

This userguide will guide you through some best practices to keep in mind when customizing Client Site settings. Don't forget that features can be enabled or disabled on a per client basis or saved globally!

To manage the settings of a Client Site, click the **Client Site Globe Icon** and select **Manage**.



**Features** appear as tabs across the Client Site. You will want to familiarize yourself with each feature on your own eMoney profile to determine which features to use with your Clients. It is recommended to start small, with fewer features and build upon the experience as you and your Clients become more familiar with the environment. It is much easier to enable features down the road than to take them away!

- Users
- Features**
- Editing Options
- Onboarding Options
- Reports
- Report Favorites
- Report Order
- Theme
- Organizer
- Document Suggestions
- Investments
- Vault

## Features

Place a check next to each feature that should be visible to the client on their website.

### Primary Features

The items you select will appear on your client's website.

**Casey and Hannah Overview**

- Home
- Organizer
- Goals
- Spending
- Investments
- Vault
- Reports

**Note:** Be sure to pay special attention to the Other Features located towards the bottom of the page. Enabling Interactive How-To's will give your Clients access to assisted & guided workflows!

## 1 | Client Site Setup

Giving your Clients an appropriate level of access with eMoney's **Editing Options** is an important customization. If you want your Client to be able to add and modify information on their site, then you will set Facts and Accounts to **May view and make changes to Data**. Keep in mind, the Client's Organizer and your Facts are bi-directional, meaning if the Client changes something on their Organizer, it will automatically update on your Facts. The alternative option is to set the environment to **May View Data** which allows your Client to only read the facts that you have entered. For Connections, the best practice is to *always* keep the setting on **Can Manage Connections!** This allows your Client to link accounts to their site that you do not manage, giving you a wholistic view of their financial condition.

### Facts and Accounts

You can allow your clients to modify their facts and accounts.

Casey and Hannah Overview

May view and make changes to Data ▼

NOTE: This client's settings match the current default settings.

### Connections

You can allow your client to create and manage connections to their institutions.

Casey and Hannah Overview

Can Manage Connections ▼

Many advisors choose to enable Client editing options for a set amount of time, then disable it when they begin analyzing the clients plan to avoid any further changes to the data.

**Onboarding** will walk your Clients through a dynamic, automated fact-finding process that helps to populate their profile. To send a client through Onboarding, their Facts and Accounts editing options must be set to **May view and make changes to Data**. Note the ability to customize the welcome message. Once your Client has finished the workflow, they will gain access to their site. At any point they can dismiss it, but the workflow will re-appear until it has been completed or disabled on the advisor side.

### Onboarding Options

Choose whether your client should complete the Onboarding wizard, and personalize their Onboarding experience.

**Send client through Onboarding**  
This client has never completed Onboarding

**Welcome Message**

Welcome to your personal financial website! The first step in financial planning is helping us get to know you. In this short exercise, you'll begin your path to a financial plan by answering some questions about your family, your goals, your retirement plans, and the property you own.

Save Changes
Reset to Default

**Tip:** It is best practice to let your Clients know ahead of time that they will be sent through Onboarding.

The **Organizer** is your Clients version of Facts. Depending on the Editing Options you set, they may or may not have functionality to add and modify the data. The Organizer can be customized by disabling any of the pages you may not want your Client to have access to.

- Accounts**
- Real Estate, Property, and Business**
- Family and Friends**
- Professional Contacts**
- Income, Expenses, and Savings**
- Future Goals**
- Financial Priorities**
- Risk Tolerance**

**Document Suggestions** act as a placeholder in facts/accounts for your client to upload important and related files that will also be stored in their Vault. Use the Manage Defaults link to manage suggestions globally. On the client level, you can check and uncheck which suggestion will appear on their website.

The screenshot shows a web interface with a navigation bar at the top containing five tabs: 'People', 'Real Estate', 'Businesses', 'Personal Properties', and 'Accounts'. The 'People' tab is currently selected. Below the navigation bar, the heading 'Client/Spouse' is displayed. Underneath, there is a list of four document suggestions, each with a checked checkbox: 'Birth Cert', 'Passport', 'Drivers License', and 'Insurance Card'.

On the **Investments** page you are able to enable or disable Intraday Pricing and Investment Transactions for your client's website.

**Analysis:** chart that plots net change in total value.

**Intraday Pricing:** Feature that reprices the market value of investments based on last nights close in units, 20-minute delay.

**Investment Transactions:** The Transactions tab displays all investment transactions retrieved from your online accounts. The number of transactions found is displayed at the top of the results list.

**Tip:** Many users mistake Intraday Pricing for performance reporting. You may want to consider disabling for certain Clients or take special care to fully explain the feature.

The **Vault** page allows you to enable/disable your Client's ability to upload documents as well as hide any "empty" folders from the client. Since Clients can only upload into 2 Vault folders (my documents & shared documents), it is best practice to **hide empty folders**. The max file size for uploading is 30mb.

Casey and Hannah Overview	
Allow client to upload files?	Yes ▼
Total in use for this client:	0.00
Total uploaded by this client:	0.00
Hide empty folders from client?	Yes ▼

The **Alerts** page allows you to entitle specific alerts for your Client to use on their site. Keep in mind that you're only enabling which Alerts to make available to your Client. They will be responsible for enabling and setting parameters!

Enable Alerts	
Casey and Hannah Overview	
Client can receive notifications	▼
NOTE: This client's settings match the current default settings.	
<b>Choose Alerts</b>	
Place a check next to each alert that should be visible to this client under alert settings.	
Casey and Hannah Overview	
<input checked="" type="checkbox"/>	Bank Fees
<input checked="" type="checkbox"/>	Budget Exceeded
<input checked="" type="checkbox"/>	Date Reminders
<input checked="" type="checkbox"/>	End of Year Planning Reminder
<input checked="" type="checkbox"/>	Excess Cash Position
<input checked="" type="checkbox"/>	FICA Maximum Approaching