Chart Options

Last Modified on 10/24/2025 1:32 pm PDT

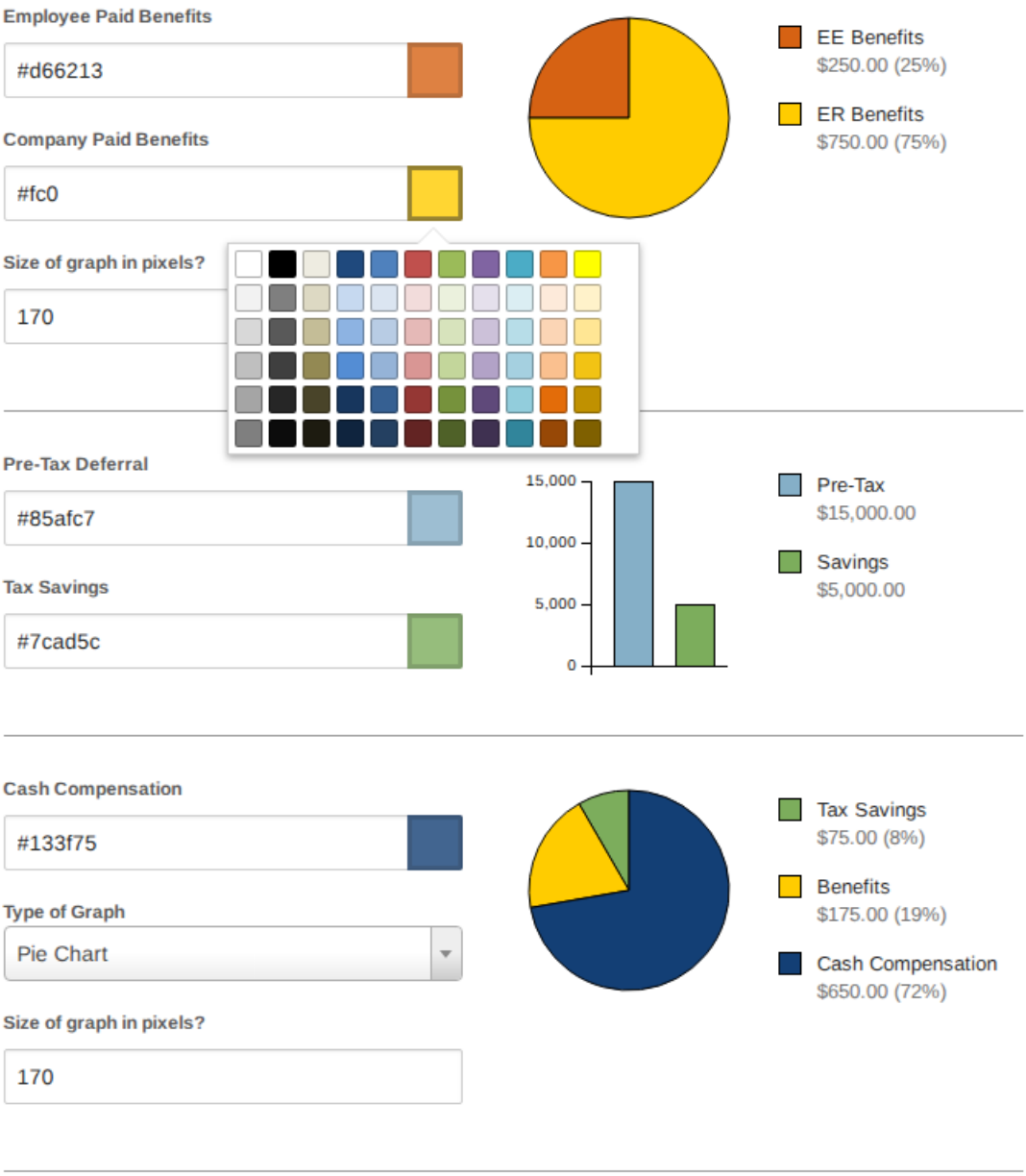
Chart Options are typically left enabled to provide visual representation of data within the statement.

For the **two-page PDF print version**, the chart under the **Estimated Tax Savings** section is automatically removed.

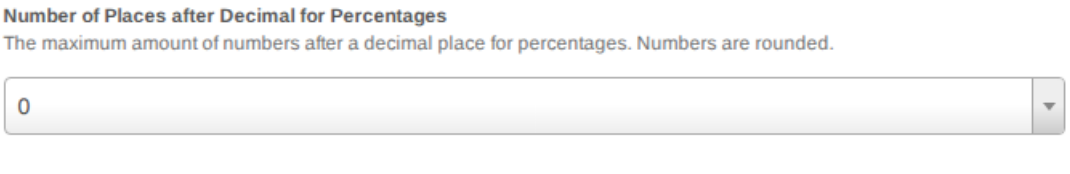
Customize Chart:

1. Go to **Design.**
2. Select **Chart Options** from the dropdown.
3. To control **chart visibility,** simply uncheck the corresponding boxes.

4. Enter **HTML color codes** directly in the color fields.
5. Or click the **color squares** to select from the palette.
6. Adjust **graph size** if necessary**.**



7. Modify the **number of decimal places** shown in percentage values.



8. Changes will take effect after you click **Save.**

> **Note:** Use brand-specific colors to maintain consistency with your organization's visual identity.

 Quick Steps: Design → Chart Options → Charts Visibility → Colors → Graph Size → Decimal Places → Save