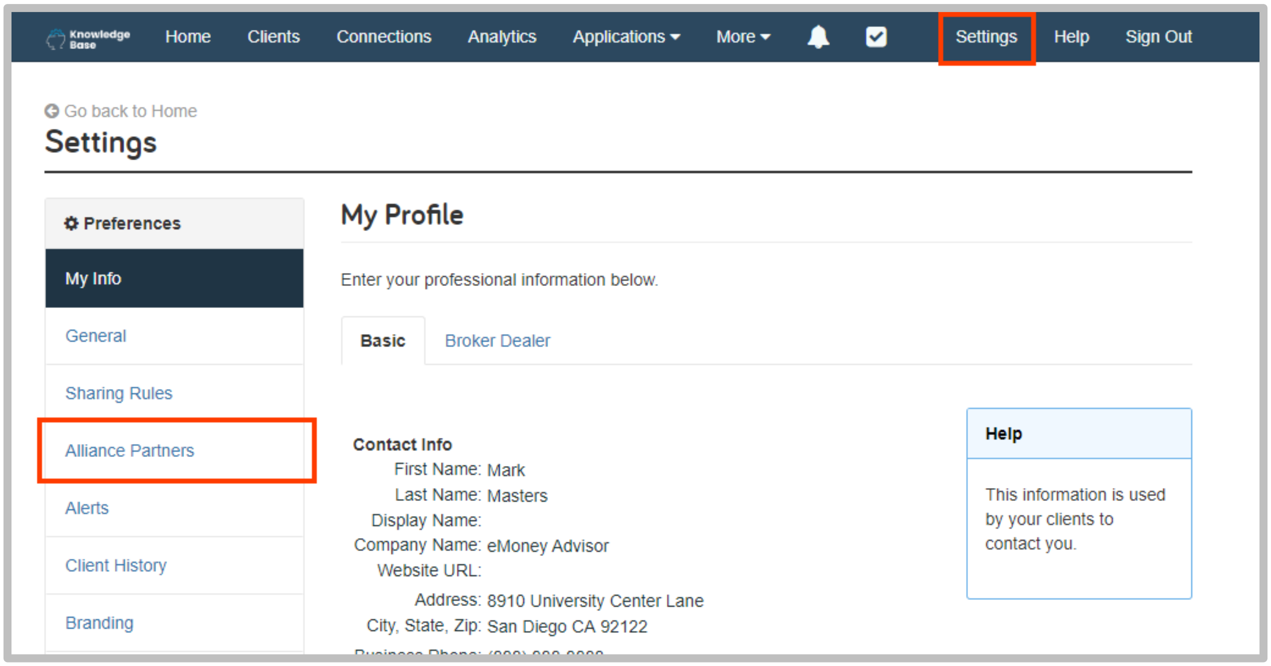
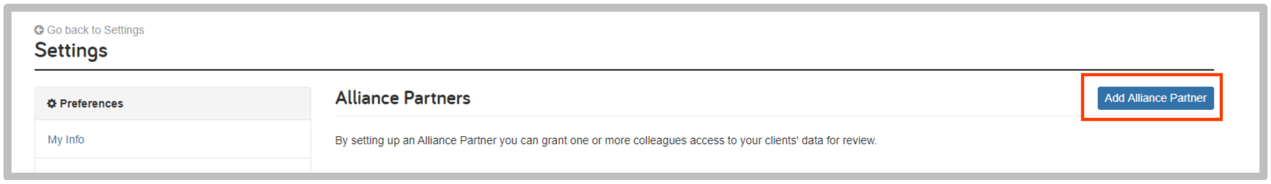
Alliance Partners

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**.

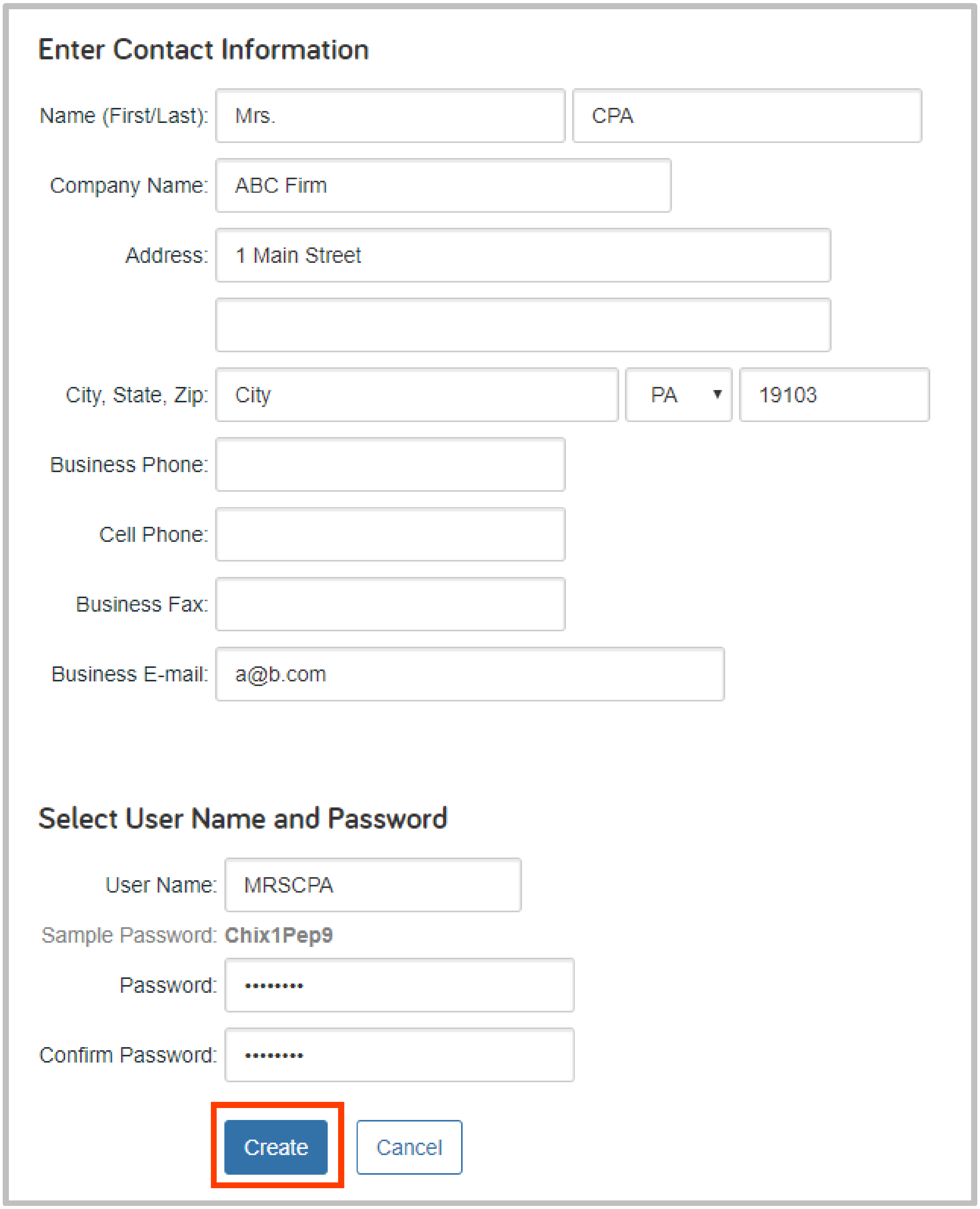


2. Click **Add Alliance Partner.**



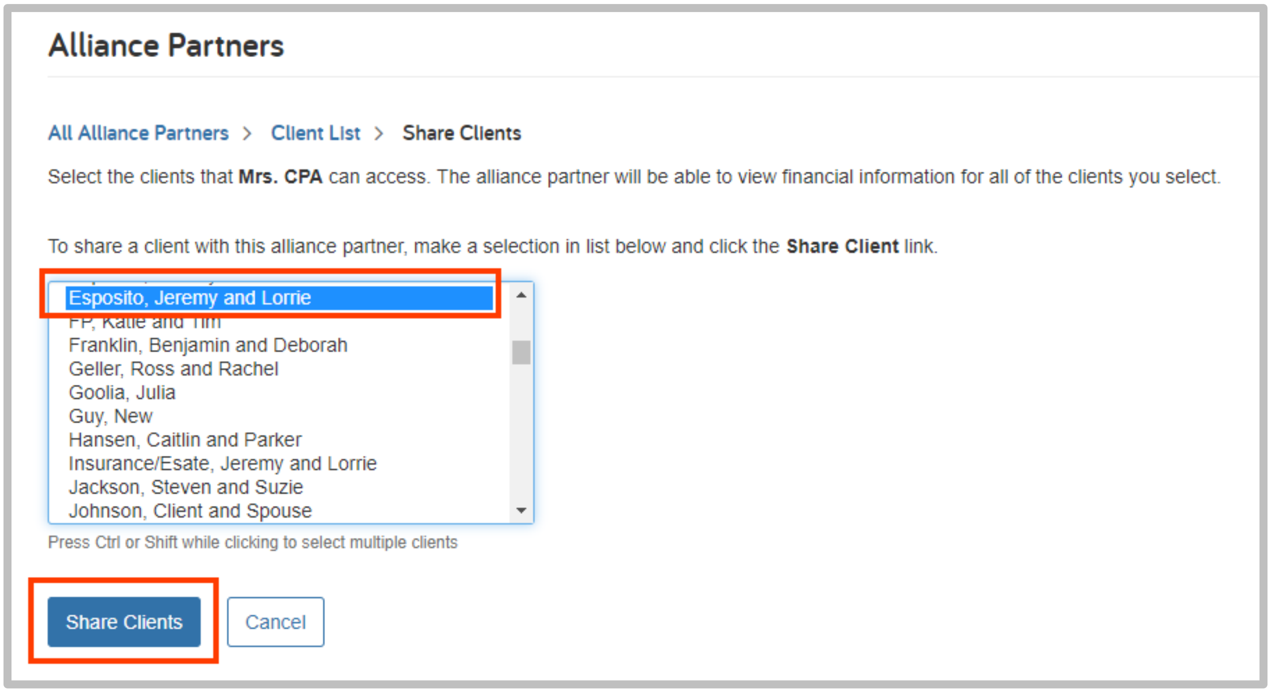
Alliance Partners

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

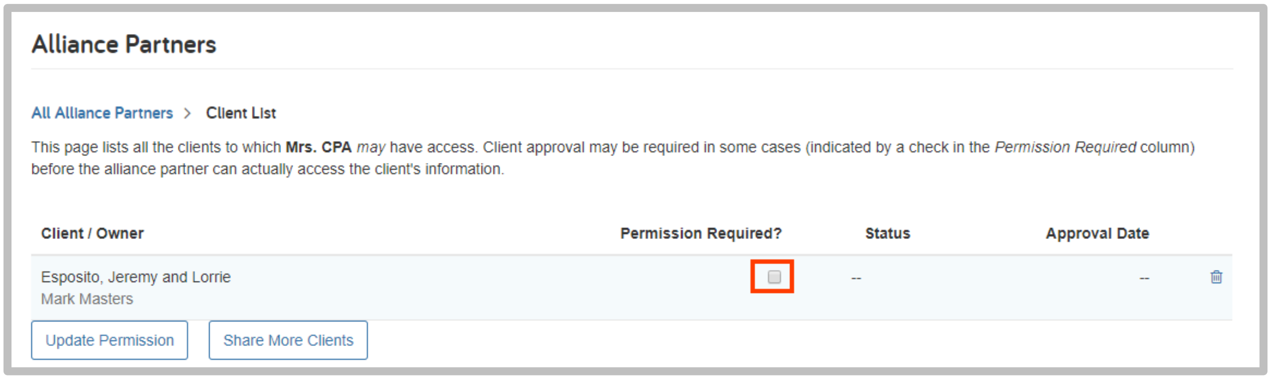


Alliance Partners

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



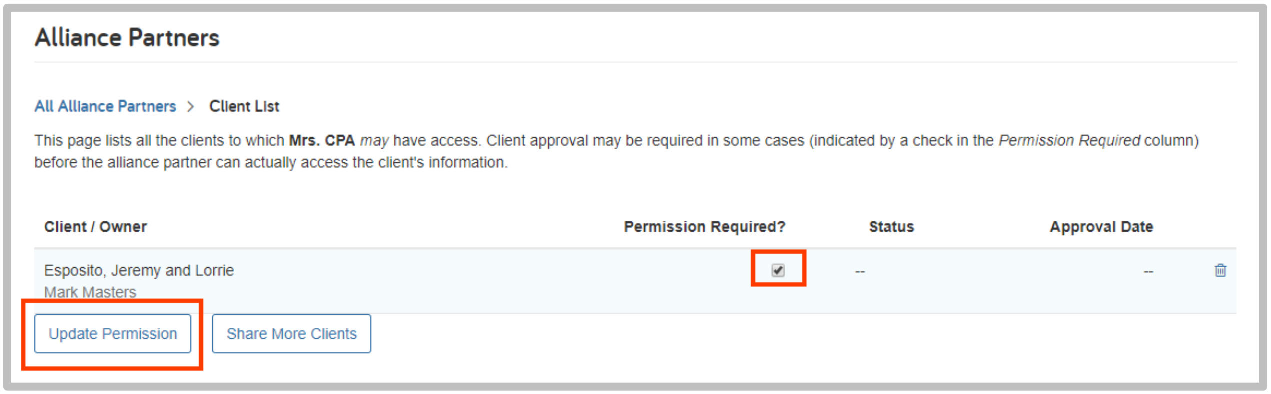
5. The **Permission Required** box designates if a client must grant permission for the Alliance Partner to access their financial data.



Knowledge Base

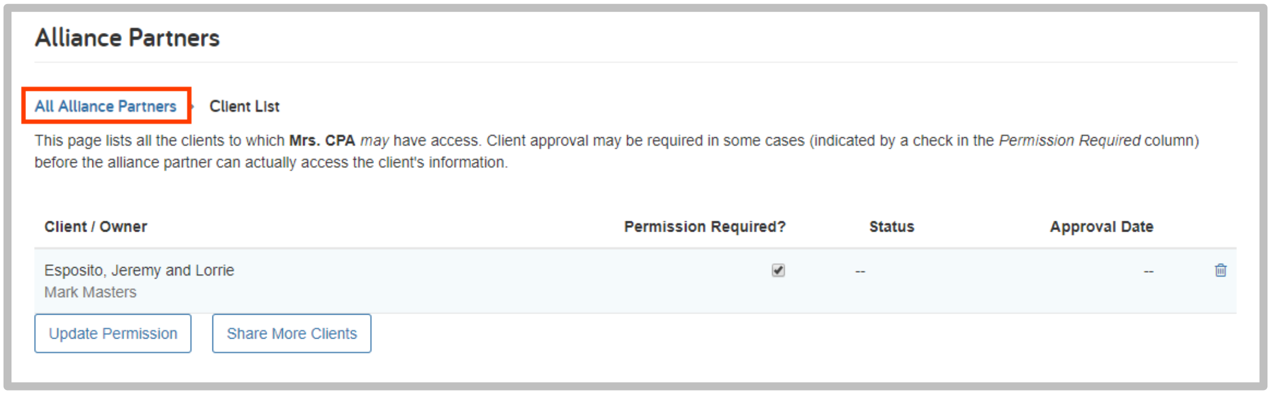
Alliance Partners

6. 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.



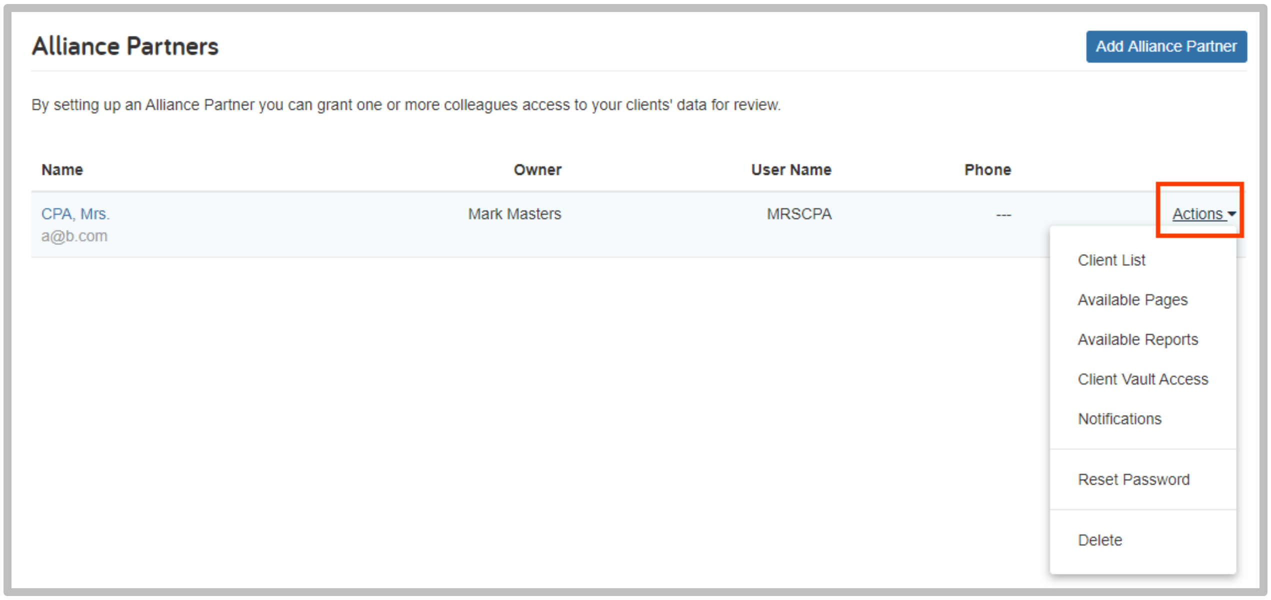
Please Note: To share more Clients to this Alliance Partner click **Share More Clients**

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

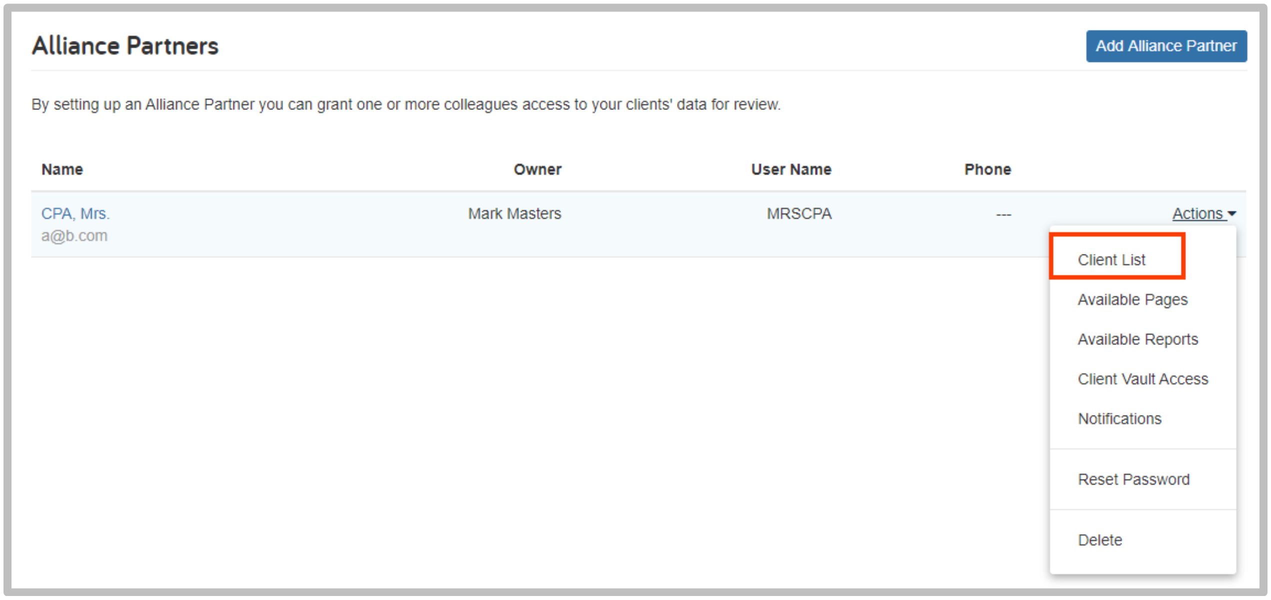


Alliance Partners

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



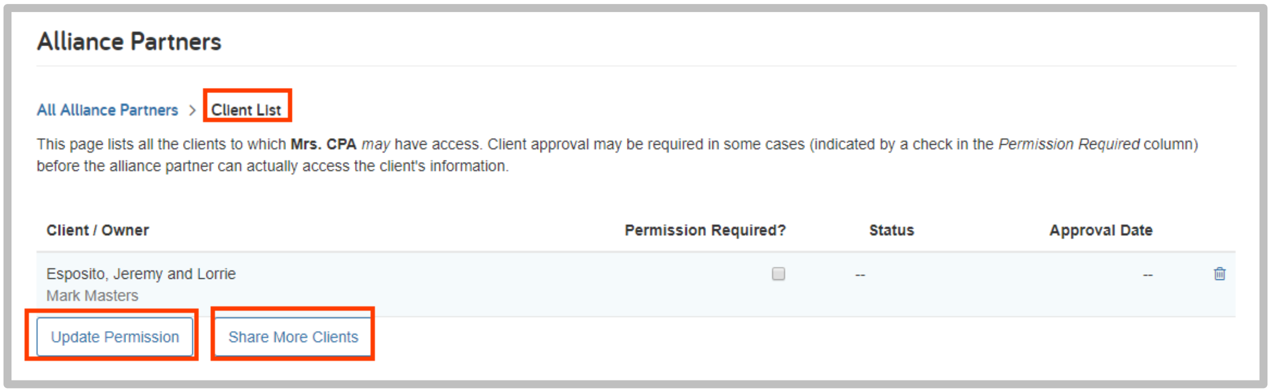
9. From the Actions drop down menu click **Client List** to view any shared Client.



Knowledge Base

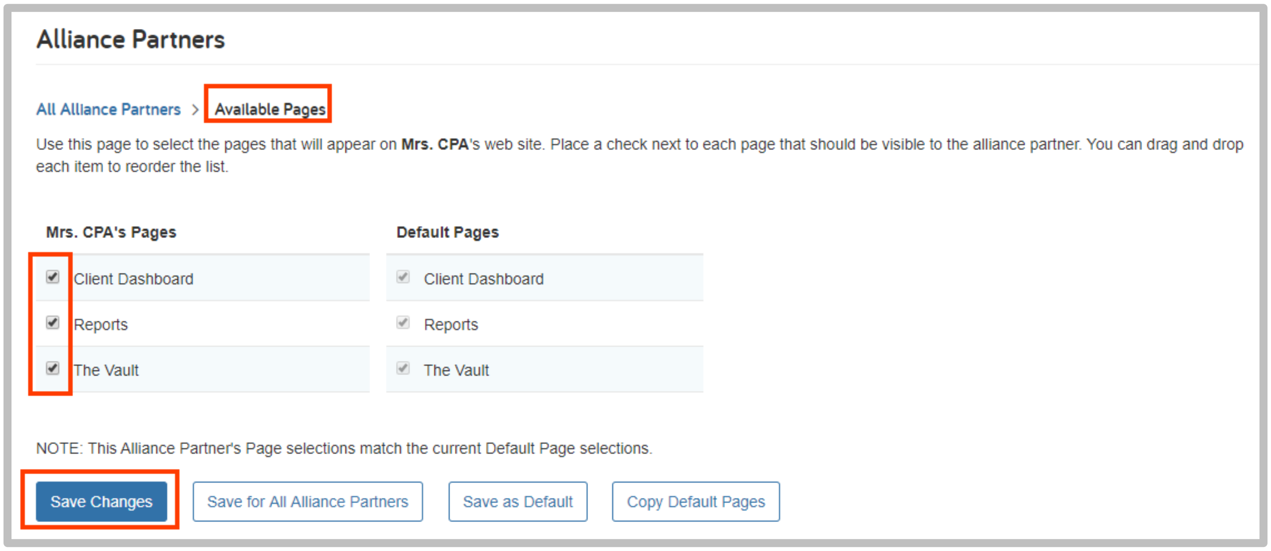
Alliance Partners

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

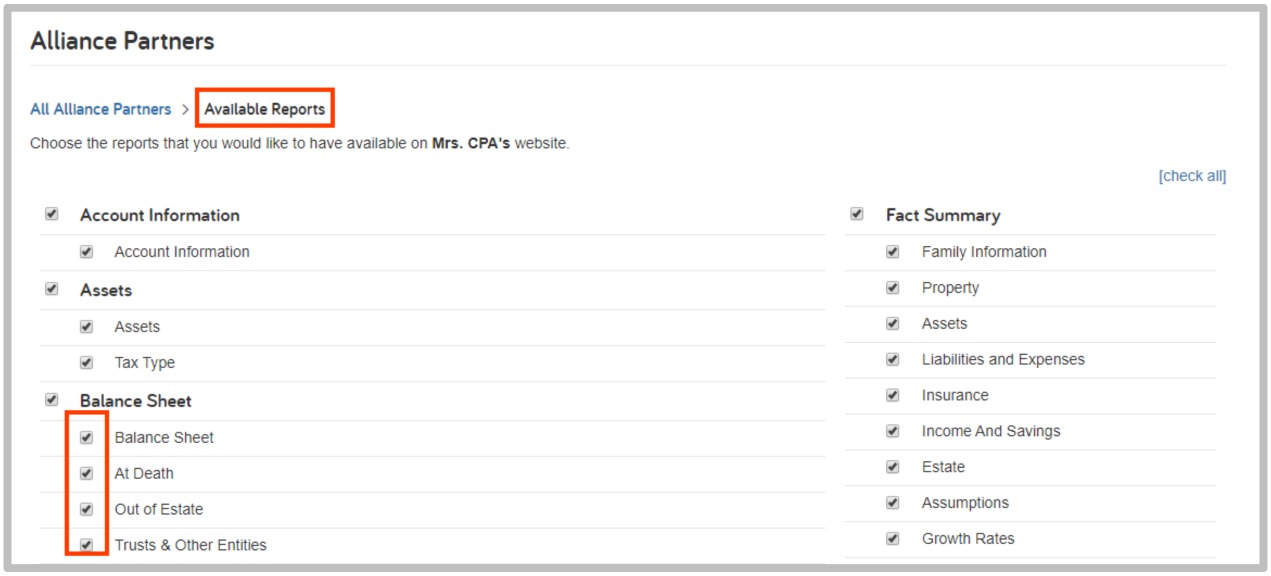


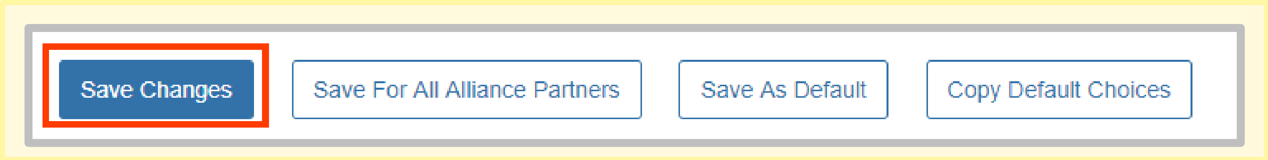
Knowledge Base

Alliance Partners

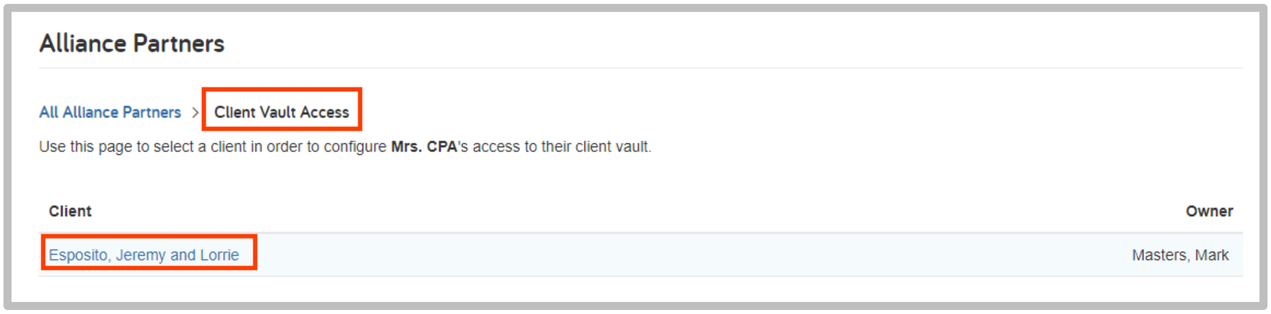
13. From the Actions drop down menu Click **Available Reports** to choose which Reports will be available on the Alliance Partners website

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



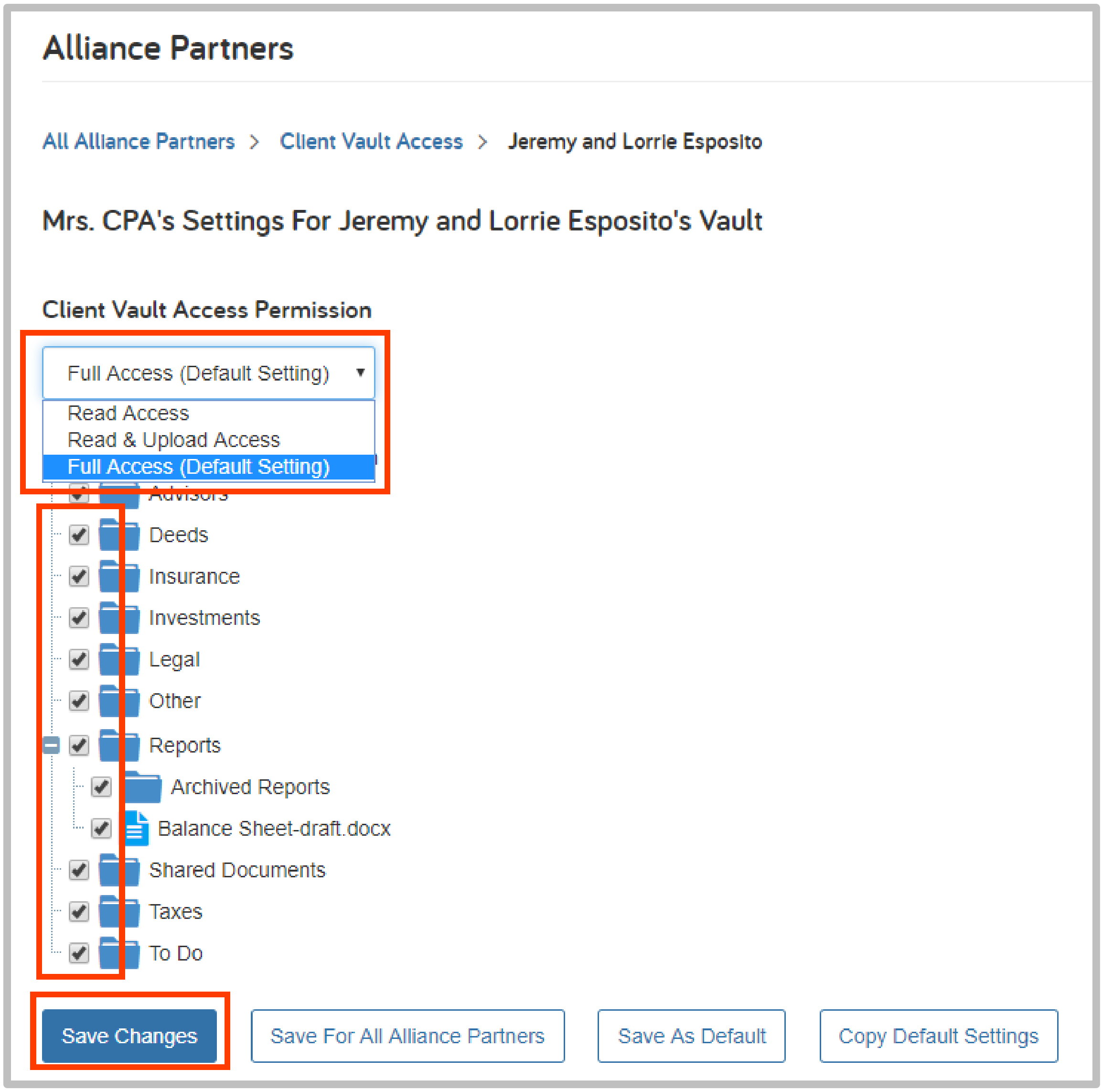


15. From the Actions drop down menu Click **Client Vault Access** to select a Client and configure the Client's Vault. Click the **Client Name.**



Alliance Partners

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



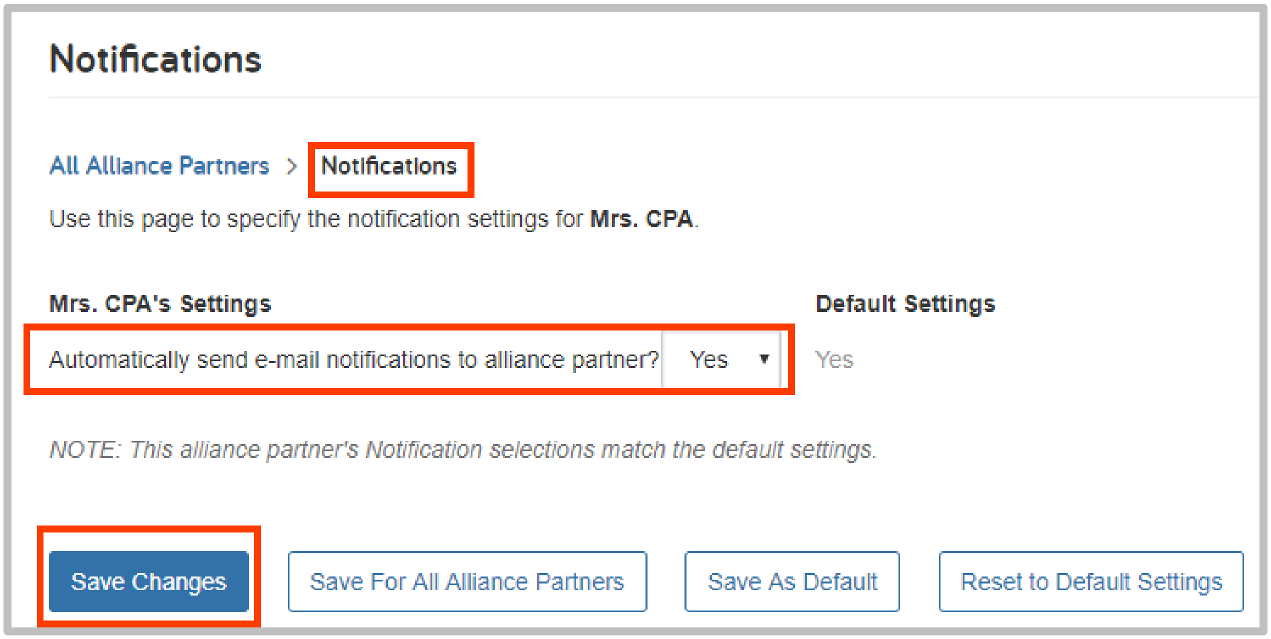
- **Read Access** allows the Alliance Partner to only view folders and read files made available by the advisor.
- **Read & Upload Access** allows the Alliance Partner to view folders and read files made available by the advisor and upload files to the vault.
- **Full Access** allows the Alliance partners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

Alliance Partners

17. Place a **Checkmark** next to a folder to allow the Alliance Partner access or Un-check the folder to remove access.

18. Click **Save Changes.**

19. From the Actions drop down menu Click **Notifications** to specify settings for the Alliance Partner.



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