

Introducing Connections to Your Clients

Setting up your client with access to their Client Website for the first time? Here's what you'll need to know for your first conversation.



SET EXPECTATIONS UP FRONT

The Client Website shows your clients their complete financial lives in one easy-to-view location. However, connections may break occasionally. So make sure your clients understand that this is normal and are prepared with basic troubleshooting instructions in case a connection issue arises.



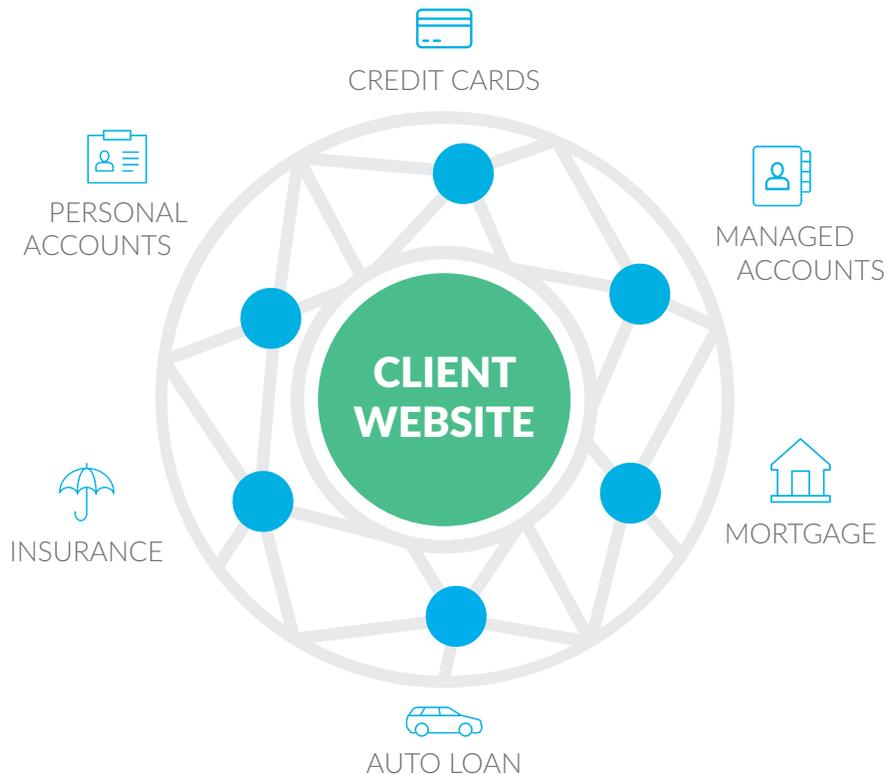
ENCOURAGE CLIENTS TO BE PROACTIVE

Any changes a client makes to their financial institution must also be updated within their Client Site. So to avoid future confusion, be sure your clients know when and how to update their connection information.



CREATE A PROCESS FOR REPORTING CONNECTION ISSUES

After you've set that expectation with your clients, make sure you establish a process going forward for handling any connection questions that arise. Your clients should know the best way to contact you, and your team should know how to address the issue in a timely manner.

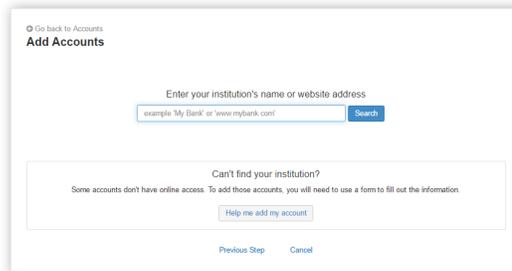


Best Practices for Client Connection Management

Now that you've set the expectations, here are some best practices to help you and your clients manage account connections.

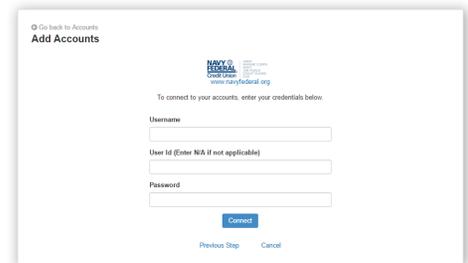
ADD CLIENT CONNECTIONS ON THE CLIENT WEBSITE

Because connections created on the Advisor Site must be managed by the advisor on an ongoing basis, we recommend your clients add their own connections on their Client Website.



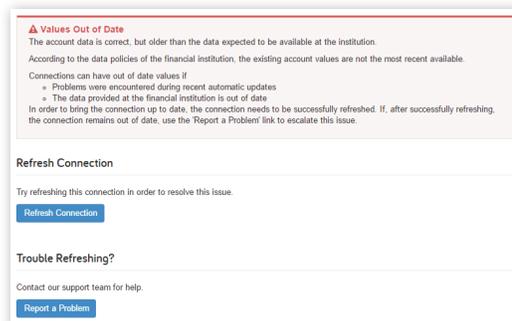
ENSURE CLIENTS TEST THEIR CREDENTIALS

For every connection, the system provides a link to the desired Financial Institution during the set-up process. Before entering any credentials in the Client Website, instruct clients to test those credentials with the institution to ensure they are up-to-date.



MANAGE ERRORS

Your Connection Dashboard shows an updated list of all Connections Errors. Be sure to reach out to your clients proactively to provide troubleshooting tips for resolving the error.



REPORT PROBLEMS

If a question arises that you or your clients can't address on their own or with your help, don't hesitate to contact eMoney's Data Services Team at dss@emoneyadvisor.com.

DON'T DELETE CONNECTIONS WITH OPEN TICKETS.

When you open a ticket with our Data Services Team, it's tied to the connection under which you've opened it. So be sure you and your client do not delete the connection during your troubleshooting. Otherwise you will delete the ticket as well.

