

ACCESS TO RESULTS AND REPORT

This job statement is executed to access and display the results as well as the reports. Only fields and windows that require explanation are described.

RESULTS PAGE

1. Click **Yes** on the Scenario page to display the renewal premiums in the results tables.
2. Select the table you want to display.
The Tax Data table is now available.



The Tax Data table presents the tax-related information for the illustration scenario. This table is available only for insurance products with a surrender value.

The legend identifies the insureds specified in the displayed result columns.

3. Click **Export to Excel** to export available tables in the current illustration scenario to a single Excel spreadsheet in which each table is displayed in a separate tab.

REPORTS PAGE

4. Clicker Click **Yes** on the Scenario page to display the renewal premiums in the results tables.

Sections	Descriptions
Prepared for	<ul style="list-style-type: none"> • Use this section to display the name of the applicant(s) on the illustration scenario. • The applicant(s) information will also be presented on the report title page.
Prepared by	<ul style="list-style-type: none"> • Use this section to select the name of the advisor(s) who prepared the illustration scenario. • A maximum of three advisors can be selected.

5. Click on the **change** button to modify the list of advisors appearing on the report.
6. Select an advisor to list in the report by checking the appropriate boxes.
7. Click on **Add an advisor** to add to the list of advisors for the illustration scenario.
8. Choose the sections of the illustration report to be produced by selecting predefined sections or manually check the desired sections.

Feature of the report layout:

- The CLHIA sections are mandatory.
- Based on the context of the illustration scenario, some sections may not be available.
- Some sections of the report are specific to the advisor. These sections are not numbered in the illustration report.

9. If you want to change the projection years in the report results tables, you must select those years in the **Years Customization section**.
10. Click on **Generate report** to generate a PDF file that can then be printed.