Sending and receiving financial profile e-fact finders

This guide will go through the various steps involved with sending, receiving, and accepting financial profiles for your client's plan.

NOTE : Clients must be setup with the client portal to send and receive financial profiles. Click here to learn more about setting up client portal.

NOTE : This feature may not be automatically available, if unavailable contact our Partner Support team for more information.

Sending a Financial Profile to clients

To send a client a financial profile to their client portal account, follow the below steps:

NOTE: This process is automatically done for new clients setup with the **Collaborative client onboarding** option.

1. Open the client you wish to send a financial profile to, click the **Portal Management** button on the left side of the screen.
2. Click the **Send Fact Finder** button.

   NOTE : Only one financial profile may be sent at a time to a client. If a previous financial profile that was sent to the client has not been accepted, the **Send Fact Finder** button will not be available.

3. In the **Send Fact Finder** pop-up, review which plan level and which modules to send to the client.
4. Click the **Finish** button

Receiving and reviewing financial profiles

After a client submits their financial profile, NaviPlan will notify you on the **Alerts** page (the button). Follow the steps below to review and approve the financial profile:

1. Click the button.
2. Click the notification you wish to review, then click the **Open Fact Finder list** button.

   NOTE : To remove the alert from your list, click the **Delete** button. This will remove the alert, not the financial profile. The financial profile can be found within the **Active Client - Fact Finders** page .

3. Click the **Review & Accept** button.
4. Click the **Open Fact Finder** button to review the financial profile. You may edit any incomplete or inaccurate information before accepting. Click the **Finish Editing** button once complete.
5. Enter a plan name then click the **Accept** button.

Note: You can cancel any submitted financial profile by clicking the **Cancel & Archive** button.