Advisor360° Mobile App

Reference Guide

Use this guide to learn how to download the Advisor360° mobile app. Note: Remember to use CTRL+F to find and search for keywords.

Contents

Overview

The Advisor360° mobile app provides a secure mobile environment so you can stay connected to your business on the go.

Advantages

- Perform key business tasks on your mobile device easily and securely.
- Secure sign-in and authentication using domain credentials.
- Shortcut sign-in using a 4-digit PIN, fingerprint, or facial recognition.
- Send secure text messages to clients, receive Investor360° messages, and alerts.
- Easy navigation with quick-view tiles on the Home screen for easy access.
- Place trades, receive alerts, deposit checks, and confirm transfers.
- View compensation, business, and market snapshots.

NOTE: Advisors are unable to open and submit new accounts or policies via the Advisor360° Mobile App.

Requirements

- Apple iOS device: Latest OS version; password-protection enabled.
- Android devices: Latest OS version; password-protection enabled.

Where to find it? On your mobile device:

- Go to Workspace ONE
- Search for **Advisor360° Mobile App** on Hub App
- View the Downloading Apps on Workspace ONE Intelligent Hub Catalog Training Video (04:23 min)

Getting Started

Downloading the App

On your mobile device, open the Workspace ONE, and download the **Advisor360°** app.

Opening the App for the First Time

1. On your mobile device's home screen, tap the Advisor360° icon.
2. Follow the on-screen instructions.

A tutorial guides you through an overview of the app's features.

Signing in with a PIN, Fingerprint, or Facial Recognition

After you sign-in the first time, your username and password are authenticated and you can choose an alternative sign-in method of either a 4-digit PIN, fingerprint, or facial recognition.

1. On your mobile device's home screen, tap the **Advisor360°** icon. The app prompts you to switch your sign-in method.
2. Follow the on-screen instructions to change your sign-in method or dismiss the prompt.

Alternate sign-in methods, such fingerprint or facial recognition, are available if your mobile device supports the technology.

Viewing the Tutorial

The tutorial opens the first time you sign into the app. After that, you can view the tutorial anytime.

Tap **Main Menu** icon **> Tutorials**.

Using the App

You can use the app on your mobile device to perform key activities, such as trades, check deposits, texting, viewing accounts, and reviewing case workflow.

The app supports swipe controls for iOS and Android devices. Use the swipe gesture supported by your device.

Home Screen

- Easy navigation with quick-view tiles on the Home screen for easy access.
- Tap a tile on the Home screen to open its menu.
- Use swipe gestures to open and close menus.
- Tap the **Main Menu** icon to view full list of features.
- Use the Search bar to quickly find a household and view recently viewed households.
- Tap **Recent Updates** to view company and app updates

Main Menu

Tap the **Main Menu** icon to view all features, including those that don't appear on the Home screen. Tap a feature to open it.

Changing Sign-in Information

Use the Settings menu to change your sign-in method or PIN.

1. Tap **Main Menu** icon > **Settings** to change or access these settings:
   - Remember Member ID
   - 4-Digit PIN
   - Change PIN
   - Fingerprint Sign-In
   - Facial Recognition
2. Follow the on-screen instructions

Alerts

Tap **Alerts** to view notifications about changes in your practice and in client portfolios. You may receive alerts regarding:

- Check, wire, or EFT paid or received.
- Bond calls, maturity notices, and fee funding.
- Check exceptions, debit accounts, and invalid beneficiary accounts.
- Investor360° messages, GTC orders (executed, expired), beneficiary accounts.
- Compliance, model drift alert, and odd lot offer notices.

Placing a Mobile Trade

Using the app on your mobile device, you can place these trades: equity, mutual fund, UIT, precious metals, and bonds.

You can't place block trades from the mobile app.

Placing a Trade

1. Launch the Advisor360° app.
2. Tap **Trading > Place a Trade.**
3. Choose the household, account and position.
4. Follow the on-screen instructions to continue with the order.
5. Review (or edit) your order before tapping **Submit**.

Checking a status of a Mobile Trade

You can view a household's performance, including rate of return, portfolio, and S&P 500 performance.

1. Launch the Advisor360° app.
2. Tap Trading > Processed Trades.
3. Tap the trade to view details.

Depositing a Check on Mobile

You can deposit checks using your mobile device.

Depositing a Check

1. On the Home screen, tap **Check Deposit**.
2. Follow the on-screen instructions.

Checking on Deposit Status

On the Home screen, tap **Check Deposit > Transaction Status.**

Adding an Activity to a Contact

You can create activities for contacts, such as: tasks, add notes and appointments, track phone calls, send messages, and write letters to a client.

Adding an Activity from the Main Menu

1. Tap **Main Menu** icon **> Client360° Contacts** and choose a household.
2. Tap **Add Activity** and follow the on-screen instructions.

Adding an Activity from the Home Screen

1. On the Home screen, tap **Client360°** and choose a household.
2. Tap **Contacts > Add Activity**.
3. Tap an activity and follow the on-screen instructions.

Viewing Household Information

Tap **Client360°** to access households from your mobile device. You can also access households from the Main menu.

Searching for a Household

There are a couple of ways to search for a household:

- On the Home screen, tap **Client360°**, choose a recent household or enter a household in the search bar
- Tap the **Main Menu** icon > **Client360°**, choose recent household or enter a household in the search bar.

Viewing a Household

When you view a household, you can see balances and accounts. You can also view household details, such as contact information, holdings activity, performance, and orders.

1. Tap **Client360°** and choose a household. You will see a balance snapshot and household accounts.
2. Tap an icon under the Detail menu:
   - **Contacts** to view contact details
   - **Holdings** to view account holdings
   - **Activity** to schedule an activity
   - **Performance** to view performance
   - **Orders** to view trade orders

Viewing Household Contacts

1. Tap **Client360°** and choose a household.
2. Tap **Contacts**.

Viewing Account Holdings

You can view a household's holdings, filter by account, and launch trading.

1. Tap **Client360°** and choose a household.
2. Tap **Holdings** and account.
3. Tap a holding to view details.

View Household Activity

You can view a household's activities, filter by account, and sort by date.

1. Tap **Client360°** and choose a household.
2. Tap **Activity.**
3. Follow the on-screen instructions.

View Household Performance

You can view a household's performance, including rate of return, portfolio, and S&P 500 performance.

1. Tap **Client360°** and choose a household.
2. Tap **Performance.**

View Household Orders

1. Tap **Client360°** and choose a household.
2. Tap **Orders.**

Viewing Contact Information

Tap **Main Menu** icon **> Client360° Contacts** to search for contacts by household or name and manage activities, including notes, tasks, phone calls, letters, and appointments.

Searching for a Contact

There are a couple of ways to search for a household:

- On the Home screen, tap **Client360°**, choose a recent household or enter a household in the search bar
- Tap the **Main Menu** icon > **Client360°**, choose recent household or enter a household in the search bar.

Viewing Contact Details

You can search for a contact by household name or contact name.

1. Tap **Main Menu** icon **> Client360° Contacts**.
2. Choose recent household or enter a household in the search bar.
3. Tap the name to open contact details.
    - View address, phone numbers, and email.
    - Tap the **Map** icon to get directions to the address.
    - View people in the household.
    - See account details.
    - Send a secure message.

Viewing Account Performance

You can view a household's performance, including rate of return, portfolio, and S&P 500 performance.

1. Tap **Main Menu** icon > **Client360° Contacts**.
2. Choose recent household or enter a household in the search bar.
3. Tap **Performance.**

Using Text Messaging

*** Details on how to text will be provided after the launch of Advisor360° ***

You can send secure text messages to clients. You can name the conversation to make it easier to find when scrolling through your messages.

Clients can use any standard texting app to respond or opt out of receiving messages.

Sending a Text Message

1. Tap **Texting** to send secure text messages using the app.
2. Follow the on-screen instructions.

Receiving a Text Message

Your mobile device will receive a push notification when a message is sent to you. Tap the notification to view the message.

If the app is closed, tap the notification to launch the app and view the message.

Muting Text Notifications

1. Tap **Texting**
2. You'll see your text conversations.
3. Tap the **Texting Settings** icon.
4. Tap the Notifications switch to off.

Sending Secure Messaging to Clients

You can send and receive secure messages with clients using **Investor360° Messages**. You need to give the client access to Investor360° before you can send secure messages.

- Send secure messages to clients
- Mark messages unread.
- Review sent messages.

Sending an Investor360° Message

1. Tap **Investor360° Messages > Compose.**
2. Choose a household and follow the on-screen instructions.

Managing Your Business

Reviewing Case Workflows

You can search for and view all requests and documents submitted to home office for processing. Tap **Workflow** to view:

- Follow Up Required.
- Work in Progress.
- Work Completed.

Viewing Your Compensation

Tap **Compensation** to view the following:

- Compensation due.
- Year-to-date production, including annualized and prior year.
- View last three checks deposited.

Viewing your Business Snapshot

Tap **Business Snapshot** to view the following items:

- Cash available, total assets and year-to-date production.
- Breakdown of assets including PPS, NFS Non-PPS, and Non-NFS.

Submitting Feedback to Home Office

On the Home screen, tap **Feedback**, enter your comment, and tap **SEND FEEDBACK.**

Viewing the Market Snapshot

On the Home screen, tap **Market** to view a daily market summary of major indices and stock details, and any watch lists you've created on the Advisor360° dashboard.

- Tap the **Camera** icon to view market snapshot
- Tap the **Eye** icon to view your watch lists.
- Tap the **Search** icon to search for a stock.

Tip: From the Main Menu icon, tap Market Snapshot.