

# Investnet CoBrowsing Feature

## Step-by-Step Activation Instructions

Follow the steps below with your client to start CoBrowsing

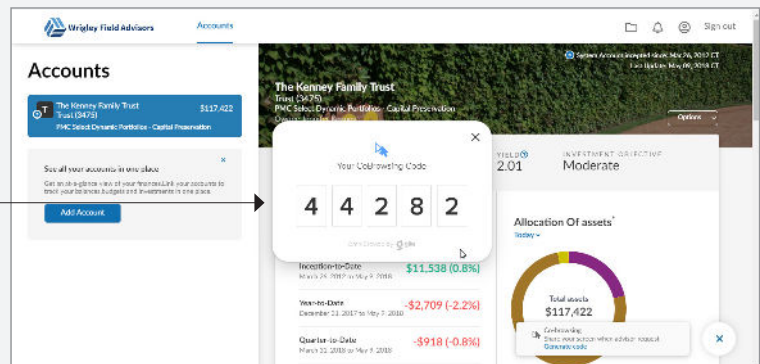
1. Your client, Jennifer Kenney calls you about account performance.



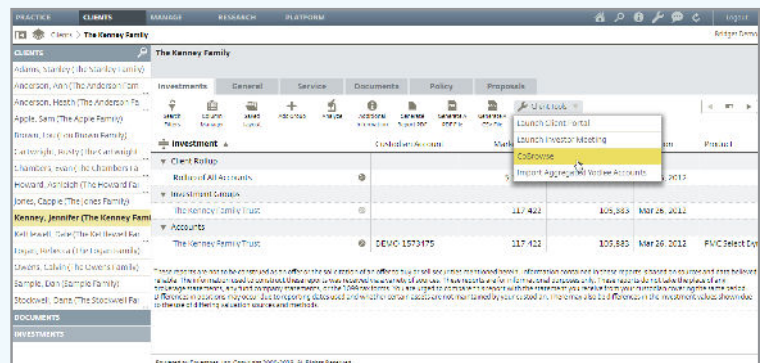
2. Have Ms. Kenney launch Client Portal and ask her to click the question mark at the bottom right hand corner.



3. When Ms. Kenney selects the help button a screen prompt for CoBrowsing appears. She will need to click **Generate code** and share the results with you to initiate CoBrowse.



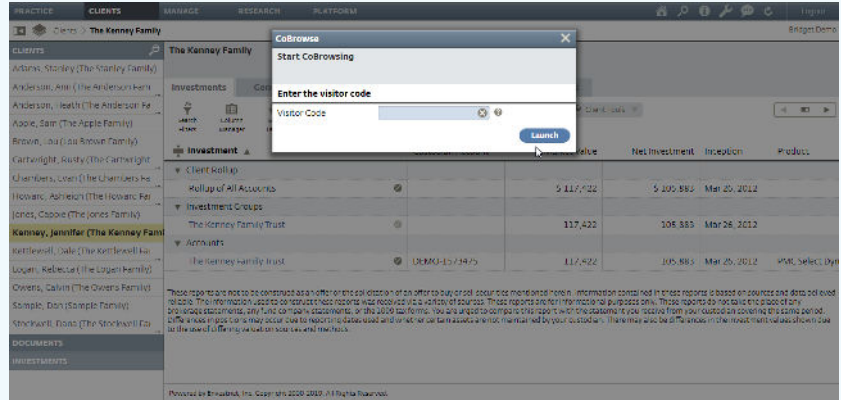
4. Launch Advisor Portal dashboard and find your client. The drop-down menu under "Client Tools," offers the option to CoBrowse.



5. Insert your client generated code, and click launch.



Entering the code into Advisor Portal will then prompt Ms. Kenney to accept cobrowsing.

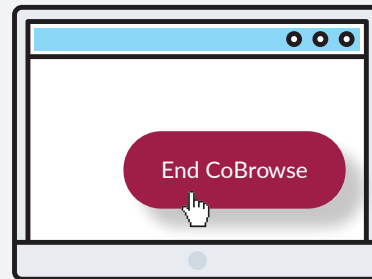


6. Accepting the offer to CoBrowse will allow you to view Ms. Kenney's Client Portal view.

Clicking Offer CoBrowse allows you to control the screen as well. Add another level of personalization by clicking Start Video for a face-to-face interaction.



7. Ms. Kenney can end the session by clicking End CoBrowse.



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