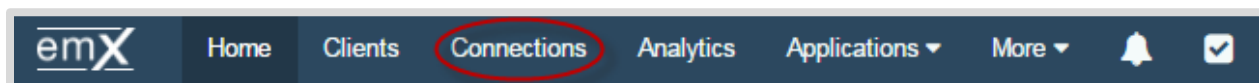


In this user guide, we will demonstrate how to establish a connection to online financial institution. The goal of the Connections area is to manage all data connections across all clients in one centralized location.

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

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

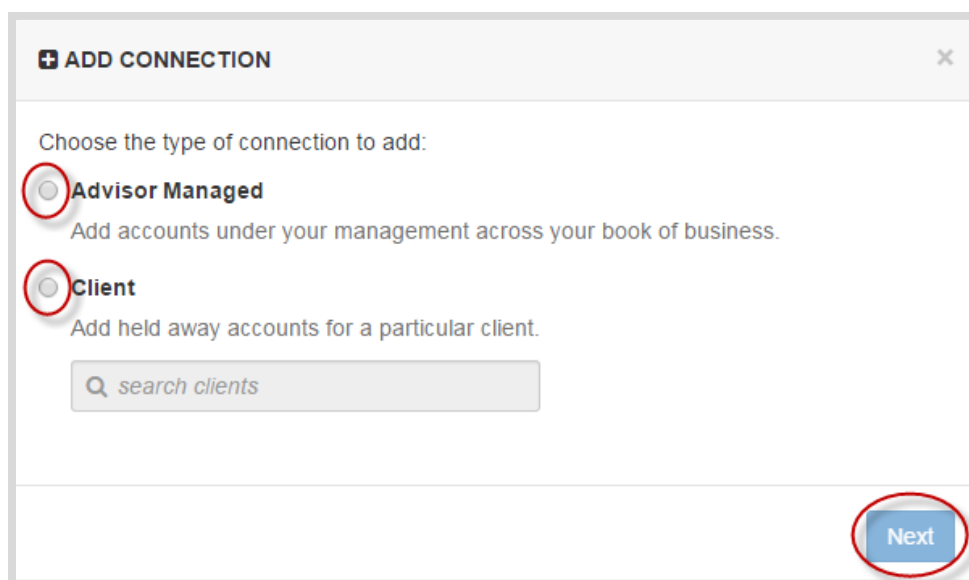


2. Click **Add Connection**.

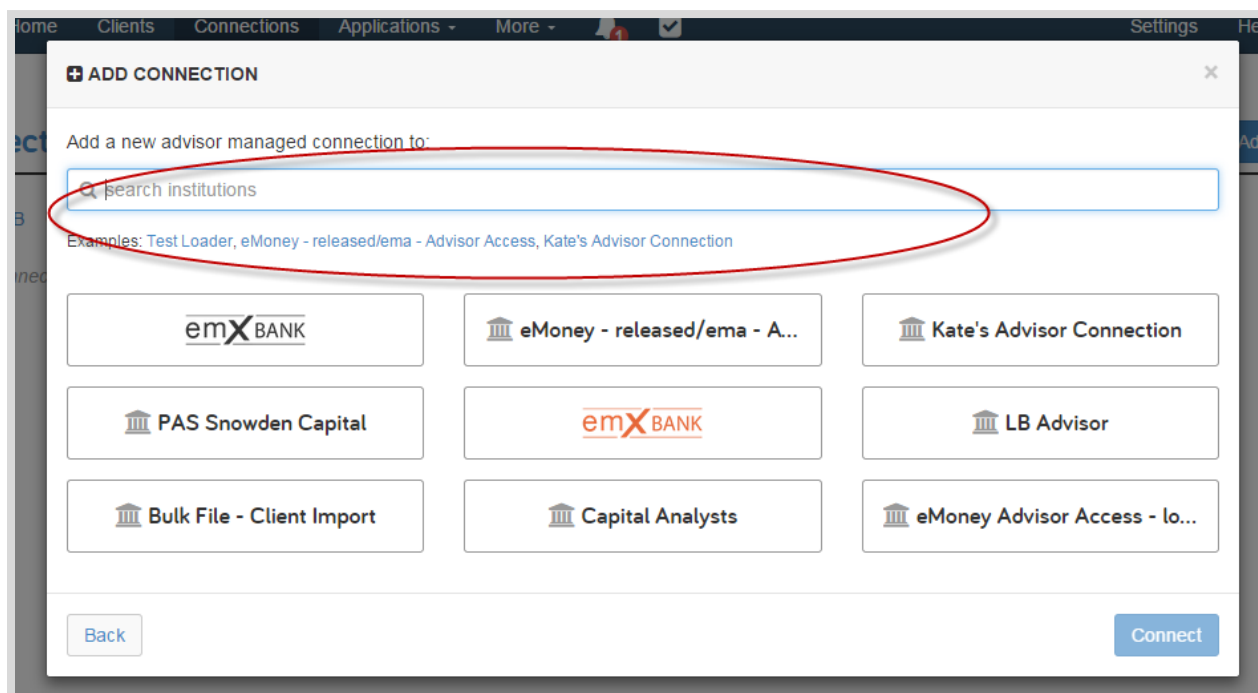


**Please Note:** Use the search to find clients or existing institutions.

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



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.

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**.

**ADD CONNECTION**

Add a new advisor managed connection to:

Q bank

Examples: Test Loader, eMoney - released/ema - Advisor Access, Kate's Advisor Connection

Sort results by: Popularity **Name**

CashEdge Test Bank (Agg) - Advisor Access  
cashedge.com

CashEdge Test Bank (Agg) 2 - Advisor Access  
cashedge.com

CashEdge Test Bank (Agg) 2FA - Advisor Access  
cashedge.com

**CashEdge Test Bank (Agg) - Advisor Acc...**

cashbank.cashedge.com

**User Name**

User Name

**Password**

Password

**Confirm Password**

Confirm Password

Back Connect

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

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

**ADD CONNECTION**

Add a new advisor managed connection to:

Q bank

Examples: Test Loader, eMoney - released/ema - Advisor Access, Kate's Advisor Connection

Sort results by: Popularity **Name**

CashEdge Test Bank (Agg) - Advisor Access  
cashedge.com

CashEdge Test Bank (Agg) 2 - Advisor Access  
cashedge.com

CashEdge Test Bank (Agg) 2FA - Advisor Access  
cashedge.com

**CashEdge Test Bank (Agg) - Advisor Acc...**

cashbank.cashedge.com

**User Name**

User Name

**Password**

Password

**Confirm Password**

Confirm Password

Back **Connect**

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

Go back to Connections

eMoney - released/ema - Advisor Access

Status Accounts Tickets

Details

eMoney - release...

Last Updated Just now

Actions

+ Add Accounts

Report a Problem

All Accounts

search accounts

All 123 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

You haven't added any accounts for this connection. Start adding accounts now.

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

+ ADD ACCOUNTS

Who do you want to add accounts for?

Search s

Sample, Joe and Bonnie

Sample, Joe and Bonnie

Next

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

**ADD ACCOUNTS**

Find new accounts for **Joe and Bonnie Sample**.

Client GUID is

Client GUID  
Account Number

+ Add Another

Back Next

**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.

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

**ADD ACCOUNTS**

Classify accounts for **Joe and Bonnie Sample**.

Account	Link To	Type
Blue Credit Card -\$2,368	A New Fact	Credit Card
Easy 123 Checking \$4,568	A New Fact	Checking
Electric Orange \$3,000	A New Fact	Checking
Fidelity 401(k) (401k) \$40,249	A New Fact	Traditional 401(k)
Fidelity Brokerage \$62,684	A New Fact	Taxable Investment

Back Link

11. The linked accounts are displayed in the middle of the screen. To add the next client's accounts, click + **Add Accounts** and repeat Steps 8 – 10.

Go back to Connections

**eMoney - released/ema - Advisor Access** Status Accounts Tickets

Details

eMoney - release...

Last Updated Just now

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Actions

**+ Add Accounts**

Report a Problem

**All Accounts** ▼

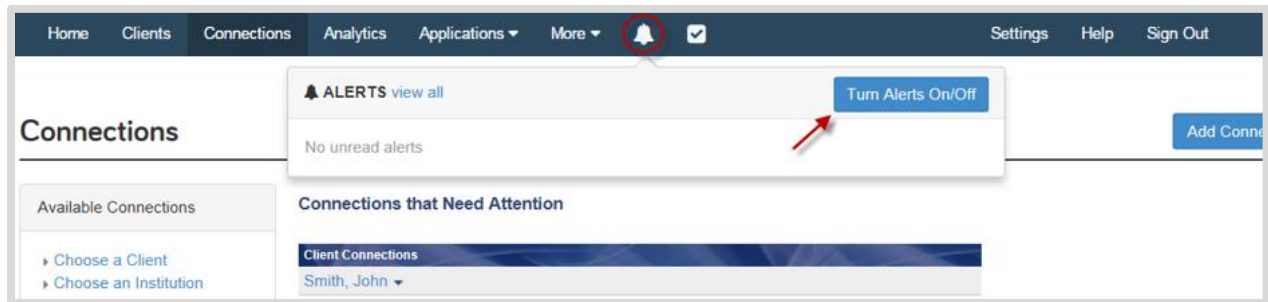
All 123 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Sample, Joe and Bonnie** + Add Refresh Freeze

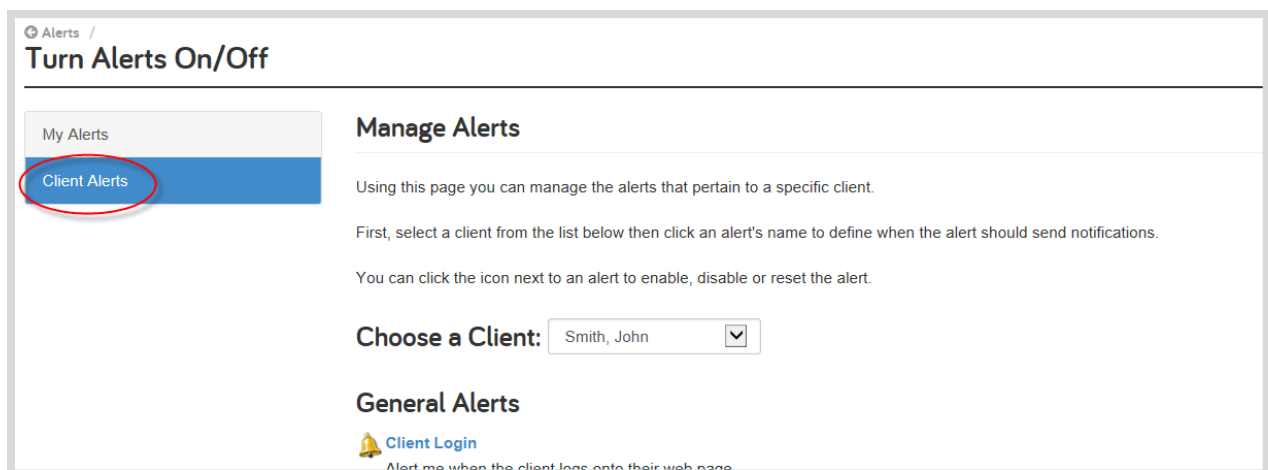
Name	Type	Value	
Blue Credit Card	Credit Card	-\$2,368 53 minutes ago	Unlink
Disability Policy	Disability	\$0 53 minutes ago	Unlink
Easy 123 Checking	Checking	\$4,568 53 minutes ago	Unlink

**Alerts: Connection Best Practices**

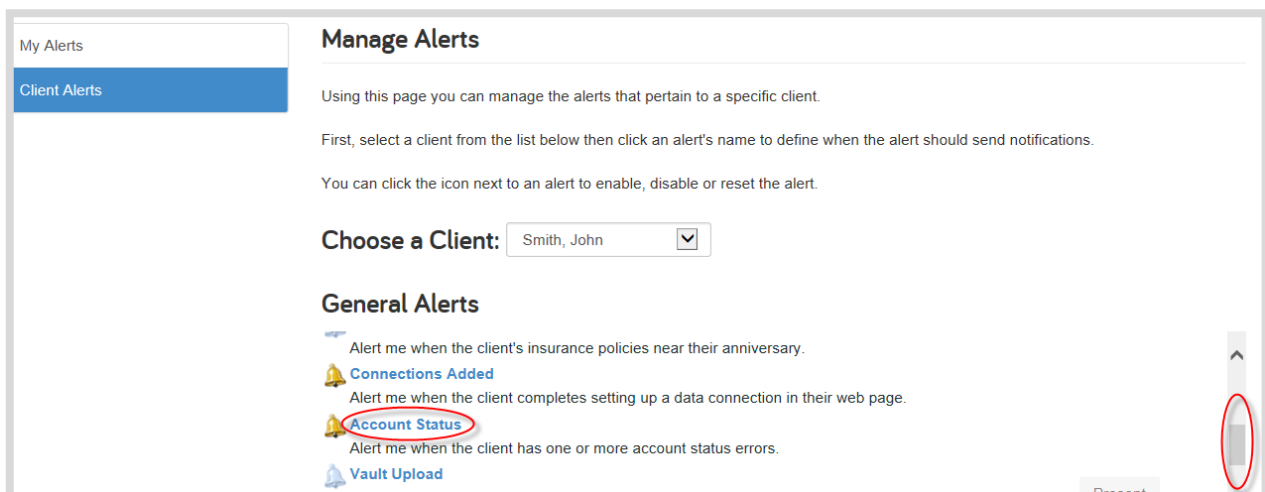
1. Click the bell icon in the navigation bar to access Alerts. Click, **Turn Alerts On/Off**.



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



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



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

**My Alerts**

- Client Alerts

**Alerts**

- [View Notifications](#)
- [Manage My Alerts](#)
- [Manage Client Alerts](#)

**Manage Alerts > Account Status**

Alert me when the client has one or more account status errors.

Alert Settings
  **Delivery Options**

**Email Recipients**

Notifications for this alert will appear only on your View Notifications page. If you want notifications to also be sent via email, use the controls below to add email recipients.

**Add Recipients**

Select a User to Email: Kelly, Deanna

or

Enter an Email Address:

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

**Status Types To Monitor**

Place a check next to each type of account status event for which you wish to receive alert notifications.

- Invalid Logon Credentials**  
One or more Connections have invalid credentials.
- Logon Needs Attention**  
One or more Institution Logons needs attention at the financial institution's website.
- Account Needs Attention**  
While the auto update process was running, the connection service was not able to clearly match this platform's account with an account present at the financial institution.
- Logon With No Accounts**

- indicates the account status event has been triggered.

**Global Settings**

To save these alert settings for all of your existing clients and to use them as the initial settings for future clients, click the **Save For All Clients** button, below. This action will not affect sample clients.