

Alliance Partners

In this user guide, we will demonstrate how to add Alliance Partners. By setting up an Alliance Partner you can grant one or more colleagues access to your Clients' data for review.

1. From the **Home** tab, click **Settings** then click **Alliance Partners**.

Knowledge Base Home Clients Connections Analytics Applications More Settings Help Sign Out

Go back to Home

Settings

- Preferences
- My Info**
- General
- Sharing Rules
- Alliance Partners**
- Alerts
- Client History
- Branding

My Profile

Enter your professional information below.

Basic Broker Dealer

Contact Info

First Name: Mark
Last Name: Masters
Display Name:
Company Name: eMoney Advisor
Website URL:
Address: 8910 University Center Lane
City, State, Zip: San Diego CA 92122
Business Phone: (888) 888-8888

Help

This information is used by your clients to contact you.

2. Click **Add Alliance Partner**.

Go back to Settings

Settings

- Preferences
- My Info

Alliance Partners

By setting up an Alliance Partner you can grant one or more colleagues access to your clients' data for review.

Add Alliance Partner

Alliance Partners

3. Enter the associated contact information, User Name and Password, and click **Create**.

Enter Contact Information

Name (First/Last):

Company Name:

Address:

City, State, Zip:

Business Phone:

Cell Phone:

Business Fax:

Business E-mail:

Select User Name and Password

User Name:

Sample Password: **Chix1Pep9**

Password:

Confirm Password:

Alliance Partners

- To share a Client, make a selection from the Client list, then click **Share Clients**.

Alliance Partners

[All Alliance Partners](#) > [Client List](#) > [Share Clients](#)

Select the clients that **Mrs. CPA** can access. The alliance partner will be able to view financial information for all of the clients you select.

To share a client with this alliance partner, make a selection in list below and click the **Share Client** link.

Esposito, Jeremy and Lorrie

FP, Kate and Tim

Franklin, Benjamin and Deborah

Geller, Ross and Rachel

Goolia, Julia

Guy, New

Hansen, Caitlin and Parker

Insurance/Esate, Jeremy and Lorrie

Jackson, Steven and Suzie

Johnson, Client and Spouse

Press Ctrl or Shift while clicking to select multiple clients

Share Clients

Cancel

- The **Permission Required** box designates if a client must grant permission for the Alliance Partner to access their financial data.

Alliance Partners

[All Alliance Partners](#) > [Client List](#)

This page lists all the clients to which **Mrs. CPA** may have access. Client approval may be required in some cases (indicated by a check in the *Permission Required* column) before the alliance partner can actually access the client's information.

Client / Owner	Permission Required?	Status	Approval Date
Esposito, Jeremy and Lorrie Mark Masters	<input checked="" type="checkbox"/>	--	--

Update Permission

Share More Clients

Alliance Partners

- Place a checkmark in the box to require the Client to grant permission to the Alliance Partner then click **Update Permission**. If this box is checked, the Client Website notifies the Client when the advisor requests permission for an Alliance Partner to access their data. The Client must Grant or Deny permission for the Alliance Partner to view their data.

Alliance Partners

[All Alliance Partners](#) > [Client List](#)

This page lists all the clients to which **Mrs. CPA** may have access. Client approval may be required in some cases (indicated by a check in the *Permission Required* column) before the alliance partner can actually access the client's information.

Client / Owner	Permission Required?	Status	Approval Date
Esposito, Jeremy and Lorrie Mark Masters	<input checked="" type="checkbox"/>	--	--

Update Permission
Share More Clients

Please Note: To share more Clients to this Alliance Partner click **Share More Clients**

- To go back to your Alliance Partner, select **All Alliance Partners**.

Alliance Partners

All Alliance Partners > [Client List](#)

This page lists all the clients to which **Mrs. CPA** may have access. Client approval may be required in some cases (indicated by a check in the *Permission Required* column) before the alliance partner can actually access the client's information.

Client / Owner	Permission Required?	Status	Approval Date
Esposito, Jeremy and Lorrie Mark Masters	<input checked="" type="checkbox"/>	--	--

Update Permission
Share More Clients

Alliance Partners

8. To edit the preferences for the Alliance Partner created select the **Actions** drop down.

The screenshot shows the 'Alliance Partners' management page. At the top right is a blue button labeled 'Add Alliance Partner'. Below the header is a descriptive sentence: 'By setting up an Alliance Partner you can grant one or more colleagues access to your clients' data for review.' A table lists the partners with columns for Name, Owner, User Name, and Phone. One partner is listed: 'CPA, Mrs. a@b.com' owned by 'Mark Masters' with user name 'MRSCPA' and phone '---'. To the right of this row is an 'Actions' dropdown menu, which is highlighted with a red box. The dropdown menu contains the following options: Client List, Available Pages, Available Reports, Client Vault Access, Notifications, Reset Password, and Delete.

9. From the Actions drop down menu click **Client List** to view any shared Client.

This screenshot is identical to the previous one, showing the 'Alliance Partners' management page. However, in the 'Actions' dropdown menu, the 'Client List' option is now highlighted with a red box, indicating it has been selected.

Alliance Partners

10. From the Client List view select **Update Permission** or **Share More Clients**.

Alliance Partners

All Alliance Partners > **Client List**

This page lists all the clients to which **Mrs. CPA** may have access. Client approval may be required in some cases (indicated by a check in the *Permission Required* column) before the alliance partner can actually access the client's information.

Client / Owner	Permission Required?	Status	Approval Date
Esposito, Jeremy and Lorrie Mark Masters	<input type="checkbox"/>	--	--

Update Permission **Share More Clients**

11. From the Actions drop-down click **Available Pages** to select which pages will appear on the Alliance Partners website.

12. Check the corresponding box to Add or Remove Pages then click **Save Changes**.

Alliance Partners

All Alliance Partners > **Available Pages**

Use this page to select the pages that will appear on **Mrs. CPA's** web site. Place a check next to each page that should be visible to the alliance partner. You can drag and drop each item to reorder the list.

Mrs. CPA's Pages	Default Pages
<input checked="" type="checkbox"/> Client Dashboard	<input checked="" type="checkbox"/> Client Dashboard
<input checked="" type="checkbox"/> Reports	<input checked="" type="checkbox"/> Reports
<input checked="" type="checkbox"/> The Vault	<input checked="" type="checkbox"/> The Vault

NOTE: This Alliance Partner's Page selections match the current Default Page selections.

Save Changes Save for All Alliance Partners Save as Default Copy Default Pages

Alliance Partners

13. From the Actions drop down menu Click **Available Reports** to choose which Reports will be available on the Alliance Partners website

14. Check the corresponding box to Add or Remove Reports and click **Save Changes**.

Alliance Partners

All Alliance Partners > **Available Reports**

Choose the reports that you would like to have available on Mrs. CPA's website. [check all]

<p><input checked="" type="checkbox"/> Account Information</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Account Information <p><input checked="" type="checkbox"/> Assets</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Assets <input checked="" type="checkbox"/> Tax Type <p><input checked="" type="checkbox"/> Balance Sheet</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Balance Sheet <input checked="" type="checkbox"/> At Death <input checked="" type="checkbox"/> Out of Estate <input checked="" type="checkbox"/> Trusts & Other Entities 	<p><input checked="" type="checkbox"/> Fact Summary</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Family Information <input checked="" type="checkbox"/> Property <input checked="" type="checkbox"/> Assets <input checked="" type="checkbox"/> Liabilities and Expenses <input checked="" type="checkbox"/> Insurance <input checked="" type="checkbox"/> Income And Savings <input checked="" type="checkbox"/> Estate <input checked="" type="checkbox"/> Assumptions <input checked="" type="checkbox"/> Growth Rates
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Save Changes

Save For All Alliance Partners

Save As Default

Copy Default Choices

15. From the Actions drop down menu Click **Client Vault Access** to select a Client and configure the Client's Vault. Click the **Client Name**.

Alliance Partners

All Alliance Partners > **Client Vault Access**

Use this page to select a client in order to configure Mrs. CPA's access to their client vault.

Client	Owner
Esposito, Jeremy and Lorrie	Masters, Mark

Alliance Partners

16. Specify the level of functionality (add, edit, remove) for the folders and files made available to the Alliance Partner.

Alliance Partners

All Alliance Partners > Client Vault Access > Jeremy and Lorrie Esposito

Mrs. CPA's Settings For Jeremy and Lorrie Esposito's Vault

Client Vault Access Permission

Full Access (Default Setting) ▾

Read Access

Read & Upload Access

Full Access (Default Setting)

Advisors

Deeds

Insurance

Investments

Legal

Other

Reports

Archived Reports

Balance Sheet-draft.docx

Shared Documents

Taxes

To Do

Save Changes

Save For All Alliance Partners

Save As Default

Copy Default Settings

- **Read Access** allows the Alliance Partner to only view folders and read files made available by the advisor.
- **Read & Upload Access** allows the Alliance Partner to view folders and read files made available by the advisor and upload files to the vault.
- **Full Access** allows the Alliance partners to add, edit, and remove folders and files made available by advisor.

Alliance Partners

- Place a **Checkmark** next to a folder to allow the Alliance Partner access or Un-check the folder to remove access.
- Click **Save Changes**.
- From the Actions drop down menu Click **Notifications** to specify settings for the Alliance Partner.

Notifications

All Alliance Partners > **Notifications**

Use this page to specify the notification settings for **Mrs. CPA**.

Mrs. CPA's Settings	Default Settings
Automatically send e-mail notifications to alliance partner? Yes ▾	Yes

NOTE: This alliance partner's Notification selections match the default settings.

Save Changes

Save For All Alliance Partners

Save As Default

Reset to Default Settings

- To Reset an Alliance Partner Password click **Reset Password** from the Actions drop down menu, enter a Temporary Password and click **Set Password**.

Alliance Partners

All Alliance Partners > Reset Password

User Name: **MRSCPA**
Sample Password: **TytJaix1**

Password:
 Confirm Password:

Set Password

Cancel

About Passwords and Security

For security purposes, passwords must include a mixture of numbers and both upper and lower case characters. A good password is a password that is not easily guessed. The alliance partner will have to change their password to a password of their own choosing the first time they log in. The user will be notified via email of the password you have set.