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Tutorial

Link a Client to a Portfolio

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Link a Client to a Portfolio

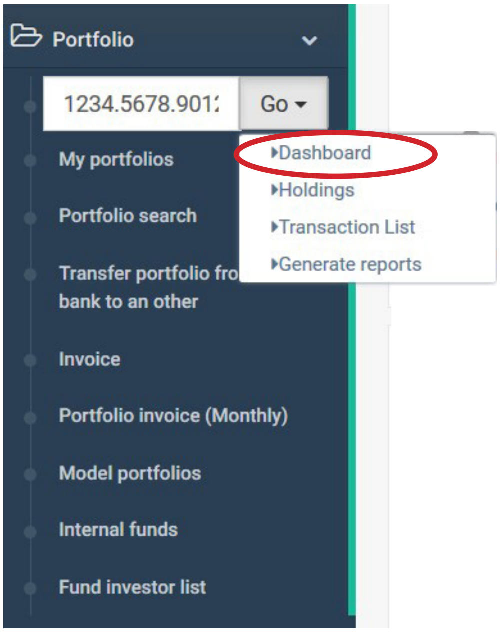
This tutorial is needed when you want to link a client to a portfolio. For example, a new power of attorney has to be linked to the portfolio.

Link a Client to a Portfolio - Overview:

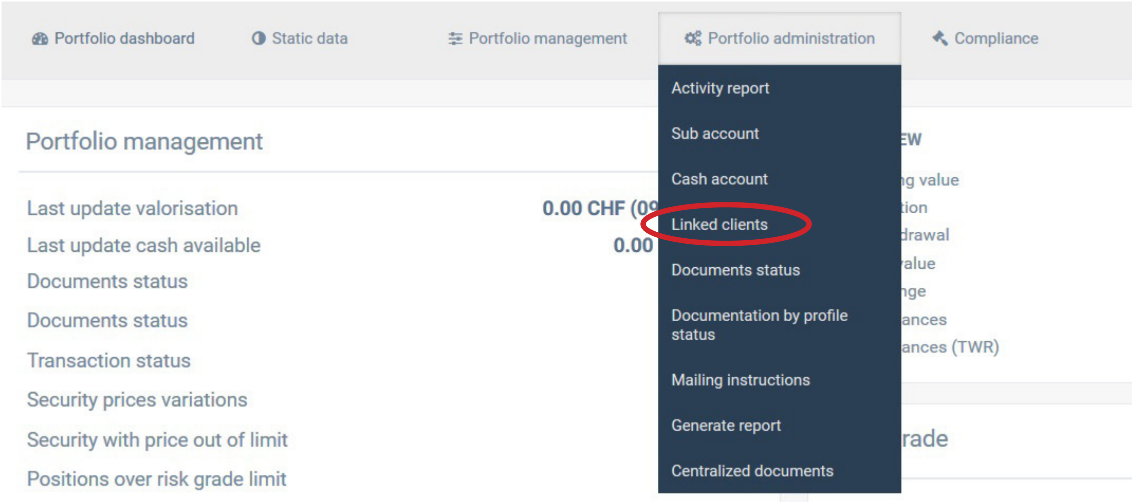
1. Create the client if it has not been created yet. To create a client, please refer to the tutorial "Create a client".
2. Open the portfolio and link it to the client wanted through the "Portfolio Administration" menu.

Link a Client to a Portfolio - Details:

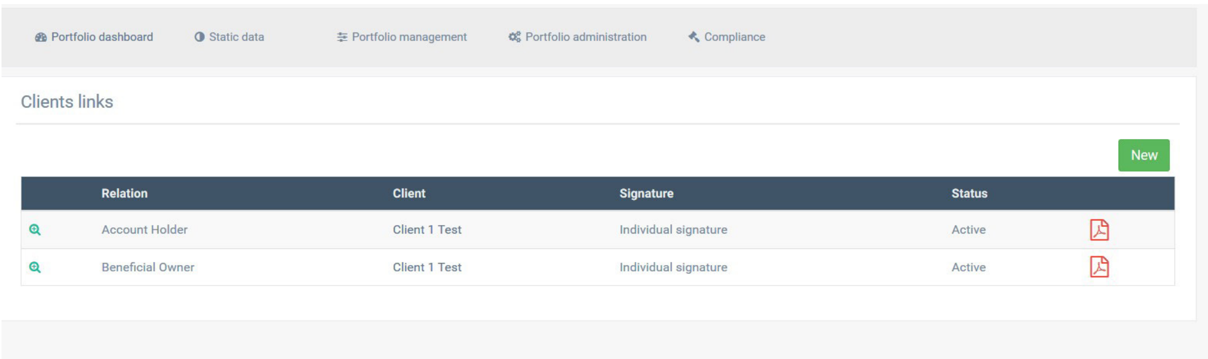
1. To link a portfolio to a client, both client and portfolio must have been created first. To create a client or a portfolio, please refer to the related tutorials.
2. Open the portfolio. Click on "Portfolio" in the main menu and search for the portfolio number.
3. Select "Dashboard" in the drop-down menu, which appears on the "Go" button.



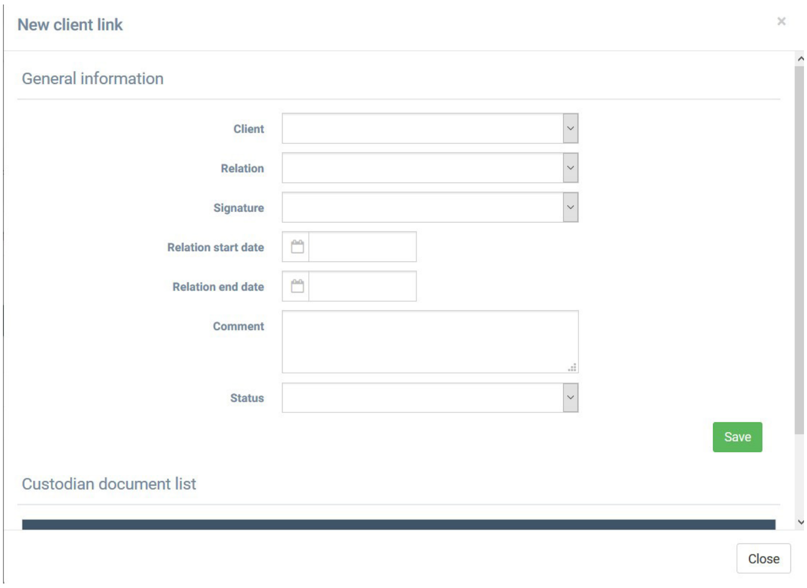
4. When the portfolio is opened, click on "Portfolio Administration" and select "Linked clients".



5. There you should see the list of existing clients who are already linked to the portfolio. To add a new one, click on "New".
Be aware that you can only link clients who are in the same business relation.



6. Fill in the form and click “Save”.



7. Once your form has been saved, you can upload PDF document to the form. Click “Close”, once the form has been completed.

Repeat this operation if you have multiple clients to link to the current portfolio.