Update Transaction Permissions

By default, any bank account or credit card transactions feeding into the Budget module of your RightCapital portal will be hidden from your advisor. To grant your advisor access to these transactions, you can follow the steps below.

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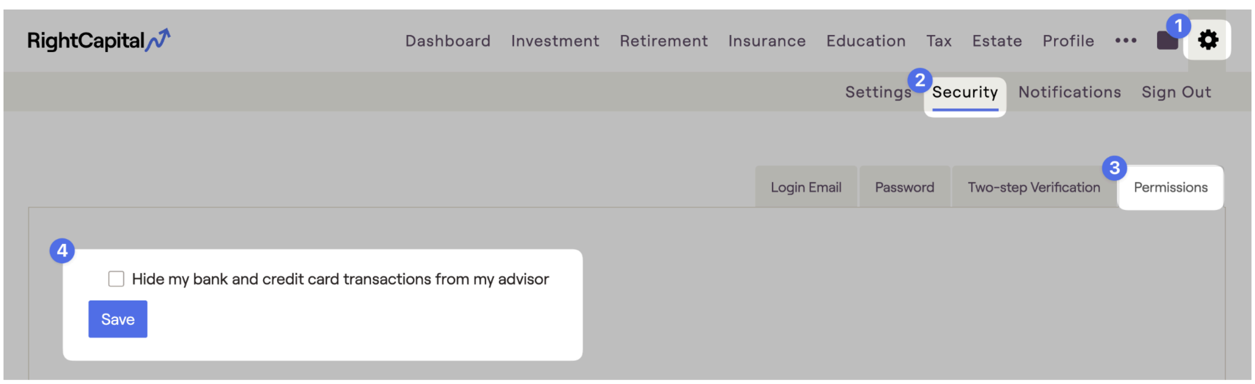
1. Log into your RightCapital portal (this must be done on the computer, not on the mobile app).
2. Click the Gear Icon in the upper right corner, and navigate to the Security > Permissions tab.
3. Uncheck the box labeled, “Hide my bank and credit card transactions from my advisor”, and then click Save.



What does this do?

With this box unchecked, your advisor will be able to view and help you manage your transactions in the Dashboard > Budget > Transactions tab. This includes renaming, recategorizing, and splitting transactions. Please note that you can always revert this change by re-checking this same setting within your RightCapital portal.