

NAVIGATING SERVICE REQUESTS

- 1. Launch into the Advisor's Portal via Advisor Search (only for Staff, if you are the advisor go to step 2)
 - You will see the Advisor's Name in the top right hand corner if you have done this correctly.

Advisors							
Search Filters	Eolumn Manager	Saved Layout	👗 Groupings	+ Create Advisor For :	CSV Generate A CSV File		
Name 🔺			C	Iount	Branch		
Demo, Alli				#		Demo User	
Demo2, Alli				*		Demo User	
User1, Demo				#		Demo User	
				Launch Advisor Portal			
				Launch Advisor Portal			

- 2. Navigate to the Practice Tab
 - Locate Service Requests in the left sidebar menu
 - Click the List Magnifier

PRACTICE	CLIENTS	MANAGE	IANAGE RESEARCH		PLATFORM				
Service Requests > Service Requests									
PRACTICE		Service Requests							
SERVICE REQUESTS									
		Service Tasks							
FINANCIAL PLANS		Ý	ň 🕤	+	csv				
PROPOSALS		Search Filters	Column Saved Manager Layout	Create Service	Generate A CSV File				
SERVICE REQUEST	5 1	Pequest		Request ID	Client	Reg	Submitted 💌		
		Daise Cash		1250620	Valued Family Account	1208222			
		Kaise Casil		1200000	Valueu Family Account	1096020	FED 15, 2010 08.50 AM CT		



NAVIGATING SERVICE REQUESTS

3. Use the Search Filters icon to filter and locate specific requests

PRACTICE CLIENTS	MANAGE	RESEARCH	PLATFORM					
Service Requests > Service Requests								
PRACTICE	Service Requests							
SERVICE REQUESTS								
	Service	Tasks						
FINANCIAL PLANS	₩	-	+	csv				
PROPOSALS	Serch Colur	mn Saved	Create	Generate A	Apply			
SERVICE REQUESTS 1	Client		_	Clear	лрріу			
	Clienc							
	Request Type			^				
	Status	Subm	Submitted					
	Rep Code Digital Advice Client Rep Code Rep Code Completed Not Yet Submitted		Rejected Completed					
			ed 🗸					