Working with Documents

The Documents view enables your Henssler team to post documents to you and you to post documents to your Associate. For example, your Associate can post a review document to you that requires your signature. You can open the document, sign it, and post it back to the Planning Portal for your Associate/team to view. Advisor View will send your Associate/team an e-mail when the document is posted.

Note: You may also use this area as a lockbox for other important documents, such as, your Will. Keep in mind, your Associate will have access to these documents.
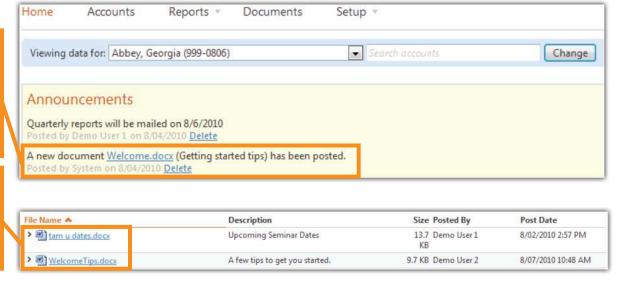
1. Viewing Documents
You can view documents in two ways:

Dashboard Announcements: Oftentimes, new documents posted by your adviser will be accompanied by an announcement on your Dashboard. Click the link in the announcement to open the document.

Documents Page: You can also open documents directly from the Documents page by clicking the file name link. The icon next to the file name represents the document type.

For more information about the file, such as the labels applied and file type, click on the arrow to the left of the file name.

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2. Filtering Documents

There are two key ways in the Documents view to locate a specific document or type of document.

View Filter

The first way to filter a view is by using labels. A label is a way to categorize documents by type or function. Your adviser can create the labels and apply more than one label to any given document. By default, documents with all labels display. To view by filter:

- Select the label in the View List
- Click Filter to display only the documents that are posted with the specified label.

For example, filtering by the Billing label will show all invoices.

Sorting the View

You can sort the displayed list of files using the column headers. The default lists files in ascending order by name.

- Click a column header to sort the view by that column.
- To reverse the sort order, click the column header again.
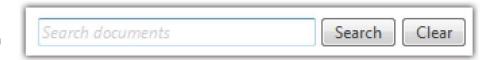
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3. Searching Documents

You can search the list of displayed documents according to the terms entered in the Search documents box.

The search capability provides full text search for words in either the File Name or the Description column. If you have a view filter applied, the search terms will only apply to the documents in the filter criteria.

For example, if you have a filter set to display only reports and you try to search for a review document, the search will not locate the document because of the filter. In most cases, it is best to clear all filters on the Documents page before searching for a document.

When you are finished with your search or to change the criteria of the view filters or the search terms, click Clear.
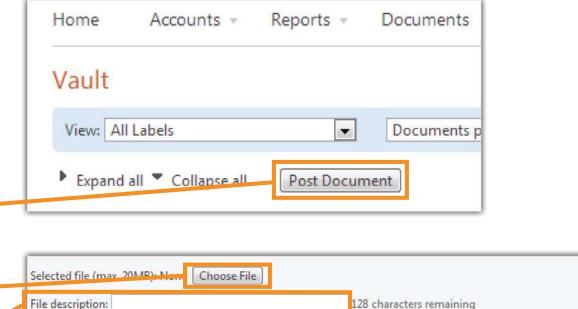
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4. Posting Documents

You can post and update documents in the Planning Portal that you want your Associate to see. When you post or update a document, your Associate receives an e-mail notification and a link to view the document.

To post a document, simply select a file from your computer and enter a description. While the description is optional, it is important to provide some context as to the document's purpose. Your adviser may see a large number of documents each day and it is important to provide a good description for the document you are posting. You can only post one document at a time. Once you post a document, you will not be able to delete it.

To post a document, follow these steps:

- On the Documents page, click Post Document. The file upload area will expand.
- In the expanded file upload area, perform the following actions:
    - Click Choose File and select the file you want to post.
    - In the File description box, type a description of the file.
- Click Post.