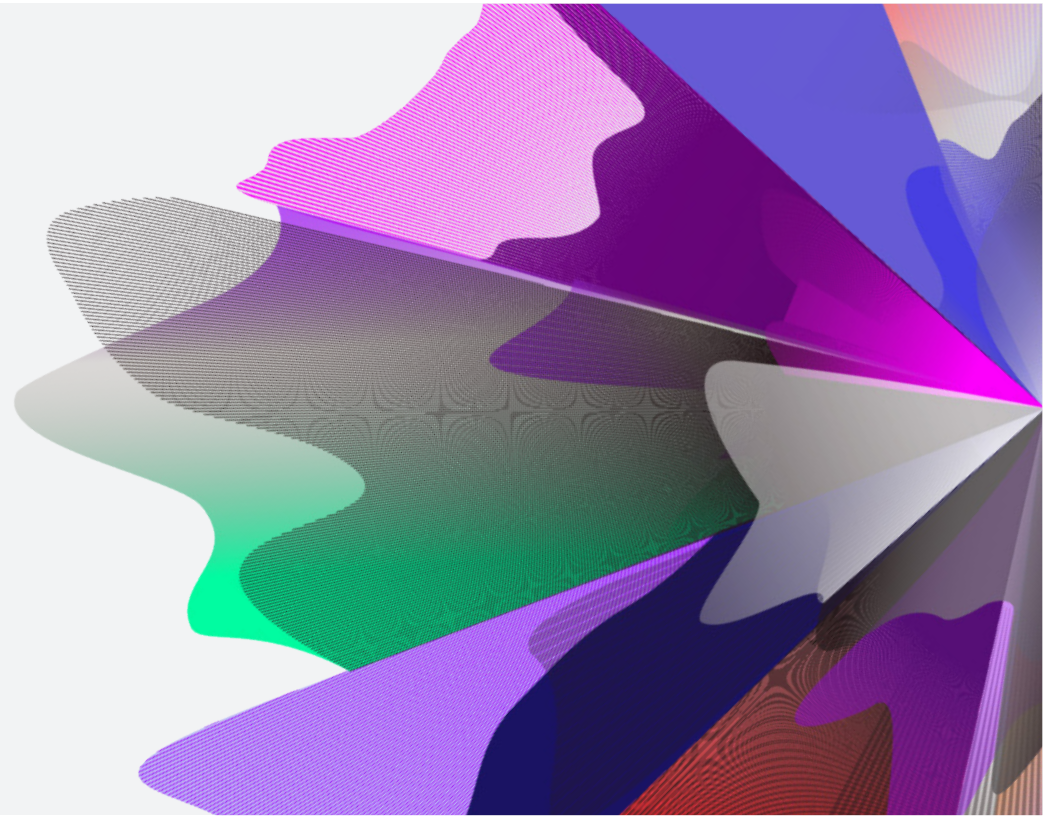


EXPAND



Expand Functionality – Report templates

August 2025
myexpand.com.au

To access the reports panel

- 1 Select **Your clients** tab and click on **Reports**.

The screenshot shows the 'Your clients' tab selected in the top navigation bar. Below the navigation bar, there is a search filter and a table of client accounts. In the top right corner of the client list area, there is a 'Reports' button highlighted with a green box. A green arrow points from a green circle with the number 1 to this button.

Client / Account Name	Account #	Date of Birth	Employer	Account Type	Product	Balance (\$)	Action
Abi-Rached, Mai Phan	16770177	21/04/1948		Pension	Expand Essential Pension	\$ 645,751.17	[Icons]
Alameodine, Aleisha Maria	16783181	04/03/1954		Pension	Expand Essential Pension	\$ 440,386.38	[Icons]
Aljomaily, Claire Leeanne	16554251	21/11/1948		Pension	IOOF Pension	\$ 135,659.25	[Icons]

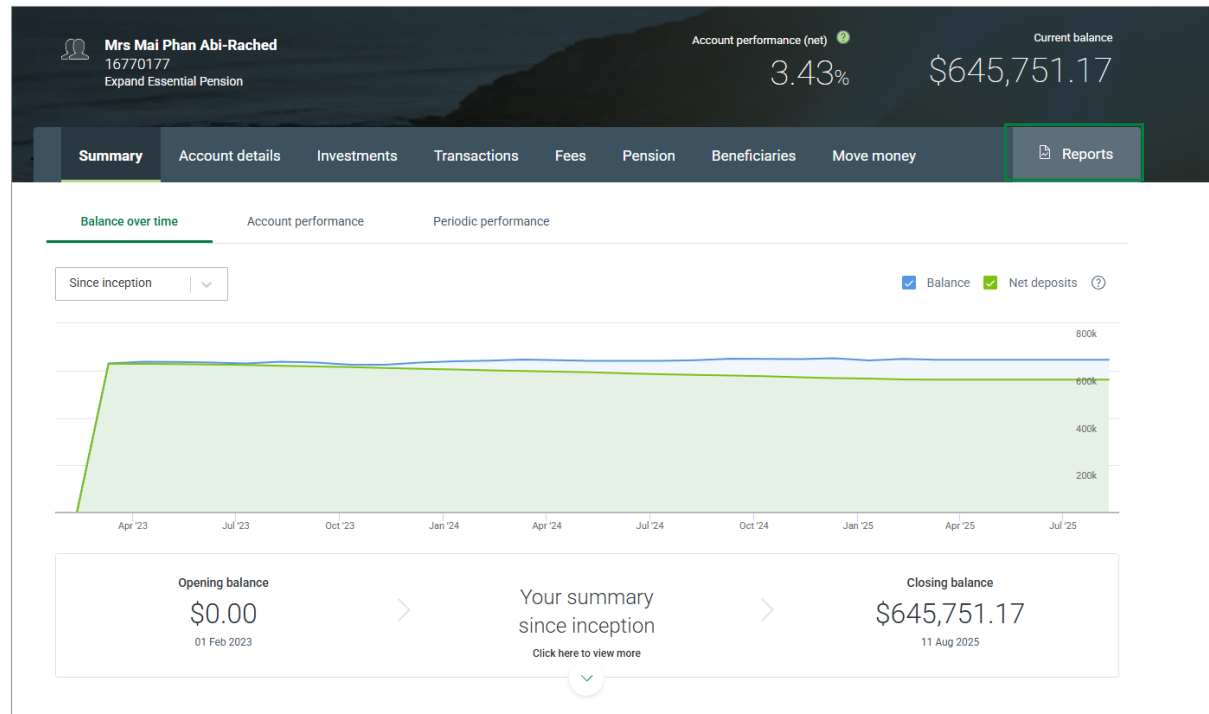
- 2 Select **Your clients** tab and click on **Reports** icon under the **Action** column.

The screenshot shows the 'Your clients' tab selected in the top navigation bar. Below the navigation bar, there is a search filter and a table of client accounts. In the 'Action' column of the table, there is a 'Reports' icon (a document with a magnifying glass) highlighted with a green box. A green arrow points from a green circle with the number 2 to this icon.

Client / Account Name	Account #	Date of Birth	Employer	Account Type	Product	Balance (\$)	Action
Abi-Rached, Mai Phan	16770177	21/04/1948		Pension	Expand Essential Pension	\$ 645,751.17	[Icons]
Alameodine, Aleisha Maria	16783181	04/03/1954		Pension	Expand Essential Pension	\$ 440,386.38	[Icons]
Aljomaily, Claire Leeanne	16554251	21/11/1948		Pension	IOOF Pension	\$ 135,659.25	[Icons]

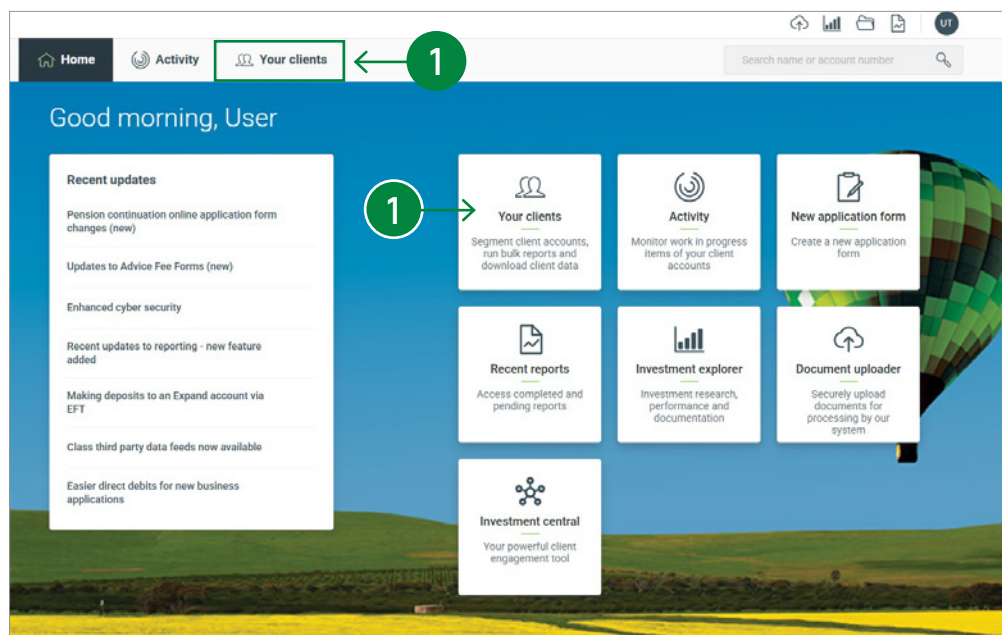
To access the reports panel (cont)

- 3 When you have selected a client account, you can select **Reports** from the tool bar.

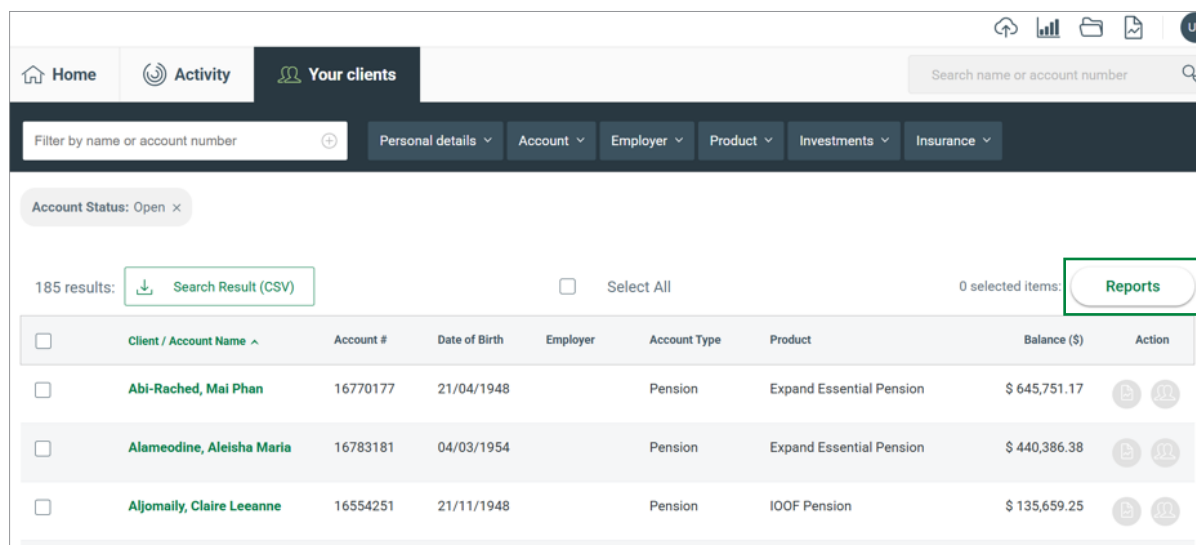


To create a template

- 1 From the homepage, select **Your clients**.



- 2 Select **Reports**.



To create a template (cont)

3

From the **Reports** panel, set the following default settings for the template:

- **Reporting period**
- **File format** as PDF or CSV.

If you don't set a reporting period or file format, the default will be **Last 12 months** and **PDF**.

HINT: If you select PDF as your master file format, you can still choose a report that is only available in a CSV format or change the file format for an individual report to CSV.

You can also change the reporting period for each individual report, allowing you to tailor the reports to your needs.

×

Reports 0 accounts selected [Report guide](#)

Choose from templates (optional)

Select a template Manage Templates

Reporting period **From** **To / Effective Date**

Last 6 months 05/02/2025 04/08/2025

File format ?

☒ PDF ☐ CSV

☐ Select all Reorder selected reports

– Account information

☐ Account details ▼

☐ Insurance certificate ▼

☐ Centrelink schedule ▼

☐ Super contribution summary ▼

☐ Standing instructions (CSV Only) ▼

– Portfolio details

☐ Portfolio summary ▼

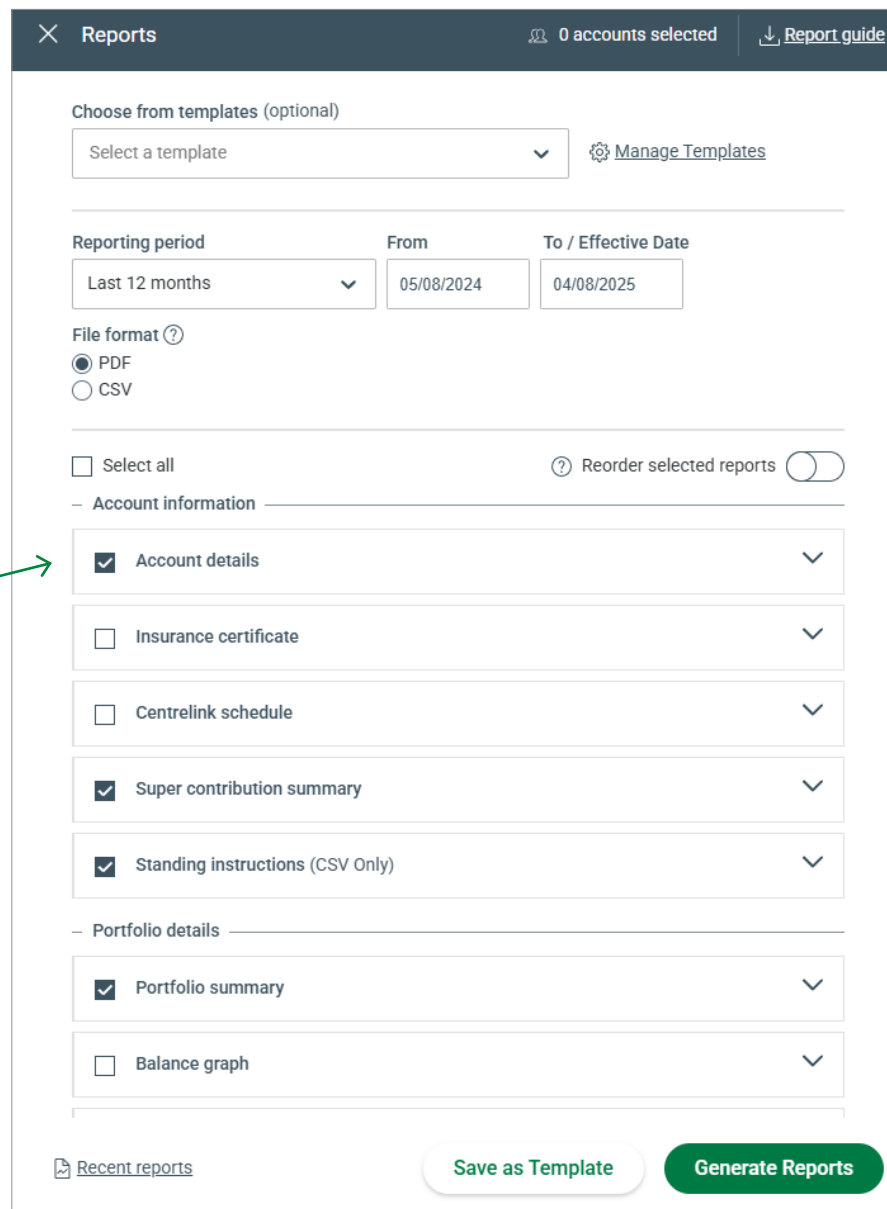
☐ Balance graph ▼

[Recent reports](#) Save as Template Generate Reports

To create a template (cont)

4

Choose the reports that will be included in the template



Reports 0 accounts selected [Report guide](#)

Choose from templates (optional)
Select a template [Manage Templates](#)

Reporting period: Last 12 months
From: 05/08/2024 To / Effective Date: 04/08/2025

File format [?](#)
☒ PDF
☐ CSV

☐ Select all [? Reorder selected reports](#)

Account information

- ☒ Account details
- ☐ Insurance certificate
- ☐ Centrelink schedule
- ☒ Super contribution summary
- ☒ Standing instructions (CSV Only)

Portfolio details

- ☒ Portfolio summary
- ☐ Balance graph

[Recent reports](#) [Save as Template](#) [Generate Reports](#)

To create a template (cont)

5 To update the reporting period or file format for an individual report click on the accordion to expand.

6 Arrange the order of the reports by toggling on **Reorder selected reports**, then drag and drop.

HINT: You can change the order of any PDF reports; any CSV reports will appear as the bottom of the panel.

7 Once you have customised the reports for the template, select **Save as Template**.

The image shows two parts of a software interface. The top part is an expanded report template for 'Super contribution summary'. It includes a description, an optional filter, report options (including a checkbox for 'Include contribution transactions'), a 'Select reporting period' dropdown set to 'Current financial year 25/26', and a 'Select file type' section with radio buttons for 'PDF' (selected) and 'CSV'. The bottom part is the 'Reports' panel, which shows a list of reports: 'Portfolio summary', 'Account movement', 'Super contribution summary', 'Investment performance', and 'Account details'. A 'Reorder selected reports' toggle is turned on. At the bottom of the panel are buttons for 'Recent reports', 'Save as Template', and 'Generate Reports'. Green arrows and numbers 5, 6, and 7 point to the report accordion, the 'Reorder selected reports' toggle, and the 'Save as Template' button respectively.

To create a template (cont)

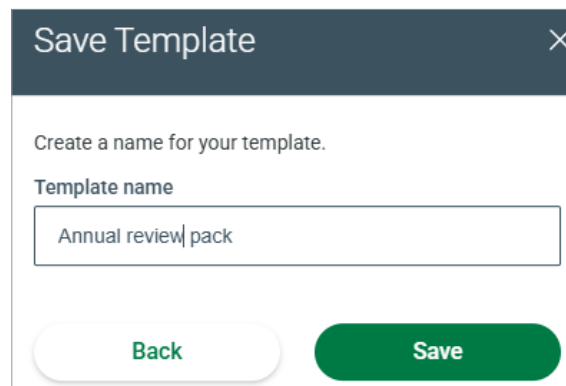
8

Enter a **Template name** and select **Save**.

HINT:

- Report templates are saved to your user profile for easy access. You are unable to share templates with other users in your practice.
- The template name must be unique.

8



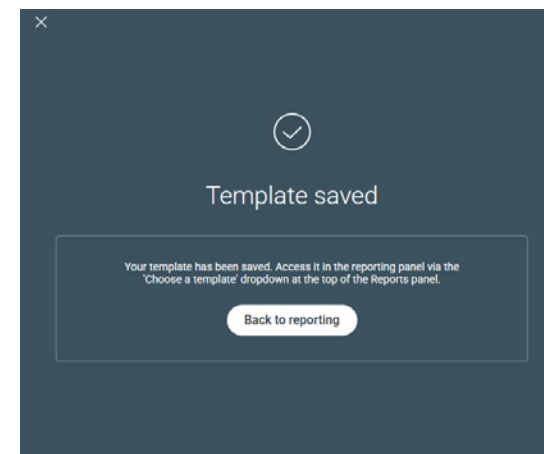
Save Template

Create a name for your template.

Template name

Annual review pack

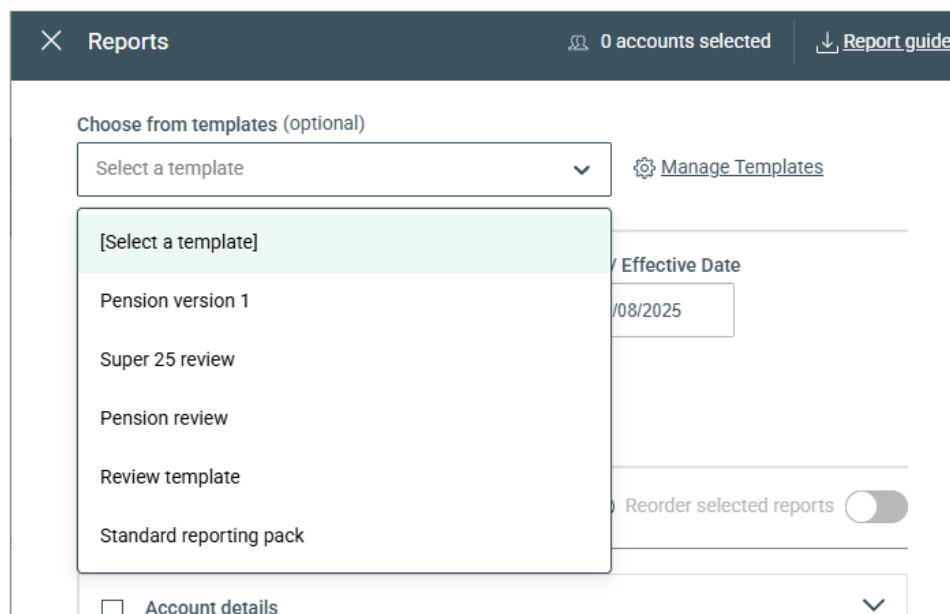
Back Save



9

Select the saved template you wish to use from the **Choose from templates** dropdown.

9



Reports 0 accounts selected Report guide

Choose from templates (optional)

Select a template

[Select a template]

Pension version 1

Super 25 review

Pension review

Review template

Standard reporting pack

Effective Date

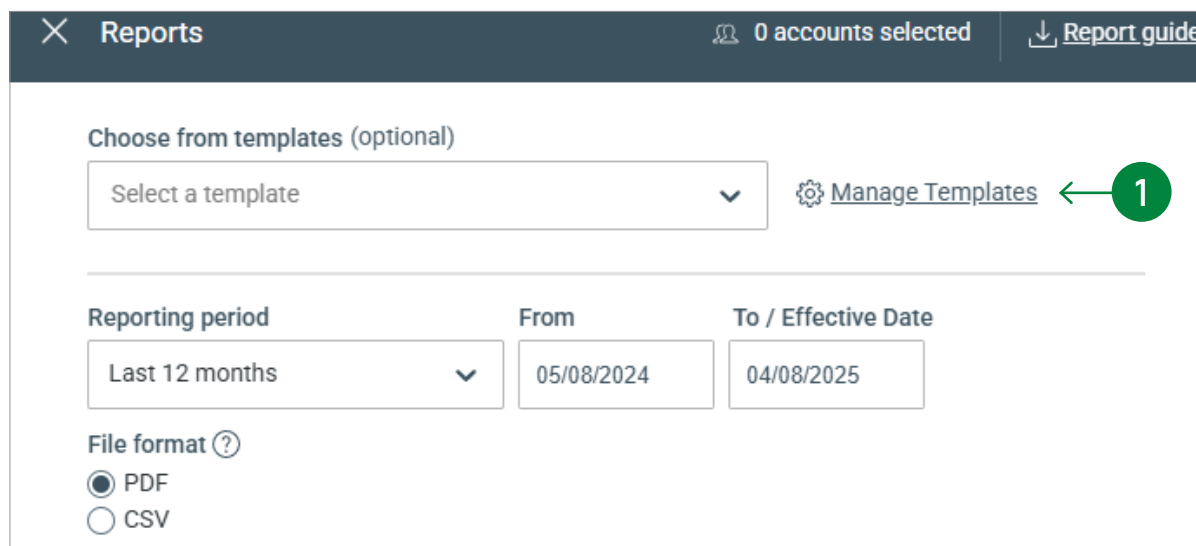
/08/2025

Reorder selected reports

Account details

How to manage templates

1 Select **Manage Templates**.



Reports 0 accounts selected [Report guide](#)

Choose from templates (optional)

Select a template [Manage Templates](#) ← 1

Reporting period From To / Effective Date

Last 12 months 05/08/2024 04/08/2025

File format ?

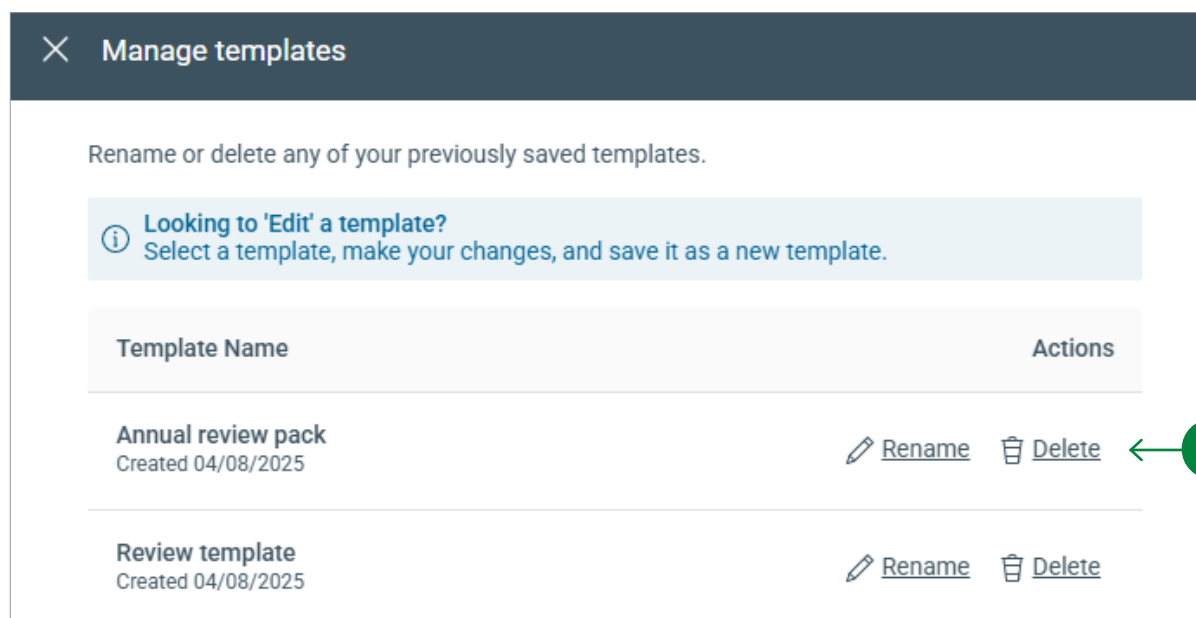
☒ PDF

☐ CSV

2 Under actions you can choose to **rename** or **delete** a template.

3 To edit a template, select a template, make your changes and save it as a new template.

HINT: You cannot make changes to the **Standard reporting template**.



Manage templates

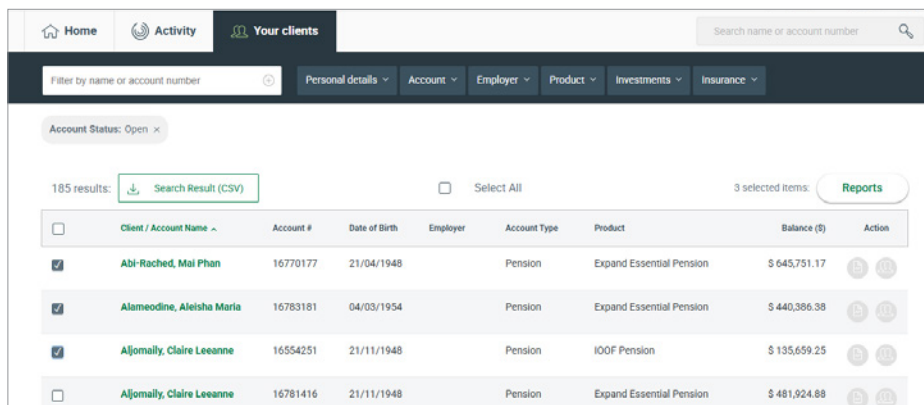
Rename or delete any of your previously saved templates.

Looking to 'Edit' a template?
Select a template, make your changes, and save it as a new template.

Template Name	Actions
Annual review pack Created 04/08/2025	Rename Delete ← 2
Review template Created 04/08/2025	Rename Delete

How to select clients to run a report

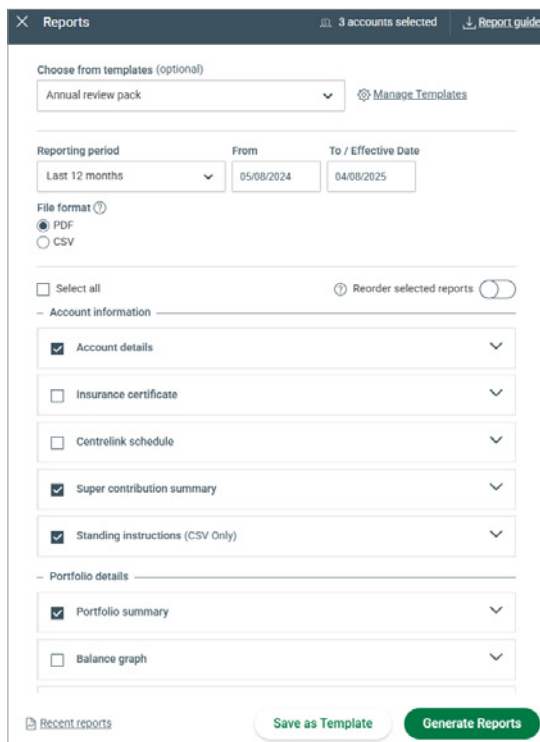
- 1 Select your client/s and then click **Reports** (refer to page 2 for the ways you can access the **Report** panel)



The screenshot shows the 'Your clients' panel in a web application. At the top, there's a navigation bar with 'Home', 'Activity', and 'Your clients'. Below this is a search bar and a filter bar with dropdowns for 'Personal details', 'Account', 'Employer', 'Product', 'Investments', and 'Insurance'. A table lists clients with columns: Client / Account Name, Account #, Date of Birth, Employer, Account Type, Product, Balance (\$), and Action. Three clients are selected, and a 'Reports' button is visible in the top right corner of the table area. A green circle with the number '1' and an arrow points to this button.

Client / Account Name	Account #	Date of Birth	Employer	Account Type	Product	Balance (\$)	Action
<input checked="" type="checkbox"/> Abi-Rached, Mai Phan	16770177	21/04/1948		Pension	Expand Essential Pension	\$ 645,751.17	
<input checked="" type="checkbox"/> Alameedine, Aleisha Maria	16783181	04/03/1954		Pension	Expand Essential Pension	\$ 440,386.38	
<input checked="" type="checkbox"/> Aljomaily, Claire Leeanne	16554251	21/11/1948		Pension	IOOF Pension	\$ 135,659.25	
<input type="checkbox"/> Aljomaily, Claire Leeanne	16781416	21/11/1948		Pension	Expand Essential Pension	\$ 481,924.88	

- 2 Select the template you wish to use or select individual reports. Make the necessary adjustments and then select **Generate Reports**.



The screenshot shows the 'Reports' panel. At the top, it says '3 accounts selected' and 'Report guide'. Below this is a dropdown for 'Choose from templates (optional)' with 'Annual review pack' selected. There are fields for 'Reporting period' (Last 12 months), 'From' (05/08/2024), and 'To / Effective Date' (04/08/2025). Under 'File format', 'PDF' is selected. There are checkboxes for 'Select all' and 'Reorder selected reports'. A list of report templates is shown with checkboxes: 'Account details' (checked), 'Insurance certificate' (unchecked), 'Centrelink schedule' (unchecked), 'Super contribution summary' (checked), 'Standing instructions (CSV Only)' (checked), 'Portfolio summary' (checked), and 'Balance graph' (unchecked). At the bottom, there are buttons for 'Recent reports', 'Save as Template', and 'Generate Reports'. A green circle with the number '2' and an arrow points to the 'Generate Reports' button.

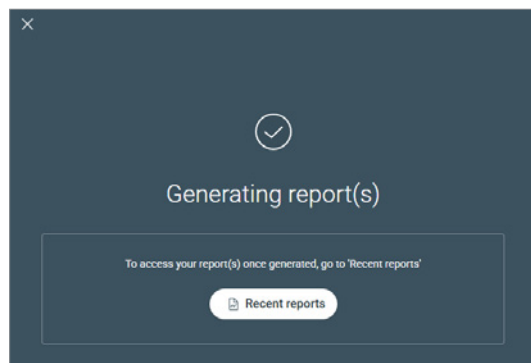
How to select clients to run a report (cont)

3 You can access from reports from the following:

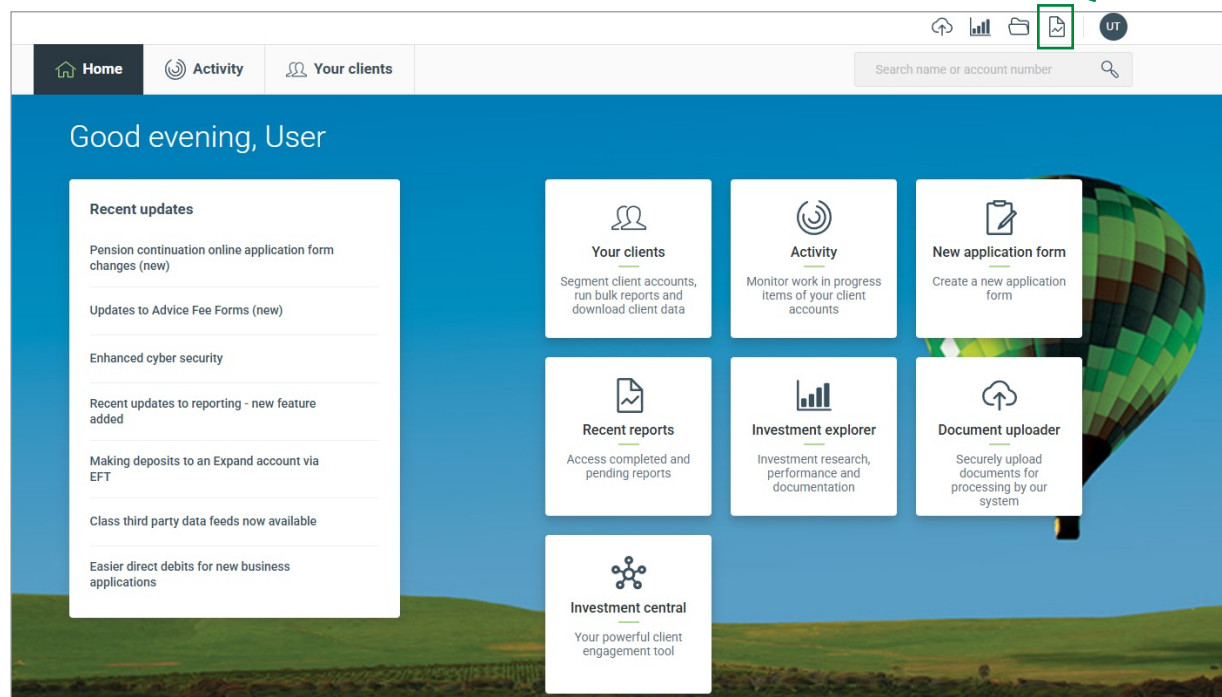
3a Confirmation page

3b Recent reports icon on the tool bar or tile on the homepage

3c The **Recent reports icon** down the bottom of the Reports panel on the left hand side



3a



3c

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