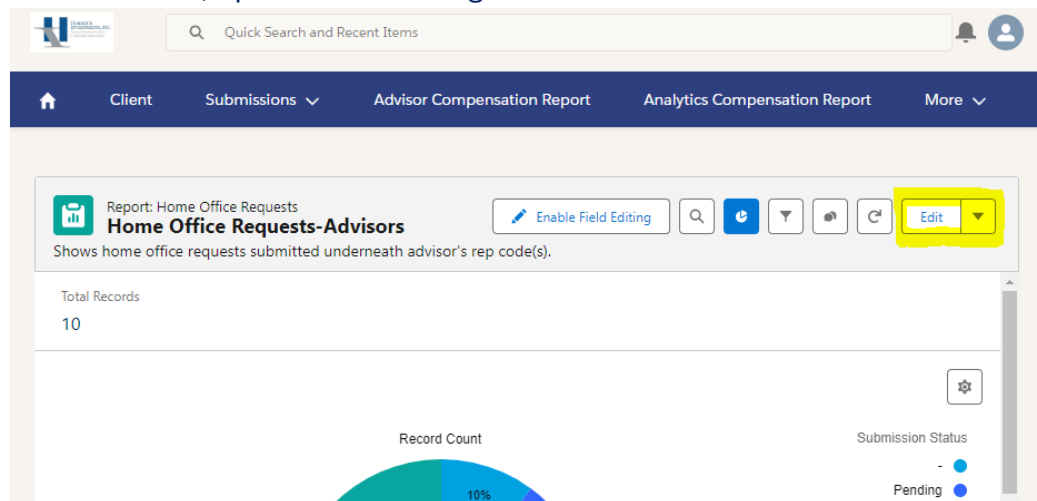
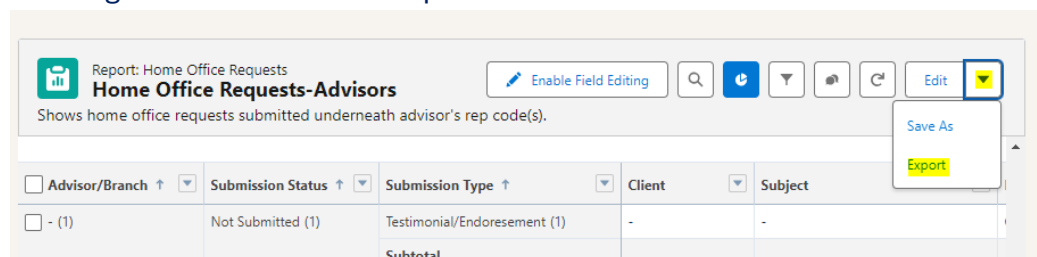


How To Access and Export Reports in Atlas

1. Once logged into Atlas, click the “Report” button in the top, blue line
2. On the lefthand side under “Folders,” click the “All Folders” link. You’ll be taken to a page with unique folders:
 - a. **Assistant Dashboard Reports**
 - i. The source reports for assistant’s home page dashboard charts.
 - b. **Atlas Dashboard Reports**
 - i. The source reports for all “Advisor Dashboard” and Business Analytics” charts
 - c. **Client Reports**
 - i. Client’s personal and financial data
 - d. **Commission Reports for Advisors**
 - i. Commission hold & expense reports are accessible here. Otherwise, we recommend exporting off the “Analytics Compensation Report” tab in the blue line
3. Click the folder with the desired report
4. Once you’ve clicked into your report, on the right-hand side, you will see an “Edit” button with a smaller, upside-down triangle beside it



- a.
5. Click the triangle button and then “Export”



- a.
6. For “Export View,” select “Details Only” and change the “Format” to “Comma Delimited .csv”

If you have questions or report requests, please direct them to atlas@harbourinv.com