Using the Client Web Portal

Morningstar Office Cloud



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Using the Client Web Portal

The Client Web Portal (CWP) is a secure web site your clients can log into using their email and a custom password. In addition to providing real-time visibility into clients' accounts and portfolios, the CWP acts as a two-way communication vehicle, allowing you to upload reports and receive documentation from your clients, securely.

Overview

The following topics are covered:

- Logging on to the Client Web Portal (page 5)
- Using the Overview page (page 7)
- Using the Investments page (page 9)
- Using the Documents page (page 12)
- Setting up the Client Web Portal (page 14)
- Managing CWP tasks in Office Cloud (page 18)

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Logging on to the Client Web Portal

The Client Web Portal is available on any device, using any browser. This section **Overview** describes how to log on to the CWP.

To sign in to the advisor view of the CWP, log in using your Morningstar Office Cloud log in credentials. Once inside, take an under the hood look at all of your enabled clients CWPs

The first time your clients sigh in, they receive email instructions on how to register for the CWP.

The second secon

To sign in, do the following to log in to the CWP:

- 1. In any browser, launch fp.morningstar.com. The Login screen opens.
- 2. In the Sign In screen, enter your **email address** and **custom password**.



3. Click Sign In.

How do I sign in to

the CWP?

If your client forgets their password, he or she will need to change it. To change a password, click the **Forgot your password?** link within the Login screen. From there, the system will prompt you on how to create a new password.

What should I do if my client forgets their password?

| E-mail Address | |
|-----------------------|--|
| | |
| Password | |
| | |
| | |
| | |
| Forgot your password? | You only need to select this option if you are changing your password. |
| longer your password. | |
| | |
| | |

Using the Overview page

This section describes the data available within the Overview section.

After logging in, you are brought to the Overview page. This page acts as your clients' dashboard, providing high-level information at a glance.

To view additional information, click the **View More** icon within the upper right corner of each component.

Overview

What data is displayed within the Overview page?



The table below describes each component within the Overview page:

| This component | Contains this information |
|--------------------------------------|--|
| Your Annual Investment Performance | Investment information including the following: |
| | ► Ending Balance |
| | Total Gain, and |
| | New Investment, including: |
| | Additions, and |
| | Withdrawals. |
| Your Top Holdings & Asset Allocation | Asset Allocation pie chart and Top 10 Allocated Holdings. |
| Your Accounts | Account balances for each underlying account within your clients' portfolio. |
| Files for you | Links to folders and documents most recently posted by you. |

Using the Investments page

This section describes the data found within the Investments page.

The Investments page provides data related to the investments within your clients' portfolio.

The top section includes data points and graphs showing how investments are performing. The bottom section includes limited details about the account constituting your portfolios.



What data is displayed within the Investments page? From the Investments page, your clients have to ability to select their time frame for data. Choose from the following options:

- ► Since Inception
- ► 1-year
- ► 3-year
- ► 5-year
- ► 10-year, and
- ► YTD.

| Welcome Odro, ! Take a look at | your investments over the pas | t <u>1year v</u> утр | | Snapshot Report | |
|--|--|---|---|--------------------------|-------------------------------------|
| Ending Balance 01/05/2018 \$1,063,503 | Total Investment Gain - 12/31/2017 Net Return 20.34% | 1 year ✓ 3 years 5 years | Net Investment - 12/31/2017 Additions Withdrawals \$500,000 — | | Select the time frame for data here |
| How are my investments doing? 01/31/2017 - | 01/05/2018 | 10 years | | Income the second second | |

Note: You will see only as much data as is available. For example, if you select the 10-year time frame, your account has been open for only 5 years, your will see 5-years worth of data.

Below the header, figures for Ending Balance, Total Investment Gains, and Net Investment are displayed at the portfolio level.

| Welcome Odro, ! Take a look a | V | Snapshot Report | The time frame you choose controls | |
|--------------------------------------|------------------------------------|--------------------------------------|------------------------------------|--------------------|
| Ending Balance 01/04/2018 | Total Investment Gain - 12/31/2017 | Net Investment - 12/31/2017 | | the start date for |
| \$1,057,807 | Net Return 20.34% | Additions Withdrawals \$500,000 — | | these data points |

The start date for these data points is controlled by the time frame you chose. The following table provides the end date and definition for each data point:

| This data point | Uses this end date | With this definition |
|-----------------------|---------------------|--|
| Ending Balance | End of previous day | Ending balance of the entire portfolio as of close of business the previous day. |
| Total Investment Gain | Previous Month End | The overall increase or decrease in a portfolio's market value including or excluding management fees. |
| Net Investment | Previous Month End | The total of all additions minus withdrawals made to a portfolio between the start and end dates. |

| This component | Provides this information |
|-------------------------------------|---|
| How are my investments doing? | This line chart shows how the value of your portfolio has changed over the time period you have chosen. It also includes a cumulative contributions line. |
| | Click anywhere on the line to see an exact figure for a specific month. |
| How are my investments diversified? | This donut chart shows what percentage of your investments fit into each asset class. |
| How much have my investments grown? | This bar chart shows how your investments have performed. |
| Which accounts are included? | This table includes the accounts comprising your portfolio, along with limited details about each account. Click on the icon next to each account to open the Account Details page for transactional accounts only, |
| | Each Account Details page contains the same content as the Investments page, however a list of holdings replace the list of accounts at the bottom of the page. Click on any holding to launch the Morningstar page. |
| Other Investment Accounts | Quick accounts that you are not managing, such as a 401(k) account or other held-away assets. |

The following table describes the charts and table included in this page:



Using the Documents page

This section describes content available within the Documents page.

The Documents page provides access to paperless statements and documentation, and allows clients to securely upload documents to you. cThe Documents page is broken into two sub-pages:

- Upload Files, and
- ► View Files.

The View Files page includes all documentation, including documents and statements published from Morningstar Office Cloud, and any documentation uploaded by clients.

Overview

What content is displayed within the Documents page?

| | | | MORCANAPI NUM | | | | |
|--------------|---|---------------------------------|---------------|-----------|--------------------|------------|---------------------|
| Overview | | Investments | | Documents | | Contact Us | |
| | | | | | | | All document |
| B View Files | > | Files You've Received | | | | | within this page |
| | | Name | | | Modified | | |
| | | Document Management Test Folder | | | 08/31/2018 1:56 AM | | |
| | | May 09 | | | 06/07/2018 1:24 PM | | |
| | | New Accounts | | | 04/23/2018 3:53 PM | | |
| | | 📑 testing the post | | | 01/25/2018 3:30 PM | | |
| | | | | | | | |

Clients can share sensitive documentation with you, securely. To upload files to the CWP, instruct your clients to do the following:

How do clients upload documentation?

- Pote: the Upload button is unavailable within the Advisor view of the CWP>
- 4. From the CWP landing page, click **Documents**.
- 5. Select Upload Files.
- 6. Click Upload. .

| мо | RCANAFIRENCIAL | A My Acc | ount V |
|--|--|---------------------------------|---|
| Investments | Documents | Contact Us | |
| Files You've Shared name Lineop | | Modified 12/06/2017 11:57 AM | You can upload documents to me using this button |
| | No Investments Files You've Shared O Name E Lineop | Investments | My Acc M |

Note: The first time a document is uploaded, the Upload button appears in the center of the page. 7. Navigate to the **document** you want to upload, and **double-click** to select it.

| G v ■ Desktop > v 4 | |
|--|------------------------------|
| Organize 🔻 🚺 Open 👻 Share with 👻 Print E-mail New folder | |
| ∱ Favorites | |
| Desktop | Devilate altabate de sum est |
| E AMOO | from this panel |
| AWJOE | |
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| lemplates | |
| Uropbox | |
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| ▼ € | |
| Lineup.xlsx Title: Add a title Size: 19.8 KB Tags: Add a t Microsoft Excel Worksheet Authors: Elizabeth Morgan Date modified: 11/8/2017 2:01 PM | |

8. Once uploaded, the document will immediately be available within the View File

| MORGA | AFingneties | ≗ M ₁ 1 | ccount 🗸 |
|-------------------------|---|---------------------------------|--|
| Investments | Documents | Contact Us | |
| Files You've Shared | | Mostiled 12/06/2017 11:57 AM | All uploaded documents will be available here |
| | Investments Files You've Shared ③ Name Lineup | NORCONNTRINCIP | More More More Contact Us Investments Documents Contact Us Files You've Shared Name Name Name |

Setting up the Client Web Portal

This section describes how to set up the Client Web Portal. Once you enable settings, they will apply to all of your clients portals, meaning you cannot create settings for a specific client or subset of clients.

To access the Client Web Portal Setup window, from the Header, click the Account Icon. Then select Client Web Portal Setup. The Client Web Portal Set up window opens.

Overview

How do I access the Client Set Up Window?

| | Ç® 🖌 🖓 🙎 | |
|--|-------------------------|--------------------|
| | Account | |
| | User Profile | |
| | Client Web Portal Setup | UICK here to start |
| liante Securitias Reports and Research | Global Settings | |
| | Sign Out | |
| preadsheet report on: (O) Your practice's overall performance for all your clients | | |

The Portal Branding area of the Client Web Portal Set up window determines they type of information displayed within your clients portal.

How do I create my Portal's Branding?

| Client Web Portal Setup | | Cancel | Click here to save |
|---|----------|--|-----------------------|
| | | Portal Brending Portal Notifications | |
| Header | | Pages to Include | |
| Your firm's logo can be uploaded/updated within Global Settings. | | Display Overview | |
| Footer | | Display Investment | |
| Display Disclosure | | Oisplay Account Details | |
| The information displayed on this page may contain forward looking information and is not approved by FINRA. Tested hy: Sendeen Nellore | | Oisplay Benchmark Returns | |
| | <u>^</u> | C Allow Clients to Generate Reports | |
| | | Oisplay Document Manager | |
| lested by: Sandeep Nellore | | C Allow Clients to Upload Documents | |
| There should be a space in between lines. This test is | | Date & Lashada | |
| so we make sure it works as expected. Some symbols are | | Data to include Display Return Information | |
| added: `^*!" $\$ $\$ $\$ $\$ $\$ $\$ $\$ Test QA, there should be also a | ~ | Display Net Investment Information | Based on the |
| Display Morningstar [®] Logo | | O Display Additions and Withdrawals | descriptions below. |
| | | As Of Data | select the slider for |
| | | As Ut Date | each functionality |
| | | C FR2C Mouth Fug | |
| | | Last Market Close | |

The table below describes each setting option.

| Setting | Options |
|------------------|--|
| Header | Alerts you that you can add your firms logo using Global Settings. |
| Footer | Select from the following options: |
| | Display Disclosure, once enabled, type disclosure text. Display Morningstar Logo. |
| Pages to Include | Select the sliders for Display Overview and Display Investment to display both the Overview and Investments page of the CWP. |
| | Note: You must select Display Investments in order for Investments information to display on the Overview tab. |
| | Once selected, customize the Investments page by selecting from the following options; |
| | Display Account Details, this enables the account details page for each transactional account within a clients portfolio. Display Benchmark Returns, this enables the benchmark comparison withing in the bar chart. Allow Clients to Generate Reports, this enables a button that generates the Snapshot report. |
| | Select the slider for Display Document Manager to enable the Documents page of the CWP. Once enabled, select the slider for Allow Clients to Upload Documents if you choose to allow your clients to upload documents to you. |
| | Note: You must select Display Document Manager in order for documents to display on the Overview tab. |
| Data to Include | Select from the following options: |
| | Display Return Information, this enables performance information to be included in CWP data points and charts Display Net Investment Information, this enables the Net Investment data point to display. Once select, Select Display Additions and Withdrawals to include those data points. Display Net Worth Information |
| As of Date | Select from the following options |
| | Last Month End Last Market Close |

The Portal Notification area of the Client Web Portal Setup window controls the auto-generated notifications your clients receive when documents are posted to the CWP.

What settings do I create within Portal Notifications?

You can also create a custom signature and electronic delivery consent notification.

| Client Web Portal Setup | Ca | ancel Save | Click here to save |
|---|---|------------|--|
| Portal Branding | Portal Notifications | | |
| Nutomatic Notifications Send an email notification to clients when reports are posted to the porta BCC me on notifications sent to my clients I have posted a report to your Client Web Portal. Please click on the link below to log in and view the report. The URL for the New Client Web Portal Login is https://fp.morningstar.com/ Thank you very much. | Custom E-Mail Signature Enable custom e-mail signature for automatic notifications All reports are confidential. Elizabeth Morgan, CFA | | Enter a custom email signature here Select each slider to enable |
| Send me an email notification when clients upload to the portal Delivery Consent C Require clients to accept Delivery Consent 2018-5-7 Version 6 + Create New from Copy Please consent to electronic delivery of reports and bills. | | | Click here to edit the conten of your electronic delivery consent notification |

The table below describes each setting option:

| Setting | Options |
|-------------------------|--|
| Automatic Notifications | Select the slider to disable the following automatic notifications, including the following; |
| | E-mail for posted reports. You can also customize the content that your clients receive. Blind copy (BCC) e-mail notifications sent to your client. Email notifications when your client uploads documentation to you. |
| Delivery Consent | Select the slider to require your clients to consent to the electronic delivery of reports and documentation. Click Create New from Copy to update the content of your consent. |
| | Note: Each time you edit electronic delivery consent, your clients will be prompted to read and re-accept electronic delivery consent. |
| Custom E-mail Consent | Select the slider to enable a custom email signature for all automatic notification. Once enabled, type your custom email signature into the text box. |

Now that you've enable the functionality you want to include in the CWP, invite your clients to activate their portal. Once activated, publish and receive reports and other documentation for your activated clients. This section describes the following;

Overview

- Inviting Clients to the CWP
- Posting reports for a single client
- ► Posting reports for multiple clients at once, and
- ► Launching the CWP from inside Office Cloud.

You must invite clients and prospects to the CWP individually. To invite clients and prospects to the CWP, do the following:

How do I invite clients to the CWP

1. From the Menu, click either Clients & Accounts or Prospects. The Clients grid opens.

| E Home | | | | |
|------------------------------|------------------------------------|-------------------------------------|-------------------|---------------------|
| Home > | | | | |
| EXPLORE | | M RNINGSTA | | |
| Morningstar Research | | | | |
| Markets | | earch for Clients, Securities, R | eports, and Re | |
| CLIENT MANAGEMENT & ANALYSIS | | | | |
| Clients & Accounts | Practice Management Re | enorts | | Click here to start |
| Prospects | ruotioo managoment ne | porto | | |
| Billing | iain insights into your practice b | y starting a spreadsheet report on: | | |
| Redtail CRM | Your assets under | Your n | ractice's overall | |
| ► Reporting | management | (O) perfor | mance | |
| PRACTICE MANAGEMENT | | | | |
| ► Workspace | | | | |
| Integrations | lients | 🖾 Create | Lists & S | |
| Import | lame | Market Value | Name | |
| Securities | | | Humo | |
| | eterson Family | \$4,133,695.15 | My New Lis | |
| | . R. R. Tolkien | \$3,513,257.58 | Current Star | |

- 2. Hover the cursor in the row of the **client** you want to enable the Client Web Portal for, then select the **Actions** icon. The Actions menu opens.
- 3. Select Client Web Portal. The Client Web Portal box opens.

| | Clients & Accounts | | | | | |
|------|-------------------------------|--------------------|------------------------|-------|-------|--------------------|
| Acti | ve Clients \vee | | | | | |
| 0 | 27 🖉 Edit Settings 🔤 | 오 [Z Export All | | | | |
| | Name | | Client Report Setting | | Prima | |
| | ► Albert Einstein ♀ Can Edit | | ✓ Bryan Reporting Sett | ing | 60% | |
| | ► Alexander Hamilton Po Can | Edit | New Renort Setting | ~ | Russ | |
| | ► Anderson Family Po Read C | Actions | | | S&P | |
| | ► Baker Household Po Read (| e constanting and | | | Globa | |
| | Bayly Family | Client | > | | Globa | |
| | ► Haba Family Po | Members | > | | S&P | |
| | ▶ J. R. R. Tolkien 🍳 Can Edit | Client Web Portal | > | g | 60% | Select this option |
| | Jennifer Roop | | | | Globa | |
| | ► Jim Winklehoffer Po Read | Share | | | Globa | |
| | ► John Keats 🕰 Can Edit | Create New Accourt | nt | g | 60% | |
| | ► Johnson Family Po Can Edi | Generate Report | | | Globa | |
| | ► Peterson Family Po Read Or | Convert to CRM | | eport | 60-40 | |

4. Type your **client's email address** into the text box, the select **Send Invite**. Your client will receive an email instructing them how to register for the CWP.

| | Clients & Accounts | | | | | |
|-------|--------------------------------|--------------------|-----------------------|------|-------|------------------------------------|
| Activ | ve Clients \vee | | | | | |
| 0 | 27 🖉 Edit Settings 🔤 | ২. [] Export All | | | | |
| | Name | | Client Report Setting | | Prima | |
| | ► Albert Einstein ♀ Can Edit | \odot | Bryan Reporting Set | ting | 60% | |
| | ► Alexander Hamilton Po Can F | dit | New Report Setting | - | Russ | |
| | ► Anderson Family Po Read C | Client Web Portal | | | S&P | |
| | ► Baker Household Po Read (| 0 | | | Globa | |
| | Bayly Family | Einstein@email.com | 1 | | Globa | |
| | ► Haba Family Po | | | | S&P | Click this button |
| | ▶ J. R. R. Tolkien Po Can Edit | Cind | | g | 60% | after entering an email address |
| | Jennifer Roop | Send I | nvite | | Glob | cinan address. |
| | ► Jim Winklehoffer Po Read 0. | ., | | 5 | Globa | |
| | ► John Keats Po Can Edit | | Bryan Reporting Set | ting | 60% | |

Reports generated within Morningstar Office Cloud are housed within the Reports page. From the Reports page, you have the option to publish reports to a single client or multiple clients at once.

How do I publish reports for a single client to the CWP?

To publish a single report to the CWP, do the following.

1. From the **Menu**, click **Reporting > Reports**. The Reports page opens.

| Home | | | |
|------------------------------|------------------------------------|--------------------------------------|-------------------|
| Home > | | | |
| EXPLORE | | | |
| Morningstar Research | | | |
| Markets | | earch for Clients, Securities, R | leports, and Re |
| CLIENT MANAGEMENT & ANALYSIS | | | |
| Clients & Accounts | Practice Management R | enorts | |
| Prospects | nation management in | oporto | |
| Billing | iain insights into your practice b | oy starting a spreadsheet report on: | |
| Redtail CRM | Vour sessie under | Vour n | ractice's overall |
| ▼ Reporting | management | (O) perform | mance |
| Reports | | | |
| Batch Schedules | | | |
| Presentation Studio | lients | T% Create | Lists & S |
| PRACTICE MANAGEMENT | honta | | |
| ► Workspace | lame | Market Value | Name |
| ntegrations | eterson Family | \$4,133,695.15 | My New Lis |
| nport | . R. R. Tolkien | \$3,513,257.58 | Current Stat |
| ecurities | laba Family | \$3,292,138.72 | Sustainable |
| | ohnson Family | \$3,183,897.30 | High Rated |
| | Jexander Hamilton | \$2,557,344.25 | Internationa |
| | Jhert Finstein | \$2,336,132,56 | New Ideas |

- 2. Hover the cursor within the **cell of the report** you want to publish, then select the **Actions** icon. The Actions menu opens.
- 3. Select Publish to Client Web Portal.

| | Reports | | | | | |
|-------|----------------|-------------------------|--------------|--------|-------------------|---------------------|
| 0 Sel | ected 🕂 Cre | ate New Folder 🛛 🕺 U | Jpload Actio | ons∨ | | |
| | Name | | Status | Туре | Target | |
| | Einstein_Quar | ter-end Communi 🛇 | Ready | Batch | Albert Einstein | |
| | B Winklehoffer | Quarter and Com | Ready | Ratch | Jim Winklehoffer | |
| | B Roop_Quarte | Actions | | ch | Roop Family | |
| | Client_Quart | | | ch | Sample Client | |
| | Einstein_Cur | Publish to Client Web P | ortal | rent v | s Albert Einstein | Choose this option. |
| | Albert Einste | Download | | ng Su | J Albert Einstein | |
| | 🖹 Einstein_Qui | Move to | | ch | Albert Einstein | |
| | B Roop_Quarte | A 1 : | | ch | Roop Family | |
| | Winklehoffer | Archive | | ch | Jim Winklehoffer | |
| | Client Quart | Delete | | ch | Sample Client | |

How do I publish multiple reports for

multiple clients at once to

To publish multiple reports at once, do the following.

1. From the **Menu**, select **Reporting > Reports**. The Reports page opens.

| Home | | | | the CWP |
|------------------------------|------------------------------------|-------------------------------------|-------------------|---------------------|
| Home | | | | |
| EXPLORE | | | | |
| Morningstar Research | | | | |
| Markets | | earch for Clients, Securities, R | eports, and Re | |
| CLIENT MANAGEMENT & ANALYSIS | | | | |
| Clients & Accounts | Practice Management Re | enorts | | |
| Prospects | raotioo management ne | porta | | |
| Billing | lain insights into your practice b | y starting a spreadsheet report on: | | |
| Redtail CRM | Your assets under | Your n | ractice's overall | |
| ▼ Reporting Reports | management | (O) perfor | mance | Click here to start |
| Batch Schedules | | | | |
| Presentation Studio | lients | 🖄 Create | Lists & S | |
| | lame | Market Value 🔔 | Name | |
| Integrations | - eterson Family | \$4 122 605 15 | My New Lie | |
| Import | R R Talkian | \$4,133,053.13 \$2,512,257.58 | Current Stat | |
| Securities | Lake Femily | \$3,313,237.30 | Custeine bla | |
| | | \$3,292,138.72 | Sustainable | |
| | ohnson Family | \$3,183,897.30 | High Rated | |
| | Jexander Hamilton | \$2,557,344.25 | Internationa | |
| | Jbert Finstein | \$2,336,132,56 | New Ideas | |

- 2. Select the **checkbox** next to each **report** you want to publish, then select the Actions icon at the top of the screen,
- 3. Select Publish to Client Web Portal.

| | Reports | | | | | |
|-------|---------------------------------|----------------|-------------|------------------|----------------------|----------------------|
| 5 Sel | ected 🖸 Publish to Client Web | o Portal 🔟 Dov | vnload 🖵 Mo | ove to 🗗 Arch | ive III After select | ing |
| • | Name | Status | Туре | Target | Client N Client N | you oad, optio |
| | Einstein_Quarter-end Communi | Ready | Batch | Albert Einstein | Albert I | |
| | Winklehoffer_Quarter-end Com | Ready | Batch | Jim Winklehoffer | Jim Wi | |
| | Roop_Quarter-end Communica | Ready | Batch | Roop Family | Roop Fa | |
| | Client_Quarter-end Communica | Ready | Batch | Sample Client | Sample | |
| | Einstein_CurrentvsModelPortfo | Ready | Current vs | Albert Einstein | Albert I | |
| | 🖹 Albert Einstein_BillingSummar | Ready | Billing Su | Albert Einstein | Albert I | |
| | Einstein_Quarter-end Communi | Ready | Batch | Albert Einstein | Albert I | |
| | Roop_Quarter-end Communica | Ready | Batch | Roop Family | Roop Fa | |
| | Winklehoffer_Quarter-end Com | Ready | Batch | Jim Winklehoffer | Jim Wi | |
| | | P 1 | Des 1 | 0 | | |

Now that you've posted reports to the CWP, you may want to see how the reports appear on your clients' portals. To launch the advisor view of the CWP from inside Office Cloud, do the following:

How do I launch the CWP from inside Office Cloud?

1. From the **Menu**, select **Reporting > Reports**. The Reports page opens.

| Home | | | |
|----------------------------|-------------------------------------|-----------------------------------|-------------------|
| Home | > | | |
| EXPLORE | | | |
| Morningstar Research | | INC JUNINOUIF | NUTICE |
| Markets | Q Sea | arch for Clients, Securities, R | eports, and Re |
| CLIENT MANAGEMENT & ANALYS | IS | 10 mg | 10 00012 |
| Clients & Accounts |)restice Menogement Per | uerte : | |
| Prospects | | 10115 | |
| Billing | lain insights into your practice by | starting a spreadsheet report on: | |
| Redtail CRM | Your assets under | Your p | ractice's overall |
| ▼ Reporting | management | (O) perfor | mance |
| Reports | | | |
| Batch Schedules | | | |
| Presentation Studio | lients | Create | Lists & S |
| PRACTICE MANAGEMENT | | | |
| ► Workspace | lame | Market Value | Name |
| Integrations | eterson Family | \$4,133,695.15 | My New Lis |
| Import | . R. R. Tolkien | \$3,513,257.58 | Current Stat |
| Securities | laba Family | \$3,292,138.72 | Sustainable |
| | ohnson Family | \$3,183,897.30 | High Rated |
| | Jexander Hamilton | \$2,557,344.25 | Internationa |
| | Ibert Finstein | \$2,336,132,56 | New Ideas |

- 2. Select the **checkbox** next to a **published report** you want to view within the CWP, then select the **Actions** menu. A drop-down menu appears.
- 3. From the **Actions** menu, select **View in Client Web Portal.** The advisor-view of the CWP launches in new browser.

| | Reports | | | | | | | |
|------|-------------------|--------------------|-------------------|------------|------------------|------------------|----------|--------------------|
| 0 Se | lected + Cre | ate New Folder _1 | <u>Upload</u> Act | tions∨ | | | | |
| | Name | | Status | Туре | Target | Client Name | Report L | |
| | 🔄 Einstein_Quar | ter-end Communi, | ⊘ Ready | Batch | Albert Einstein | Albert Einstein | Client | |
| | Winklehoffer | Quarter and Com | Ready | Batch | Jim Winklehoffer | Jim Winklehoffer | Client | |
| | B Roop_Quarte | Actions | | ch | Roop Family | Roop Family | Client | |
| | Client_Quart | | | ch | Sample Client | Sample Client | Client | |
| | 🖹 Einstein_Cur | View in Client Web | Portal | rent vs | Albert Einstein | Albert Einstein | Client | Select this option |
| | Albert Einste | Remove from Client | t Web Portal | ng Su | Albert Einstein | Albert Einstein | Client | |
| | Einstein_Qu | Download | | ch | Albert Einstein | Albert Einstein | Client | |
| | B Roop_Quarte | | | ch | Roop Family | Roop Family | Client | |
| | Winklehoffer | Iviove to | | ch | Jim Winklehoffer | Jim Winklehoffer | Client | |
| | 🖹 Client_Quart | Archive | | ch | Sample Client | Sample Client | Client | |
| | 🔄 Haba Family, | Delete | | ng Su | Haba Family | Haba Family | Client | |
| | 🖹 J. R. R. Tolkie | | | ing Su | J. R. R. Tolkien | J. R. R. Tolkien | Client | |
| | 🖹 John Keats_B | illingSummary_0 | Ready | Billing Su | John Keats | John Keats | Client | |
| | Albert Einstein | n_BillingSummar | Ready | Billing Su | Albert Einstein | Albert Einstein | Client | |
| | 🖹 Haba_Quarter | -end Report_04 | Ready | Batch | Haba Family | Haba Family | Client | |
| | 🖹 Haba Family_ | BillingSummary | Ready | Billing Su | Haba Family | Haba Family | Client | |
| | Johnson_Wee | ekly Performance | Ready | Batch | Johnson Family | Johnson Family | Client | |

To view reports you posted, click on the **Documents** tab within the CWP.

| Feedback |) | You're currently view | You're currently viewing: Albert Einstein v | | |
|----------|----------------|--------------------------------------|---|---------------------|-----------------|
| | | | | My Account V | |
| | Overview | Investments | Documents | Contact Us | View all posted |
| | | | | | reports here. |
| | View Files | > Files You've Received | | | |
| | ⊥ Upload Files | | | | |
| | | Name | | Modified | |
| | | Einstein_Quarter-end Communications | _05-04-2020 | 05/05/2020 4:09 PM | |
| | | Albert Einstein_BillingSummary_03- | 10-2020 | 03/27/2020 11:54 AM | |
| | | BelAir-Direct WT Transition Bundle P | 0-(BM)-20200108 | 02/24/2020 1:38 PM | |