Quick compare from Old to New.

. sei

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

NTERPRISE						
Desktop	_					
Desktop		Enterprise Activ	vity Customization		Account	V Q Search
Advisors	- Le	-				
Advisor Search S						
Rep Codes		SEARCH		SERVICE	PERFORMANCE	MONITOR
Login History						
Branches		Desktop	Accounts	Service Requests	QPRs	Advisor Alerts
Regions		Advisors	Account Holding Duplicates	Tasks		Restrictions
lients	in	Rep Codes	Account Activity	Proposals		Service Enrollment
Client Search		Login History	Account History			Import Rejection Summary
Client Activities						
Accounts	/0	Branches	K1 Issued Accounts			Validations
Accounts	, Ja	Regions	Systematic Withdrawals			
Account Holding Duplicates	s	Clients	Change Log Search			
Account Activity		Client Activities				
Account History		Chent Activities				
K1 Issued Accounts	I S					
Systematic Withdrawals	otite.	ist nacho on orodustion	Lul 4 2023	2.11.19 DM CT		
Change Logs						

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.

	🔎 Client List
AdvisorGuided, Allison	
AdvisorGuided, Andrew	
AmericanFund, Arthur	Search Column Saved Groupings Add Filters Manager Layout
DistributionFocused, Dennis	Primary Owner
ETF, Barbara (ETF HH)	AdvisorGuided, Allison
GBMutualFund, Calvin	AdvisorGuided, Allison AdvisorGuided, Andrew
GBMutualFund, Cate	
Institutional, Maureen	AmericanFund, Arthur
Institutional, Mike	DistributionFocused, Dennis
Investor, John (Investor Househol	d) ETF, Barbara
ManagedAccount, Martha	GBMutualFund, Calvin
MultiMutualFund, Matt	GBMutualFund, Cate
CLIENTS 2	Institutional, Maureen
	Institutional, Mike
	Investor, John
	ManagedAccount, Martha
	MultiMutualFund, Matt

SEARCH
Clients
Service Requests

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.

+		
Account Reports	Add Ca	ncel Save
Select All	*	
Account Overview		
Account Value Summa	ry	
Activity and Performan	ice Summary	
Advisory Fee Summary		
Allocation Over Time		
Asset Allocation		
Asset Allocation By Ma	nager	
Attribution Analysis		
Bond Analysis		
Committed Capital Rep	port	
Comparative Value Sur	nmary	
Deposits and Withdraw	vals 🔻	

dit account reports	
ACTIVE	⊖ Remove al
Click	
AVAILABLE	⊕ Add al
Account Overview	€
Account Value Summary	€
Activity and Performance Summary	€
Advisory Fee Summary	€
Allocation Over Time	€
Asset Allocation	€
Asset Allocation By Manager	€
Attribution Analysis	€
Bond Analysis	€
Committed Capital Report	€
Comparative Value Summary	€
Deposits and Withdrawals	€

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.

Primary Benchmark Non-primary Benchmarks	do not show benchmarks show benchmarks 😵 All 🔻	•	ڻ 🔻
Hide Non-primary Benchmarks in Reports	Enter search criteria		
Report Delivery Mode	Print & Online		
Enroll for QPR delivery	(to)		
Show Client Title in Mailing Label			

-		
		UPDATE PROPERTIES X
		Melissa Capuano (Primary) Sample Advisor (Primary)
		Advisor
		Advisor, Sample v
	Membe	Create copy of advisor models
	Chris S.	If used by other clients 30, 3
	Ray N. A	Primary Benchmark 31,
	Ray N. P	do not show benchmarks Q 3
		Q do not show benchmarks X Search
		All ~
		· · · · · · · · · · · · · · · · · · ·
		No matches found
		Enroll for QPR delivery (to)
		Show Client Title in Mailing Label

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

