

Setup Client Console Access

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From the Client Page

- Select the **General** tab and **Properties** link.

Aaron Ackerman

Investments **General** Service Billing Documents Policy

Properties Activity Report Settings Fiduciary Notes

Client Tools

Properties

Client Title	Aaron Ackerman
Rep Code	
Primary Member First Name	Aaron
Primary Member Last Name	Ackerman
Address	77 Demo Drive Chicago, IL 12345
Sample Client	<input checked="" type="checkbox"/>
Estimated Net Worth	\$ 0.00
Assets Available For Investments	\$ 0.00
Annual Household Income	\$ 0.00
Advisor	Koleno, Dan
Create copy of advisor models	<input type="checkbox"/> if used by other clients
Benchmark	use default
Report Delivery Mode	Print & Online
Disable QPR download to professional printer	<input type="checkbox"/>

- All members of the client group are listed on the **Properties** page.
- Select a **'Member'** by clicking on the corresponding hyperlink.

Members	Member Type	Relation	Birth-Date
Aaron Ackerman	Family Member	Primary	Jun 21, 1960
Demo			

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Create Online Access

- Click **Edit** to setup or modify client Online Access.
- Enter a username and temporary password.
- Click **Save**.

Aaron Ackerman

General **Contact**

Online Access Activation

Personal Info

Salutation	
First Name	Aaron
Middle Name	
Last Name	Ackerman
Suffix	
Date of Birth	Jun 21, 1960
Gender	
Marital Status	
Dependents	
SSN	
Country of Citizenship	
Country of Tax Residence	

Online Access

Username	
Password	
Confirm Password	
Accessibility	All Accounts/Groups

Edit

Online Access

Username	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Accessibility	All Accounts/Groups


Cancel **Save**

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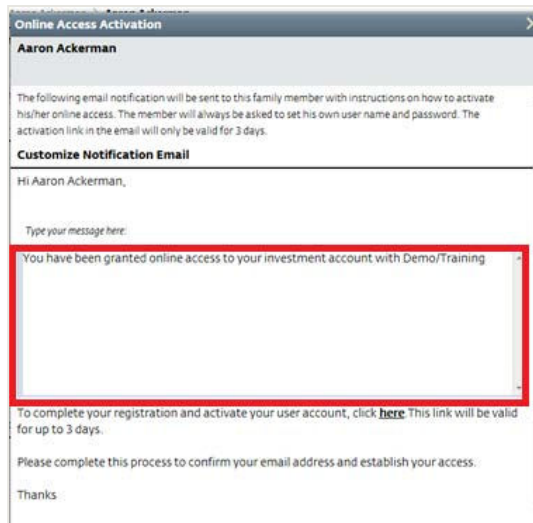
Online Access Activation

- Click the **Online Access Activation** dropdown to allow the client online activation via email.



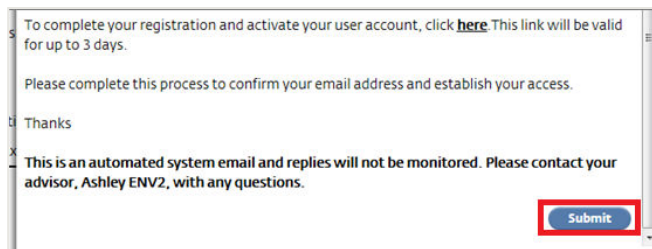
The screenshot shows a client profile form with two tabs: 'General' and 'Contact'. The 'Online Access Activation' dropdown menu is open, and the option 'Online Access Activation' is selected and highlighted with a red box. Below the dropdown, the form contains fields for Salutation, First Name (Aaron), Middle Name, Last Name (Ackerman), Suffix, Date of Birth (Jun 21, 1960), Gender, Marital Status, Dependents, SSN (***_**-****), Country of Citizenship, and Country of Tax Residence. An 'Edit' button is located at the bottom right of the form.

- Type in a custom message for the body of the email.



The screenshot shows the 'Online Access Activation' email template editor for Aaron Ackerman. The email body is pre-filled with a message: 'You have been granted online access to your investment account with Demo/Training'. This message is highlighted with a red box. The editor also includes a 'Customize Notification Email' section with a 'Type your message here:' label and a text area for the custom message.

- Click **Submit**.



The screenshot shows the final email template. The message body is: 'To complete your registration and activate your user account, click [here](#). This link will be valid for up to 3 days. Please complete this process to confirm your email address and establish your access. Thanks'. At the bottom right, there is a blue 'Submit' button highlighted with a red box.

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Notes:

- Advisor creates the username.
- Advisor creates the initial, temporary password ('welcome1' for example). The client will change the password upon the first login.
- Advisor may use Custom Report Templates to customize the reports viewable to the end client.
- The online access activation email link will be valid for up to 3 days.
- Client will need either SSN or custodian account # to activate.

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