Setting up clients with the NaviPlan client portal

Clients can now receive access to the powerful NaviPlan client portal. The portal, after being setup, grants clients the ability to create their own financial profiles, review their existing plans, and submit changes that can be instantly applied to new plans in NaviPlan. The portal reduces data re-entry, and gives your clients a reference to ask informed questions based on their own analysis. Follow the below steps to get your client setup.

Sending a new client with the client portal

To setup a new client with a unique login for the client portal follow the below instructions:

1. In the **Client List** category, click the **Create New Client...** button.
2. Select the **Collaborative client onboarding** option, and click the **Get Started** button.
3. Select the analysis type (individual or joint), enter the client's name(s), a unique user name, their email. If you wish, include a customized email. Click the **Next** button.
4. Choose which modules you wish to income or omit, click the **Next** button.
5. Review the summary of what all will be sent and click the **Finish** button.

Setting up an existing client with the client portal

To setup an existing client with a unique login for the client portal, follow the below instructions:

1. Open the desired client you wish to create a login for.
2. Click the **Portal Management** section, found on the left side of the screen.
3. Click the **Create New User** button.
4. Within the **Create a New User** pop-up enter a desired username, the clients email address. If you wish, include a customized email. Click the **OK** button.

> NOTE : A default username will automatically generate when a client is added, this username may be edited.

Publishing client plans to the client portal

Once a client has been setup with the client portal, client plans can be published to it. To do this follow the below instructions:

1. Click the **Publish...** button that will now be selectable.
2. Within the **Publish to NaviPlan Client Portal** pop-up, confirm the information listed and email address is accurate. If you wish, include a customized email. Click the **OK** button to publish.

Editing a Client

To edit a client's information, follow the below instructions:

1. Open the desired client you wish to create a login for.
2. Click the **Portal Management** section, found on the left side of the screen.
3. Click the ✎ button.

From here various options are possible:

- Reactivating/Deactivating clients:

Click the **Deactivate the client portal account** button to remove portal access to this client. Deactiveated clients can be reactived at any time by clicking the **Reactivate this client portal account** button, located in the same location.

- Adjusting email address:

In the **Email** field and adjust the email address to match the proper email for the client.

> NOTE: user names cannot be adjusted.