

4.7. Client Package

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There are three options relating to the client package on the top right of the Compliance Tasks block – “Select Reports”, and “Print Package - Word or PDF”. Clicking the select reports option allows you to select which reports to include in the client package. You select which reports and statements to include in the client package on this screen and also pull in the global default letter and edit it, to customize for this client. To include a report or statement in the package, enter a number in the box to the right of that report. The numbers will determine the order that the reports appear within the client package, the report with the lowest number will be first. Note that for page numbering to work properly in the client package, participant statements should appear last in the list of documents to print.

Q.S. Tip: When selecting reports for the client package, if you enter numbers that are spaced five or more units apart, it’s much easier to slot in a new report in the middle as you don’t need to re-number all the other reports.

Back on the Tasks menu, clicking the print package link will allow you to open the client package in Microsoft Word. Click the “Enable Editing” button at the top of the screen if you want to make changes to the Word file.
