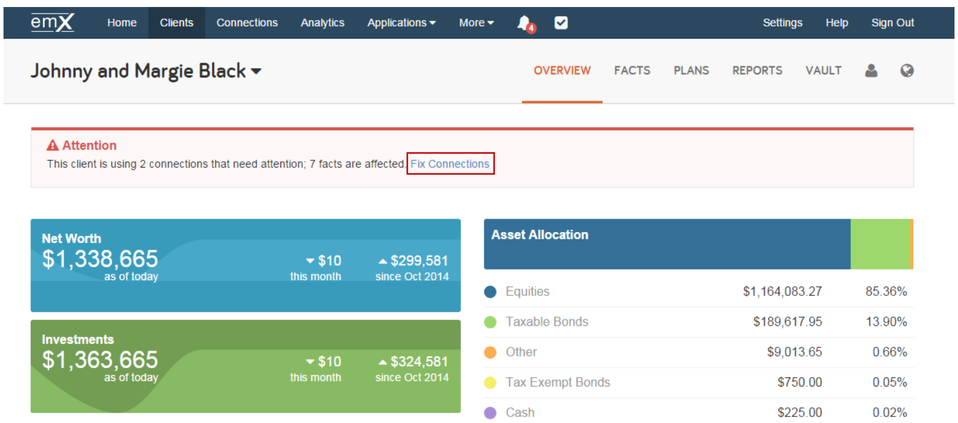
In this user guide we will review how to access Connections while working in the context of a client in emX.

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.

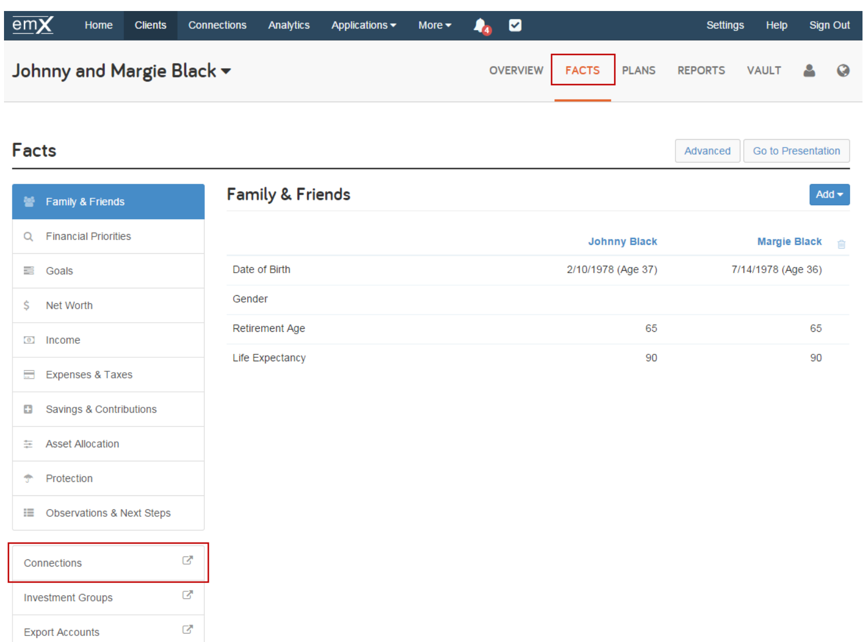
How do you Access the Client Connections View?

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:



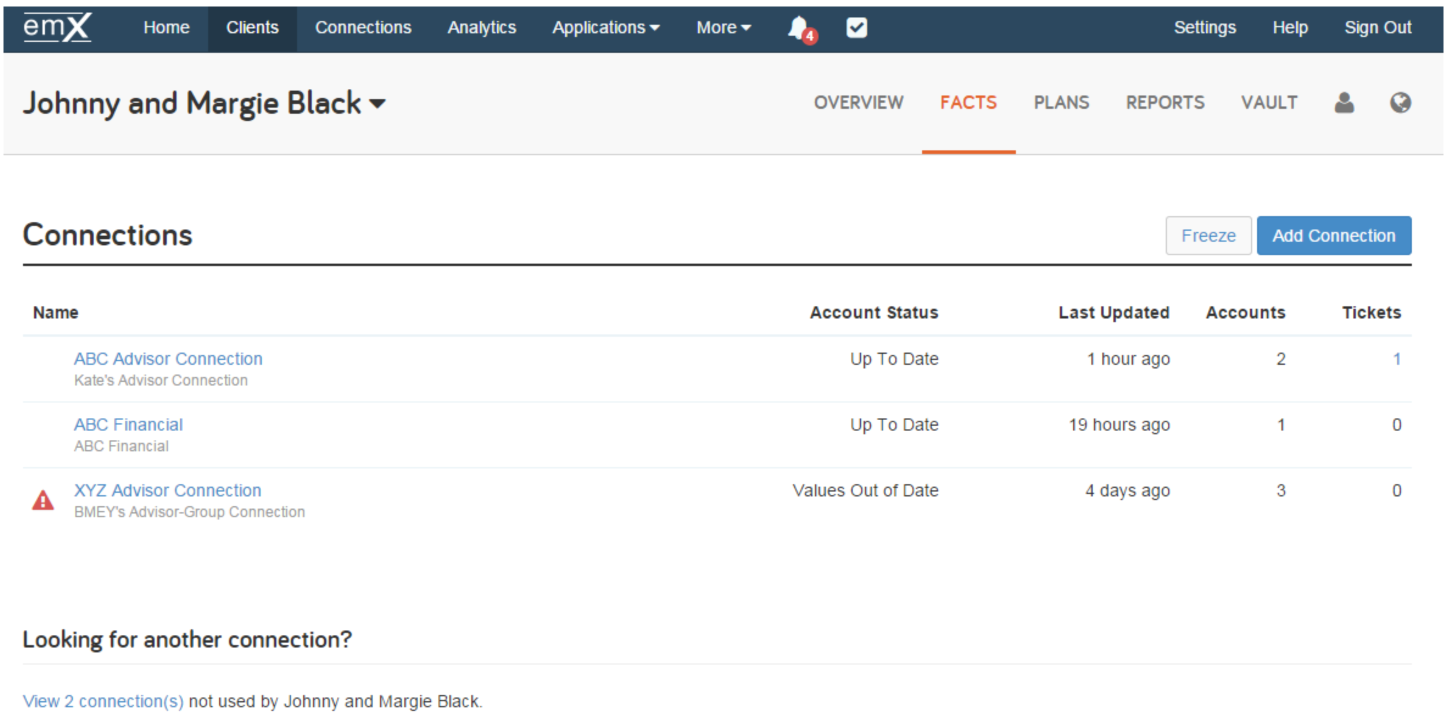
This page can be accessed directly through **Facts** by selecting **Connections** in the menu:



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

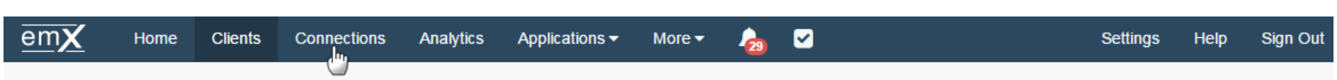


Items to note:

- 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.

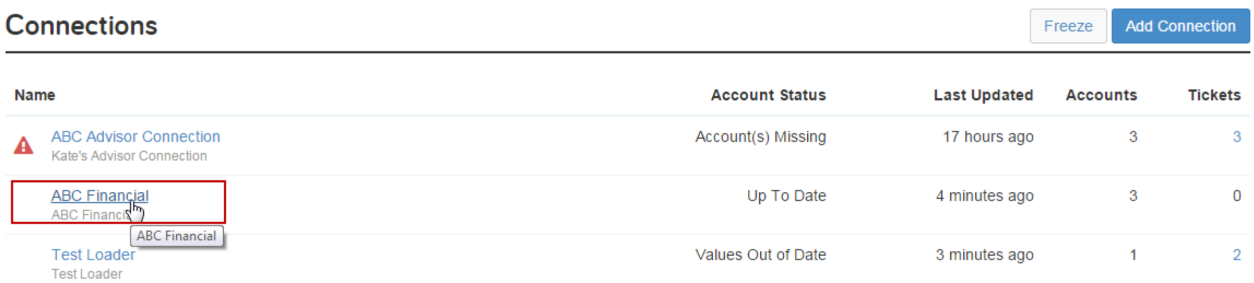
- Any existing advisor managed connections not currently used by the client will be available at the bottom of the page under '**Looking for another connection?**'. You can add accounts for these clients using these links.

- 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:



Connection Details in the Client View

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

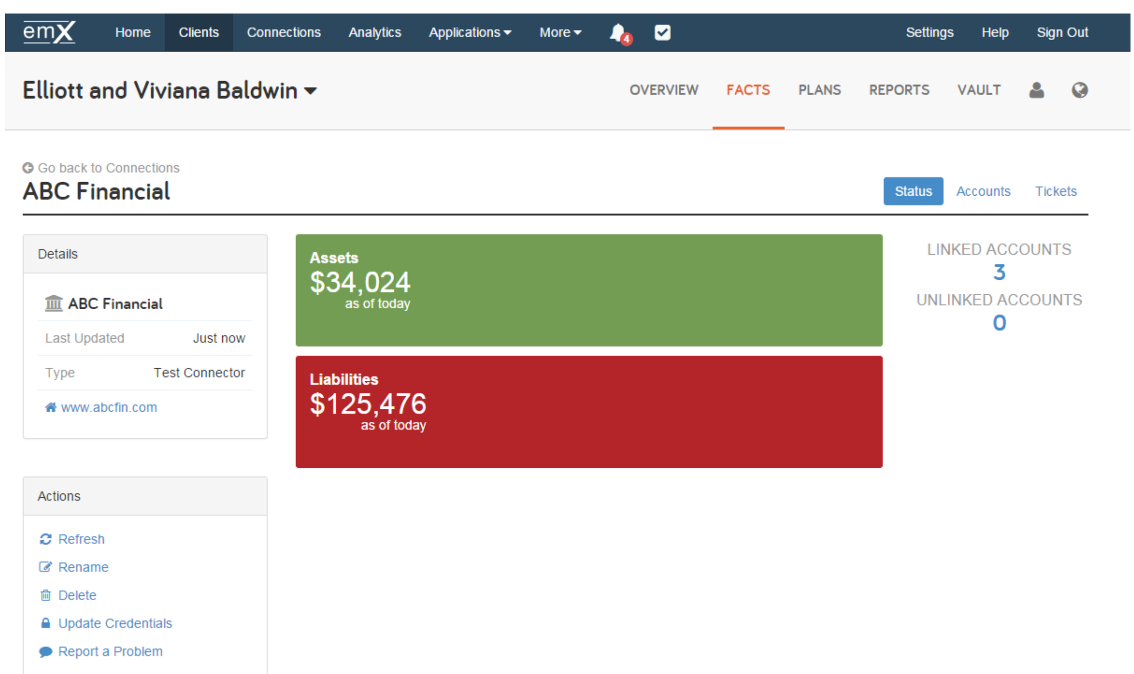


Status Page

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.



Accounts Page

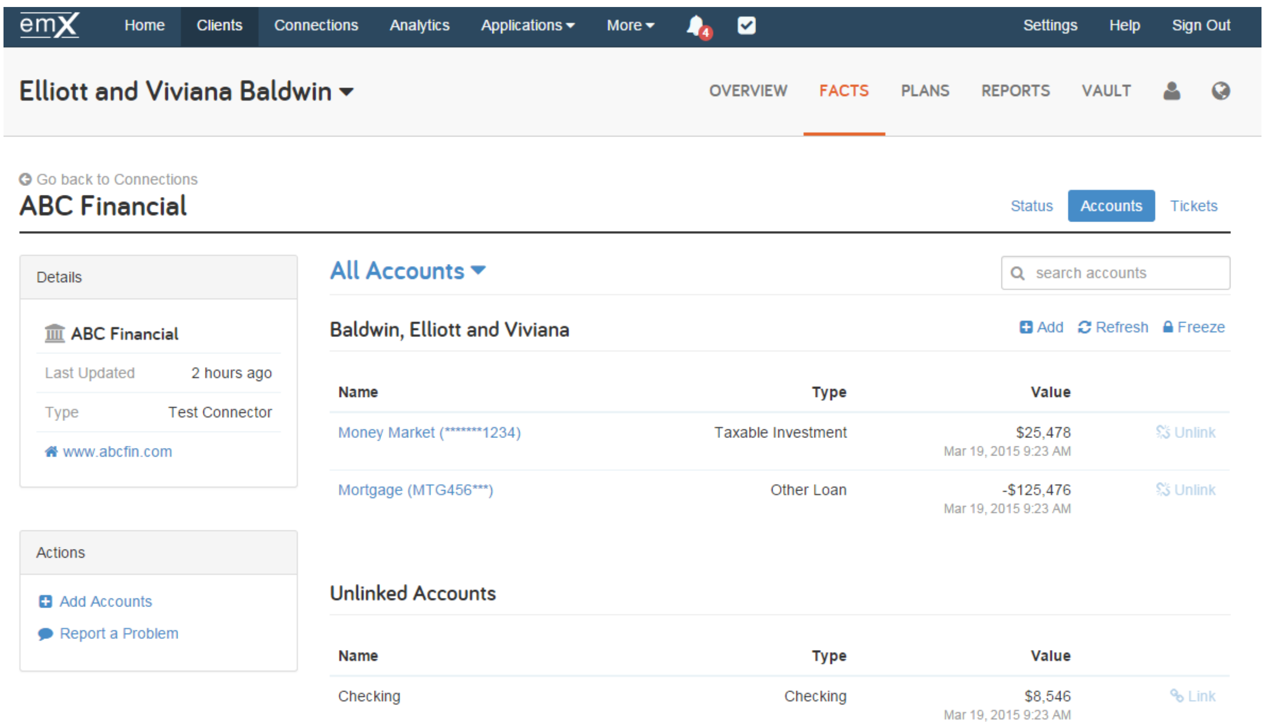
The Accounts page lists all of the client's linked accounts and unlinked accounts for the connection.

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.

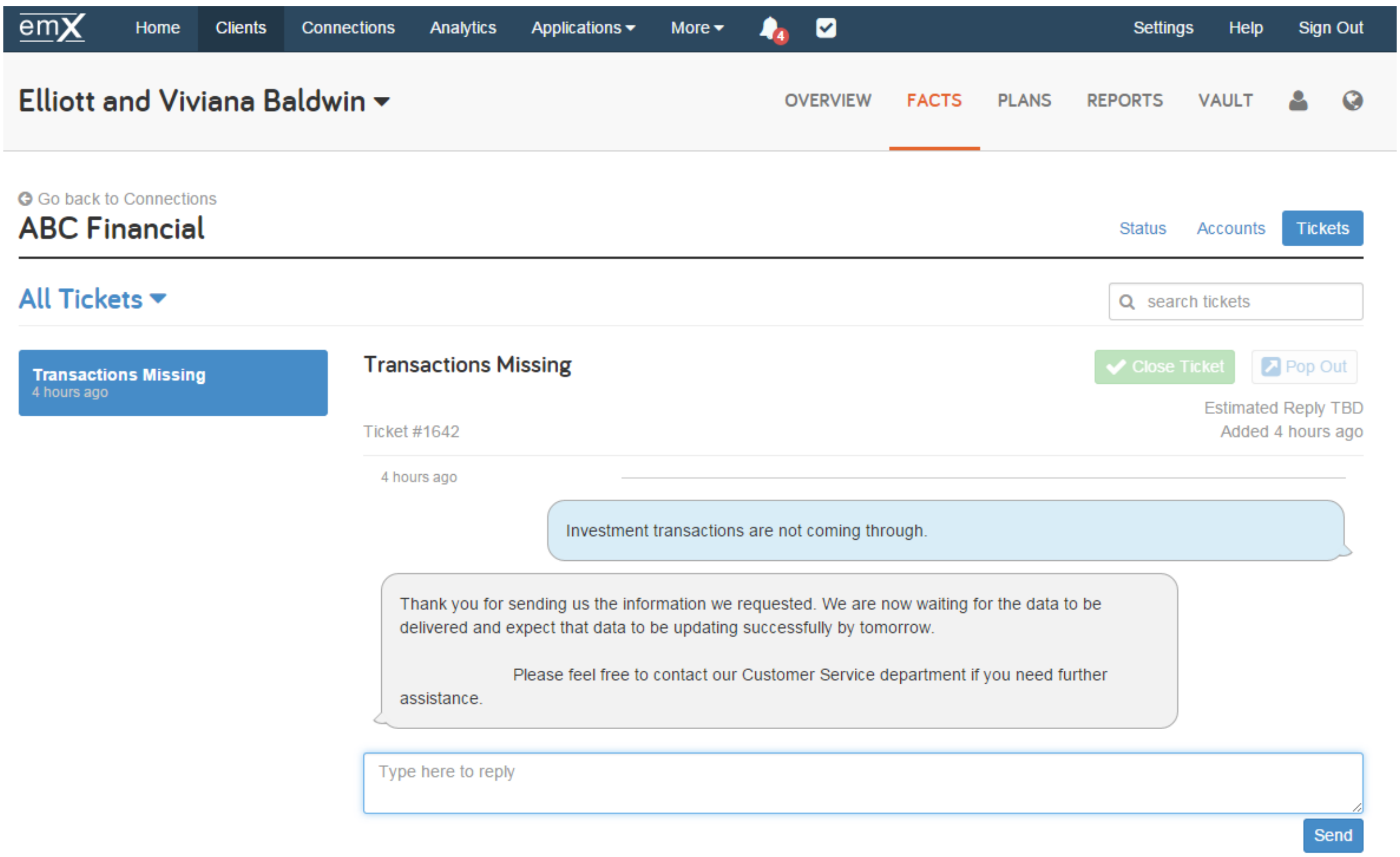


Tickets Page

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.

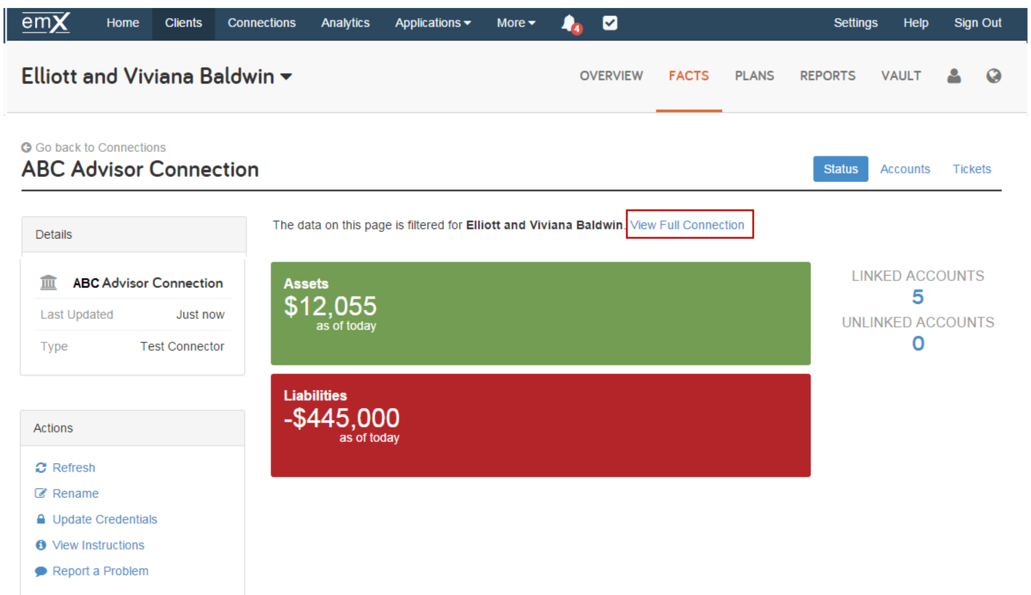


Switching to View Full Connection

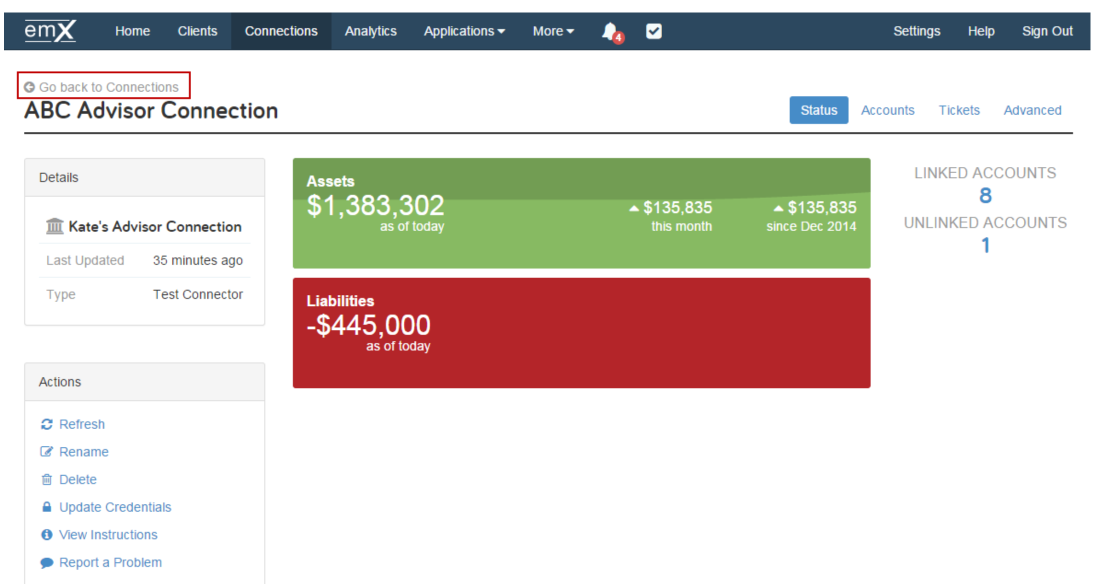
When viewing an advisor managed connection in the context of a client we only show data relevant to the selected client. This includes not only account data, but error messages as well.

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.

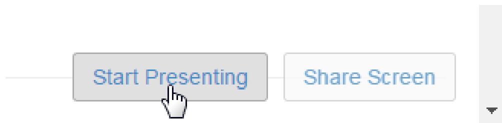


- When you switch to the full connection view, the 'Go back to Connections' link in the upper left of the page will take you back to the previously selected client's Connections page.



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.