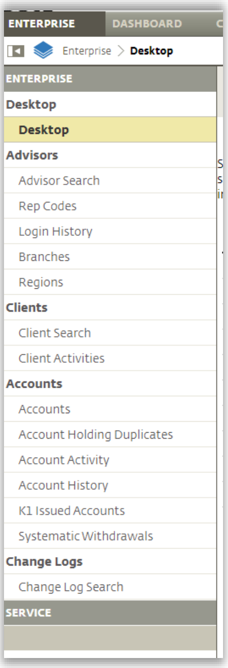
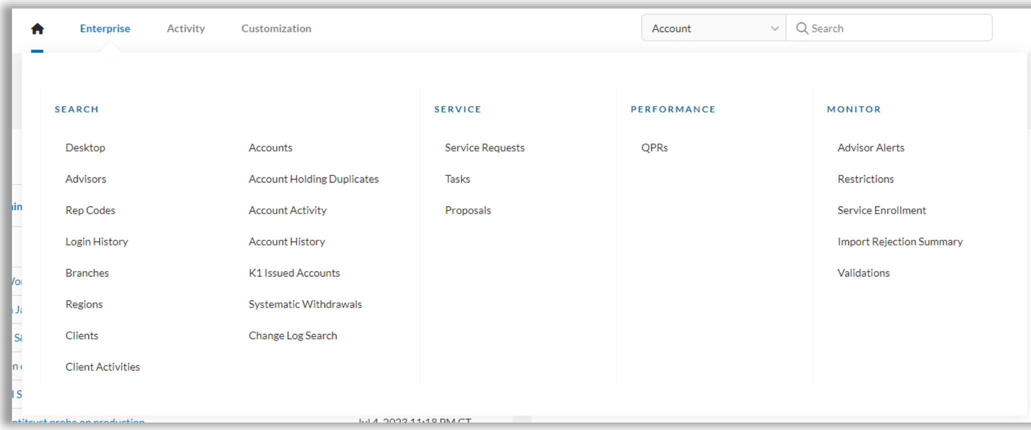
Advanced Client Reporting

Quick compare from Old to New.

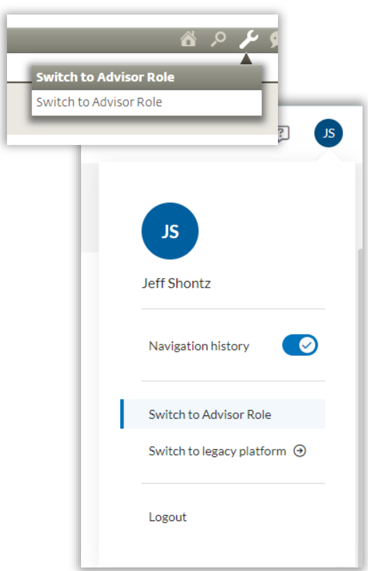
The Enterprise left side menu has been moved to a dropdown menu.



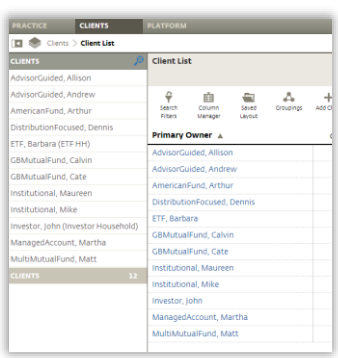
Enterprise is Enterprise, Dashboard is Activity, and Customization is Customization.

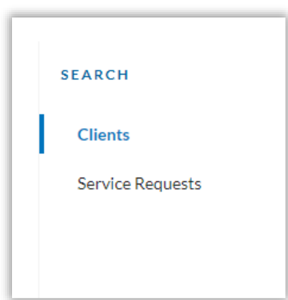


Switching from Supervisor to Advisor

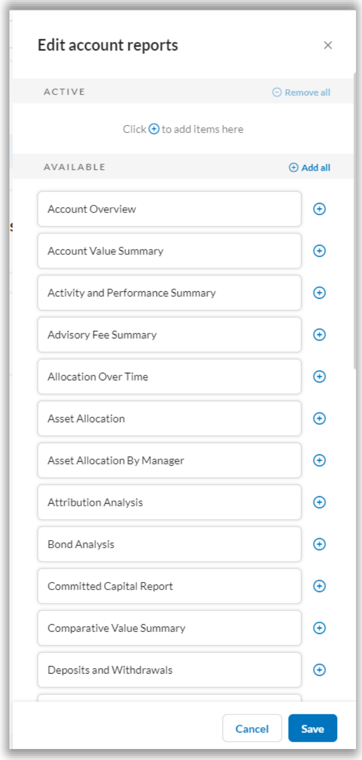


The CLIENTS left side menu has been removed. The list found through the Magnifying icon is now the main Client List. This can be found under the Practice menu.



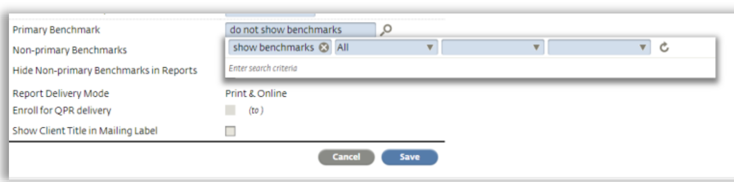


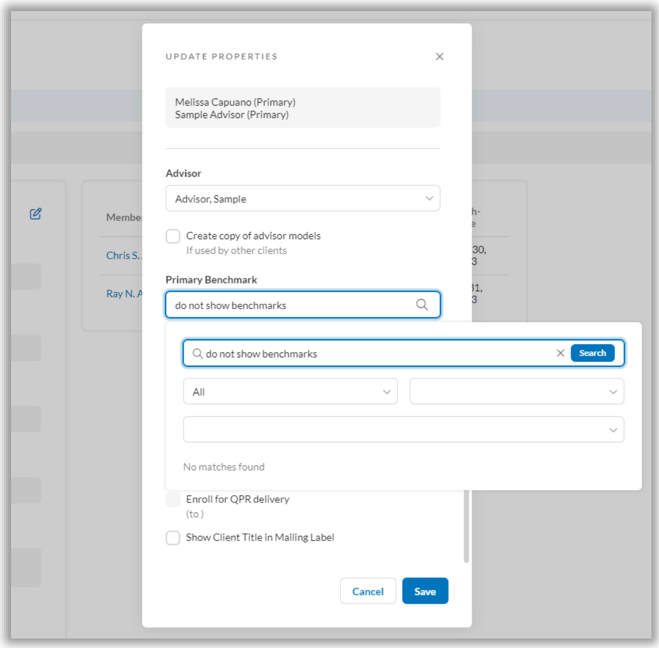
Creating a Report Template is no longer a drop down from a Plus icon. The list of available reports will display as a right side list.



Benchmarks

From the General tab, the edit button has been moved from the bottom of the section to the top. A new Update Properties window will open for modifying the benchmark.





Additional Guides

Individual guides can be found within the Help menu of SEI Advisor Center, search Advanced Client Reporting

- 3 Things to know about Benchmarks, Custom Logos, and Shortcuts
- Account Level Performance
- Assigning a Benchmark at the Client and Account levels
- Custom Benchmarks
- Custom Report Templates
- Scheduled Reports