

Month One Checklist

Once you've customized your preferences, established Fact defaults, set up your integrations and put yourself into the system, you're ready to take the next steps!

Here are a few actions we recommend you take during your first month using emX Select.

1. Enter Trusted Clients into the System

Now that you've added yourself as a client in the system, you're ready to start adding real clients. Before adding your full client base, we recommend asking two or three of your top clients to test drive your new system. Getting hands-on experience within the system using actual client information allows you to see how the features work and test the settings you put in place, making sure they work the way you envisioned before you scale across your book of business.

2. Set Up Personal and Client Alerts

In the Settings page, you can customize which alerts each of your clients should receive based on what's important to them. This "set it and forget it" method pushes automated messages to clients once they perform specific actions, allowing you to tend to other important matters.

Some recommended client alerts to set up in the first month are:

- Client Login
 - Follow up with your clients as soon as they log into their website so you can address any initial questions.
- Connections Added
 - Make sure your clients linked their newly added accounts under the proper account type.
- Client Login Inactivity
 - Proactively reach out to clients who are not using the client site and help them get started.

3. Add Single Sign-On Link to Your Professional Website

Once you are comfortable with the system and ready to get your clients on the emX Select platform, you can add a single sign-on link to your professional website so your clients can login directly from your website. Download a step-by-step guide to learn how to add an SSO link to your website.

Not following by the book? No worries! These are just some of our suggestions for getting started – you can always decide what first steps are important for your business.