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Fast•Class File

Client Data System

Volume 140: Creating an Investment Graph

The Investment Report Setup utility offers several different options for running investment reports, including the option to display investment information in a pie or bar chart format.

To Create an Investment Graph:

- From an open contact record, select **Reports** in the main menu.
- From the Reports menu, select **Investment Reports**.
- From the Investment Report list, select the report you would like to modify, and click the **Modify Record** button.

Note: If the system reports listed do not meet your requirements, click the New Record button to create an investment report with a graph.

- In the Investment Report Setup window, click the **Graph** tab.

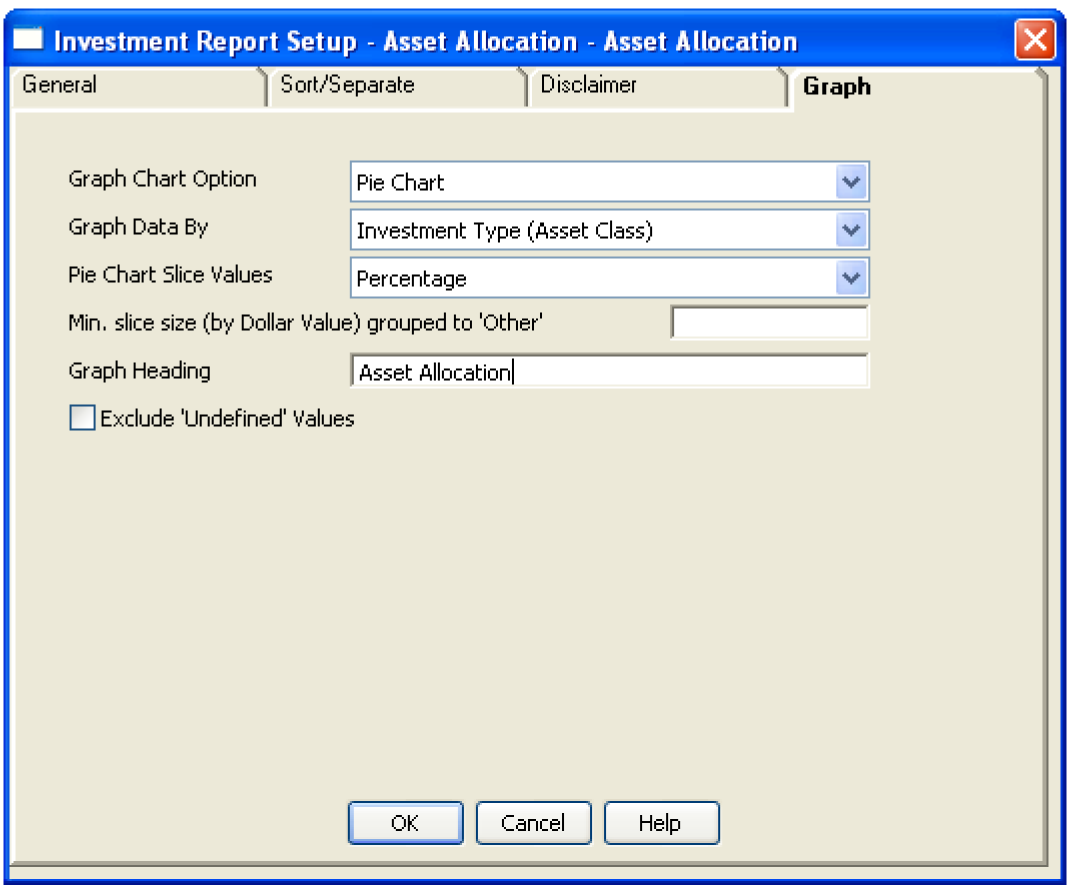

Figure 1: The Investment Report Setup window – Graph Tab

- In the **Graph Chart Option** drop-down, select **Pie Chart** or **Bar Chart**.

- In the **Graph Data by** drop-down, select how you would like the data graphed.

*Note: The sort option in this field does not affect the options selected in the **Sort/Separate** tab.*

- In the **Pie Chart Slices Values** drop-down, select whether you would like the pie chart to display the breakdown by **Percentage** or **Dollar Value**.
- In the **Min. slice (by Dollar Value) grouped to 'Other'**, enter a minimum dollar amount and any asset under that dollar amount will be grouped under a heading called "Other" on the graph.

*Note: This field is only active when **Standard Category** is selected in the **Graph Data by** field.*

- Check the **Exclude 'Undefined' Values** if you would like to exclude the value of fields that are left blank.
- Click **OK** when finished selecting report options.
- Click **Yes** to save the changes.
- Click **OK** in the Investment Report Setup window.
- To run the report, highlight the report and click the **Run** button.