

Customising reports

Reports generated in Microsoft Word/RTF format can easily be tailored to your requirements, by using Microsoft Word to:

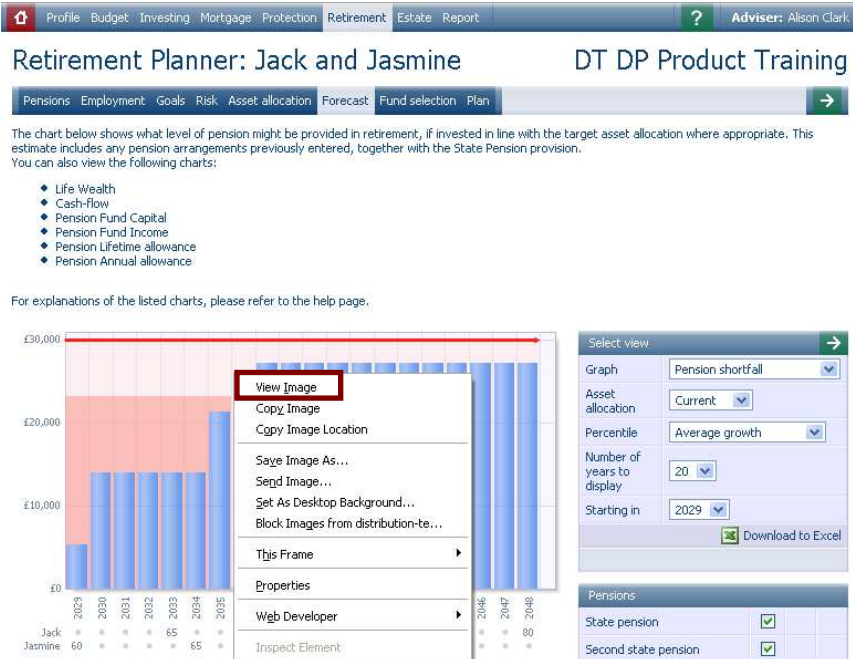
- Edit the text and table contents
- Add sections such as your company's terms and conditions
- Change the formatting and add your logo and branding
- Add further graphs and images from planning tool

Remember – Always click **File/Save as** to save your report to a suitable location, with an appropriate name.

Adding individual images

To add an individual image from a screen:

- Right click over the required image, and click **Copy Image**
- Open the document to which you would like to add the image
- Right click approximately where you would like to add the image in the document, and click **Paste** (or Ctrl-V) to insert image



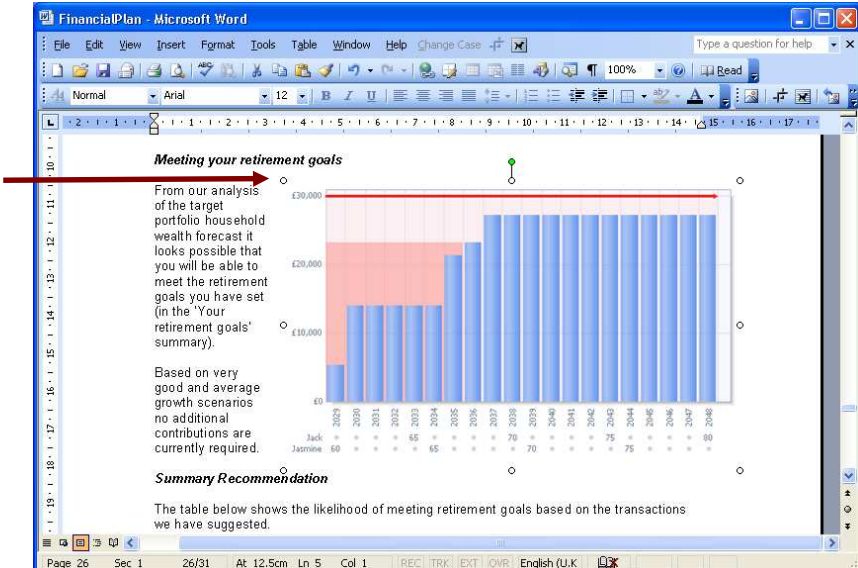
The screenshot shows the Retirement Planner interface for Jack and Jasmine. A chart displays pension forecasts from 2029 to 2048. A context menu is open over the chart with 'View Image' highlighted. The interface includes a top navigation bar with tabs like Profile, Budget, Investing, Mortgage, Protection, Retirement, Estate, and Report. A right-hand panel shows 'DT DP Product Training' and a 'Select view' dropdown set to 'Pension shortfall'. Below the chart, there are controls for asset allocation, percentile, and number of years to display.

To resize the picture:

- Click on the image, and position the mouse pointer over one of the sizing handles on each corner
- Click, drag and drop the sizing handle until the object is the size you want

To reposition the image:

- Click, drag and drop the picture to the exact position you require




The screenshot shows a Microsoft Word document titled 'FinancialPlan - Microsoft Word'. The chart from the Retirement Planner is pasted into the document. A red arrow points to the top-right corner of the chart, where a mouse pointer is hovering over a sizing handle. The document text includes a section titled 'Meeting your retirement goals' and a 'Summary Recommendation' section.

Adding screen shots


Should you wish to add part or all of a screen to a document:

- Position the mouse over the window you would like to copy, and hold down the **Alt** key while clicking the **Print Screen** (or Prnt Scrn) key
- Open the document to which you would like to add the image
- Right click approximately where you would like to add the image, and click **Paste** (or CTRL-V) to insert image

To crop the picture:

- Click the image, and if the Picture toolbar is not visible, then right click the image and click **Show Picture Toolbar**
- Click **Crop**  on the Picture toolbar
- Position the cropping tool over a cropping handle, and click, drag and drop the edge of the picture to the exact place you require

To resize the picture:

- Click **Crop**  on the Picture toolbar to turn off the cropping tool, if it is on
- Click on the image, and position the mouse pointer over one of the sizing handles on each corner
- Click, drag and drop the sizing handle until the object is the size you want

To reposition the image:

- Click, drag and drop the picture to the exact position you require

