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.

![Investment Report Setup - Asset Allocation - Asset Allocation](image)

- 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.