

Reports: Creating Reports

Reports A ?

Favorites (0) | My Work (115) | Report Administration | Client Reports Data Dictionary | New Report

Report Type Include Historical Reports

Report Name	Subject Area	Type	Alert	Schedule	Last Updated
Activity (18) New B					
ACH Override	Cashiering	Shared			07-Jun-201

Category: Orders **C** Subject Area: Orders

New Orders Report

Report Name: Report Output: Online

Report Description: [Add Description](#) Schedule: None

Prompted Report: **D** Manage Alert: Unsubscribed Data Dictionary

E Define Criteria : Add/Remove Criteria and Set Values Add Criteria | Reset Criteria

Prompt	Criteria	Conditions	Criteria Value	Remove
<input type="checkbox"/>	Account #	Select...	<input type="text"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	Order Entry Date	Select...	<input type="text"/>	<input type="button" value="Remove"/>
<input type="checkbox"/>	Order Reference #	Select...	<input type="text"/>	<input type="button" value="Remove"/>

F Manage Display : Add/Remove Columns, Set Sorting and Grouping Add Columns | Reset Display Columns

Account #	Account Type	Action	Symbol	Order Status	Order Entry Date	Ord
XXXXXXXX	XXXXXXXX	XXXXXXXX	XXXXXXXX	XXXXXXXX	XX-XX-XXXX	XXXXXXXX
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Include Dist. Cnt. G	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

H Include Row Count

I Format PDF

Sort: Sort By: Account # Ascending

Group: Checking the "Group" box will reorder the report columns so these items appear first. The Group feature is not available for linked columns.

J

Cancel without saving changes.

Reports & Alerts > Reports

Users with administrative entitlements to the Reports function in WealthscapeSM can create new firm reports to be shared with their firm users. Additionally, entitled report users can create new reports or edit existing shared reports.

- A** Select **New Report**.
- B** Alternatively, select **New** next to a category name to create a new report in that category.
- C** Select a report category and subject area; provide a report name and other details, such as an output and a schedule, if preferred.
- D** If you want users to be prompted to enter report criteria each time the report is run, such as a date range, select **Prompted Report**. Prompted reports cannot be scheduled.
- E** Use the Define Criteria section to add (or remove) report criteria and criteria values.
- F** Use the Manage Display section to add (or remove) columns from the report and to select sorting and grouping options.
- G** To include a distinct row count for one column on the report, select **Include Dist Cnt**, where available. Only one eligible column can be selected.
- H** To include a total row count for any groupings on the report and for the whole report, select **Include Row Count**.
- I** To format the PDF output of the report, select **Format PDF**.
- J** Select **Save** or **Save and View**. To view the report without saving, select **View**.
 - As an administrator creating a new firm report, you can distribute the report by assigning it to user profiles (not shown).
 - As an entitled user, to edit an existing report, select a listed report you want to copy, and then select **Edit**. Enter any changes to the report criteria and its options. Select **Save As** to save the report with a new name (not shown).

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200 Seaport Boulevard, Boston, MA 02210

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