



Insights

With Dynamic Planner

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1 Introduction

1.1 What is Insights?

Financial advice firms are increasingly becoming more data driven. With Insights you have the opportunity to deepen customer understanding, streamline operations, and make strategic decisions about target markets and operational efficiencies.

1.2 Aim of the Insights guide

This guide will provide you with all the information you need to create and download Insights reports within Dynamic Planner.

1.3 What does this guide consist of?

These steps will guide you through the process of generating and downloading MI reports.

Accessing Insights	How do you access the Insights module?
Scheduling and downloading Insights reports	How do you schedule MI reports? Which type of reports can you download?

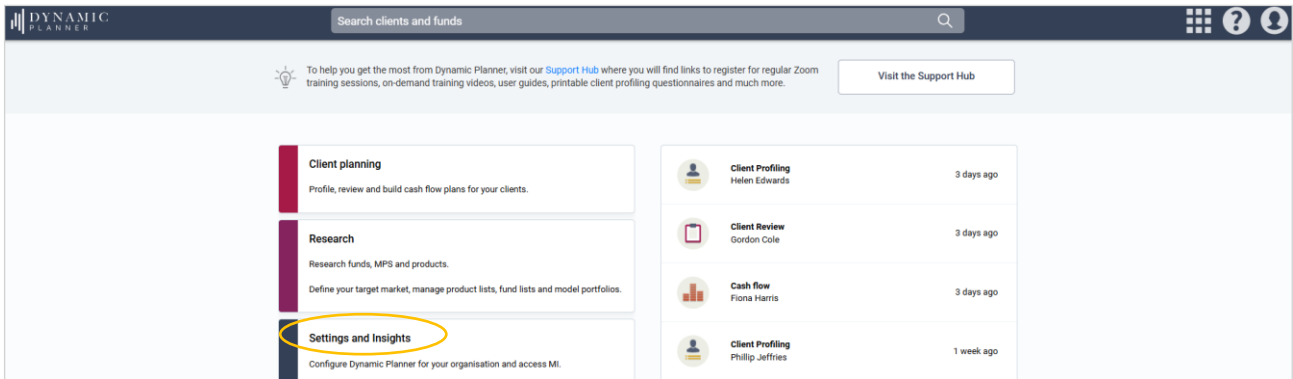
1.4 How to use this guide

If this is the first time that you have used Dynamic Planner, we suggest that you work your way through the user guide. That way, you can ensure that you visit the section(s) relevant to you and understand the tasks you need to complete.

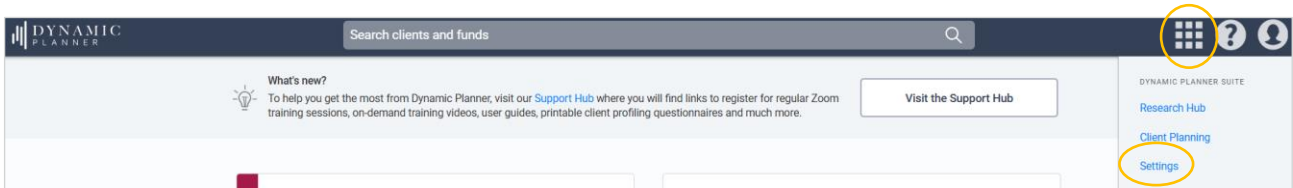
If you have used Dynamic Planner before, we suggest that you use this as a reference guide when you are unsure of the steps you need to take to complete a task.

2 Accessing Insights

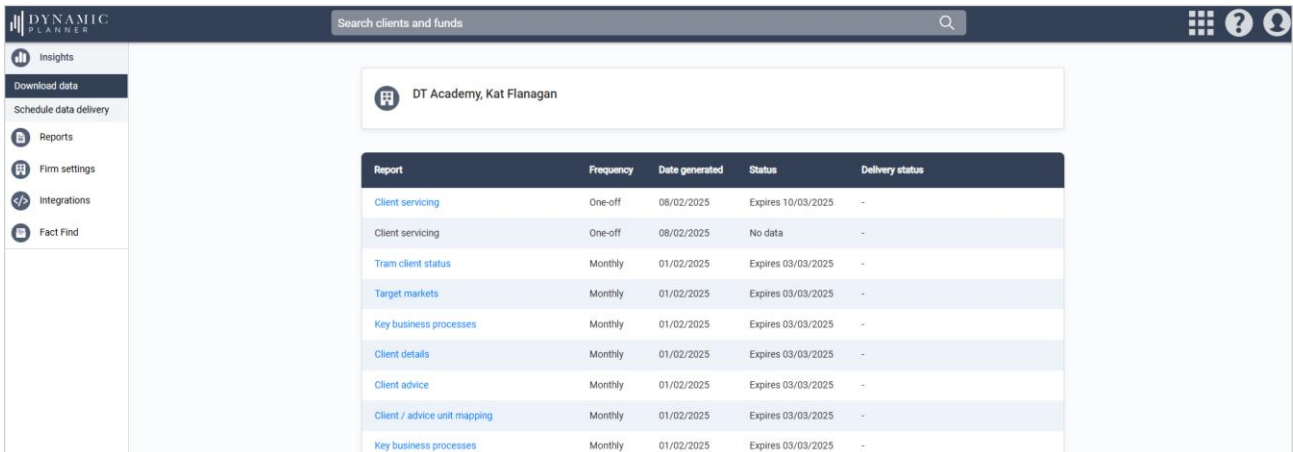
Insights can be accessed directly from the home page in Dynamic Planner by clicking **Settings and Insights**.



Alternatively, if you are anywhere else in Dynamic Planner, click on the Rubix icon in the top right corner and select **Settings**.

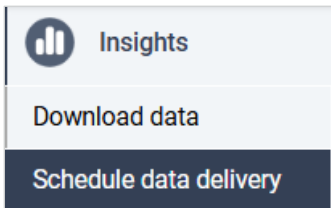


You will automatically land on the **Insights** module. If you previously scheduled MI reports, a list of the available reports will appear on the **Download data** page. If no reports are available yet, this page will be empty.



3 Scheduling and downloading Insights reports

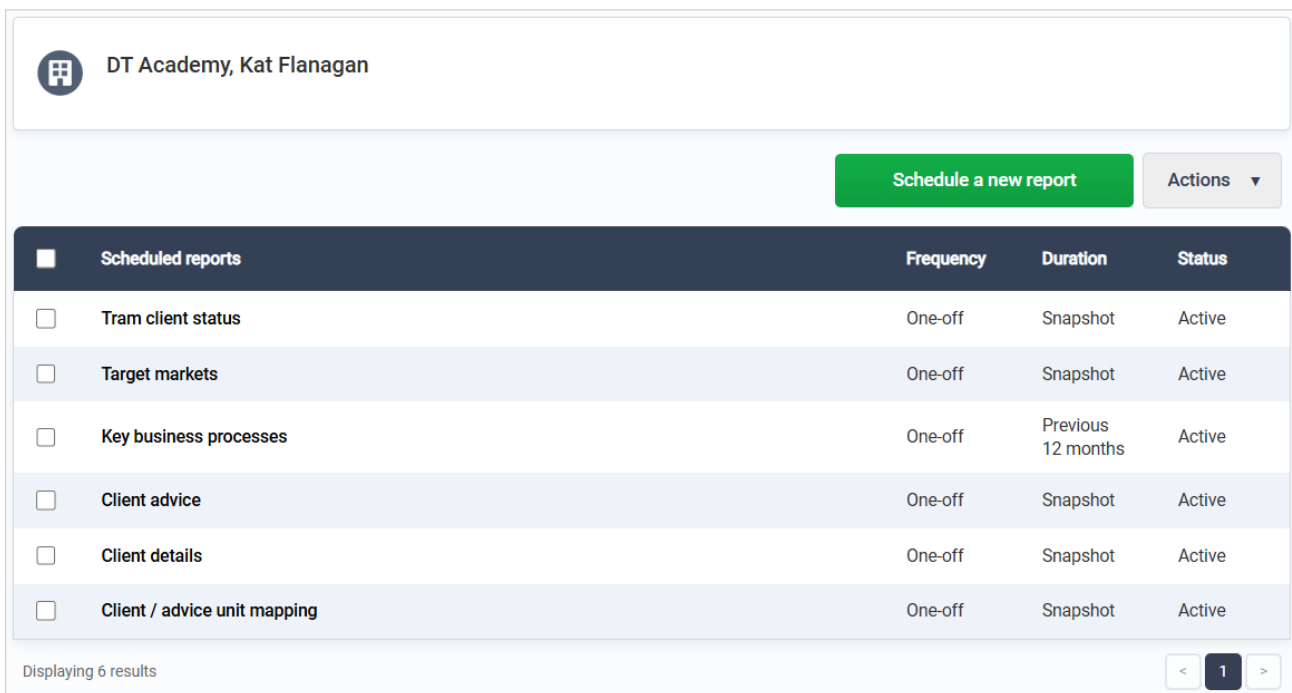
If your role is at the top of a large firm that has a structured hierarchy within Dynamic Planner, you will be able to generate reports for the whole organisation, including any organisations below. If you don't sit at the top of the hierarchy, then you will only be able to generate reports for your Organisation Unit and below.



To start scheduling reports, navigate to the left hand menu and select **Schedule data delivery**.

If you previously scheduled Insights reports, a list of the reports will appear on this page.

Click the green **Schedule a new report** button to start scheduling reports.



The screenshot shows a user interface for 'DT Academy, Kat Flanagan'. At the top right, there is a green button labeled 'Schedule a new report' and a dropdown menu labeled 'Actions'. Below this is a table of scheduled reports.

<input type="checkbox"/>	Scheduled reports	Frequency	Duration	Status
<input type="checkbox"/>	Tram client status	One-off	Snapshot	Active
<input type="checkbox"/>	Target markets	One-off	Snapshot	Active
<input type="checkbox"/>	Key business processes	One-off	Previous 12 months	Active
<input type="checkbox"/>	Client advice	One-off	Snapshot	Active
<input type="checkbox"/>	Client details	One-off	Snapshot	Active
<input type="checkbox"/>	Client / advice unit mapping	One-off	Snapshot	Active

At the bottom left, it says 'Displaying 6 results'. At the bottom right, there is a pagination control showing '< 1 >'.

You will land on the page below.

+ Schedule a new report
×

Report Availability

All reports will be available from the **Download Data** page in Dynamic Planner. Reports expire after 30 days.

Organisation being reported on
DT Academy, Kat Flanagan

Report name
Client / advice unit mapping

Client / advice unit mapping

Use this to see a list of advice units and the corresponding clients at this organisation and below.

Columns	Description
Advice Unit ID	The way in which Dynamic Planner identifies one or more advised clients receiving advice together
Client ID	The way in which Dynamic Planner identifies each client

Frequency
One-off

✔ A one-off report will be generated overnight and be available the following day.

Duration
Snapshot

✔ The report will show a snapshot of the data as it was on the evening before the report is generated.

Cancel
Save

There are different types of reports which can be generated on a **One-off** basis or on a **Monthly** frequency on the 1st of each month.

Frequency
One-off

✔ A one-off report will be generated overnight and be available the following day.

Frequency
Monthly

✔ The report will be generated every month on the 1st of the month.



Each report is a **Snapshot** of the data taken the evening before the report is generated with the exception of the 'Key business processes' report where you have the ability to select a **specific Duration** covered by the report.

Duration

Snapshot

✔ The report will show a snapshot of the data as it was on the evening before the report is generated.

Duration

Previous day

Previous day

Previous 1 month

Previous 12 months

Custom

✔ The report will cover the previous day.

Save

Please note: Once a report has been generated, it will be available to download for **30 days**. Make sure you download your Insights reports before the expiry date so that you do not lose any data.

Report Availability

All reports will be available from the **Download Data** page in Dynamic Planner. Reports expire after 30 days.

The first report you will see in the **Report name** drop down menu is the 'Client / advice unit mapping' report: This report matches advice units with corresponding clients.

Report name

Client / advice unit mapping

Client / advice unit mapping

Use this to see a list of advice units and the corresponding clients at this organisation and below.

Columns	Description
Advice Unit ID	The way in which Dynamic Planner identifies one or more advised clients receiving advice together
Client ID	The way in which Dynamic Planner identifies each client

The second report is 'Client Advice'. This is a very detailed report which runs off an advice unit entity and provides the client's status and name, the organisation ID, Adviser ID and adviser's name, target market, AUM (Assets Under Management), benchmark risk profile and sustainability profile assigned to each advice unit plus the number of business processes created, dates of the most recent business processes and number of Fact Find (previously known as Client Access) invites sent and completed for each advice unit.

Report name

Client advice ▼

Client advice

Use this to see the advice details of each client at this organisation and below.

Columns	Description
Advice Unit entity ID	The way in which Dynamic Planner identifies one or more advised clients receiving advice together
Advice Unit status	The status of the Advice Unit
Client 1 (first name last name)	Name of client receiving advice
Client 2 (first name last name)	Name of any second client receiving advice
Client 3 (first name last name)	Name of any third client receiving advice
Organisation ID	The way in which Dynamic Planner identifies your organisation
Adviser ID	The way in which Dynamic Planner identifies each user
Adviser name	The name of the user advising the client(s) in this advice unit
Target market	The target market selected for the client(s) in this advice unit
AUM	The most recent assets under management for the client(s) in this advice unit
Benchmark risk profile	The benchmark risk profile selected by the adviser for the client(s) in this advice unit
Sustainability profile	The sustainability profile selected by the adviser for the client(s) in this advice unit
Review processes created	Number of Review processes started for this advice unit
Profiling processes created	Number of Profiling processes started for this advice unit
Recommendation processes created	Number of Recommendation processes started for this advice unit
Cash flow processes created	Number of Cash flow processes started for this advice unit
Date of most recent Review	Date of most recent Review process started for this advice unit
Date of most recent Profiling	Date of most recent Profiling process started for this advice unit
Date of most recent Recommendation	Date of most recent Recommendation process started for this advice unit
Date of most recent Cash flow	Date of most recent Cash flow process started for this advice unit
Client Access questionnaires sent	Number of questionnaires sent via Client Access for this advice unit
Client Access questionnaires completed	Number of questionnaires completed via Client Access for this advice unit

The third report is 'Client details', which will show the client's personal details such as first name, last name, date of birth, address, contact details, etc.

Each time you select a report, you will see a breakdown of the information provided in the Columns together with a short description alongside them.

Report name

Client details ▼

Client details

Use this report to see the personal details of each client at this organisation and below.

Columns	Description
Client ID	The way in which Dynamic Planner identifies each client
Client last name	Last name of the client
Client middle name	Middle name/s of the client
Client first name	First name of the client
Title	The client's title
Date of birth	The client's date of birth
Gender	The client's gender
Marital Status	The client's marital status
NI number	The client's NI number
Status	The client status - Active, Inactive, Deceased, Do not contact.
Address line 1	Client address information
Address line 2	Client address information
Address line 3	Client address information
Town	Client address information
Country	Client address information
Postcode	Client address information
Home phone number	The client's home phone number
Mobile phone number	The client's mobile phone number
Email address	The client's email address

The fourth report is “Client Servicing”. With this report, you can view details of each client’s most recent review, including fees, holdings and outcomes.

Report name

Client servicing

Client servicing

Use this to view details about each client’s most recent review, including fees, holdings and outcomes.

Columns	Description
Year	The year being reported on
Month	The month being reported on
Day	The day being reported on
Advice Unit entity ID	The way in which Dynamic Planner identifies one or more advised clients receiving advice together
Advice Unit Status	The status of the advice unit
Client 1 ID	The way in which Dynamic Planner identifies each client
Client 1 name	The name of the client receiving advice
Client 2 ID	The way in which Dynamic Planner identifies each client
Client 2 name	Name of any second client receiving advice
Client 3 ID	The way in which Dynamic Planner identifies each client
Client 3 name	Name of any third client receiving advice
Adviser ID	The way in which Dynamic Planner identifies each user
Adviser name	The name of the user advising the client(s) in this advice unit
Organisation ID	The way in which Dynamic Planner identifies your organisation
Organisation name	The name of the organisation
Date of most recent Review report	Date of most recent Review report for this advice unit/client
Date of previous Review report	Date of the previous Review report for this advice unit/client
Most recent Client Access invite sent	Date of most recent Client Access questionnaire sent to the client
Most recent Client Access invite completed	Date of most recent Client Access questionnaire completed by the client
Client wishes to continue with ongoing service?	Does the client wish to continue with ongoing service
Ongoing service fee amount	Ongoing advice fees amount
Ongoing service fee percentage	Ongoing advice fees percentage
Charges in report?	Was a charges statement included in most recent review report
Fees paid - Ongoing Advice £	Ongoing advice fee amount paid in previous review period
Fees paid - Ongoing Advice %	Ongoing advice fee percentage paid in previous review period
Fees paid - Initial £	Initial fee amount paid in previous review period
Fees paid - Initial %	Initial fee percentage paid in previous review period
Outcome use ISA allowance	Was using the ISA allowance recommended in the most recent review
Outcomes rebalance required	Was a rebalance required in the most recent review
Outcomes fund switch required	Was a fund switch required in the most recent review
Outcomes top-up requested	Was a top-up requested in the most recent review
Outcomes other new advice required	Was other new advice required in the most recent review
Target market ID	The way in which Dynamic Planner identifies the target market selected for the client(s) in this advice unit during the most recent Recommendation

Target market name	The name of the target market selected for the client(s) in this advice unit during the most recent Recommendation
Target market service wording	Description of the service provided by being linked to this target market
Target market value wording	Description of the value provided by being linked to this target market
Tram enabled?	Does the client have a Tram account enabled
Holdings in UK pension fund?	Does the client have holdings in a UK pension fund
Holdings in UK life fund?	Does the client have holdings in a UK life fund
Holdings in offshore life fund?	Does the client have holdings in an offshore life fund
Holdings in offshore non-life fund?	Does the client have holdings in an offshore non-life fund
Holdings in investment trust?	Does the client have holdings in an investment trust
Holdings in exchange traded fund?	Does the client have holdings in an exchange traded fund
Holdings in unit trust/ICVC (OEIC)?	Does the client have holdings in a unit trust/ICVC (OEIC)
Holdings in discretionary portfolio?	Does the client have holdings in a discretionary portfolio
Holdings in savings account/deposit?	Does the client have holdings in a savings account/deposit
Does client have an ISA?	Does the client have an ISA
Does client have a GIA (Investment Account)?	Does the client have a GIA

The fifth report is 'Key business processes'. With this report, you can check the number of client invitations sent and business processes created by each user in your organisation.

Report name

Key business processes ▾

Key business processes

Use this report to see the number of new Client profiling, Client review, Cash flow and Recommendations processes and Client access invitations created by each user at this organisation.

Columns	Description
Year	The year being reported on
Month	The month being reported on
Organisation ID	The way in which Dynamic Planner identifies your organisation
Organisation name	The name of the organisation
Organisation path	The relationship of any sub-organisations to the organisation being reported on
User ID	The way in which Dynamic Planner identifies each user
User first name	First name of the user
User last name	Last name of the user
User email	Email address of the user
Client invitations sent	Number of invitations sent through Client Access
Client reviews created	Number of Client Review processes started
Client profiling created	Number of Client profiling processes started
Cash flow created	Number of Cash flow processes started
Recommendations created	Number of Recommendations processes started

When you select this report, in **Duration**, you will find a drop down menu where you have the ability to select Previous day:

Duration

Previous day ▾

✔ The report will cover the previous day.

Previous 1 month:

<p>Duration</p> <p>Previous 1 month</p>	<p>✔ The report will cover the previous calendar month.</p>
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Previous 12 months:

<p>Duration</p> <p>Previous 12 months</p>	<p>✔ The report will cover the previous 12 calendar months.</p>
---	---

Or Custom, if you wish to select a specific date range:

<p>Duration</p> <p>Custom</p> <p>07/01/2025 31/01/2025</p> <p>From To</p>	<p>✔ The report will cover the date range set below.</p>
---	--

Please note: if you select a **Monthly frequency** for this report, in the **Duration** drop down menu you will only have two options which are **Previous 1 month** and **Previous 12 months**:

<p>Frequency</p> <p>Monthly</p>	<p>✔ The report will be generated every month on the 1st of the month.</p>
<p>Duration</p> <p>Previous 1 month</p> <p>Previous 1 month</p> <p>Previous 12 months</p>	<p>✔ The report will cover the previous calendar month.</p>

The sixth report is 'Target markets' which will provide information about all target markets created within your organisation.

Report name

Target markets ▼

Target markets

Use this to view your target markets.

Columns	Description
Target market ID	The way in which Dynamic Planner identifies each target market
Target market name	The name of the target market
Last updated	The last time this target market was updated
Review date	The next review date for this target market
Adviser ID	The way in which Dynamic Planner identifies each user
Adviser name	The name of the user who owns this target market
Organisation ID	The way in which Dynamic Planner identifies your organisation
Organisation name	The name of the organisation
Clients linked	The number of clients linked to this target market
Age from	Minimum client age for this target market
Age to	Maximum client age for this target market
Risk from	Minimum risk level for this target market
Risk to	Maximum risk level for this target market
Wealth from	Minimum wealth for this target market
Wealth to	Maximum wealth for this target market
Primary objective	Accumulation, decumulation or both
Transactions	Lump sum only, regular only or lump sum and regular
Shortlist/model portfolio	Is there a shortlist, model portfolio or both associated with this target market
Is there a Risk Managed Decumulation solution in either shortlist/model portfolio?	Do any of the associated shortlists or model portfolios contain a Risk Managed Decumulation solution
Service wording	Description of the service provided to clients associated with this target market
Value wording	Description of the value provided to clients associated with this target market

The final report is 'Tram client status' which shows your clients' interactions with Tram such as their Tram account status, first time they logged in, last time they logged in, number of articles they read, liked or disliked, documents opened, etc.

Report name

Tram client status ▼

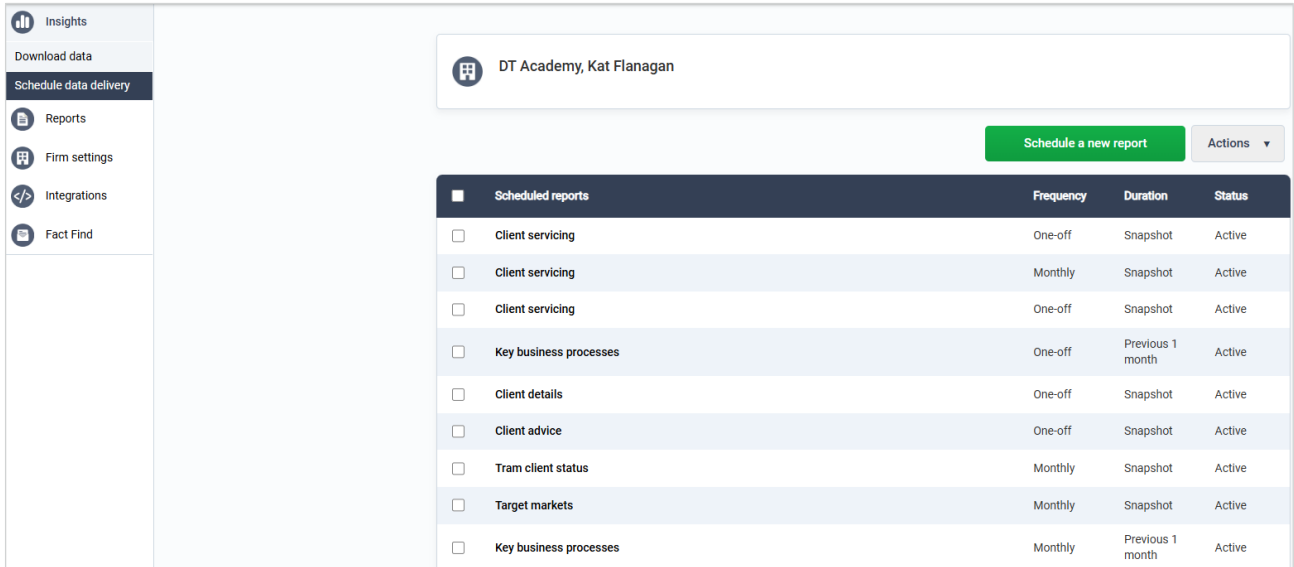
Tram client status

Use this to view your clients interactions on Tram.

Columns	Description
Day	The day being reported on
Month	The month being reported on
Year	The year being reported on
Organisation ID	The way in which Dynamic Planner identifies your organisation
Organisation name	The name of the organisation
Organisation path	The relationship of any sub-organisations to the organisation being reported on
Login group ID	The way in which Dynamic Planner identifies your login group
Adviser ID	The way in which Dynamic Planner identifies each user
Adviser first name	The first name of the user advising the client(s) in this advice unit
Adviser last name	The last name of the user advising the client(s) in this advice unit
Client ID	The way in which Dynamic Planner identifies each client
Client first name	First name of client receiving advice
Client last name	Last name of client receiving advice
Tram status	Status of the client's Tram account
First logged in	Date the client first logged in
Last logged in	Date the client most recently logged in
Total number of logins	Total number of logins since activation
Number of articles read	Total number of articles read
Number of articles liked	Total number of articles liked
Number of articles disliked	Total number of articles disliked
Number of articles bookmarked	Total number of articles bookmarked
Documents opened	Total number of documents opened
Client sees portfolio off track	Client has seen that the portfolio is off track
Client sees risk level off track	Client has seen that the risk level is off track

Remember to hit **Save** each time you schedule a new report.

Once you have scheduled all the required Insights reports for your firm, you will see a full list of scheduled reports in the **Schedule data delivery** page.



<input type="checkbox"/>	Scheduled reports	Frequency	Duration	Status
<input type="checkbox"/>	Client servicing	One-off	Snapshot	Active
<input type="checkbox"/>	Client servicing	Monthly	Snapshot	Active
<input type="checkbox"/>	Client servicing	One-off	Snapshot	Active
<input type="checkbox"/>	Key business processes	One-off	Previous 1 month	Active
<input type="checkbox"/>	Client details	One-off	Snapshot	Active
<input type="checkbox"/>	Client advice	One-off	Snapshot	Active
<input type="checkbox"/>	Tram client status	Monthly	Snapshot	Active
<input type="checkbox"/>	Target markets	Monthly	Snapshot	Active
<input type="checkbox"/>	Key business processes	Monthly	Previous 1 month	Active

If for any reason you wish to pause the scheduling of one or more reports, simply tick the box next to each report, then go to the **Actions** drop down menu and click **Pause selected subscriptions**.



<input type="checkbox"/>	Scheduled reports	Frequency	Duration	Status
<input type="checkbox"/>	Tram client status	Monthly	Snapshot	Active
<input type="checkbox"/>	Target markets	Monthly	Snapshot	Active
<input type="checkbox"/>	Key business processes	Monthly	Previous 1 month	Active
<input checked="" type="checkbox"/>	Client details	Monthly	Snapshot	Active
<input checked="" type="checkbox"/>	Client advice	Monthly	Snapshot	Active

The status of the reports will change to **Paused** and will be highlighted in red.

<input type="checkbox"/> Scheduled reports	Frequency	Duration	Status
<input type="checkbox"/> Tram client status	Monthly	Snapshot	Active
<input type="checkbox"/> Target markets	Monthly	Snapshot	Active
<input type="checkbox"/> Key business processes	Monthly	Previous 1 month	Active
<input type="checkbox"/> Client details	Monthly	Snapshot	Paused
<input type="checkbox"/> Client advice	Monthly	Snapshot	Paused
<input type="checkbox"/> Client / advice unit mapping	Monthly	Snapshot	Active

To start scheduling the reports again, tick the boxes next to them, go to the **Actions** drop down menu and this time click **Unpause selected subscriptions**. The status will change back to Active and the reports will be re-scheduled for the 1st of each month.


Schedule a new report
Actions ▾

<input type="checkbox"/> Scheduled reports	Frequency	Duration	Status
<input type="checkbox"/> Tram client status	Monthly	Snapshot	Active
<input type="checkbox"/> Target markets	Monthly	Snapshot	Active
<input type="checkbox"/> Key business processes	Monthly	Previous 1 month	Active
<input checked="" type="checkbox"/> Client details	Monthly	Snapshot	Paused
<input checked="" type="checkbox"/> Client advice	Monthly	Snapshot	Paused

Pause selected subscriptions (2)
Unpause selected subscriptions (2)

If you scheduled any one-off reports, they will become available to download after 12:00 pm on the following day. Head to the **Download data** page below and click on the report's name highlighted in blue to download it.

- Insights
- Download data
- Schedule data delivery
- Reports
- Firm settings
- Integrations



DT Academy, Kat Flanagan

Report	Frequency	Date generated	Status
Client servicing	One-off	08/02/2025	Expires 10/03/2025



If you scheduled any monthly reports, you will need to wait until the 1st of each month before they become available to download.

Tram client status	Monthly	01/02/2025	Expires 03/03/2025	-
Target markets	Monthly	01/02/2025	Expires 03/03/2025	-
Key business processes	Monthly	01/02/2025	Expires 03/03/2025	-
Client details	Monthly	01/02/2025	Expires 03/03/2025	-
Client advice	Monthly	01/02/2025	Expires 03/03/2025	-
Client / advice unit mapping	Monthly	01/02/2025	Expires 03/03/2025	-
Key business processes	Monthly	01/02/2025	Expires 03/03/2025	-

Please note: each available report has an expiry date next to it. Make sure you download each report before this date so that you do not lose any data.

Report	Frequency	Date generated	Status
Target markets	One-off	11/12/2024	Expires 10/01/2025
Key business processes	One-off	11/12/2024	Expires 10/01/2025
Client advice	One-off	11/12/2024	Expires 10/01/2025
Client details	One-off	27/11/2024	Expires 27/12/2024
Client / advice unit mapping	One-off	27/11/2024	Expires 27/12/2024

The downloaded reports are in Excel spreadsheet format, please see below for an example of the Client advice report.

Advice_Un	Advice_L	Client_1	Client_2	Client	Organisati	Adviser_ID	Adviser_na	Target_ma	AUM	Benchmark	Sustainabi	Reviews_p	Profiling_p	Recommen	Cash_flow	Date_of_mo	Date_of_mos	Date_of_mos	Date_of_mos	Client_A	Client_A		
0D726754	Active	Leon Sorrell		NULL	35EA99E0-875BD358	KatFlanagan			104953														
110C79C3	Active	Gabriella V Richard Tu		NULL	35EA99E0-875BD358	KatFlanagan																	
18866BEF	Active	Anthony McKnight		NULL	35EA99E0-875BD358	KatFlanagan			375193.9			1		1		#####		#####					
2EE37EAD	Active	Dylan Dog		NULL	35EA99E0-875BD358	KatFlanagan			512580						4					01/07/2024			
33AD3867	Active	Marie Sorri, Leon Sorre		NULL	35EA99E0-875BD358	KatFlanagan									1					24/11/2021			
4E6C3925	Active	Barry New		NULL	35EA99E0-875BD358	KatFlanagan			222795			2	1		1	#####	22/09/2023			26/04/2023	17	13	
62C9D54C	Active	Lynda New		NULL	35EA99E0-875BD358	KatFlanagan			244157	6	3	6		1	4	#####		#####		29/10/2024	7	1	
6C439735	Active	Laura Palmer		NULL	35EA99E0-875BD358	KatFlanagan			100000				1				16/01/2020						
72443CE6	Active	Nadine Hurley		NULL	35EA99E0-875BD358	KatFlanagan			100000														
7246B94D	Active	Alex Harris		NULL	35EA99E0-875BD358	KatFlanagan			364189			6				#####							
72C99E9F	Active	Samantha Austin		NULL	35EA99E0-875BD358	KatFlanagan			24545.37			1	8	2		#####	23/11/2021		#####				
7A249D7E	Active	David Smith		NULL	35EA99E0-875BD358	KatFlanagan			100000				3			#####	03/08/2021						
86990AED	Active	George H Smith		NULL	35EA99E0-875BD358	KatFlanagan			460000	7	2	8		1	1	#####		#####		22/05/2024	2		
A14660E4	Active	Gabriella V John Harve		NULL	35EA99E0-875BD358	KatFlanagan																	
AF2E19D0	Active	Phillip Jeffries		NULL	35EA99E0-875BD358	KatFlanagan			472800	7	3	3	14		1	#####	24/01/2025			30/01/2024	54	41	
B7180990	Active	Diane Thompson		NULL	35EA99E0-875BD358	KatFlanagan			100000														
D56A31C1	Active	Glenn Tipton		NULL	35EA99E0-875BD358	KatFlanagan																	
E9C17847	Active	Jerry Horne		NULL	35EA99E0-875BD358	KatFlanagan			191674			2		1		#####		#####				2	2
F383142C	Active	Sarah Palmer		NULL	35EA99E0-875BD358	KatFlanagan			100000							#####							
F4A48B28	Active	Juliana Mills		NULL	35EA99E0-875BD358	KatFlanagan			238641	6	3	2		1		#####		#####					
FF0DC072	Active	David Callcott		NULL	35EA99E0-875BD358	KatFlanagan			355000	7	2	5	1	4		#####	01/02/2022		#####				3
01416A44	Active	Susan Miller		NULL	35EA99E0-875BD358	KatFlanagan			169735			1	1	1	1	#####	28/02/2023		#####		28/02/2023	1	1
099766D7	Active	Robert Thompson		NULL	35EA99E0-875BD358	KatFlanagan			226899.1			3	2	1		#####	03/12/2020		#####				4
19F2D198	Active	Denise Bruson		NULL	35EA99E0-875BD358	KatFlanagan																	



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