

How To: Add Client

1. This is your Home screen. Go to the Household tab to select desired Household.

Go To Desired Household. Click on Household Tab

Broker One a
Wednesday December 10, 2008

Dashboard [Refresh](#) [Customize Page](#)

As of 12/10/2008 10:10 AM

My Rep Info

Name Broker One
CRD 301
OSJ 001
Branch 101
Rep ID A01

[Go to My Rep Detail Page](#)

Client Service Open Workflows

You have 21 open [CService](#) activity groups containing 44 [CService](#) tasks

Due Days	Groups	Tasks
Overdue	0	0
Today - Next 7	0	0
Beyond Next 7	21	44

Compliance Open Workflows

You have 5 open [Compliance](#) activity groups containing 5 [Compliance](#) tasks

Due Days	Groups	Tasks
Overdue	0	0
Today - Next 7	0	0
Beyond Next 7	5	5

Calendar [New Event](#) [Calendar Help](#)

Monday 12/15/2008

December 2008

2. Click on the desired Household.

Households Home [Tell me more!](#) [Help for this Page](#)

View: All Households [Go!](#) [Create New View](#)

Recent Households [New](#) [Recently Viewed](#)

Household Name	Current Cas	HH Current Total	HH Rank
Aooqe Investment Group LLC		\$0.00	
Farmer	\$1,366.74	\$350,546.05	\$351,912.79 64
Doe Household	\$10,000.00	\$10,000.00	\$10,000.00
Doe Household	\$10,000.00	\$10,000.00	\$10,000.00
Anthony Tsung		\$0.00	
Google		\$0.00	
Google		\$0.00	
Adams	\$1,565.96	\$46,356.67	\$47,922.63 94
California Leads		\$0.00	
Jones		\$0.00	
Smith	\$170,589.96	\$11,309,346.30	\$11,479,936.26 1
Fischella	\$587,563.80	\$1,019,003.83	\$1,606,567.63 14
...

Select Desired Household

3. This is the main screen for your selected Household.

The screenshot shows the E*Assist Advisor interface for Household Agoge Investment Group LLC. The top navigation bar includes 'Home', 'Households', 'Individuals', 'Financial Accounts', 'Direct Transactions', 'Prospects', 'E*Assist Support', 'Console', 'Dashboards', 'Documents', 'Reports', and 'Professionals'. The left sidebar contains 'E*Assist VNP' (with links for E*Assist Login and Transcriber Manager) and 'E*Assist Advisor' (with links for Rep Info, Service Monitor, Heat Map, Batch Center, User Review, Financial Calculator, and Wealth Map). The main content area displays 'Household Detail' for Agoge Investment Group LLC, including fields for Household Name, Parent Household, HH Estimated Net Worth (\$2,000,000.00), HH Investible Amount, HH Current Cash, HH Current MV, HH Current Total (\$0.00), HH SROR Over Prior M (0.00%), HH SROR Over Last 3 M (0.00%), HH SROR Over Last 6 M (0.00%), HH SROR Over Last 12 M (0.00%), HH Comm YTD, Household Owner (Broker One [Change]), and DemoData. The bottom of the page shows 'E*Assist Modules'.

4. Mouse over to Individuals. A menu will show up. Click on the submenu New Individual

This screenshot shows the E*Assist Advisor interface with the 'Individuals' menu open. A red arrow points to the 'New Individual' option, which is highlighted. A white box with the text 'Click Here' is positioned over the 'New Individual' option. The main content area displays a table of individuals, with one entry for 'Joan Doe'. The table has columns for Action, Individual Name, Relationship In The HH, Age, Last Activity, Current Cash, Current MV, and Current Total. Below the table, there are fields for HH Current Cash, HH Current MV, HH Current Total (\$0.00), HH SROR Over Prior M (0.00%), HH SROR Over Last 3 M (0.00%), HH SROR Over Last 6 M (0.00%), HH SROR Over Last 12 M (0.00%), HH Comm YTD, Household Owner (Broker One [Change]), and DemoData. The bottom of the page shows 'E*Assist Modules'.

5. Once you have clicked on the New Individual tab you will be presented with the following screen, Individual Edit page. Press Save when done.

The screenshot displays the 'New Individual' page in the E*Assist VNP system. The page title is 'New Individual' and it includes a 'Help for this Page' link. A notice states: 'Individuals not associated with households are private and cannot be viewed by other users or included in reports.' The main form is titled 'Individual Edit' and contains two sections: 'Individual Information' and 'Address Information'. The 'Individual Information' section includes fields for First Name (dropdown), Last Name (Ricky), Nickname (Bobby), Household Name (Agoge Investment Gro), Indv Type (dropdown), Relationship in The HH (dropdown), Income Potential, Next Contact Date (12/10/2008), Assistant, Asst. Phone, Asst. E-Mail, Individual Record Type, Rep Client, Tier, Rank, Month, Phone, Mobile, Email, Personal E-mail, and DemoData. The 'Address Information' section includes fields for Mailing Street, Other Street, Mailing City, Other City, Mailing State/Province, Other State/Province, Mailing Zip/Postal Code, Other Zip/Postal Code, Mailing Country, Other Country, Fax, and Web Page. A red arrow points to the 'Save' button, with a callout box that says 'Press Save when Done'. The left sidebar contains navigation links for E*Assist VNP and E*Assist Advisor, a 'Create New...' dropdown, a search box, and a 'Messages and Alerts' section.

6. One you have pressed Save you will not have created the client. You can edit as much as possible by pressing the Edit button.

The screenshot displays the E*Assist Sales-Advisor web application. The top navigation bar includes 'Home', 'Households', 'Individuals', 'Financial Accounts', 'Direct Transactions', 'Prospects', 'E*Assist Support', 'Console', 'Dashboards', 'Documents', 'Reports', and 'Professionals'. The user is logged in as 'force.com' and is in the 'Client Management' section.

The main content area is titled 'Individual Ricky'. It features a navigation menu on the left with options like 'Rep Info', 'Service Monitor', 'Mail Map', 'Batch Center', 'User Review', 'Financial Calculator', and 'Wealth Map'. The central panel shows the 'Individual Detail' for Ricky, with tabs for 'Edit', 'Delete', 'Submit Workflow', 'Document Merge', 'Transcriber Recorder', and 'Transcriber Viewer'.

The 'Individual Information' section includes fields for Name (Ricky), Nickname (Bobby), Household Name (Aqqee Investment Group LLC), Indv Type, Relationship in The HH, Income Potential, Next Contact Date, Assistant, Asst. Phone, and Asst. E-Mail. The 'Address Information' section includes Mailing Address, Fax, and Web Page. The 'Cash Flow Snapshot (Based on Cash Manager Module)' section shows Total Incomes, Incomes Taxable Amt, Total Cash Adjustments, and Cash Accumulation Date. The 'Financial Profile' section includes Employment Status, Employer, Occupation, Title, Ownership of Public Co, and Affiliated with Bank or Brokerage. The 'Investment Profile (Variable Annuity Required)' section includes Age (0), Investment Time Horizon, Annual Incomes, Financial Situation, Investment Experience, Investment Objectives, Investment Strategy, Total Expenses, Total Cash Expenses, Withdraw Taxable Amt, Cash Accumulation Amt, Tax Bracket Range, Tax Rate Post Retirement, Income Avail To Invest, Estimated Bonus, Bonus Avail To Invest, Net Worth Range, Liquidity Needs, Liquid Net Worth, Risk Tolerance, and Est Tax Rate.

7. To view the created Client, go to the selected Household and mouse over to the tab Individuals. A submenu will appear showing you the name for the Individual/client we have just created.

