Advisor360°

PRACTICE360° ADMINISTRATION

User Guide

Table of Contents

Overview 1
Where to Find it 1
CRM Section 1
CRM Tile 1
Workflows Tile 1
Texting Tile 1
Client360° Section 2
Global Client360° Landing Page Tile 2
Global Account Name Customization Tile 2
Benchmarks Tile 2
WealthGuide Tile 2
Quarterly Statements Tile 2
Investor360° Section 2
Investor360 Tile 3
GLOSSARY 4
Advisor360° 4
CRM Workflow 4
CRM Workflow Template 4
Practice360° 4
WealthGuide® 4

PRACTICE360° ADMINISTRATION USER GUIDE

Overview

The ADMINISTRATION tab in Practice360°® is the location where advisors can make practice-level configuration changes across the entire Advisor360°® suite.

Where to Find it

Practice360° > **ADMINISTRATION** tab

CRM Section

The CRM section of the ADMINISTRATION tab includes the following three CRM-related tiles:

CRM Tile

The CRM tile consolidates the following CRM actions/settings into a single location:

- Personal CRM Settings
- Household Types and Categories
- Relationship to Household
- Custom Fields Labels
- Custom Tags
- Mail Merge Templates

Selecting any of the links opens a page with an expanded view of each CRM action/setting.

Workflows Tile

The Workflows tile consolidates the following two Workflow actions into a single location:

- Workflow Templates
- Create New Templates

Select the **Workflow Templates** link to manage your existing templates or select the **Create New Templates** link to add a new one.

Texting Tile

Use the Texting tile to manage your office names and numbers set up for texting.

Client360° Section

The Client360°® section of the of the ADMINISTRATION tab includes the following five Client360°-related tiles:

Global Client360° Landing Page Tile

Use the drop-down menu to select which tab/subtab of Client360° will serve as your default landing page.

Global Account Name Customization Tile

Use the Global Account Name Customization tile to change how your account names will display in Client360°, Investor360°®, statements, and reports.

Benchmarks Tile

Use the Benchmarks tile to manage, add, and assign benchmark groups to households and accounts.

WealthGuide Tile

Use the WealthGuide® tile to add, rename, or delete WealthGuide topics and categories across all households associated with specific advisor IDs.

Quarterly Statements Tile

The Quarterly Statements tile consolidates the following quarterly statement-related settings and reports into a single location:

- Quarterly Statement Settings
- Step-by-Step Instructions
- Household Review Report
- Quarterly Statement Group Review Report
- Accounts Not On A Quarterly Statement Report

Selecting the **Quarterly Statement Settings** link opens a page with an expanded view of the topic. Selecting the **Step-by-Step Instructions** link opens a new window with help text. Selecting any of the Report links opens the corresponding report.

Investor360° Section

The Investor360°® section of the ADMINISTRATION tab includes a single tile that covers several Investor360°-specific topics.

Investor360 Tile

The following Investor360°-related topics are found in the Investor360° tile:

- Advisor Contact Information
- Investor360° Login IDs
- Edit Investor360° Login ID Permissions
- Account Aggregation Error Report

Selecting the **Advisor Contact Information** link opens a page where you can select what contact information to display in the header of Investor360°. Selecting the **Investor360° Login IDs** link opens a report that displays a table of information and credentials tied to Login IDs. Selecting the **Edit Investor360° Login ID Permissions** opens a page where you can edit permissions for Login IDs. Selecting the **Account Aggregation Error Report** link downloads an Excel file of a report that notifies you of any errors regarding multiple accounts.

GLOSSARY

Advisor360°

A financial technology platform that integrates everything you need to serve your clients and run your business from any computer, tablet, or phone.

CRM Workflow

A series of tasks or phone calls that have been applied to a client and are in progress.

CRM Workflow Template

A series of tasks or phone calls that can be used repeatedly.

Practice360°

Our advisor-facing platform for practice-level information and reporting.

WealthGuide®

Available within the Planning tab of Client360°, WealthGuide is a tool designed to strengthen your client relationships by allowing you to guide and track their financial planning progress. Track the financial planning topics you reviewed in your last meeting and schedule reminders for areas you still need to address, take notes on a topic you discussed, and integrate your financial planning process with our CRM.