

Quick Start Guide to Advisor360° (Launch Edition)

Your future starts now!



Get down to business with Advisor360°

This kit includes (click to view):

[Advisor360° Login Instructions](#)

[Advisor360° Site Map](#)

[Best Practices
for Setting Up Advisor360°](#)

[Advisor360° Navigation](#)

[Where to Process Business
Reference Guide](#)

[Time Savers in Advisor360°](#)

Still need help?

Contact your firm practice development specialist (PDS).

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Advisor360° Login Instructions

Reference Sheet

Login

1. From your device go to MassMutual [OKTA](#).
2. Login with your FieldNet username and password.
3. From the OKTA landing page, find the Advisor360° chicklet.
4. Click the chicklet to launch Advisor360°.
5. On first login, you will need to read and accept a subscription agreement.
6. Scroll to bottom of the agreement and click the check box to submit.



Advisor360

You will now be directed to the landing page of Advisor360° - Welcome to your Advisor360° experience!

Browser

Note: The recommended browser is Google Chrome.

Access on Mobile Device

1. Using your mobile device, go to Workspace ONE.
 - o If you haven't installed Workspace ONE on your phone, here is a how-to video:
 - [iOS Install Workspace ONE](#)
 - [Android Install Workspace ONE](#)
2. Search for Advisor360° Mobile App on Hub App. View the [Downloading Apps on Workspace ONE Intelligent Hub Catalog](#) Training Video
3. Click Install.

Support Structure

If you need further assistance, please reach out to:

- Your firm's Agency Technology Specialist (ATS)
- Your firm's Practice Development Specialist (PDS) or
- Your in-firm support model.

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Best Practices for Setting up Advisor360° Checklist

Use the checklist below after you [complete your training](#), to ensure you set up your practice with Advisor360° correctly on Day One. This checklist includes best practices in the recommended order of completion.

Day One

Selecting your dashboard (Templates and/or customize)

Advisor360° Dashboard

- When you first open the Advisor360° Dashboard you will notice that a dashboard template will be auto displayed. You can customize it to fit your practice.
- Review the Advisor360° Dashboard In App Help to get a list of all the widgets available to you on the dashboard.
- Consider which widgets you want on your dashboard and where you should put them, so they are in a location that makes the most sense for how you work.

Client360° Dashboard

- Review the various dashboard templates available based on user type. For example, if you are a CRM user you should consider using the “At Your Service” dashboard template.

[Setting up alerts](#)

- Review the [list of alerts](#) available to you.
- Define which alerts you would like to receive by activating or deactivating each option. Note: You will not have access to deactivate all alerts e.g. Compliance Alerts.
- Define who in your practice is going to receive each alert.
- Decide how the alerts will be received.
 - Dashboard Widget only OR Dashboard Widget & email.

[Customizing your global account name](#)

- Review the options available to you for ways you can set up account names via the “Manage Account Name” link in the Global Account Name Customization tile, on the Practice360° Administration tab.

[Households](#)

- Review some of your larger households to make sure all accounts are captured and appropriately placed.
- Drill into an account or two on Client360° and make sure you can see the accounts.
- Use the following reports for household maintenance:
 - **Insurance Summary Report – Manually Added Policies/Contract:** The report provides a summary of all insurance policies created in each household across an advisor’s practice.
 - **Not in A Household Report:** The report lists account name, account number, address, investment objective, and other information provided by the account holder and the advisor; these accounts are not part of a household for reporting purposes.

Wealthscape & Envestnet

- Make sure you can access Envestnet and Wealthscape by utilizing Popular Applications & Links Widget.
- Drill into an NFS client on Client360° and attempt to view statements.

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Managing Insurance & Protection Products

- Make sure you can access the illustration and new business application platforms from Client360°.
- Make sure you can access Servicing, Workbench and Inforce Illustrations from Client360°.
- Familiarize yourself on how to access and run the following Insurance reports:
 - Consolidated Portfolio Insurance Review,
 - Detailed Portfolio Insurance Review,
 - Insurance Summary-Manually Added Policies/Contracts and
 - the Portfolio Detail with Insurance report.



MMLIS New Account Initiation (MMLIS Registered Reps only)

- Access account setup process through the Client Account Wizard (CAW) found in Practice360°.
- Identify those products/registrations eligible for submission through the CAW.
- Evaluate use of Master Services Agreement (MSA) for new clients as well as for existing clients.
- Track your new business submissions through the Cases widget available on the Advisor360° dashboard.
- Depending on the product/registration, please choose a resource from list below:

- | | |
|---|--|
| • MMLIS New Business in Advisor360° Bridge Document | • Direct Mutual Fund New Business Reference Guide |
| • Master Services Agreement (MSA) Overview Reference Guide | • Variable Annuity New Business Reference Guide |
| • Value of the Master Services Agreement (MSA) Video | • Variable Universal Life New Business Reference Guide |
| • MSA/CAW Eligible Product Lines & Registration Types Reference Guide | • Direct Advisory New Business Reference Guide |
| • Open New Accounts Using the Client Account Wizard (CAW) | • Advisor360° Account Profiles Guide |
| • New Brokerage Accounts Reference Guide | |



Categorizing your contacts/clients

- *Are you segmenting your book of business?*
 - Consider how you will be separating your book of business (for example: Prospects vs. Clients; A, B, and C service levels).
 - The category field is where you can expand the values for segmentation i.e. platinum, gold etc.



3rd Party Planning Tools (RightCapital & MoneyGuideElite)

- For existing RightCapital and MoneyGuideElite users ensure that you can see the respective icons on the top right-hand tool bar of your Client360° households.
- Connect the existing Advisor360° households to existing RightCapital and/or MoneyGuideElite clients and establish data integration.
- RightCapital: ensure admins can access the tool on your behalf.
 - For advisers on teams, admins will need to know which adviser has set up an existing client in RightCapital to ensure a proper connection is made and households are not duplicated.
- MoneyGuideElite: ensure admins and any support staff can access clients through the MoneyGuideElite picklist by selecting the MoneyGuide icon.

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- **Previously, I did use Salesforce and synced in Salesforce - then do this:**
 - **Customizing your CRM including Outlook sync settings**
 - Think of additional data points you want to collect on the household and people level and create any desired custom fields in the contacts tab.
 - For example: Pet's name, favorite sports team.
 - Are you setting up Mail Merge to allow for bulk mailings?
 - *Do you have any templates that you want to prepare to upload so they are ready for use?*
 - Are you setting up Outlook to sync your calendar event information? Consider how you want syncing to work.
 - *Which types of activities do you want to sync?*
 - *Do you want to sync birthdays, wedding anniversaries, and people not in a household?*
 - *Do you want Outlook to categorize appointments, phone calls, and/or client reviews?*

- **Previously, I did not use Salesforce or sync in Salesforce - then do this:**
 - **Request that Outlook Sync be enabled through your Practice Development Specialist (PDS) or Train the Trainer (TTT) Team. Once enabled follow these steps:**
 - **Customizing your CRM including Outlook sync settings**
 - Think of additional data points you want to collect on the household and people level and create any desired custom fields in the contacts tab.
 - For example: Pet's name, favorite sports team.
 - Are you setting up Mail Merge to allow for bulk mailings?
 - *Do you have any templates that you want to prepare to upload so they are ready for use?*
 - Are you setting up Outlook to sync your calendar event information? Consider how you want syncing to work.
 - *Which types of activities do you want to sync?*
 - *Do you want to sync birthdays, wedding anniversaries, and people not in a household?*
 - *Do you want Outlook to categorize appointments, phone calls, and/or client reviews?*

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Day Two



Setting up workflows

- Identify and think through workflows for any task sequence in Advisor360° that you are likely to perform repeatedly e.g. new Client Onboarding.
- For workflows in your current process (outside of Advisor360°), document/print out the workflow to aid in the transfer of that information.

- [CRM Workflows User Guide](#)

- [Financial Planning Workflows](#)



Adding client review information

- Identify and document your current cadence for client reviews from your existing process. This feature is ideal for capturing your required annual review for Investment Advisory Clients.
 - Consider what you want to do for each household so you can add that to the Contacts tab of Client360°.
- Identify what activities you think should be considered a touchpoint, so you are ready to add that in the Contacts tab of Client360°.



Client360° Account Groupings

For individual households, determine if you have a need to group accounts together for specific reporting or Investor360° access. You have 3 options for building groups,

1. Automatically add,
2. Automatically add all fee-based, or
3. Manually add.



Setting up quarterly statement preferences (MMLIS Registered Reps only)

After go-live/conversion, households will exist in Advisor360° based on Advisor360°'s householding logic. Advisors can confirm/update the households as needed.

Please refer to the [Advisor360° Groups User Guide](#) and the [CRM at a Household Level User Guide](#) for additional information about groups and household management training materials.

- Familiarize yourself with the Quarterly Statements.
 - Define the options that best match your practice.
 - Your business logo and DBA information can be viewed within Quarterly Statements Settings.
 - If you need to update a DBA go into the Compliance Tab in Practice360° and complete the submission form. Your submission will be reviewed in Home Office Compliance and a response provided. Only Compliance approved DBAs can be used.
 - If you need to change your logo, go to the Administration tab under Quarterly Statement Settings. Only Compliance approved logos can be submitted for change. Your submission will be reviewed in Home Office and a response provided.
- Reminder for Envestnet Users - new statements will go out on 6/30/21 from Advisor360°. Quarterly Statements default to eDelivery via Investor360°.
- Consider how you want each client to receive their statements (electronic vs. mailing).
 - You must set up your clients with access to Investor360° prior to 6/30/21.

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Considerations

The following items do not need to be completed immediately. Please review and decide when you would like to complete the following tasks based on your practice:

- **1-Click Review/Templates**
 - Preview reports available in Client360° and consider which reports you would like to bundle into a 1-Click Review. This option provides you with a single convenient packet for various needs: client reviews, year-end meetings, etc.
 - By creating a 1-Click Review, you can save time and present consistent reports every time with the click of a single button. 1-Click reviews can be run for one client within Client360° or for multiple clients from the 1-Click Review widget on the Advisor360° dashboard.

- **Grouping**
 - Think of different ways you would like to organize views/lists of your data to help determine which Practice360° groups to create.
 - For example: high net worth households, clients on a mailing list, clients with a certain birthday range, fee-based financial planning clients, all whole life policies, or accounts with a certain cash balance.
 - Determine which groups will be dynamic (based on filters) and which will be static (manually added to a group).

Note: You can create groups in the Practice360° Households, Accounts, Workflows, CRM Activities, Insurance, and People tabs.

- **Exploring Investor360° and enabling it for your clients**
 - Create an Investor360° login for yourself so you can go through the login experience and understand how your clients will access the tool.
 - Explore the Investor360° environment yourself to learn about its value as a tool from both the advisor and client perspective.
 - Identify clients you want to give access to for Investor360°.
 - Set up user id and password on your own account if you have one to test it out.
 - Set up clients with User id and passwords for Investor360°.
 - Reminder for Envestnet Users - new statements will go out on 6/30/21 from Advisor360°. Quarterly Statements default to eDelivery.
 - You must set up your clients with access to Investor360° prior to 6/30/21.
 - Consider adding insurance and protection products when setting up your client's access.

- **Manage Benchmarks (MMLIS Registered Reps only)**
 - Review preset benchmarks options within Practice360°.
 - Select benchmarks that best align with your client's goals and portfolio in the Administration tab of Practice360°.

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Where to Process Business Reference Guide

Type of Business	New Business	Servicing	Illustrations/ Building Models/ Proposals	Trading	Reporting, Holdings/ Policy View/ Account information/Verify Trades
Brokerage	Advisor360° * (CAW)	Advisor360° - link to ICP <i>No Change</i>	N/A	Advisor360° (preferred, or Wealthscape as applicable)	Advisor360°
WMS (Managed Business)	Advisor360° - will connect to Envestnet/UAO <i>No Change</i>	Envestnet <i>No Change</i>	Envestnet <i>No Change</i>	Envestnet <i>No Change</i>	Advisor360°
Third Party Manager/ Referral Program	Advisor360° (CAW/ Third Party Manager paperwork) *	Third Party Manager <i>No Change</i>	Third Party Manager <i>No Change</i>	Third Party Manager <i>No Change</i>	Advisor360°
Direct (Mutual Fund Business)	Advisor360° (CAW/ Fund Company paperwork) *	Direct with fund company <i>No Change</i>	N/A	Direct with fund company <i>No Change</i>	Advisor360°
Variable Annuity	Advisor360° (CAW links to VAOE) *	Advisor360° – link to ServiceNet (prop) or Direct with carrier (non- prop) <i>No Change</i>	N/A	N/A	Advisor360°
MM Fixed Annuity	Advisor360° - routed to FAOE	ServiceNet - SE2	Annuities Sales Illustrations	N/A	Advisor360°
MM Life Insurance & DI	Advisor360° - routed to New Business system (Coverpath etc.) *	Advisor360° – link to Coverpath/ ServiceNet	Advisor360° – link to Illustration Systems	N/A	Advisor360°
MM LTC	N/A	Advisor360° – link to ServiceNet	N/A	N/A	Advisor360°
MMLIA including Non- Prop VUL	ASH/Crump (Link on Advisor360° from Popular Applications & Links Widget) <i>No Change</i>	Carrier <i>No Change</i>	ASH/Crump <i>No Change</i>	N/A	Carrier/ <i>No Change</i> (viewable in Advisor360° if manually entered) Advisor360° – for Non-Prop VUL

*Client Information from Advisor360° will populate in Coverpath, Client Account Wizards (CAW) and MMLIS forms.

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Advisor360° Dashboard provides centralized access to the entire Advisor360° platform with customizable widgets to quickly view and access information about your practice

Practice360° allows you to view topics and take action on items across your book of business.

- **Households, Accounts, People, Insurance, & CRM Activities Tabs:**
 - Create groups and columns to view and filter data cross your practice.
- **Trading Tab:**
 - Create and view trades across your book of business.
- **Analytics & Business Summary Tabs:**
 - Analyze your business using metrics, benchmarks, and statistics.
- **Procedures Wizard Tab:**
 - Open and manage accounts.
- **Reports Tab:**
 - Run reports on information across your book of business.
- **Documents Tab:**
 - View, upload, and search for documents.
- **Alerts Tab:**
 - Manage which alerts you want to receive and how.

Client360° allows you to view and take action on a particular household.

- **Portfolio Subtabs:**
 - View portfolio details such as asset breakdown, performance, holdings, account activity, statements, PIPs & SWPs, and account profiles, as well as run reports.
- **Trading Tab:**
 - Place trades for the household.
- **Insurance Tab:**
 - View all insurance policies for the household and manually add additional ones needed.
- **Documents Tab:**
 - View and upload documents that you can share with clients, if applicable.
- **Contact Subtabs:**
 - Manage all contact information such as addresses, phone numbers, and household activities.
- **Planning Subtabs:**
 - Create goals, track conversations, and run proposals for the household.
- **Administration Subtabs:**
 - Create custom groups and manage Investor360° logins.

Investor360° allows clients to view their portfolio and securely share documents and messages.

- **Portfolio Subtabs*:**
 - View portfolio details such as asset breakdown, performance, holdings, account activity, and account profiles, as well as run reports.
- **Insurance Tab*:**
 - View all insurance policies.
- **Statements & Documents Tab:**
 - View statements and documents that have been shared by the advisor.
- **Messages Tab*:**
 - Securely communicate with advisor's office.

TIP: Create an Investor360° account for yourself so you can log in and understand how it will work for your clients.

* Gain/Loss information, performance, additional assets, reports, insurance, and Investor360° Messages are only available if the login ID has been given access to that information.

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Advisor360° Navigation



Selecting the **question mark icon** provides a description of the screen displayed with helpful hints and supportive information.



Selecting the **iDot icon** provides information about the section of the screen where the iDot displays.



Selecting **View Helpful Tips**, provides helpful information on multiple areas of the tab.

ACTIONS: I want to...

Use the ACTIONS: I want to... links in the upper right of screens to take further action on items on the page.

Opening Tools in Practice360°



By default, Practice360° displays the Households tab. To add additional application tabs, select the New Application icon (+). Selecting the name of the application will open it in another tab.

Use the icon to the right of the application's name to open it in a new window. This is helpful if you want to leave something open all day in its own window (e.g., Practice360° Trading).

Filtering for Information in Practice360°



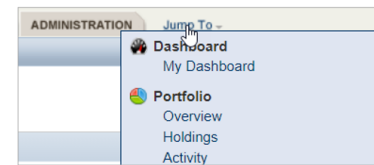
Use the filter icon to filter down your information and then save as dynamic groups (if you will be using that filtered information often). Remember to first consider the data you are looking for to determine which Practice360° tab you should be on.

Navigating to Client360° from Practice360°

From the household tab in Practice360°, selecting a household displays a pop-up that allows you to navigate to any subtab in Client360°.

Selecting the icon to the left of the household name will open the household to the default landing page (which you define in the Practice360° Administration tab). You can also use the search at the top of Practice360°.

Viewing Subtabs in Client360°



Select a tab and then a subtab or use the "Jump To" menu to quickly access any other subtab in Client360°.

These icons appear at the top right of screens in Client360°



Allows you to access the Advisor Feedback Tool.



Brings you to Insurance to start an illustration or application.



Displays a description of the screen displaying.



Opens the current screen in a new window.



Brings you to Right Capital.*



Prints the information displayed.



Create a new CRM activity from anywhere in Client360°.



Launches WealthScope.*

*Allows you to export Holdings to Morningstar and export Holdings and Generate a Portfolio Snapshot.

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Time Savers in Advisor360°

1-Click Review



1-Click Review lets you bundle report templates into a package of reports that you can run with one click. These are created in Client360°, on the Portfolio > Reports subtab.

1-Click Review Widget



Use the 1-Click Review Widget on the Advisor360° Dashboard to quickly run 1-Click Review bundles and your favorite reports for multiple households at a time.

Groups



Create groups in Practice360° and Client360° to organize the view of your business and to use when running reports, placing trades, etc.

For Practice360°, determine which groups can be created from filters (dynamic groups) and which need to be manually added and removed (static).

EasyFill™



Autofill important client, account, and advisor information into most forms, based on what we have in the system. Use this tool to increase productivity and reduce typos caused by entering the same information over and over.

Tags



Apply tags to CRM activities so that you can filter by the tag later, either in Client360°, for one household, or in Practice360°, to filter across your book of business.

Review & Touch Point Tracking



Define, for each household, how often you want to have a review as well as how often you want to have a touchpoint (and what constitutes a touchpoint).

Track reviews and touchpoints to ensure you are staying on schedule with the Next Projected and Next Scheduled dates in the Contacts tab in Client360° or through the Client Activity widget on the Advisor360° Dashboard.

Advisor IDs



As you create Practice360° Groups, report templates, benchmark groups, etc., choosing the right Advisor ID is the key to ensuring that all members of your team will have access to them.

Popular Applications & Links Widget



Utilize this widget to save time quickly accessing the apps and links you use most. To add additional items to the widget, choose the Settings option from the menu.