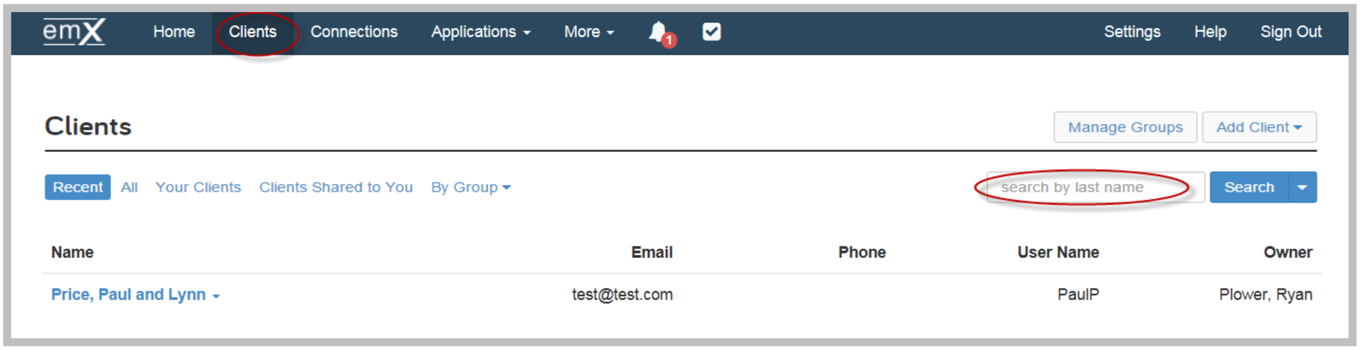
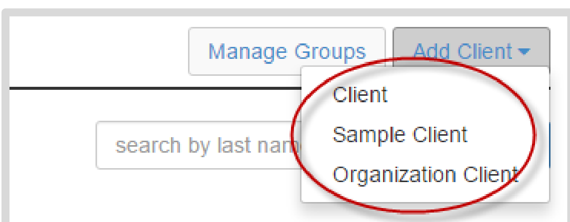
In this user guide we will demonstrate how to navigate the client Overview page, date entry and the client workflow.

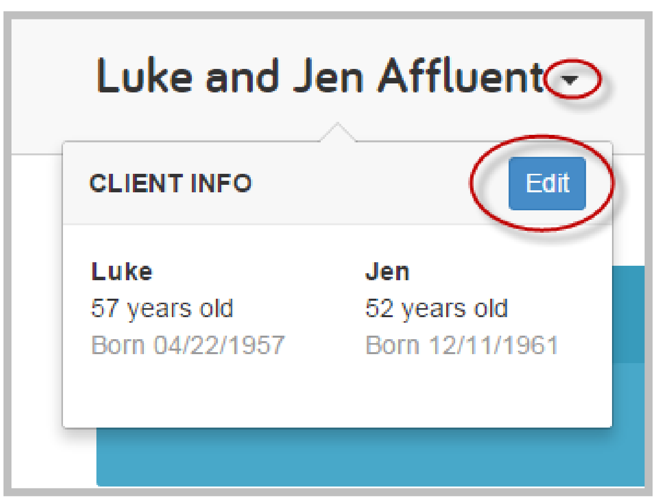
1. Click the **Clients** tab from the navigation bar. Select a client or enter a client name in the search field to find existing clients.



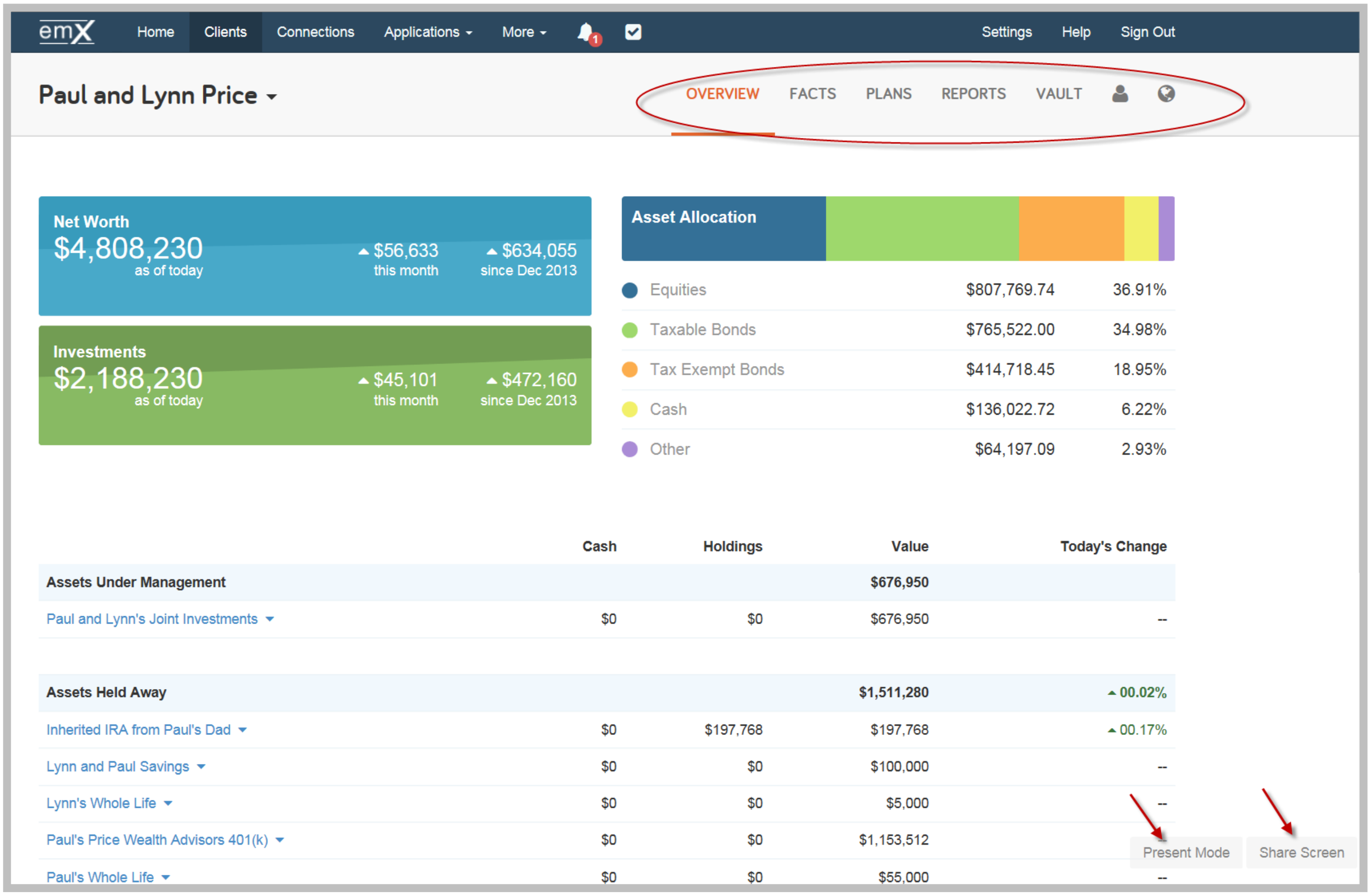
2. Use the **Add Client** dropdown to add a new **Client**, **Sample Client** or **Organization Client**.



3. The client's names and ages will appear at the top left. See option to **Edit** client information. Choose **Edit** to enter additional information.

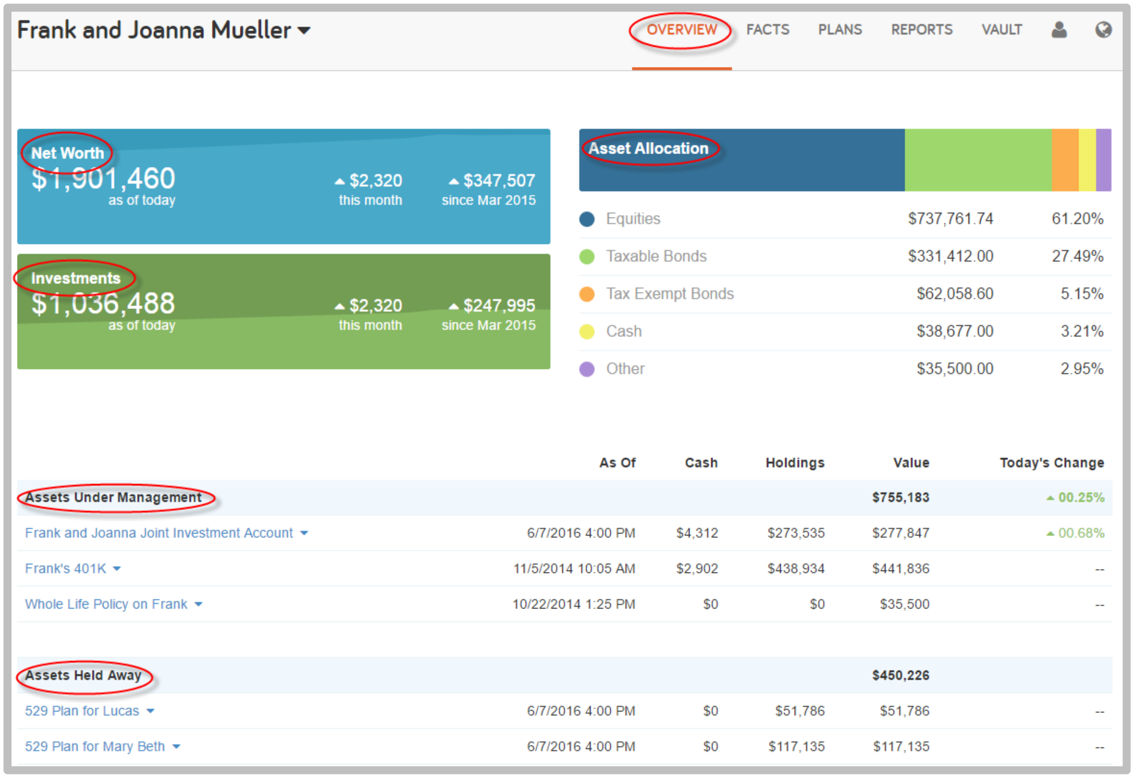


4. Once a client is selected, note the six tabs: **Overview**, **Facts**, **Plans**, **Reports, Vault, Advisor icon, as well as the globe icon** tabs. The **Present**t and **Screen Sharing** tabs are at bottom of screen.

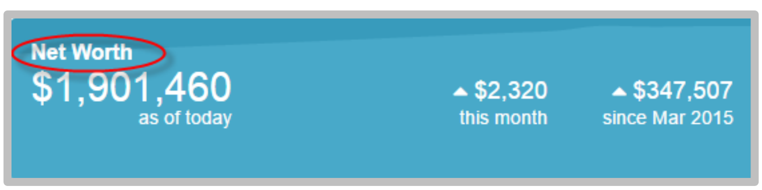


Note: See training supplements titled "Presentation Mode – How to Turn on Presentation Mode" and "Screen Sharing – How it Works" for more information on these features.

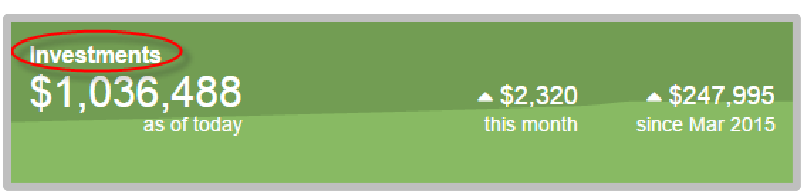
5. **Overview** shows a snapshot of the client's Net Worth, Investments, Asset Allocation, Assets Under Management and Assets Held Away.



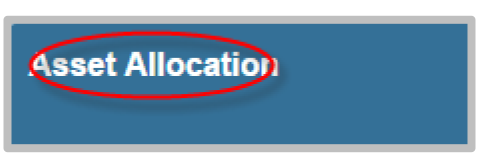
a. Click on **Net Worth** for quick access to the Balance Sheet report.



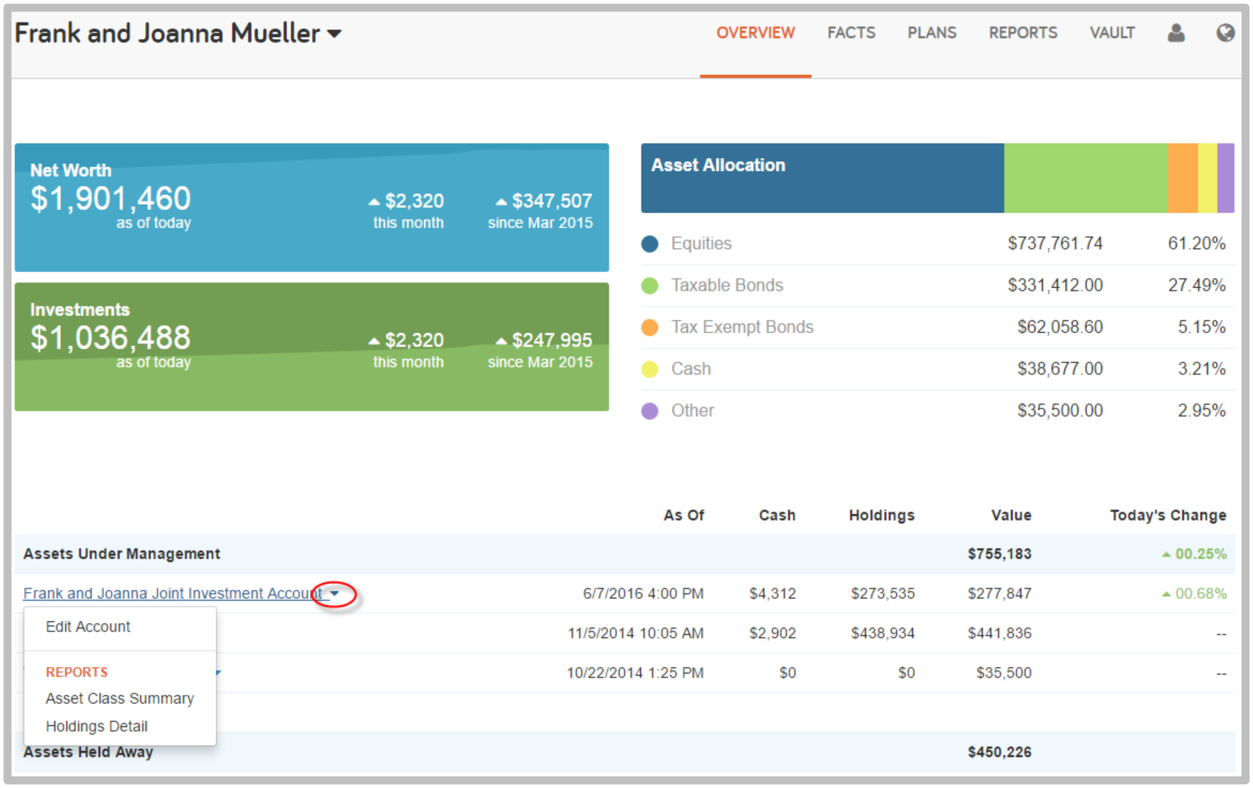
b. Click on **Investments** for quick access to the Holdings Detail report.



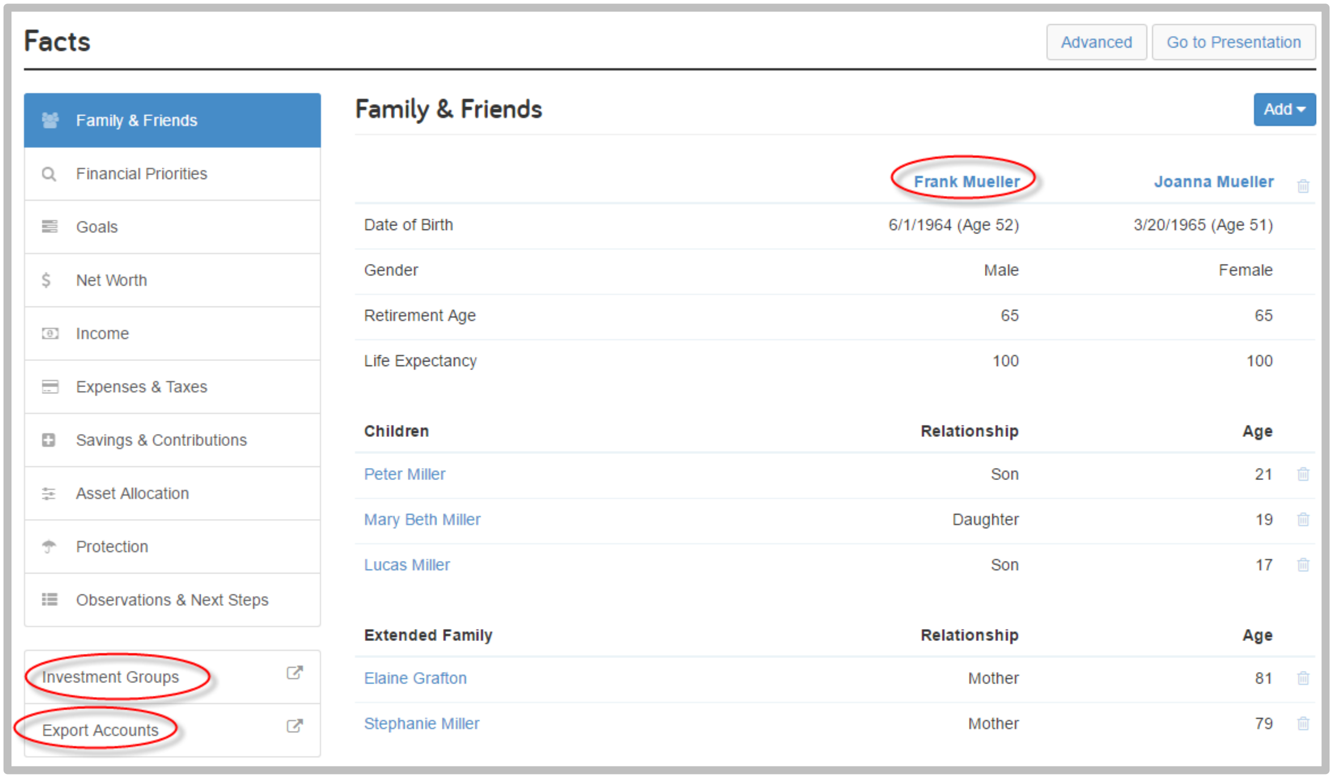
c. Click on **Asset Allocation** for quick access to the Investments report.



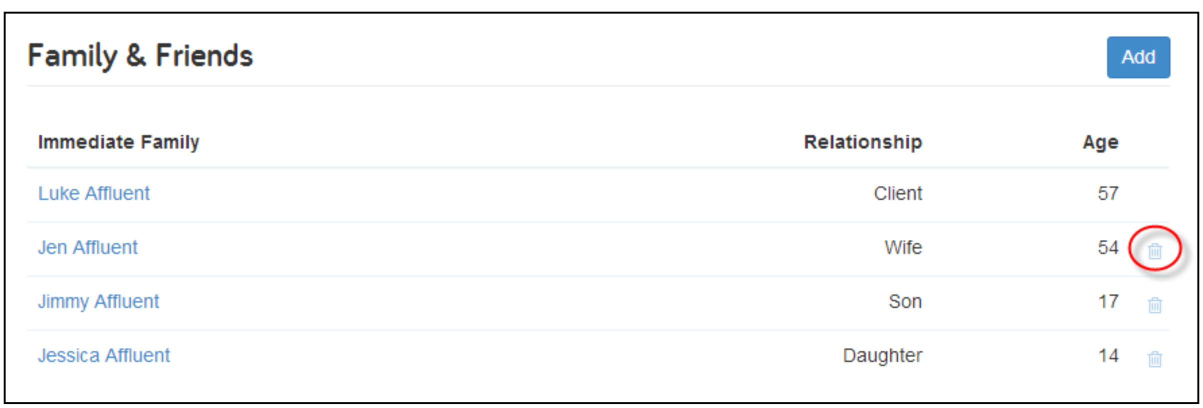
d. Next to each asset is a dropdown menu to **Edit Account** or view the Asset Class Summary Report or Holdings Detail Report.



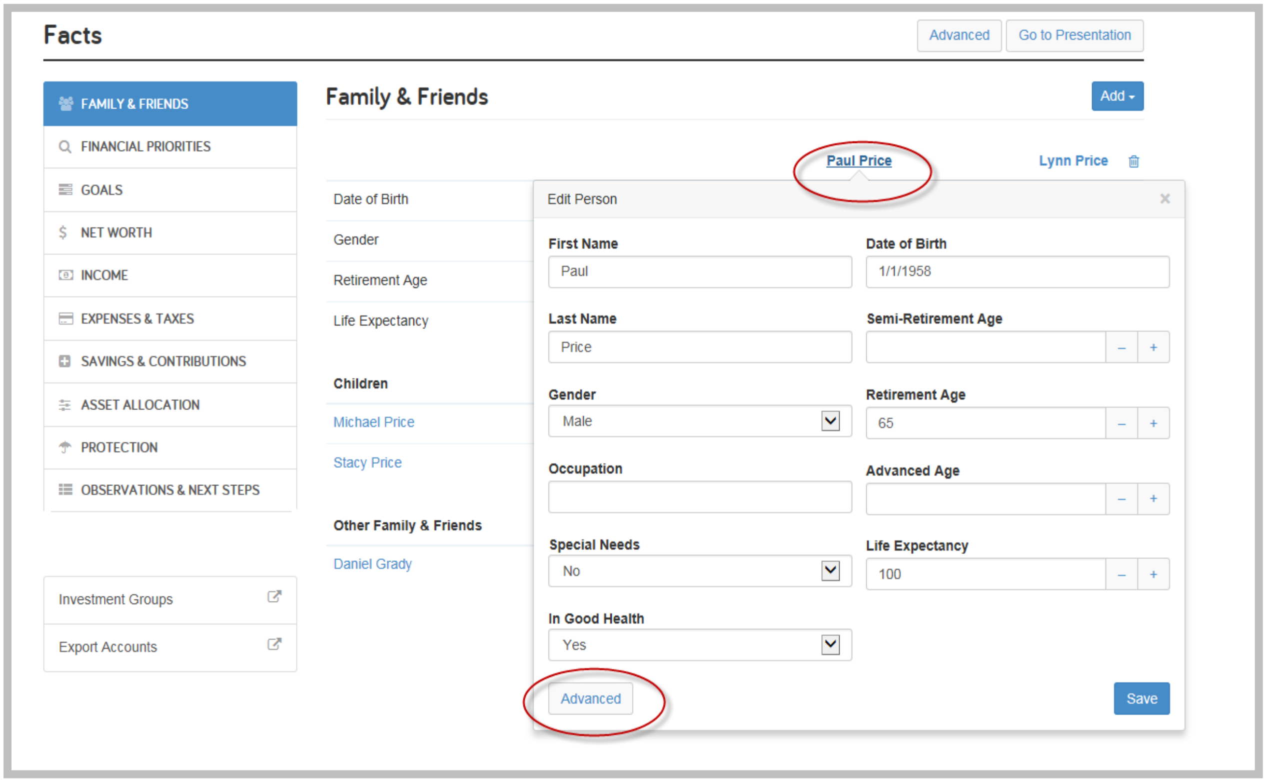
6. **Facts** list the client's facts which are broken out into sections. Each blue hyperlink allows for the editing of that fact. Access to set **Investment Groups** and **Export Accounts** is here as well.



a. The trash icon allows for quick deletion of a fact.

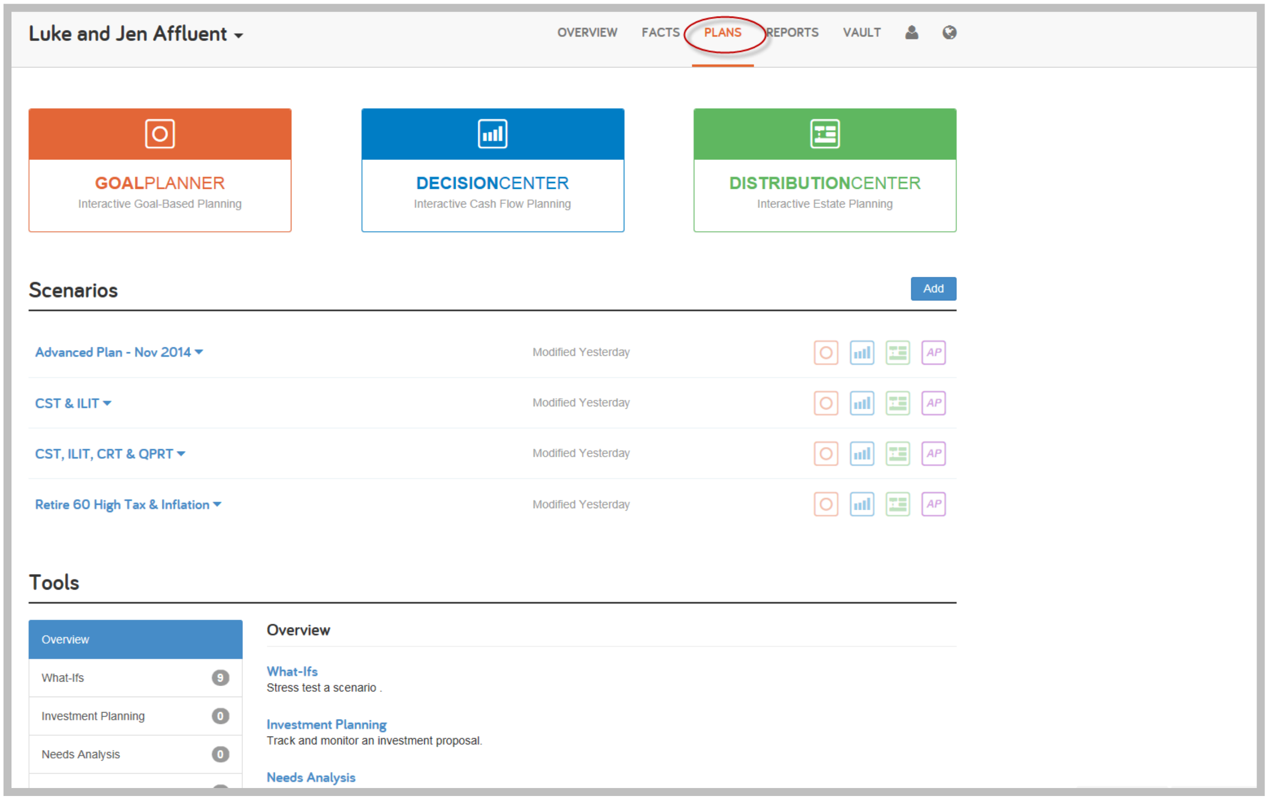


b. To add more details to a fact, click **Advanced** to jump to the Advanced Facts.



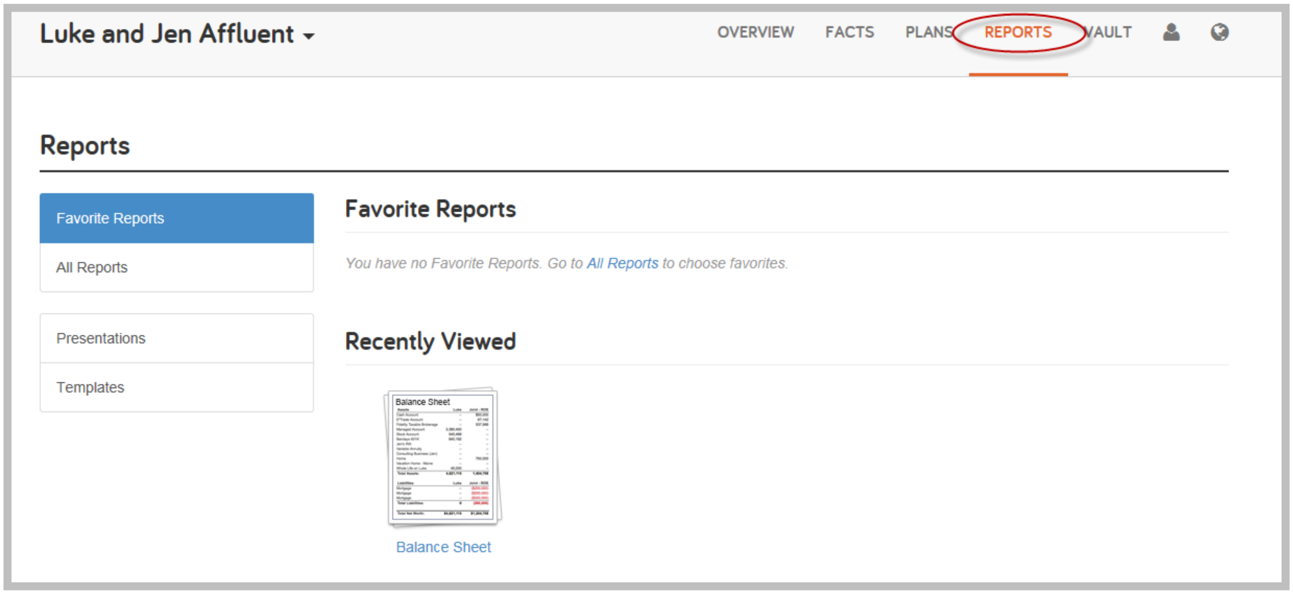
Note: Always remember to select **SAVE** in the basic or advanced facts view.

7. **Plans** gains access to Decision Center, Distribution Center, and Goal Planner.

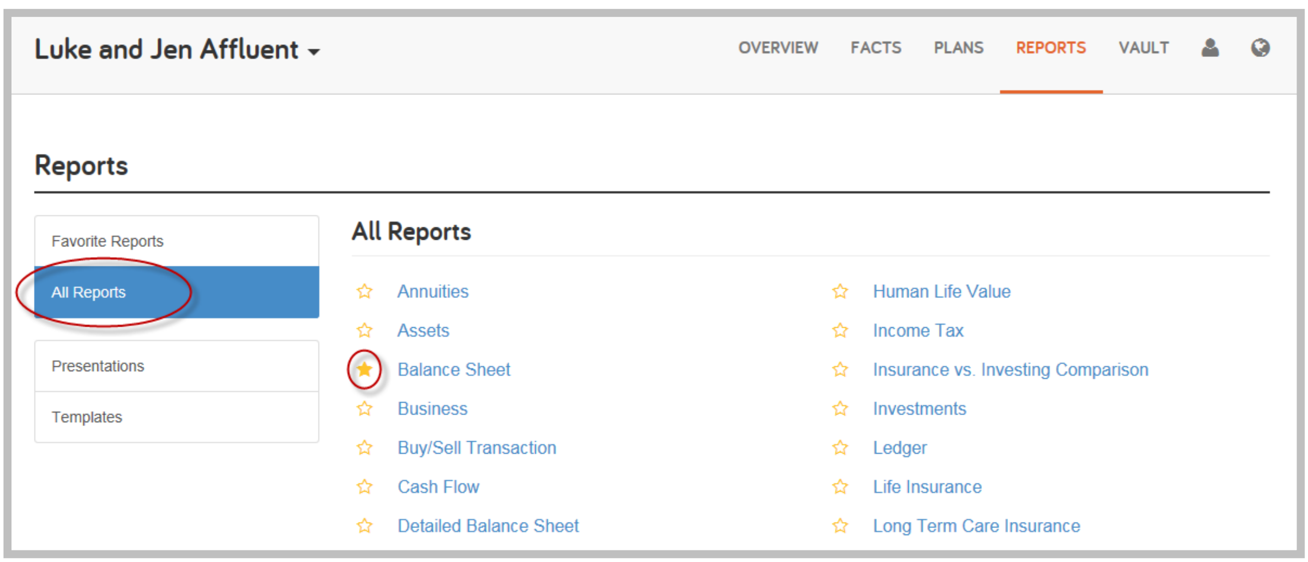


Note: For learn more about the Decision Center and Traditional Plans please refer to the following user guides:
Decision Center – Overview for Advisors
Plans – Advanced Plans Overview
Plans – Needs Analysis Overview
Plans – Investment Plans Overview
Plans – Portfolio Analyses
Plans – Financial Concepts

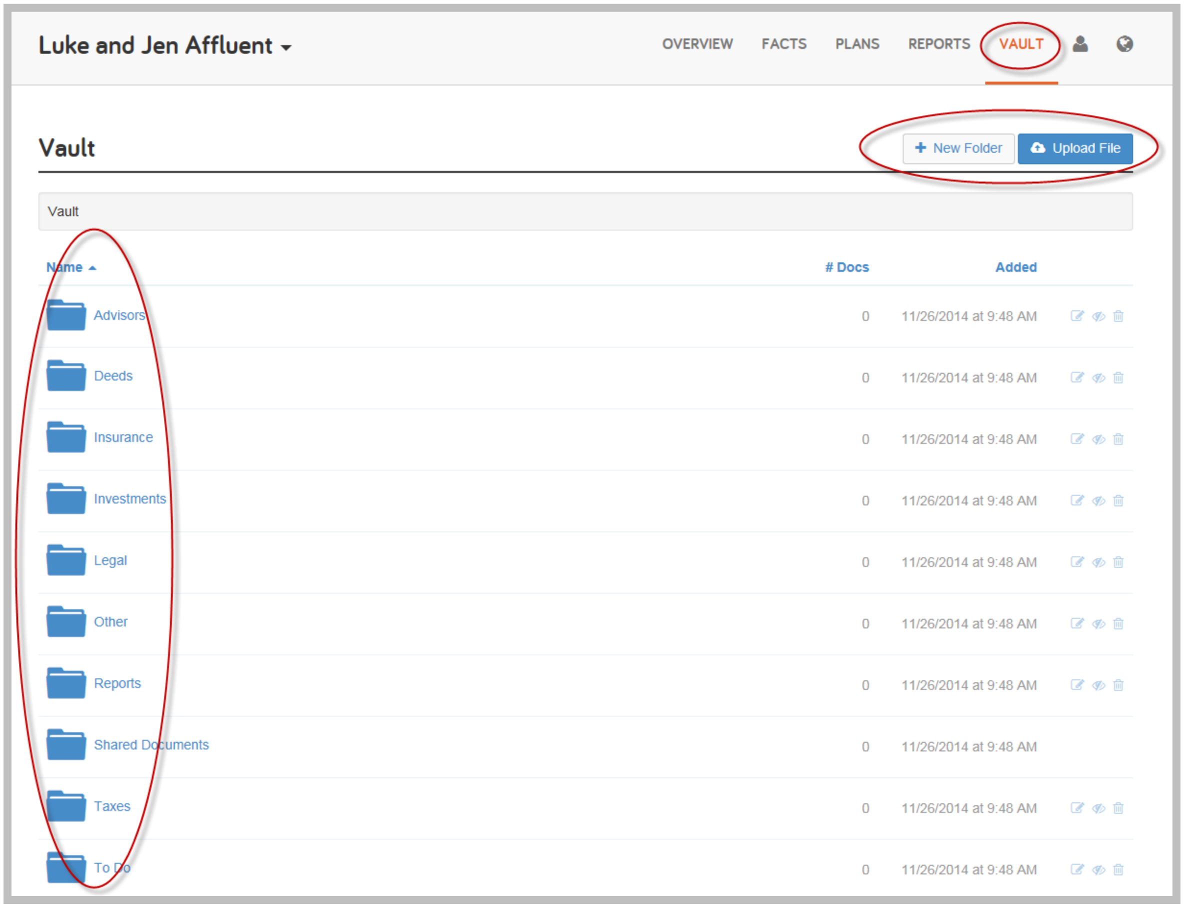
8. The **Reports** tab displays Favorite Reports, Orion Reports, All Reports, Presentations and Templates.



9. To bookmark a report as a favorite, click **All Reports** and select the star next to the desired report.



10. Click **Vault** to upload the client's documents, create new folders, and access existing documents.



11. Click the Advisor icon to Add or View All **Notes**, **Tasks** and **Client History.**