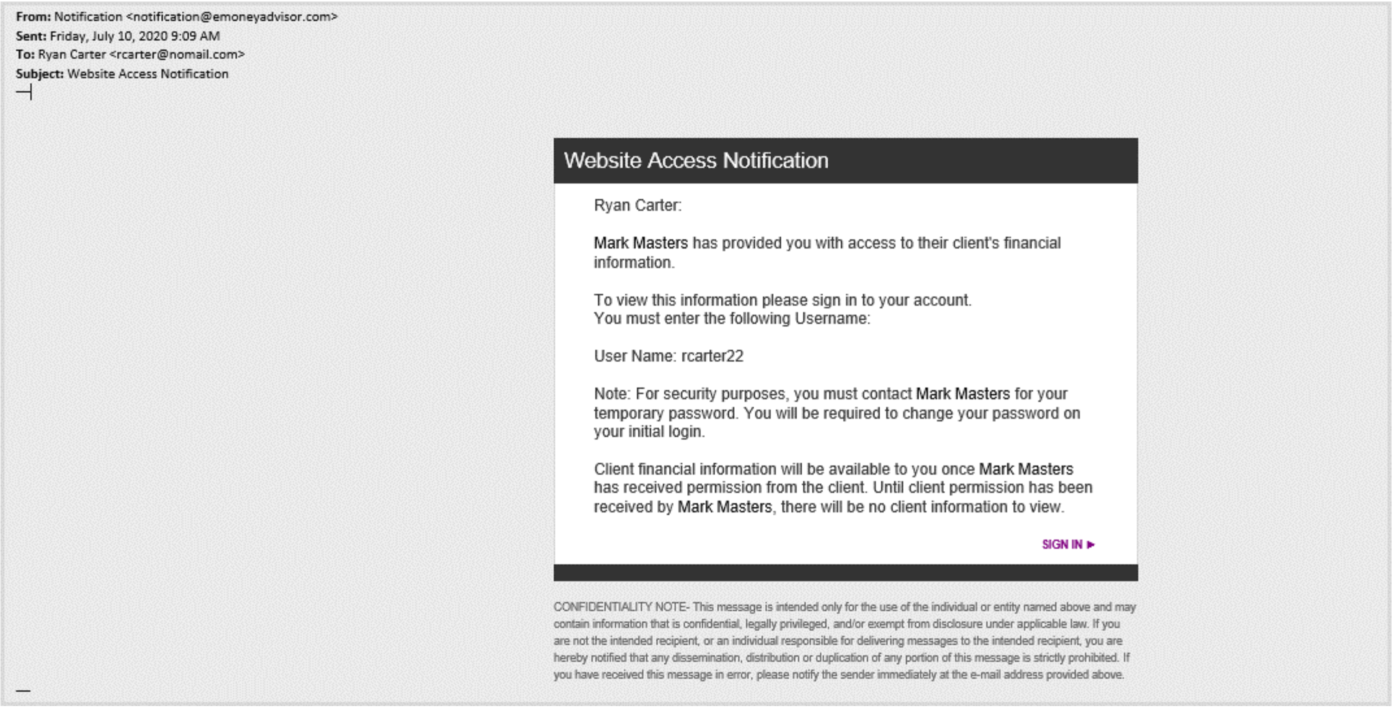
# Alliance Partner Access

Alliance Partners are individuals that do not have their own eMoney license, however, an eMoney Advisor may still want to share Client information with them. Note that Alliance Partners will have read only access, but they can be granted permission to upload documents to the Vault.

## Email Notification

The Alliance Partner will receive an email notification that they now have access to the application.


From: Notification <notification@emoneyadvisor.com>
Sent: Friday, July 10, 2020 9:09 AM
To: Ryan Carter <rcarter@nomail.com>
Subject: Website Access Notification

Website Access Notification

Ryan Carter:

Mark Masters has provided you with access to their client's financial information.

To view this information please sign in to your account.
You must enter the following Username:

User Name: rcarter22

Note: For security purposes, you must contact Mark Masters for your temporary password. You will be required to change your password on your initial login.

Client financial information will be available to you once Mark Masters has received permission from the client. Until client permission has been received by Mark Masters, there will be no client information to view.

SIGN IN ▶

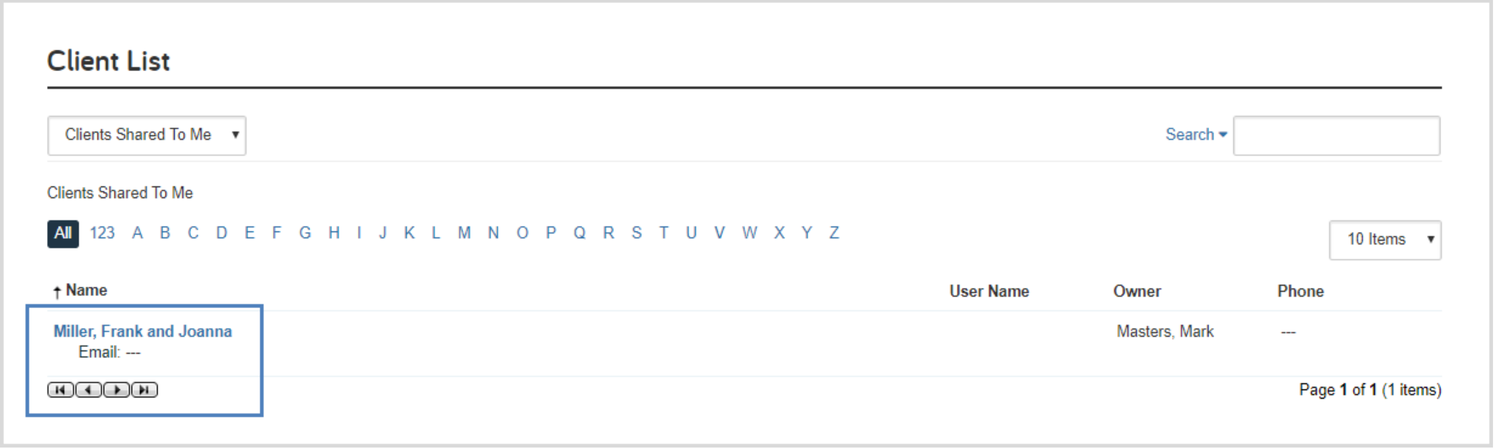
CONFIDENTIALITY NOTE- This message is intended only for the use of the individual or entity named above and may contain information that is confidential, legally privileged, and/or exempt from disclosure under applicable law. If you are not the intended recipient, or an individual responsible for delivering messages to the intended recipient, you are hereby notified that any dissemination, distribution or duplication of any portion of this message is strictly prohibited. If you have received this message in error, please notify the sender immediately at the e-mail address provided above.

## Setting the Password and Security Questions

Upon initial login, the Alliance Partner will need to reset their password and set 3 security questions.

## Viewing Clients

The Alliance Partner will see a list of Clients that the Advisor has permitted them to view.



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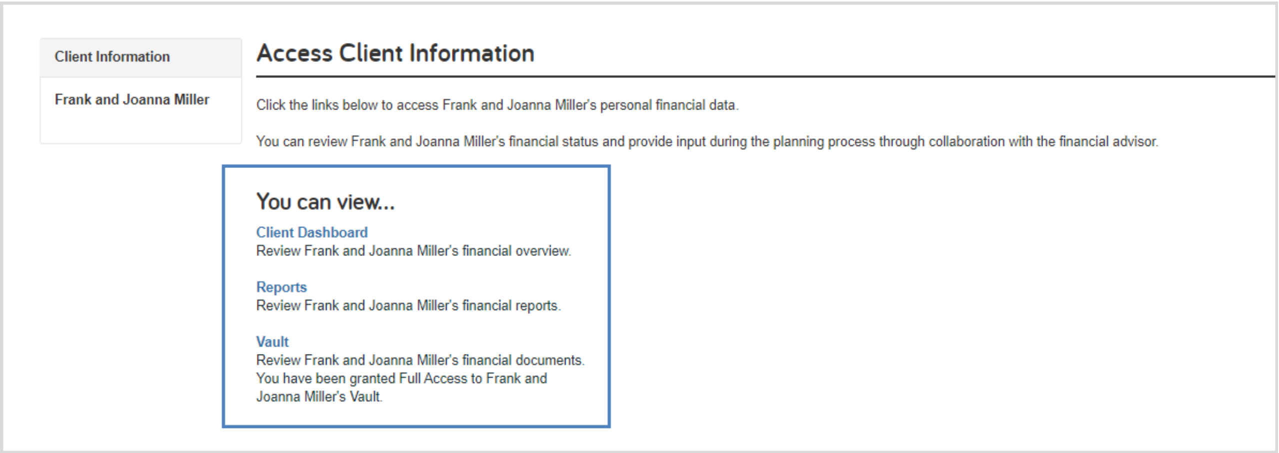
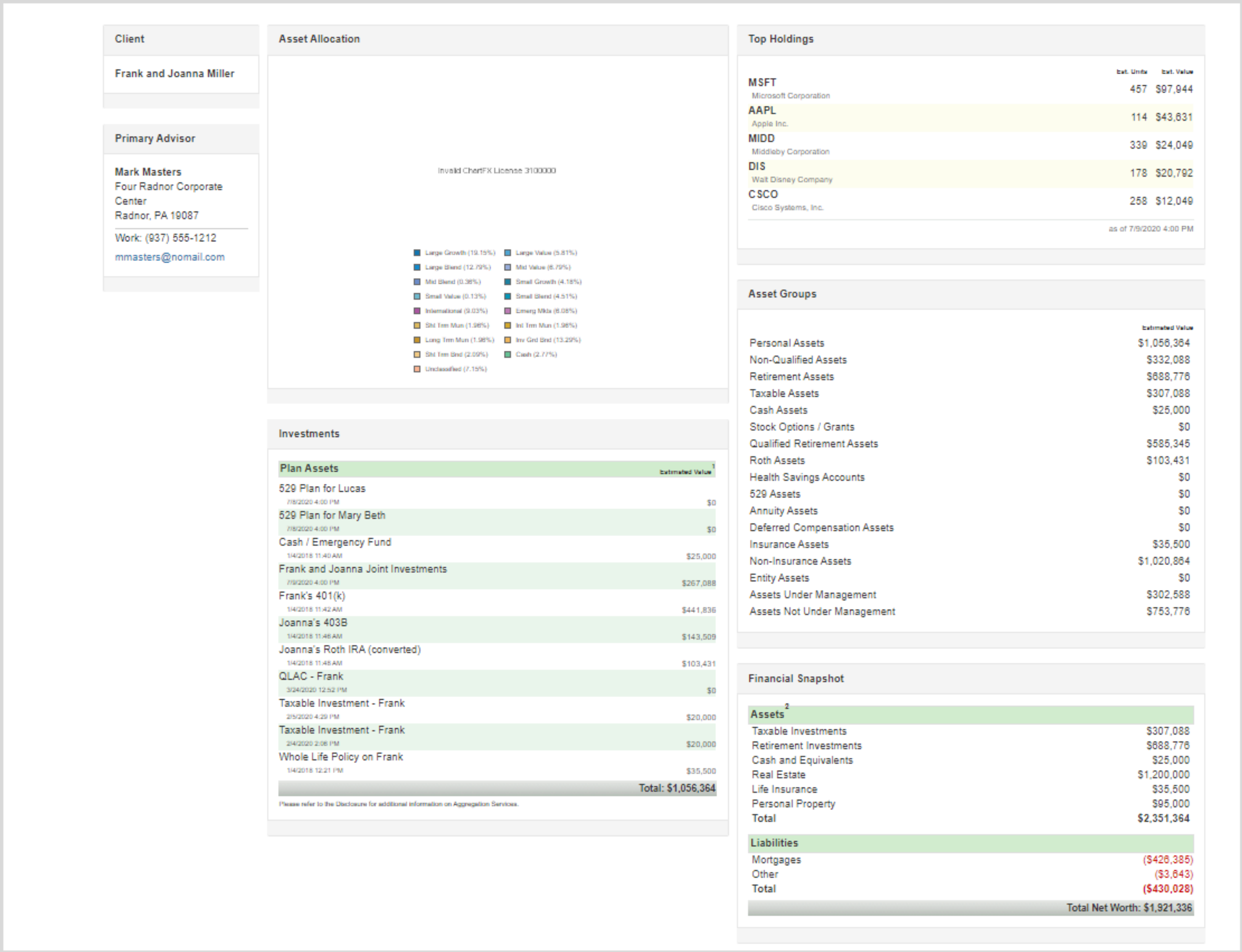
## View Limitations

After selecting a Client, the Alliance Partner will see links to the Client Dashboard, Reports, and the Vault depending on the access the Advisor has given them. Clicking on any of these will take the Alliance Partner to that content.




## Client Dashboard

The Alliance Partner sees a Client Dashboard view rather than the Advisor's Client Overview.



eMoney

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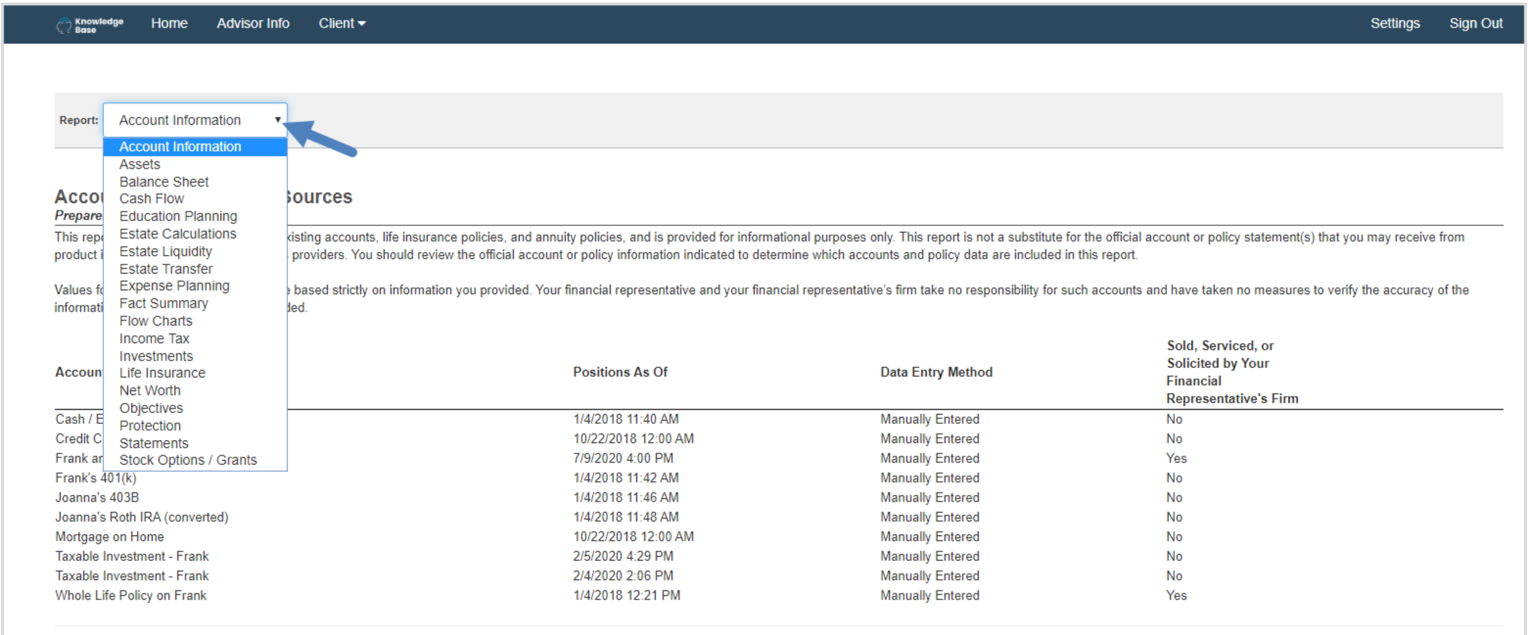
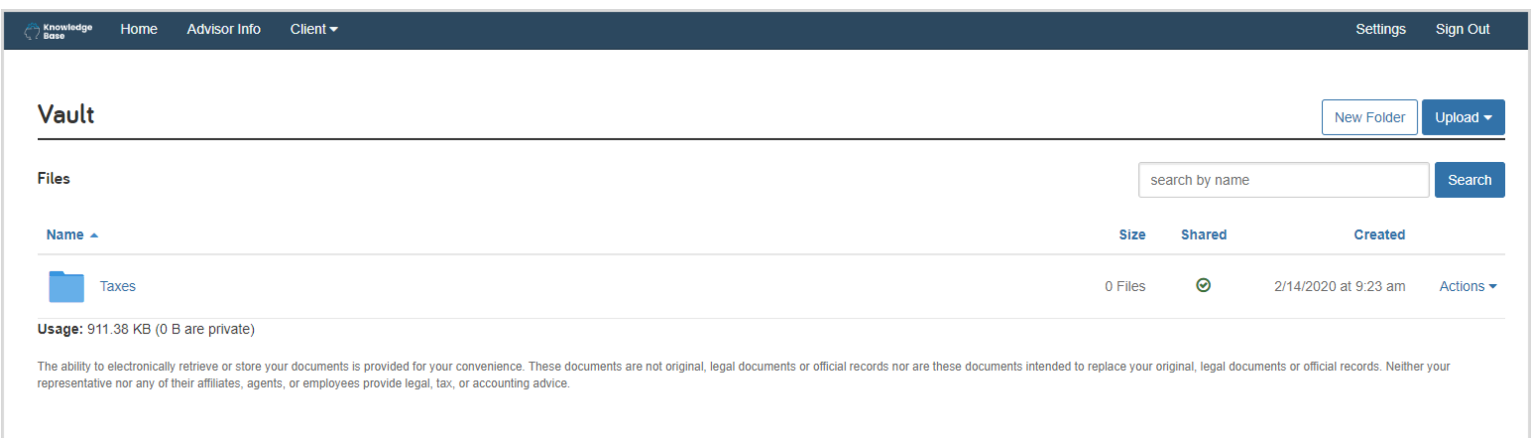
## Reports

The Alliance Partner will be able to select from a list of Client Reports that the Advisor has given them access to.




## Vault

The Alliance Partner has access to Vault content set by the Advisor and can upload documents, if given permission.




## Navigation

Clicking the Client drop-down will allow the Alliance Partner to navigate to other content for this Client.