expiration Date Person 2
- Drivers License Issue Date Person 1
- Drivers License Issue Date Person 2
- Passport Expiration Date Person 1

Filter ✕

- Record Name
- Email Record
- Phone Primary Record
- Source
- Date Became Client
- Record Tags

[Move Up](#)
[Move Down](#)



Report Assistant

Report Assistant

Here are your results

Generate as PDF Report

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

Record Name	Email Record	Phone Primary Record	Source	Date Beca...	Record Tags
Andrews - George & Sally	bubandrews@gmail.com	(555) 666-7878	Referral	9/1/1995	ABC Event - Attended, Client Planning, Financial Planning, Spouse, Meet Freq-Q, Newsletter, Person2, SEC Audit 2015, Sr
Andrews - Jeff	JeffAndrews@email.com	(555) 555-4321	Referral - Strategic Partner	2/9/2016	Client-Platinum, Client-Silver Card, Meet Freq-Q, Newsletter Invited
Billings - Rick and Judy	CBillings@net.net	5555551313	Referral	4/20/2016	ABC Event - Invited, ABC Event Gold, College Planning, Newsletter - Invited
Brown - Chris and Beverly	Cbrown@net.net	5555551313	Referral	5/6/2016	ABC Event - Invited, ABC Event Gold, College Planning, Minor Invited
Critchfield - Brad & Andrea	Bcritchfield@net.net	(555) 987-1236			College Planning, Financial Planning Child, Newsletter

Displaying items 1 - 5 of 23

Report Category Client Service

Report Name

Save

Back

Engine

X Junxure

Report Assistant

Report Assistant

Here are your records



Prepared on Tuesday, February 25, 2020
Haas Financial

Record Name	Email Record	Phone Primary Record	Source	Date Became Client	Record Tags
Andrews - George & Sally	bubandrews@gmail.com	(555) 666-7878	Referral	9/1/1995	ABC Event - Attended, Client-Platinum, Estate Planning, Financial Planning, Holiday Gift, Inherited IRA - Spouse, Meet Freq-Q, Newsletter, RMD - Person1, RMD - Person2, SEC Audit 2015, Snow Bird, XYZ Event - Attended
Andrews - Jeff	JeffAndrews@email.com	(555) 555-4321	Referral - Strategic Partner	2/9/2016	Client-Platinum, Client-Silver, Financial Planning, Holiday Card, Meet Freq-Q, Newsletter, SEC Audit 2015, Snow Bird, XYZ Event - Invited
Billings - Rick and Judy	CBillings@net.net	5555551313	Referral	4/20/2016	ABC Event - Invited, ABC Event - RSVP No, Client-Gold, College Planning, Newsletter, Related Accounts, XYZ Event - Invited
Brown - Chris and Beverly	Cbrown@net.net	5555551313	Referral	5/6/2016	ABC Event - Invited, ABC Event - RSVP Yes, Client-Gold, College Planning, Minor - Child, Newsletter, XYZ Event - Invited
Critchfield - Brad & Andrea	Bcritchfield@net.net	(555) 987-1236	Referral		College Planning, Financial Planning, Minor - Child, Newsletter

Generate as PDF Report



Displaying items 1 - 5 of 23

Report Name Save

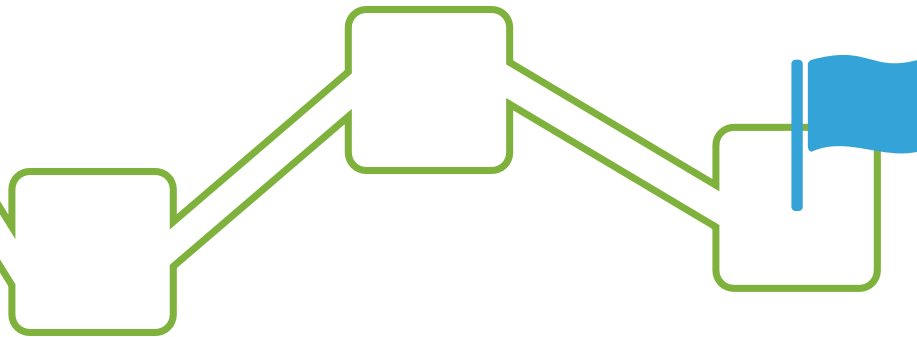
Back

Impactful Prebuilt Reports





Starting Point



Ensure your success
by finishing this
series!

Next Session:

Email Integrations

