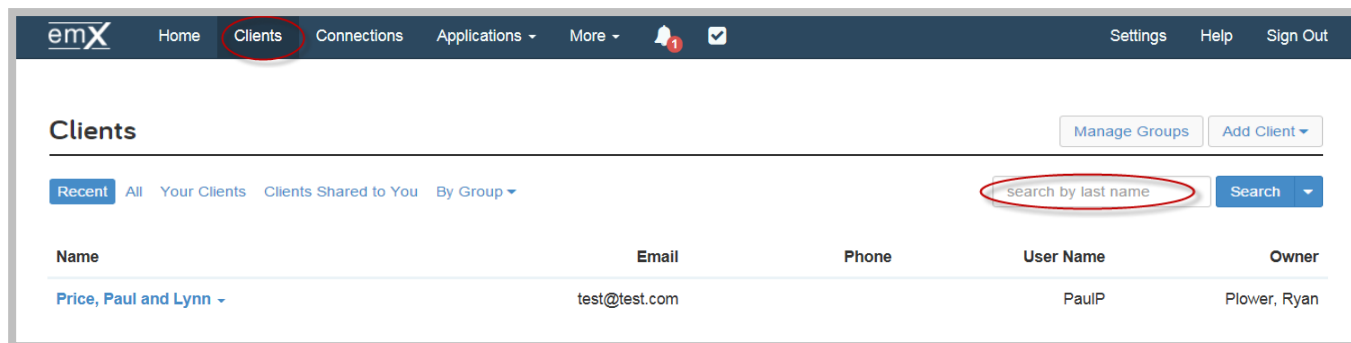
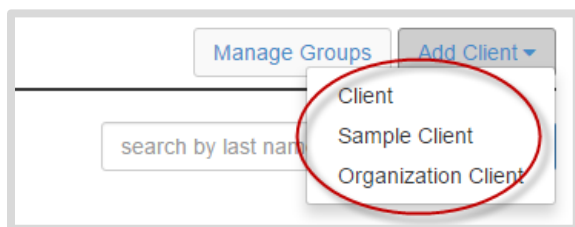


In this user guide we will demonstrate how to navigate the client Overview page, date entry and the client workflow.

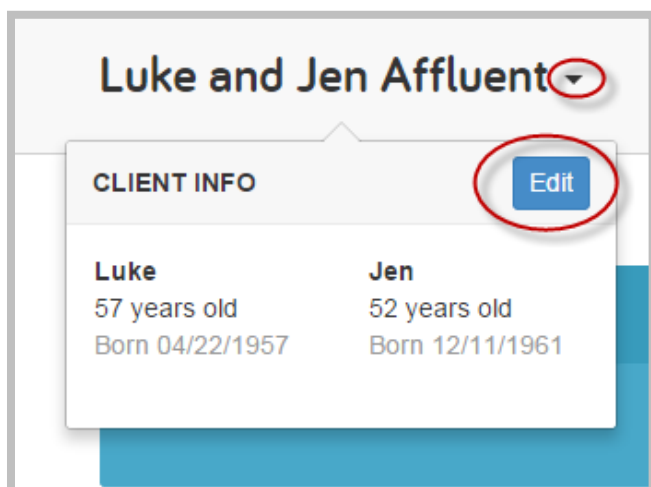
1. Click the **Clients** tab from the navigation bar. Select a client or enter a client name in the search field to find existing clients.



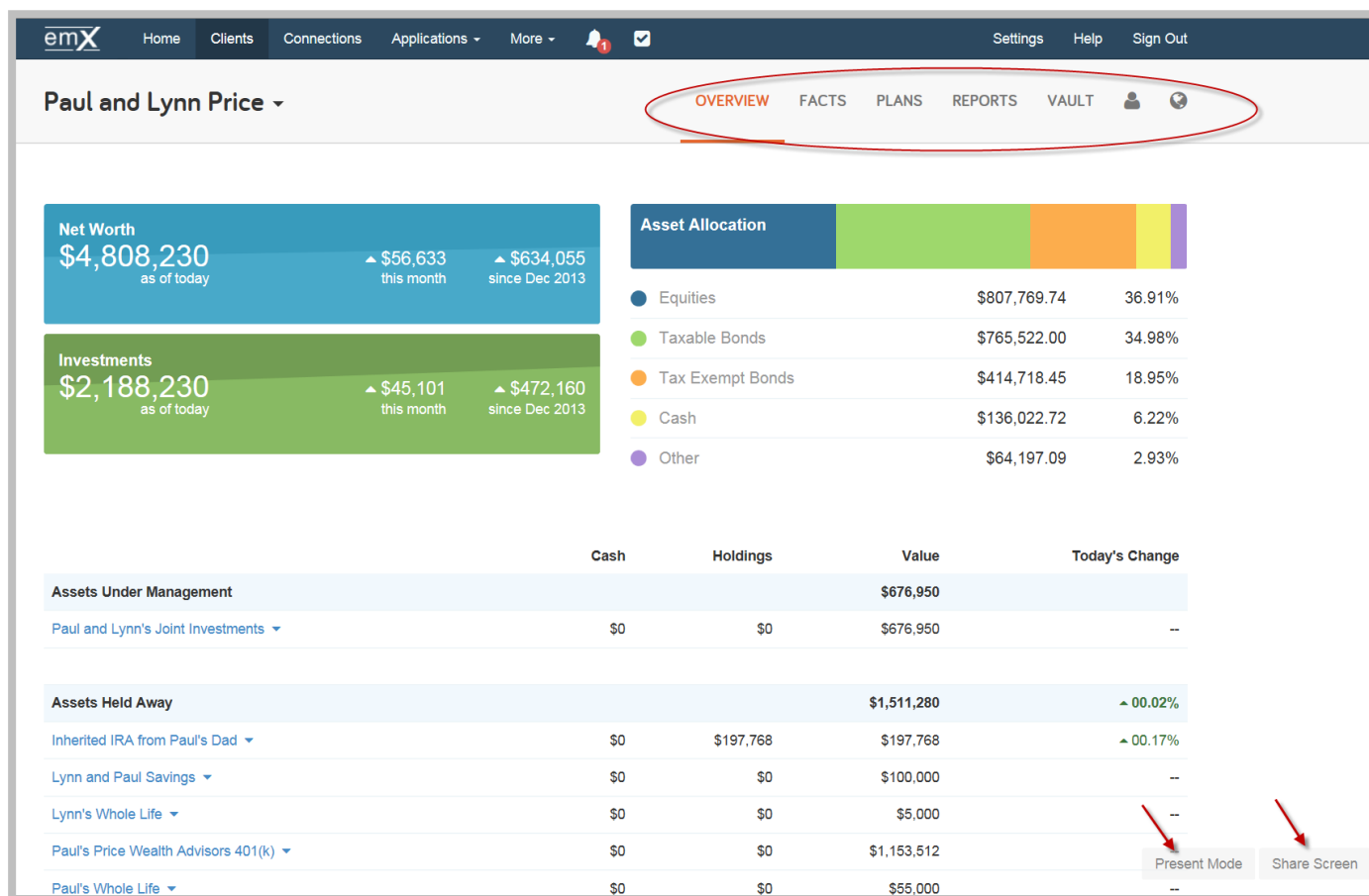
2. Use the **Add Client** dropdown to add a new **Client**, **Sample Client** or **Organization Client**.



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.

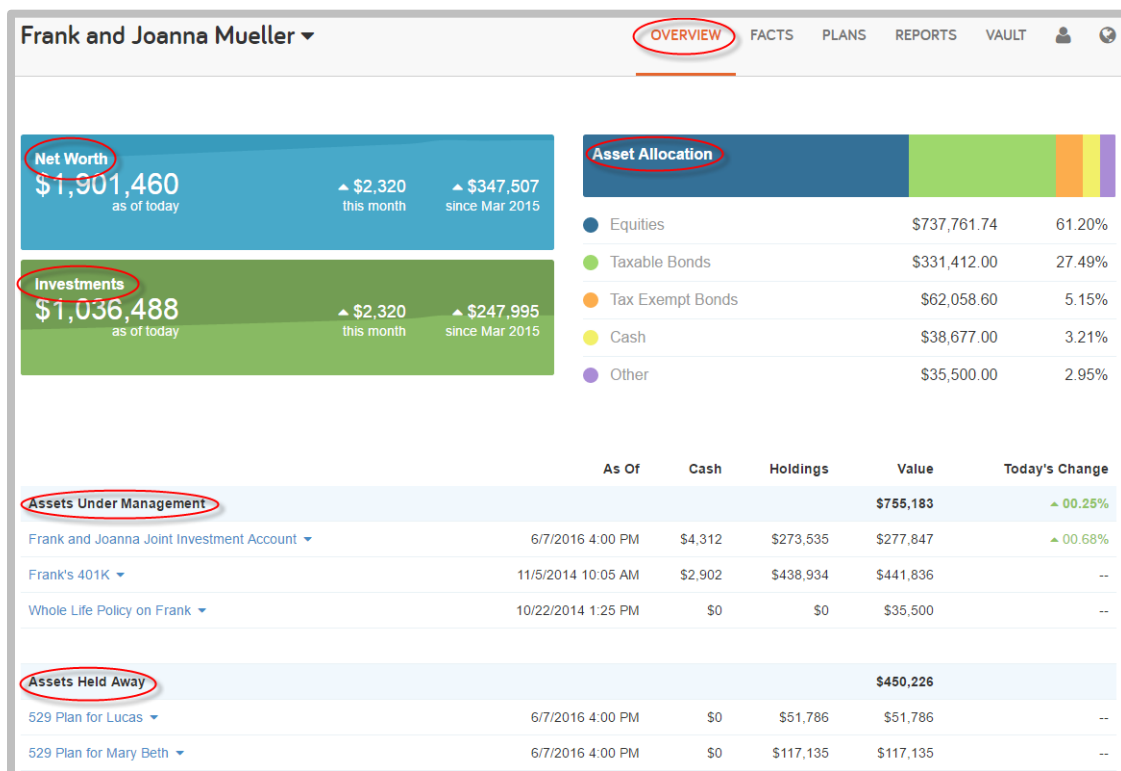


- Once a client is selected, note the six tabs: **Overview, Facts, Plans, Reports, Vault, Advisor icon**, as well as the **globe icon** tabs. The **Present** and **Screen Sharing** tabs are at bottom of screen.



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.



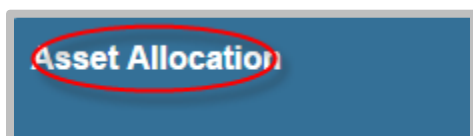
- a. Click on **Net Worth** for quick access to the Balance Sheet report.



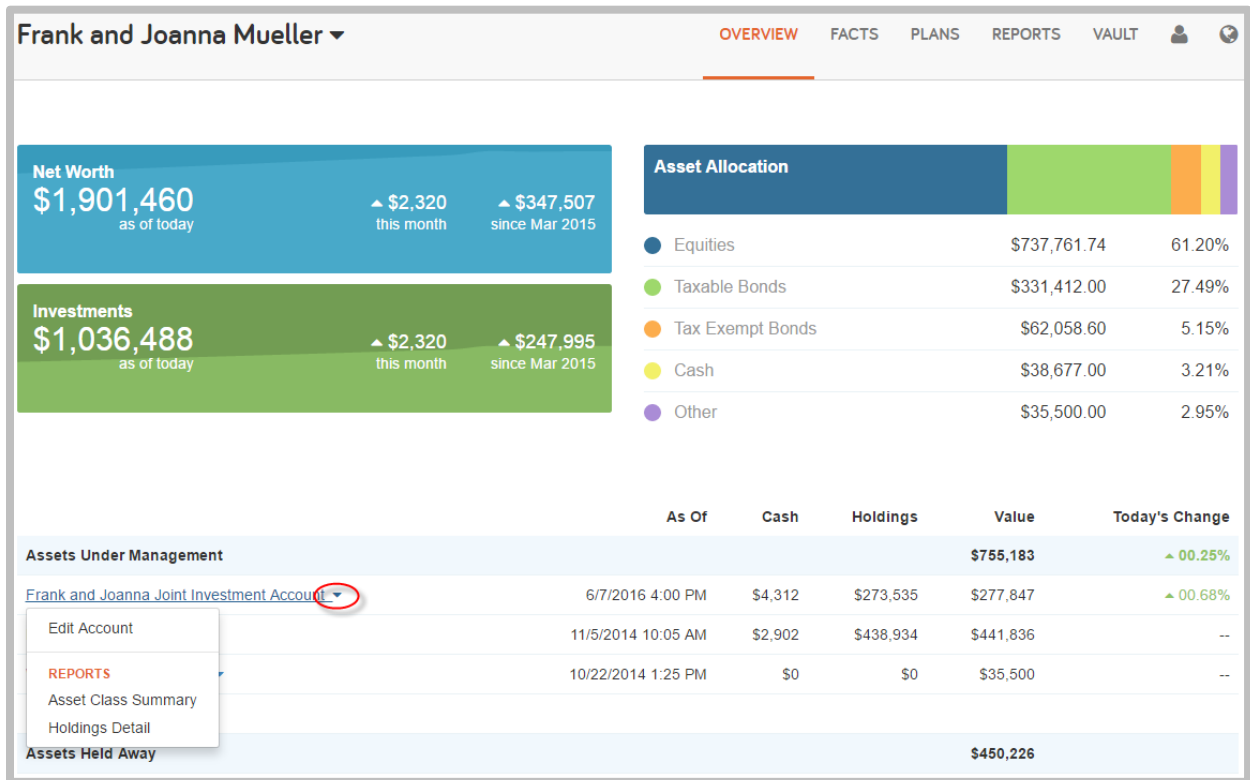
- b. Click on **Investments** for quick access to the Holdings Detail report.



- 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.

Facts

[Advanced](#)
[Go to Presentation](#)

Family & Friends

[Financial Priorities](#)
[Goals](#)
[Net Worth](#)
[Income](#)
[Expenses & Taxes](#)
[Savings & Contributions](#)
[Asset Allocation](#)
[Protection](#)
[Observations & Next Steps](#)

[Investment Groups](#)
[Export Accounts](#)

Family & Friends

[Add](#)

	Frank Mueller	Joanna Mueller
Date of Birth	6/1/1964 (Age 52)	3/20/1965 (Age 51)
Gender	Male	Female
Retirement Age	65	65
Life Expectancy	100	100
Children	Relationship	Age
Peter Miller	Son	21
Mary Beth Miller	Daughter	19
Lucas Miller	Son	17
Extended Family	Relationship	Age
Elaine Grafton	Mother	81
Stephanie Miller	Mother	79

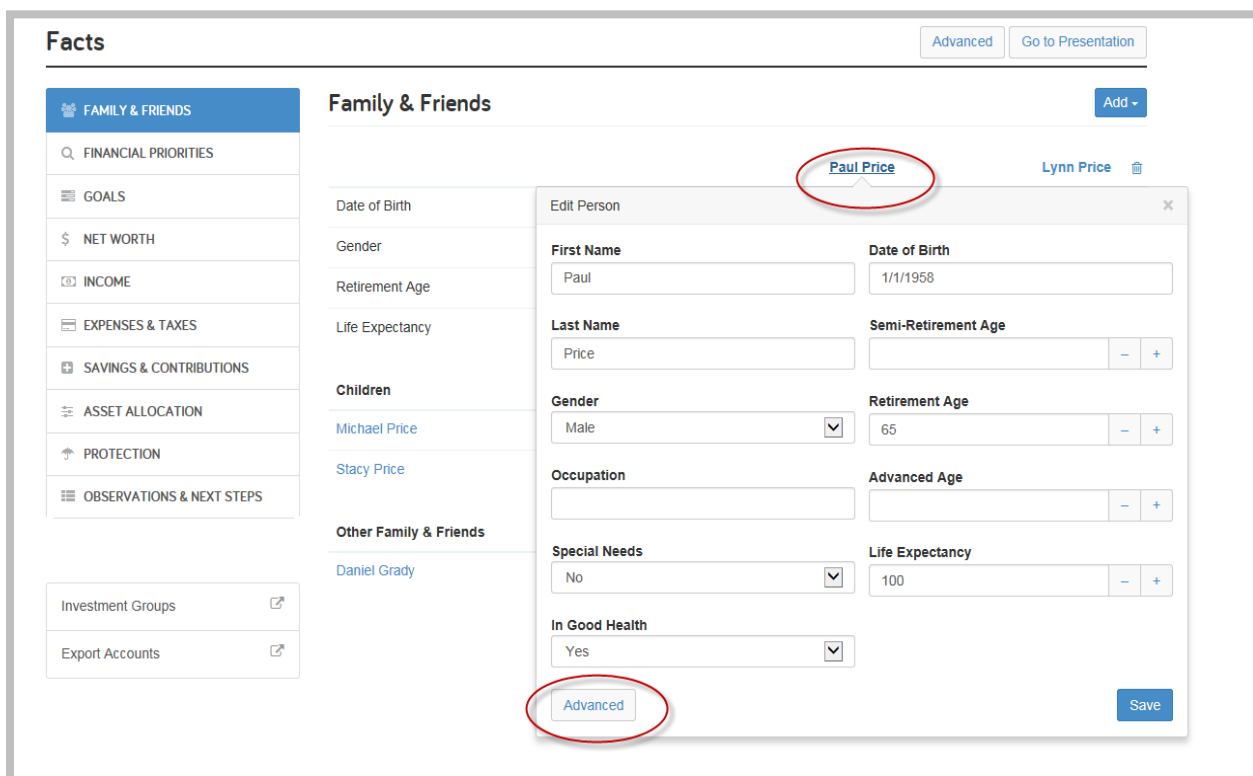
- a. The trash icon allows for quick deletion of a fact.

Family & Friends

[Add](#)

Immediate Family	Relationship	Age
Luke Affluent	Client	57
Jen Affluent	Wife	54
Jimmy Affluent	Son	17
Jessica Affluent	Daughter	14

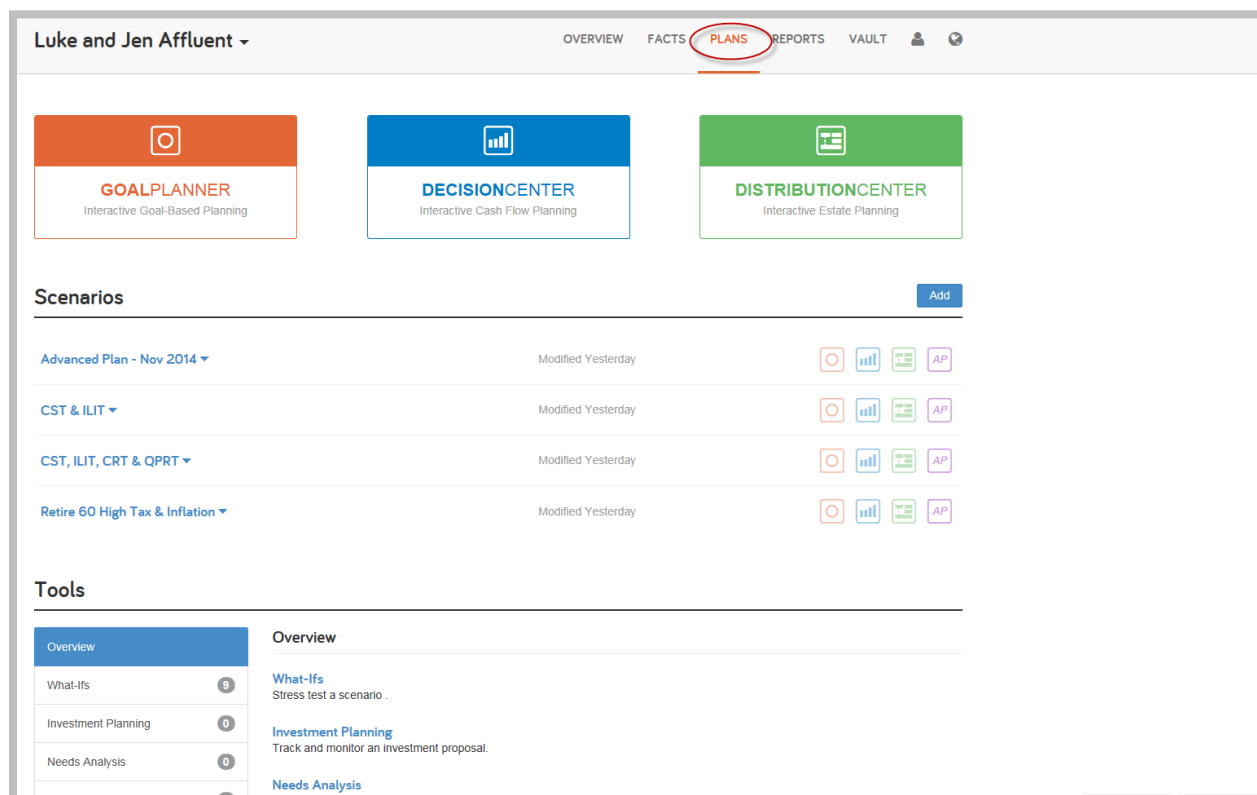
- b. To add more details to a fact, click **Advanced** to jump to the Advanced Facts.



The screenshot shows the 'Facts' section of the eMoney Advisor interface. On the left is a sidebar with various fact categories like 'FINANCIAL PRIORITIES', 'GOALS', 'NET WORTH', 'INCOME', 'EXPENSES & TAXES', 'SAVINGS & CONTRIBUTIONS', 'ASSET ALLOCATION', 'PROTECTION', and 'OBSERVATIONS & NEXT STEPS'. The main area is titled 'Family & Friends' and contains a list of family members: 'Michael Price', 'Stacy Price', and 'Daniel Grady'. An 'Edit Person' modal window is open for 'Paul Price'. This modal contains fields for 'First Name' (Paul), 'Last Name' (Price), 'Date of Birth' (1/1/1958), 'Gender' (Male), 'Occupation', 'Semi-Retirement Age', 'Retirement Age' (65), 'Advanced Age', 'Special Needs' (No), 'Life Expectancy' (100), and 'In Good Health' (Yes). The 'Advanced' button at the bottom of the modal is circled in red, and the 'Paul Price' link in the modal header is also circled in red.

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.



Luke and Jen Affluent ▾

OVERVIEW FACTS **PLANS** REPORTS VAULT

GOALPLANNER
Interactive Goal-Based Planning

DECISIONCENTER
Interactive Cash Flow Planning

DISTRIBUTIONCENTER
Interactive Estate Planning

Scenarios [Add](#)

Scenario	Modified	Tools
Advanced Plan - Nov 2014 ▾	Modified Yesterday	GOALPLANNER DECISIONCENTER DISTRIBUTIONCENTER AP
CST & ILIT ▾	Modified Yesterday	GOALPLANNER DECISIONCENTER DISTRIBUTIONCENTER AP
CST, ILIT, CRT & QPRT ▾	Modified Yesterday	GOALPLANNER DECISIONCENTER DISTRIBUTIONCENTER AP
Retire 60 High Tax & Inflation ▾	Modified Yesterday	GOALPLANNER DECISIONCENTER DISTRIBUTIONCENTER AP

Tools

Overview

- [What-Ifs](#) **9**
- [Investment Planning](#) **0**
- [Needs Analysis](#) **0**

Overview

[What-Ifs](#)
Stress test a scenario.

[Investment Planning](#)
Track and monitor an investment proposal.

[Needs Analysis](#)

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](#)

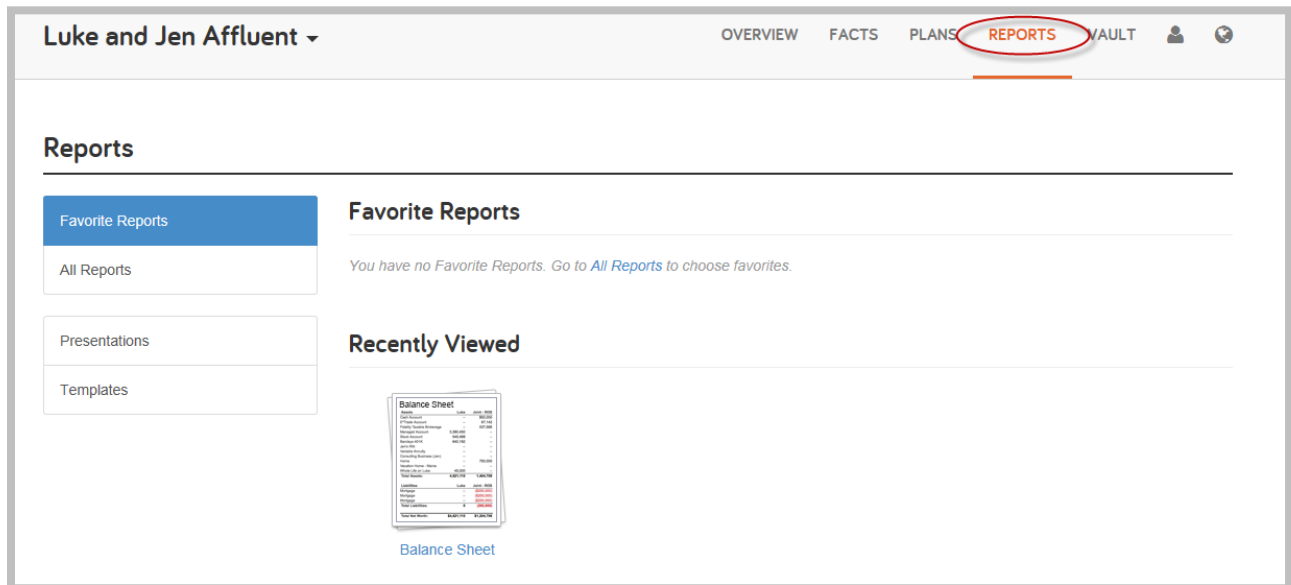
[Plans – Needs Analysis Overview](#)

[Plans – Investment Plans Overview](#)

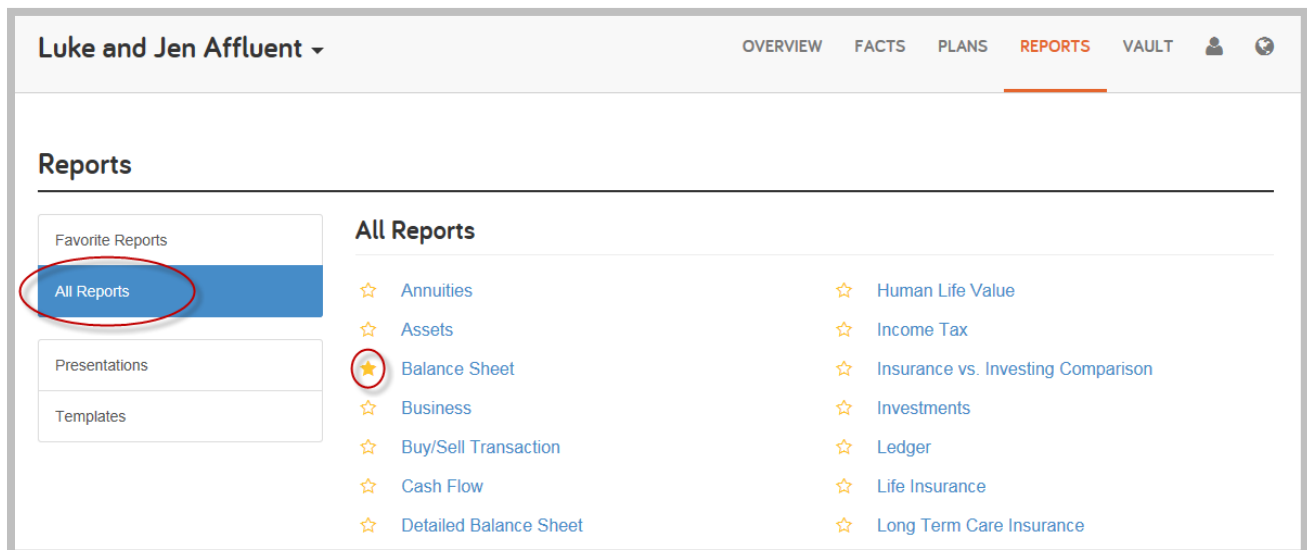
[Plans – Portfolio Analyses](#)

[Plans – Financial Concepts](#)

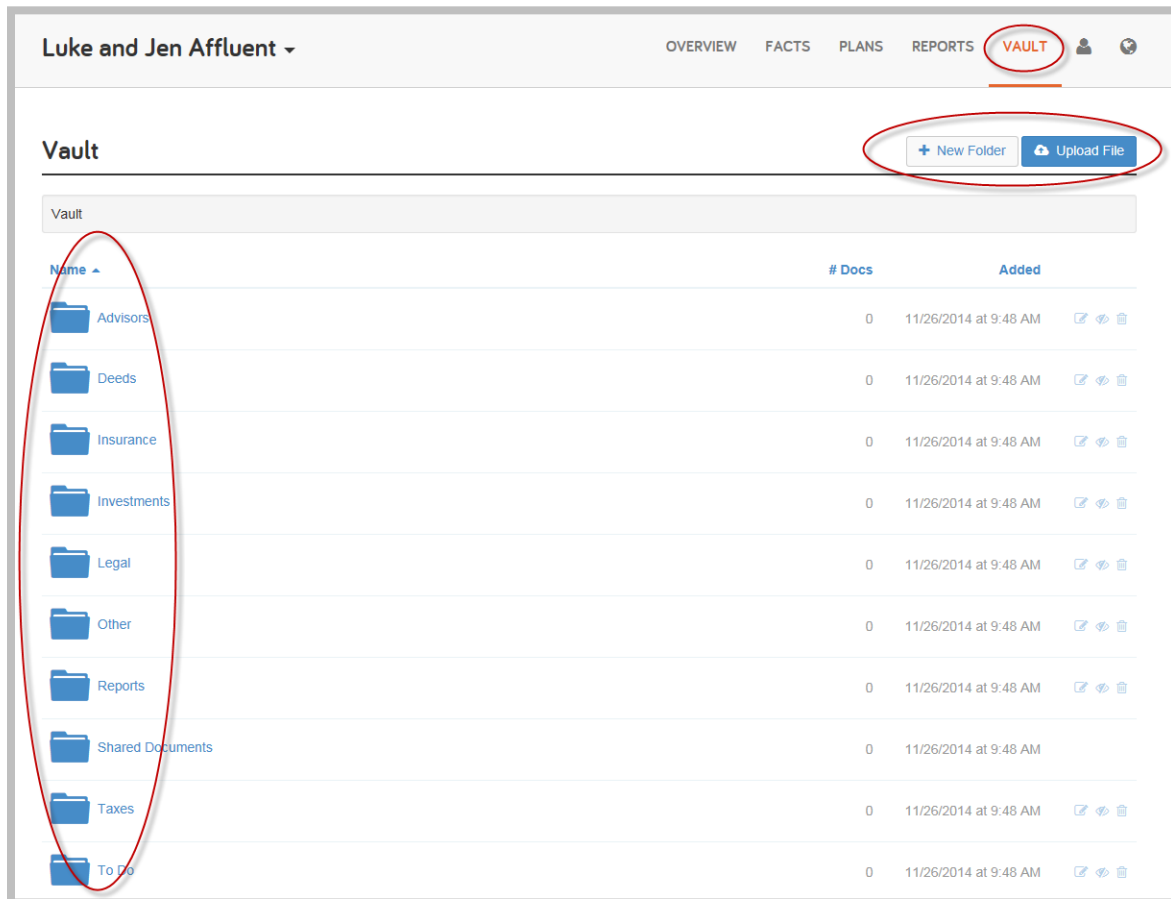
8. The **Reports** tab displays Favorite Reports, Orion Reports, All Reports, Presentations and Templates.



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**.

