

In this user guide we will review how to access Connections while working in the context of a client in emX.

The client view of connections is similar to the 'full view' available through the top level emX navigation bar, except it is filtered to only show connections and details relevant to the selected client. In addition, the client view of connections can be used when presenting to a client.

How do you Access the Client Connections View?

After selecting a client in emX, you will be notified immediately in the problem bar on the client's **Overview** page if their accounts are not updating because of a connection issue.

Clicking on the [Fix Connections](#) link from the problem bar will take you to **Connections** in the client's **Facts** to address the issues:

Category	Value	Percentage
Equities	\$1,164,083.27	85.36%
Taxable Bonds	\$189,617.95	13.90%
Other	\$9,013.65	0.66%
Tax Exempt Bonds	\$750.00	0.05%
Cash	\$225.00	0.02%

This page can be accessed directly through **Facts** by selecting **Connections** in the menu:

	Johnny Black	Margie Black
Date of Birth	2/10/1978 (Age 37)	7/14/1978 (Age 36)
Gender		
Retirement Age	65	65
Life Expectancy	90	90

1 | Connections - Client View

Client Connection View

The client connections view shows you all the connections being used by the client. For each connection you can see the following information:

- The last time the connection was updated
- The number of linked accounts for the client
- The current status of the client's accounts
- The number of open tickets associated to the connection

emX

Home


Clients


Connections

Analytics

Applications ▾

More ▾

 4



Settings

Help

Sign Out

Johnny and Margie Black ▾


OVERVIEW


FACTS

PLANS

REPORTS


VAULT





Connections


[Freeze](#)[Add Connection](#)

Name	Account Status	Last Updated	Accounts	Tickets
ABC Advisor Connection Kate's Advisor Connection	Up To Date	1 hour ago	2	1
ABC Financial ABC Financial	Up To Date	19 hours ago	1	0
 XYZ Advisor Connection BMEY's Advisor-Group Connection	Values Out of Date	4 days ago	3	0

Looking for another connection?

[View 2 connection\(s\)](#) not used by Johnny and Margie Black.

Items to note:

- When the client's accounts are not updating, or the connection has been disconnected a red warning icon  will be displayed next to the name.
- Any existing advisor managed connections not currently used by the client will be available at the bottom of the page under '**Looking for another connection?**'. You can add accounts for these clients using these links.
- You can add new client connections from the client view, but new advisor managed connections must be added through the full connections view, accessed through the top emX navigation bar:

emX

Home


Clients


Connections

Analytics

Applications ▾

More ▾

 29



Settings


Help

Sign Out

2 | Connections - Client View

Connection Details in the Client View

Click on the connection name to access the connection detail pages.

Connections					Freeze	Add Connection
Name	Account Status	Last Updated	Accounts	Tickets		
 ABC Advisor Connection Kate's Advisor Connection	Account(s) Missing	17 hours ago	3	3		
ABC Financial ABC Financial	Up To Date	4 minutes ago	3	0		
Test Loader Test Loader	Values Out of Date	3 minutes ago	1	2		

Status Page

The Status page shows you the total value of the client's linked assets and/or liabilities for a connection. All of the connection related details and action items are listed down the left side of the page.

Items to note:

- Click the '[Report a Problem](#)' link under Actions to submit a ticket to our Data Services team for help with any connection related issues.
- If the client has accounts that are not updating you will be presented with repair steps to fix the problem.

emX

Home


Clients


Connections

Analytics

Applications

More





Settings

Help

Sign Out

Elliott and Viviana Baldwin


OVERVIEW


FACTS

PLANS

REPORTS

VAULT





Go back to Connections


ABC Financial

Status

Accounts

Tickets

Details

 **ABC Financial**

Last UpdatedJust now

TypeTest Connector

[www.abcfm.com](#)

Actions

[Refresh](#)

[Rename](#)

[Delete](#)

[Update Credentials](#)

[Report a Problem](#)

Assets

\$34,024

as of today

Liabilities

\$125,476

as of today

LINKED ACCOUNTS

3

UNLINKED ACCOUNTS

0

Accounts Page

The Accounts page lists all of the client's linked accounts and unlinked accounts for the connection.

Items to note:

- Both the 'Add Accounts' and 'Add' links will check for new accounts for the selected client. For an advisor managed connection you can also add identifiers to find new accounts for the client.
- Click the 'Report a Problem' link under Actions to submit a ticket to our Data Services team for help with any connection related issues.
- Click on a linked account from the list to edit the Account Name or Type.

emX

Home

Clients

Connections

Analytics

Applications

More

4

Settings

Help

Sign Out

Elliott and Viviana Baldwin

OVERVIEWFACTSPLANSREPORTSVault

Go back to Connections

ABC Financial

StatusAccountsTickets

Details

ABC Financial

Last Updated2 hours ago

TypeTest Connector

www.abcfm.com

Actions

Add Accounts

Report a Problem

All Accounts

search accounts

Baldwin, Elliott and Viviana

Add

Refresh

Freeze

Name	Type	Value	
Money Market (*****1234)	Taxable Investment	\$25,478 Mar 19, 2015 9:23 AM	Unlink
Mortgage (MTG456***)	Other Loan	-\$125,476 Mar 19, 2015 9:23 AM	Unlink

Unlinked Accounts

Name	Type	Value	
Checking	Checking	\$8,546 Mar 19, 2015 9:23 AM	Link

Tickets Page

The tickets page displays all the open tickets for the connection and allows you to communicate back and forth with our Data Services team to resolve any issues you report.

Items to note:

- Tickets for advisor managed connections are not specific to clients. You will see any ticket that has been opened for an advisor connection in the client view even if the issue isn't specific to that client.

emX

Home


Clients


Connections

Analytics

Applications ▾

More ▾

4





Settings

Help

Sign Out

Elliott and Viviana Baldwin ▾

OVERVIEWFACTSPLANSREPORTSVAULT



[Go back to Connections](#)

ABC Financial


StatusAccounts**Tickets**

All Tickets ▾

Transactions Missing
4 hours ago

Transactions Missing

✓ Close Ticket

 Pop Out

Estimated Reply TBD
Added 4 hours ago

Ticket #1642

4 hours ago

Investment transactions are not coming through.

Thank you for sending us the information we requested. We are now waiting for the data to be delivered and expect that data to be updating successfully by tomorrow.

Please feel free to contact our Customer Service department if you need further assistance.

Send

Switching to View Full Connection

When viewing an advisor managed connection in the context of a client we only show data relevant to the selected client. This includes not only account data, but error messages as well.

Items to note:

- On the **Status** and **Accounts** pages clicking the ‘[View Full Connection](#)’ link will take you out of the client’s Facts to view the full connection details across all clients.

The screenshot shows the 'ABC Advisor Connection' page for client 'Elliott and Viviana Baldwin'. The page has a navigation bar with 'emX', 'Home', 'Clients', 'Connections', 'Analytics', 'Applications', 'More', 'Settings', 'Help', and 'Sign Out'. Below the navigation bar, there's a sub-header with 'Elliott and Viviana Baldwin' and tabs for 'OVERVIEW', 'FACTS', 'PLANS', 'REPORTS', and 'VAULT'. The main content area is titled 'ABC Advisor Connection' and has tabs for 'Status', 'Accounts', and 'Tickets'. On the left, there's a 'Details' section with 'ABC Advisor Connection', 'Last Updated: Just now', and 'Type: Test Connector'. Below that is an 'Actions' section with links: 'Refresh', 'Rename', 'Update Credentials', 'View Instructions', and 'Report a Problem'. The main content area displays 'Assets: \$12,055 as of today' and 'Liabilities: -\$445,000 as of today'. On the right, it shows 'LINKED ACCOUNTS: 5' and 'UNLINKED ACCOUNTS: 0'. A red box highlights the 'View Full Connection' link in the top right corner of the main content area.

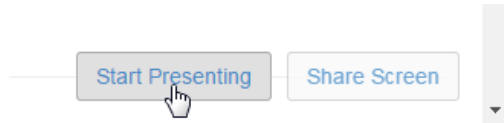
- When you switch to the full connection view, the ‘[Go back to Connections](#)’ link in the upper left of the page will take you back to the previously selected client’s Connections page.

The screenshot shows the 'ABC Advisor Connection' page in the Full Connection View for client 'Kate's Advisor Connection'. The page has a navigation bar with 'emX', 'Home', 'Clients', 'Connections', 'Analytics', 'Applications', 'More', 'Settings', 'Help', and 'Sign Out'. Below the navigation bar, there's a sub-header with 'ABC Advisor Connection' and tabs for 'Status', 'Accounts', 'Tickets', and 'Advanced'. The main content area is titled 'ABC Advisor Connection' and has a 'Go back to Connections' link in the top left corner. On the left, there's a 'Details' section with 'Kate's Advisor Connection', 'Last Updated: 35 minutes ago', and 'Type: Test Connector'. Below that is an 'Actions' section with links: 'Refresh', 'Rename', 'Delete', 'Update Credentials', 'View Instructions', and 'Report a Problem'. The main content area displays 'Assets: \$1,383,302 as of today' with a change of '\$135,835 this month' and '\$135,835 since Dec 2014'. It also shows 'Liabilities: -\$445,000 as of today'. On the right, it shows 'LINKED ACCOUNTS: 8' and 'UNLINKED ACCOUNTS: 1'. A red box highlights the 'Go back to Connections' link in the top left corner of the main content area.

6 | Connections – Client View

Presentation Mode

The client view of Connections can be used when presenting to a client. Presentation mode is turned on by clicking the 'Start Presenting' button in the bottom right corner of the screen.



While presenting to a client you will not be able to jump to 'View Full Connection' for advisor managed connections. In addition we will hide the Tickets page, Freeze button, and error messages.

Elliott and Viviana Baldwin ▾OVERVIEW**FACTS**PLANSREPORTSVAULT

[Go back to Connections](#)
ABC Advisor ConnectionStatusAccounts

Details

Kate's Advisor Connection
Last Updated 23 hours ago
Type Test Connector

Assets

\$1,221,578
as of today

LINKED ACCOUNTS

2

UNLINKED ACCOUNTS

0

Actions

[Refresh](#)
[Rename](#)
[Update Credentials](#)
[Report a Problem](#)