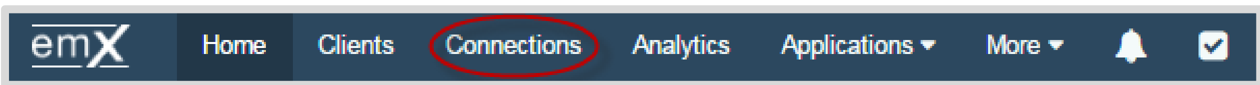
Connection Overview

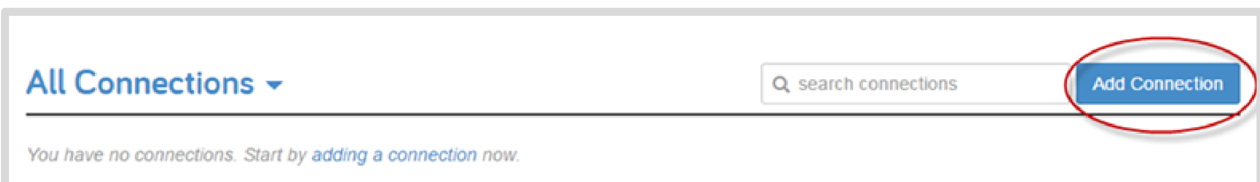
In this user guide, we will demonstrate how to establish a connection to online financial institution. The goal of the Connections area is to manage all data connections across all clients in one centralized location.

Please Note: The end of this guide contains best practice Alerts to set around connections.

1. After logging in, click **Connections**.

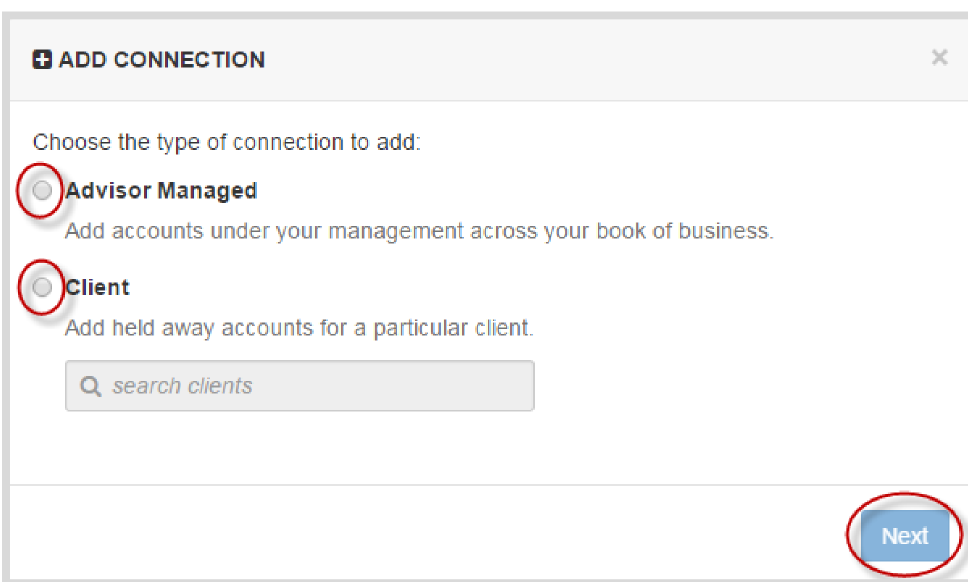


2. Click **Add Connection**.



Please Note: Use the search to find clients or existing institutions.

3. Choose whether to add an Advisor Managed connection or Client connection. For this user guide, we will choose Advisor Managed. Click **Next**.



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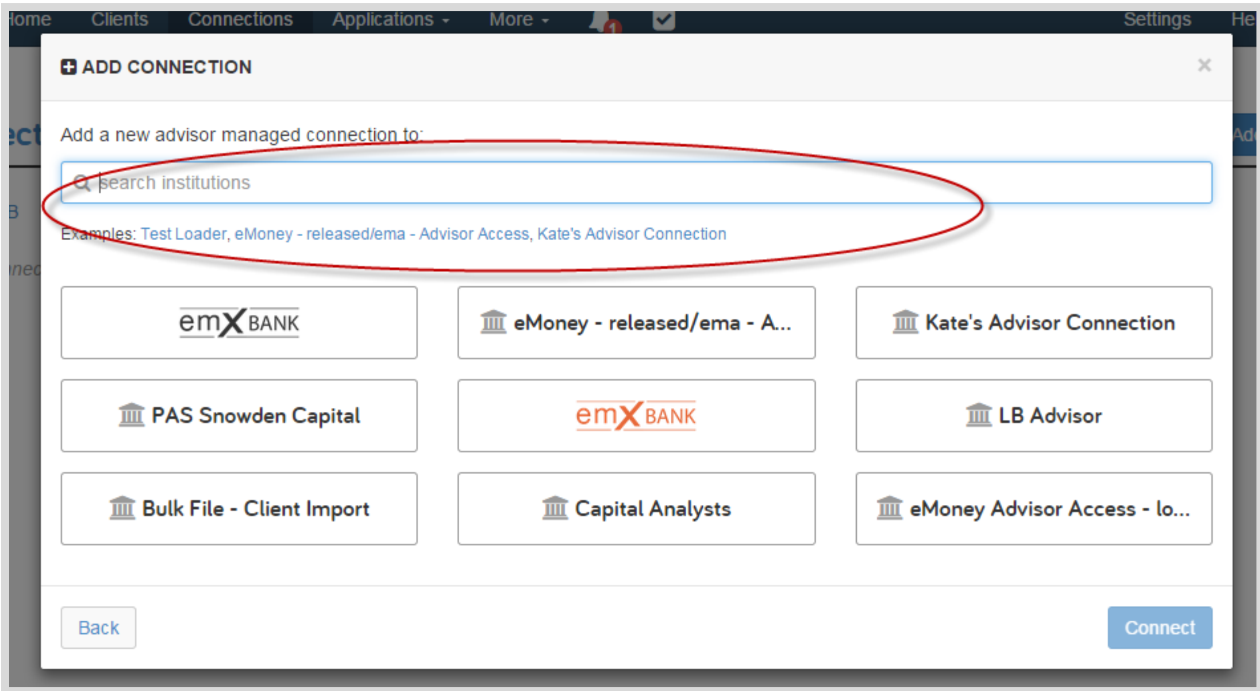
4. Search for an institution by **typing** in the **institution name** or **website**.



Please Note: Assistant and Planner licenses will only see a "Client" connection option as they do not have permission to add an Advisor Managed account.

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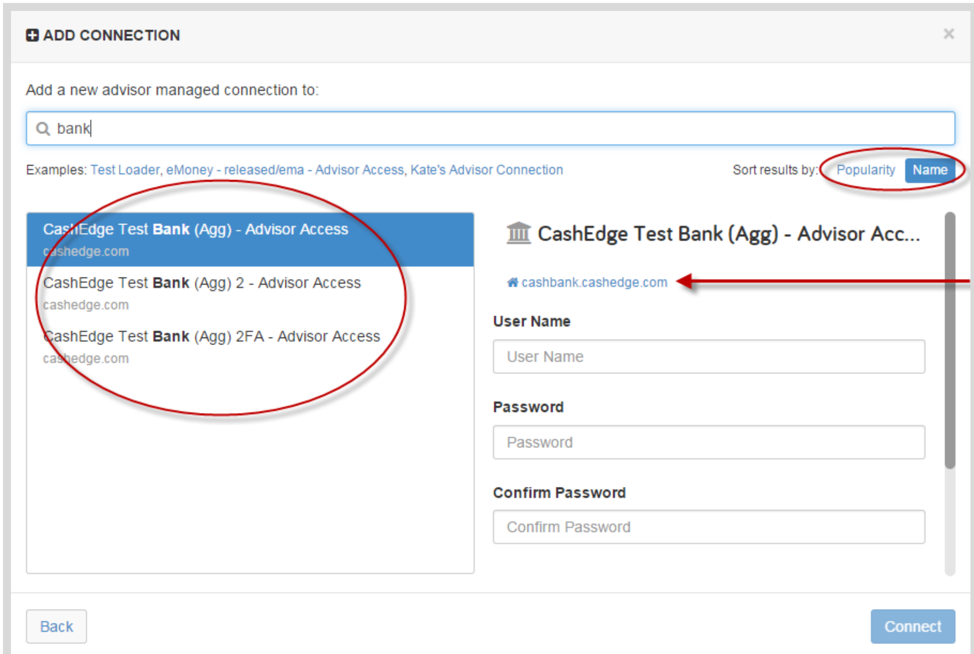
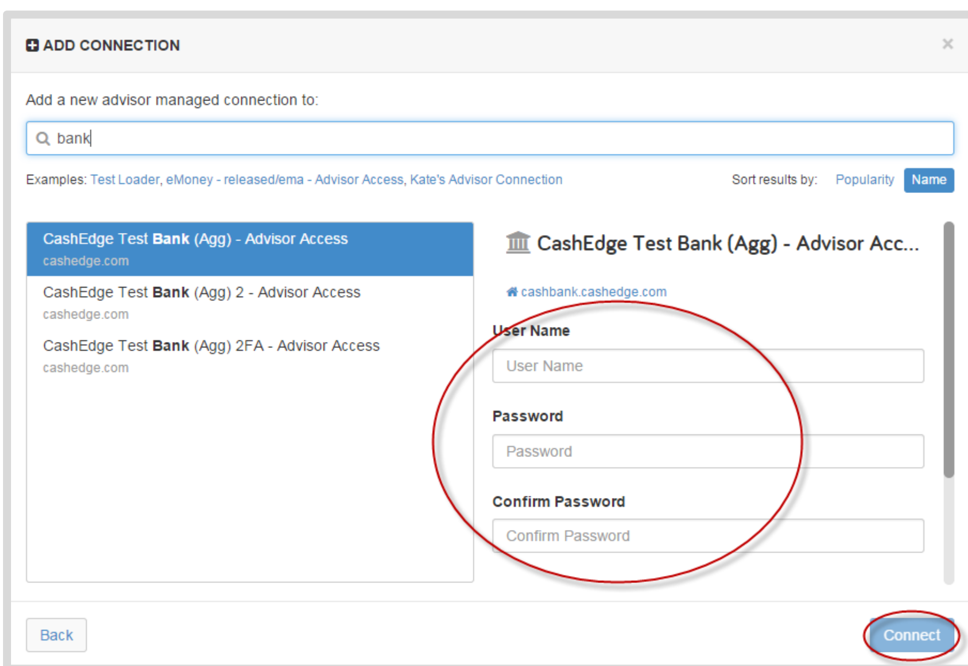
5. Choose the institution from the search results on the left. If the list is long, you can sort by **Popularity** or alphabetically by **Name**.



Please Note: Click the URL to make sure the user name and password are correct.

6. Enter User Name and Password and click **Connect**.



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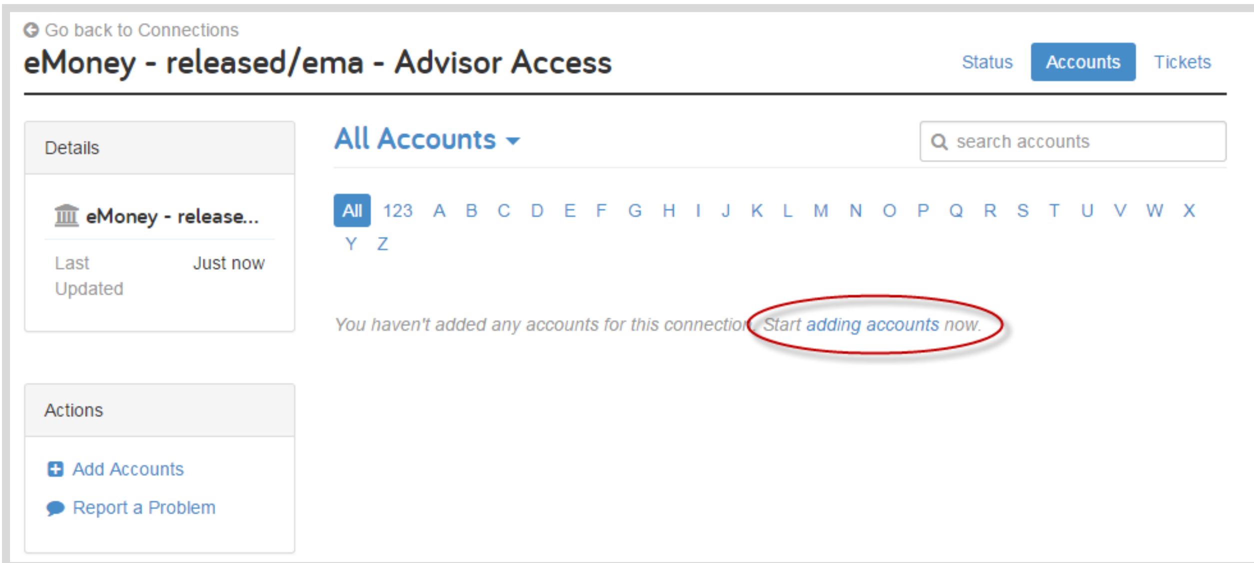
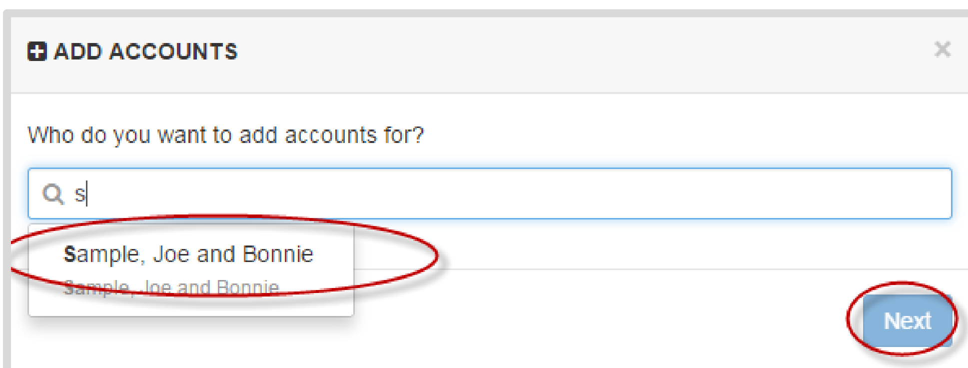
7. If credentials are accepted, the next step is **adding accounts** for the client.



8. Type in the client's last name to search for the client. Click **Next**.



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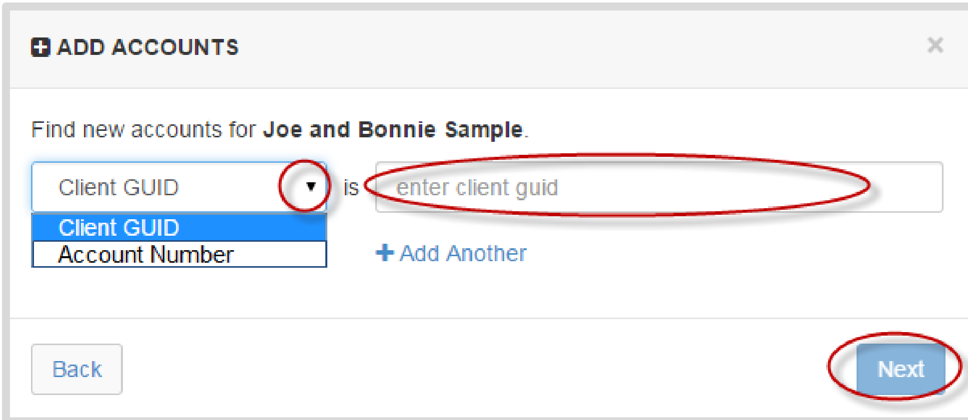
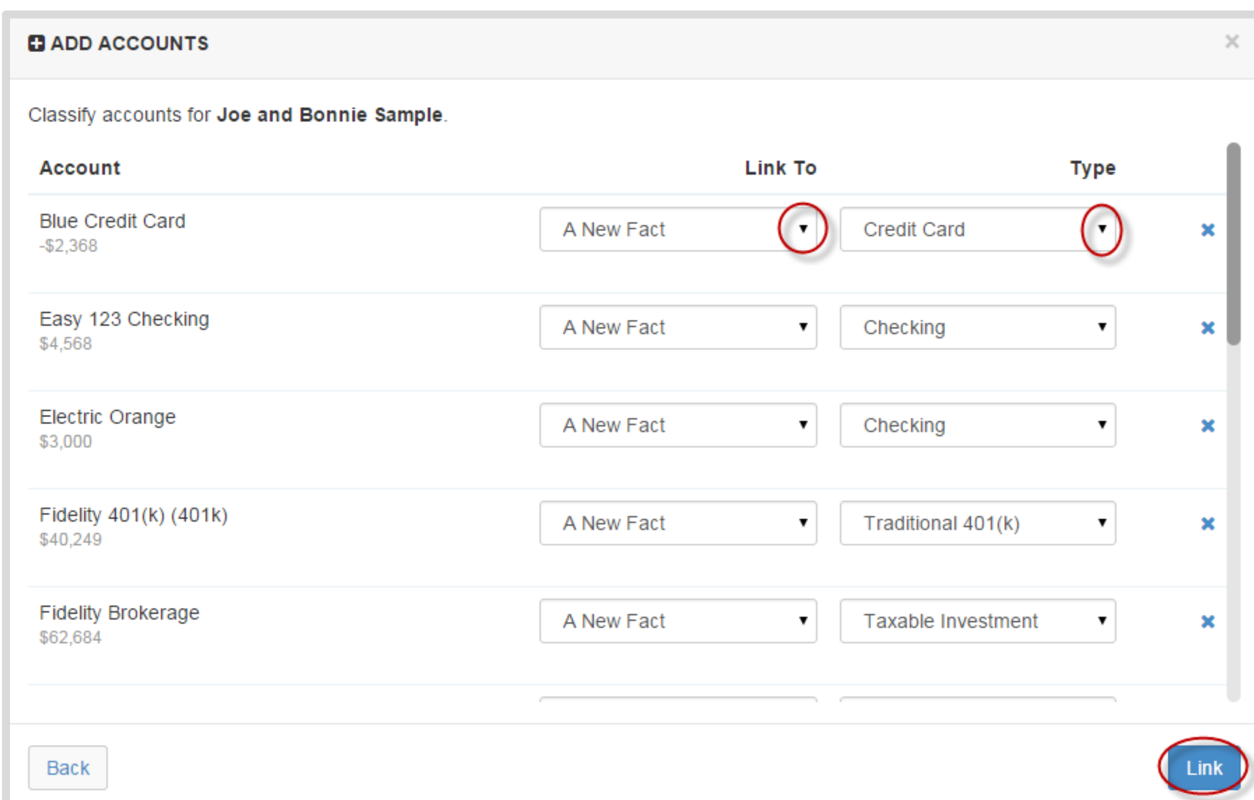
9. Add the client identifier- GUID, Account Number, Social Security number, TIN, etc. (This will vary by institution).



Please Note: For multiple identifiers, click **+ Add Another**.
Example: If the identifier is Account Number and the has multiple accounts, you will choose +Add Another to enter all accounts for the client and spouse.

10. Classify the accounts by choosing, "A New Fact" or by overriding a manually entered account. Then choose the account Type. Click **Link**.



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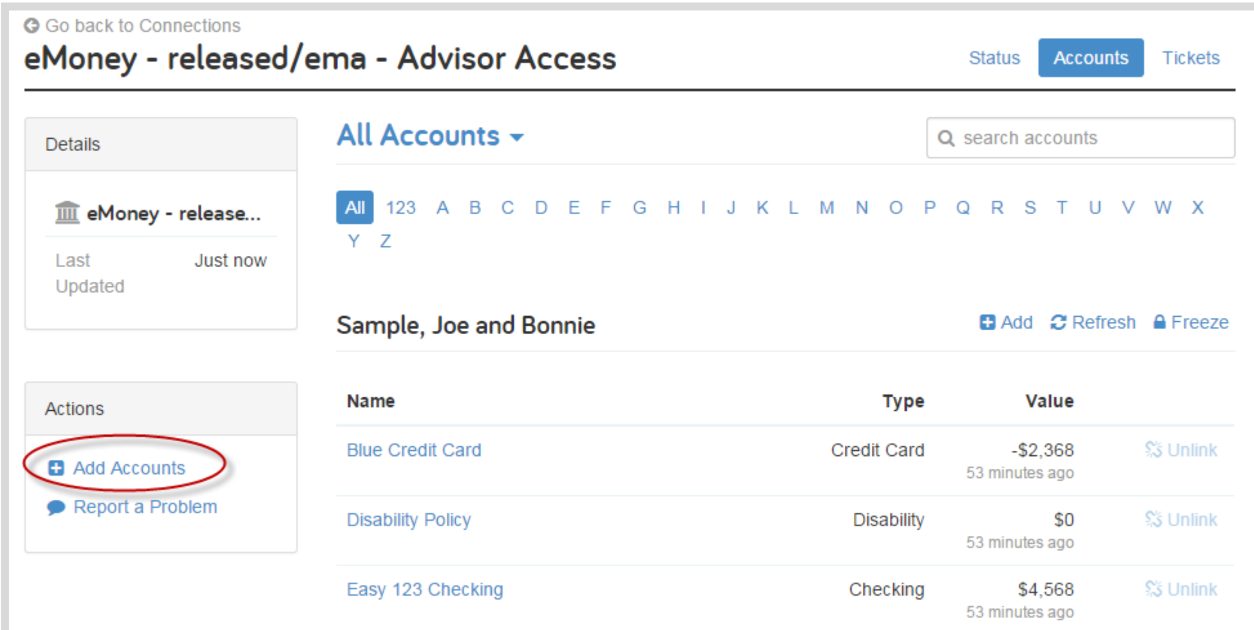
11. The linked accounts are displayed in the middle of the screen. T o add the next client's accounts, click **+ Add Accounts** and repeat Steps 8 – 10.



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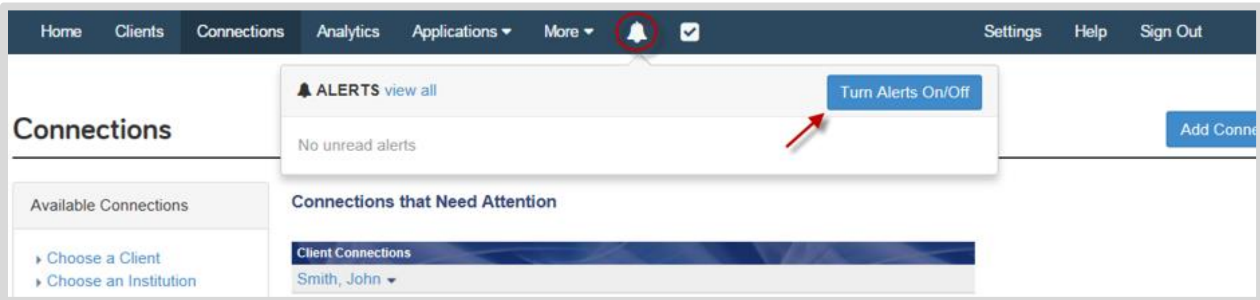
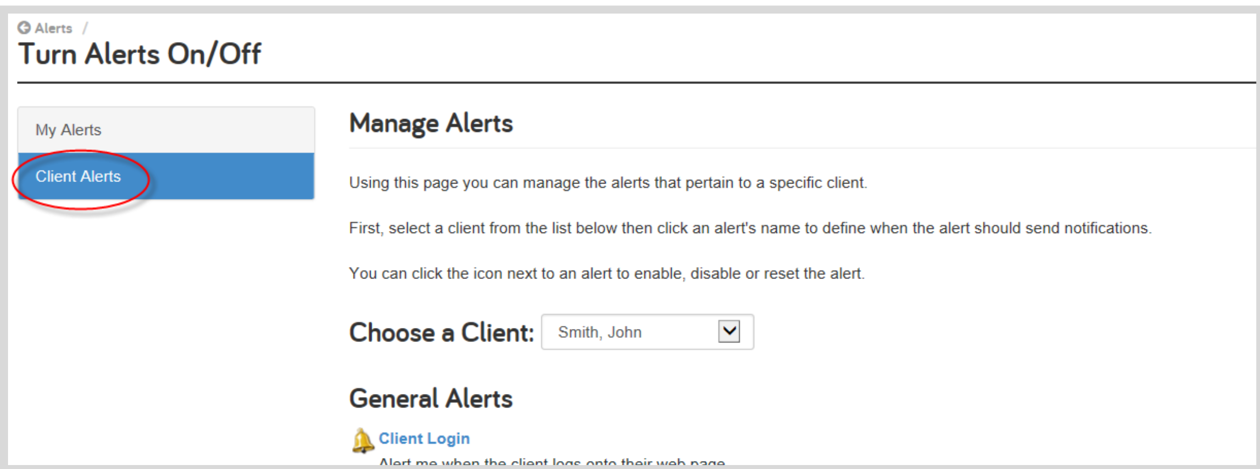
Alerts: Connection Best Practices

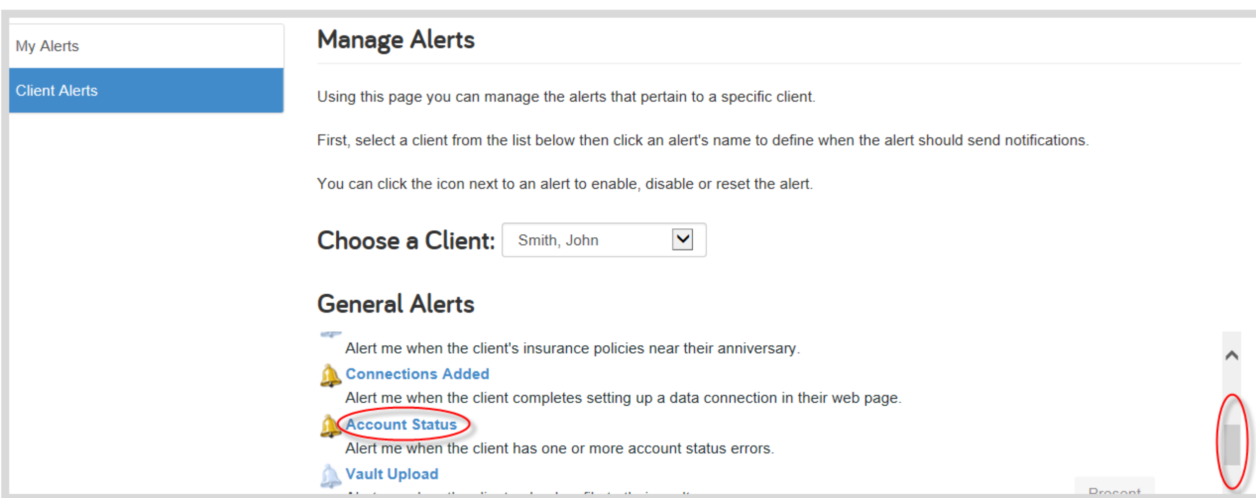
1. Click the bell icon in the navigation bar to access Alerts. Click, **Turn Alerts On/Off**.



2. Click **Client Alerts** on the left menu.



3. Scroll down in General Alerts and choose the **Account Status** alert.



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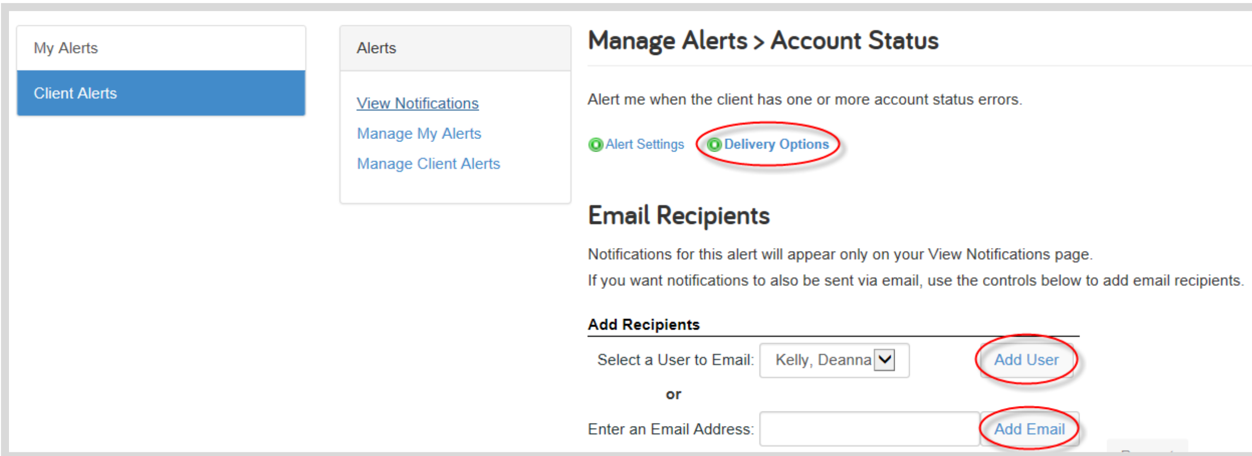
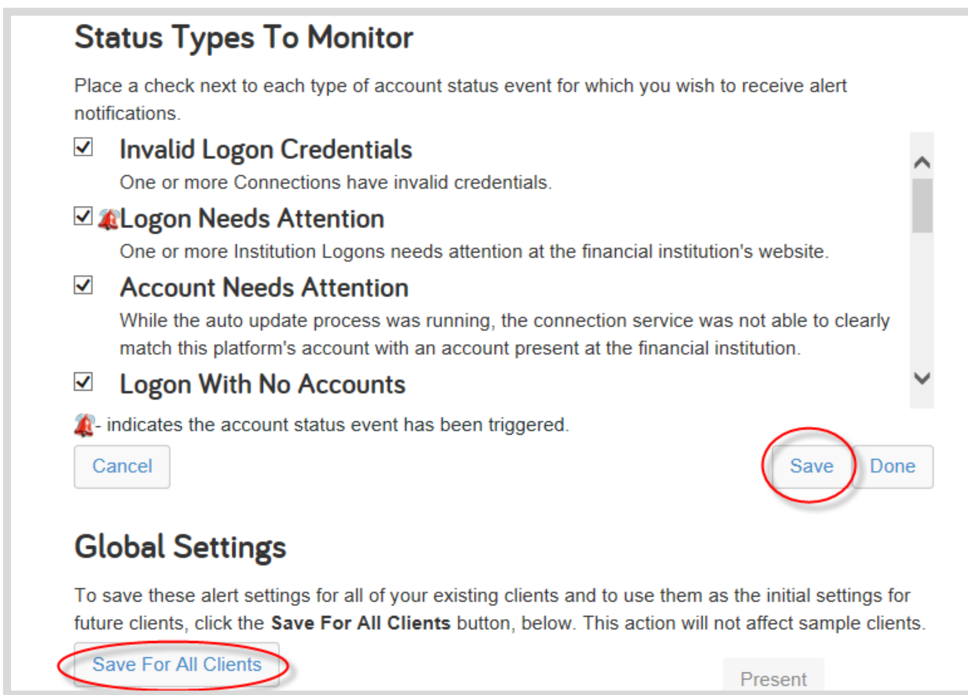
4. Make sure the alert is enabled and set the **Delivery Options** to be notified via e-mail.



5. Click **Save** or choose **Save for All Clients** to enable this Alert globally for all clients.



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