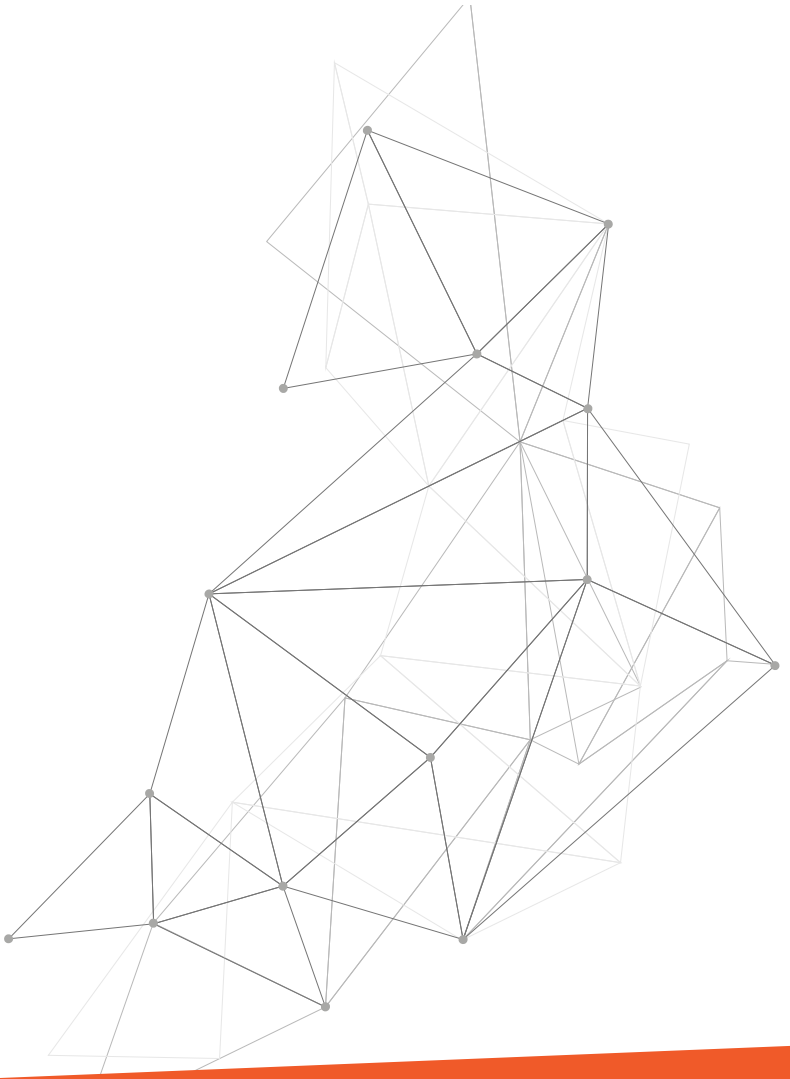
Plansmith

Lunch ‘n Learn

All About Reports



Presenter: Jenny Mello

This session is design for:

COMPASS

All Compass Users

- Financial Compass
- Budget Compass Plus
- Budget Compass

Plansmith

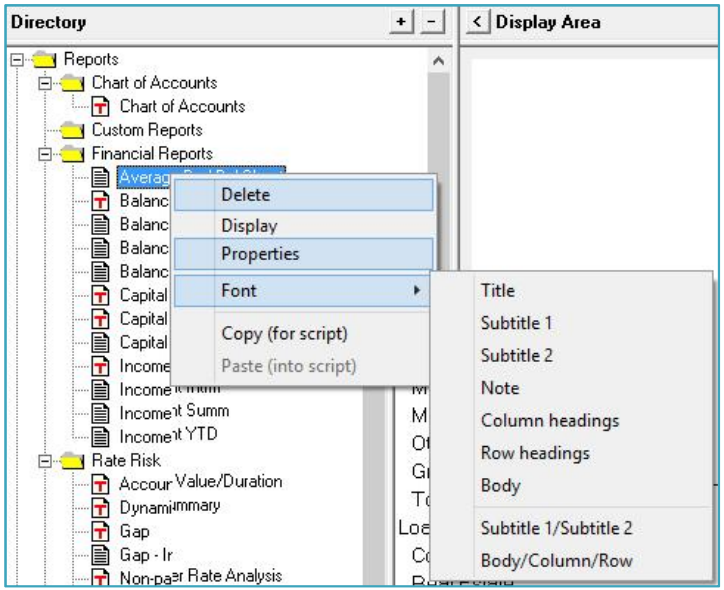
All About Reports

Format	Define	Create
• Fonts • Headers • Margins	• Scripts • Properties	• DIY

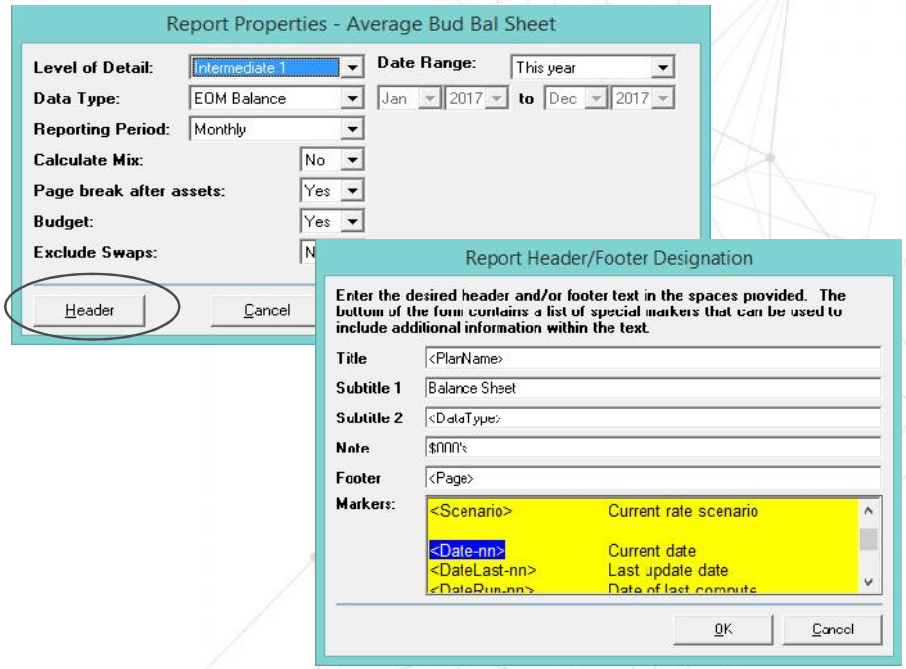
COMPASS

Right-click

- delete
- properties
- fonts



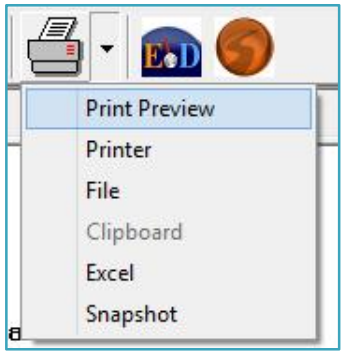
Properties: customize Header/Footer



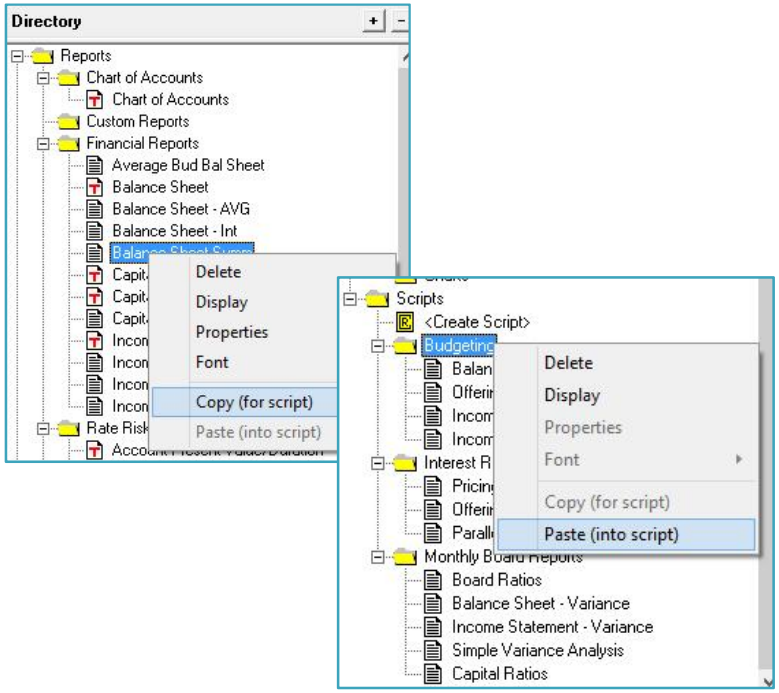
Plansmith

Print Preview

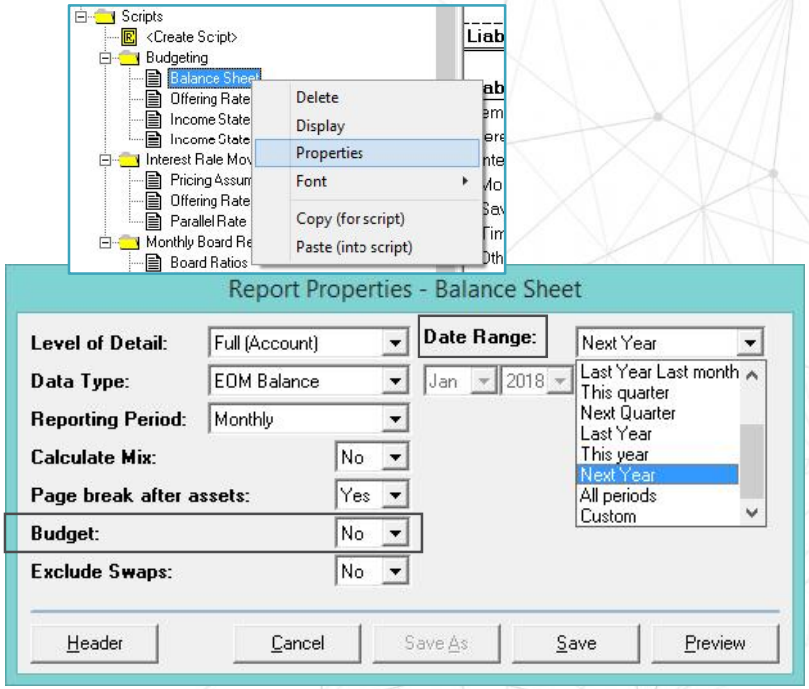
margins • alignment • orientation



Set up Scripts

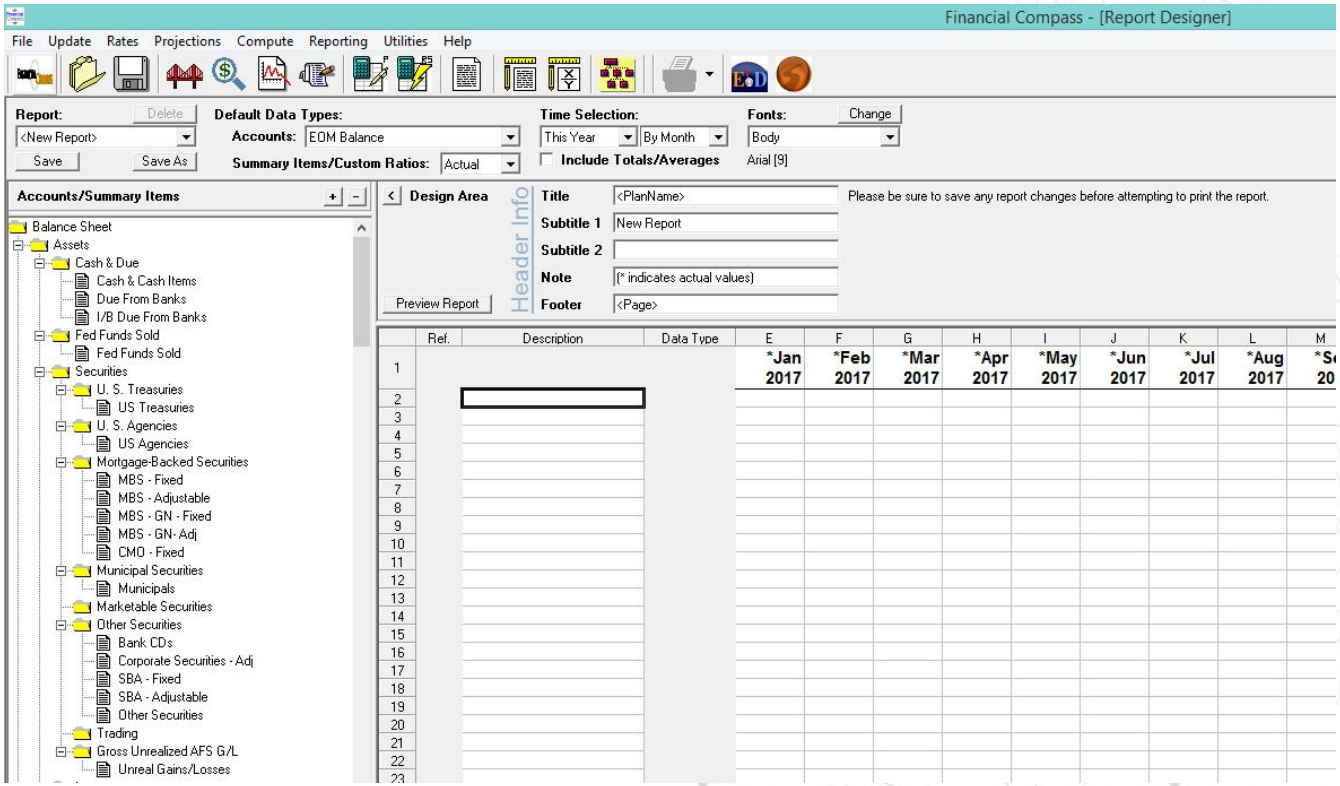


Update Properties

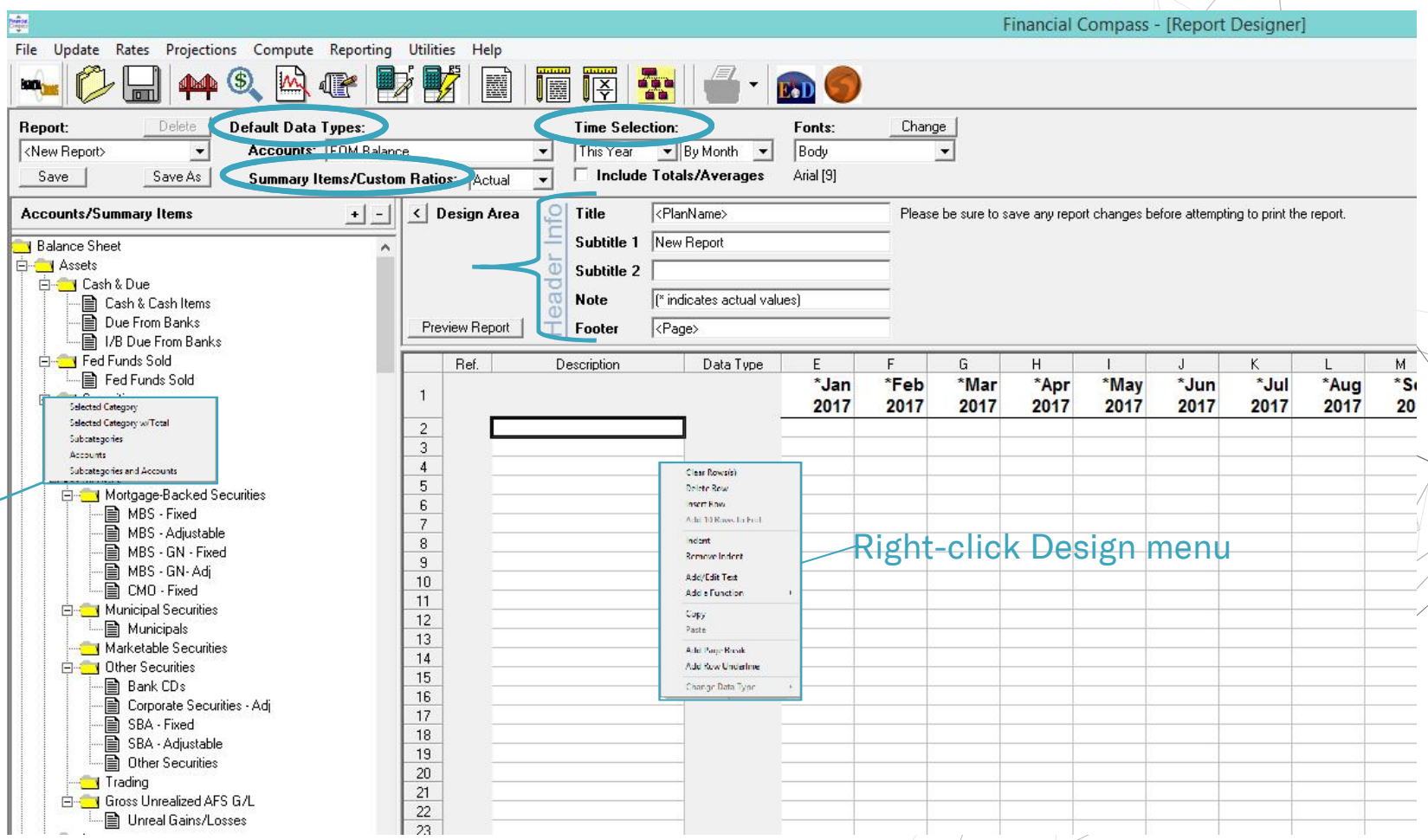


COMPASS

CREATE



Plansmith



Right-click Folder menu

Right-click Design menu

What's Next?

Friday, December 15th 2017 - Compass Roundtable
Friday, March 16th 2018 - Compass Advanced Coaching
Friday, June 15th 2018 - Compass Roundtable

Upcoming Lunch 'n Learns

December – Budgeting Q & A
January – How quickly can I make changes?

Check out www3.plansmith.com/events-page for more event info

Thanks for attending!

Plansmith
www.plansmith.com

Questions?

Jenny Mello
Client Development
800-323-3281
jenny@plansmith.com
support@plansmith.com