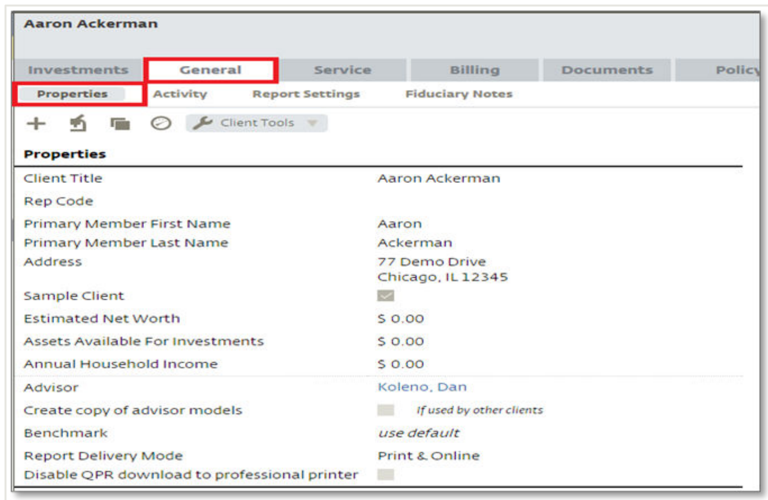
Setup Client Console Access

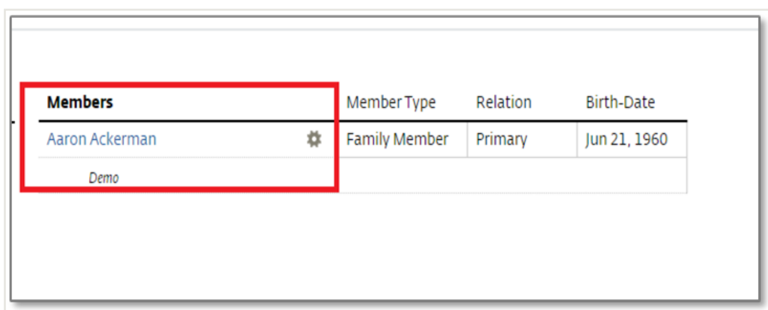
1

From the Client Page

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



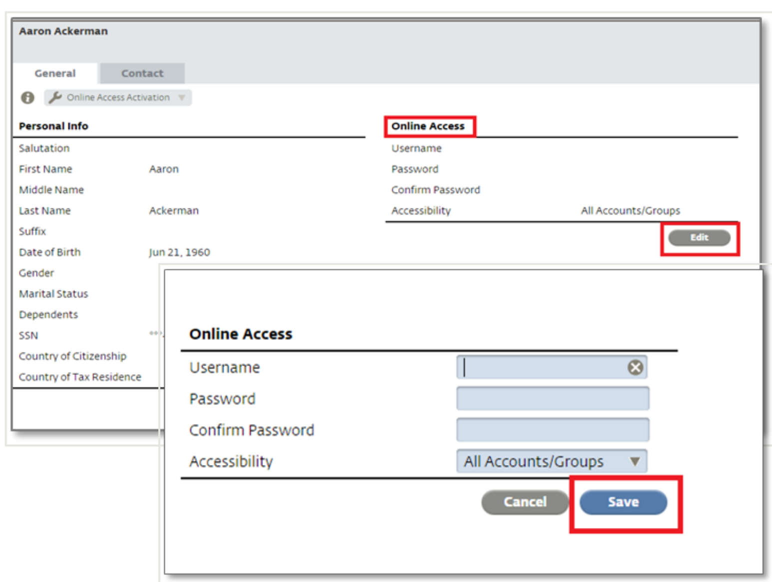
- All members of the client group are listed on the **Properties** page.
- Select a **'Member'** by clicking on the corresponding hyperlink.



2

Create Online Access

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

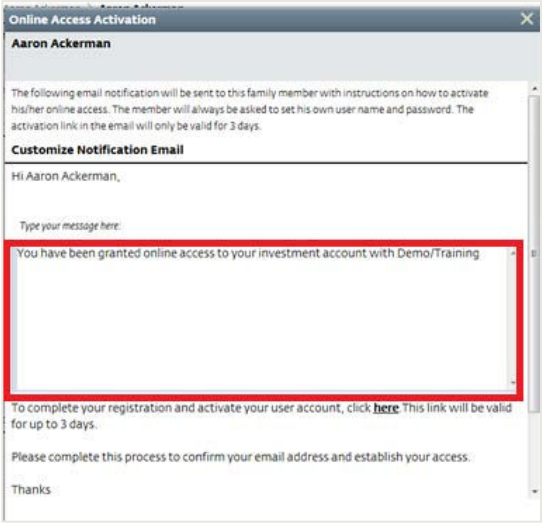


Setup Client Console Access

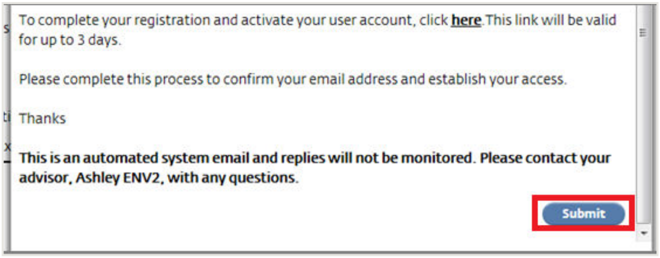
3 Online Access Activation

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

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



- Click **Submit**.



Setup Client Console Access

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.

Setup Client Console Access

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