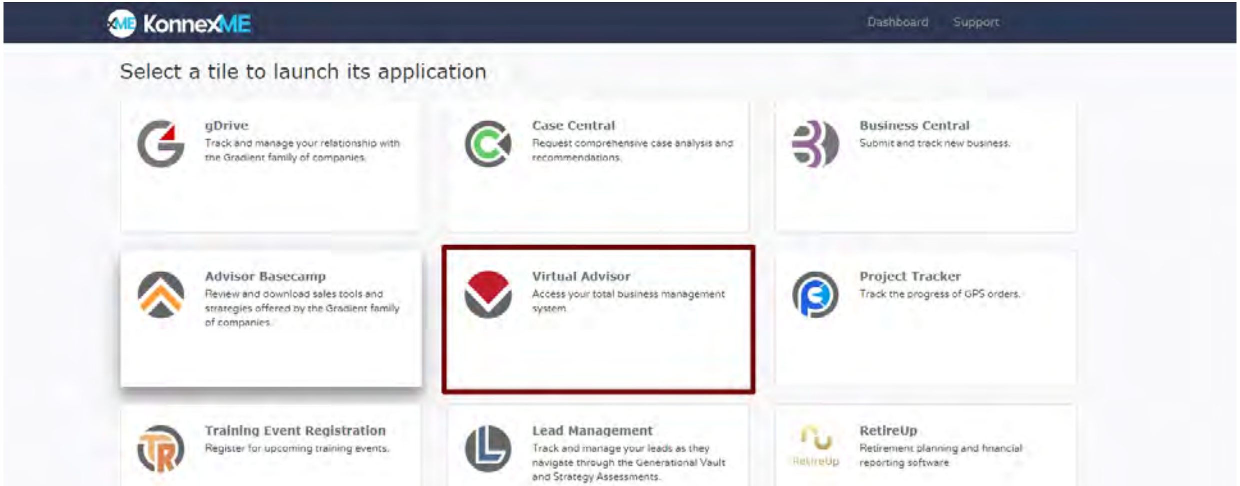
HOW TO CREATE A CASE

CaseCentral

CASE CENTRAL PROCESS

Case Central is your team of CERTIFIED FINANCIAL PLANNER™ professionals and investment advisors who analyze consumer data and provide you with impressive, presentation-ready client solutions. We offer over a dozen unique and proprietary software reports – covering topics such as income planning, portfolio analysis and asset allocation – to help you bring your recommendations to life. Reports are customizable to your practice and available to you 24/7.

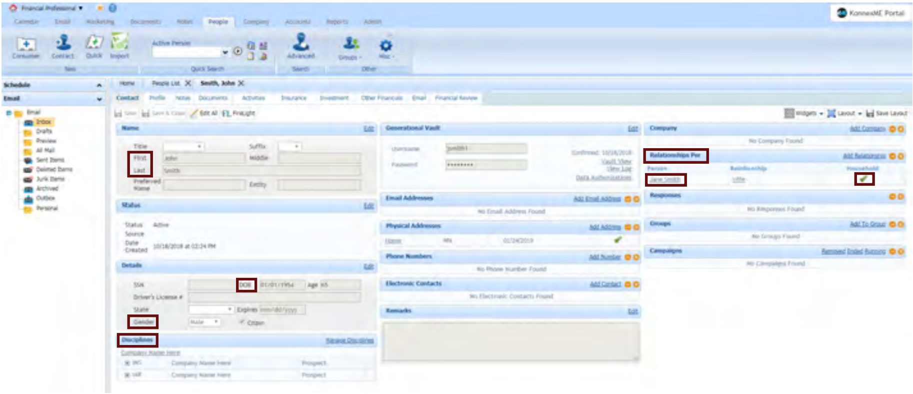
First, access Virtual Advisor through portal.konnexme.com.



To create your prospect's profile go to the **"People"** tab, then **"Add Consumer."** If the people record is already created, double click on their name to pull up this screen shown below. The following information is required in order to create a case:

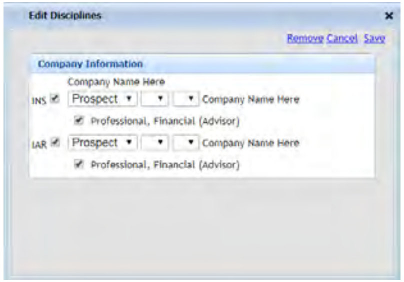
- **NAME**
- **DOB**
- **GENDER**
- **DISCIPLINE**

In a joint case scenario, create the spouse's profile with the same information, then link them via the **"Relationships Per"** widget.



EDIT DISCIPLINES.

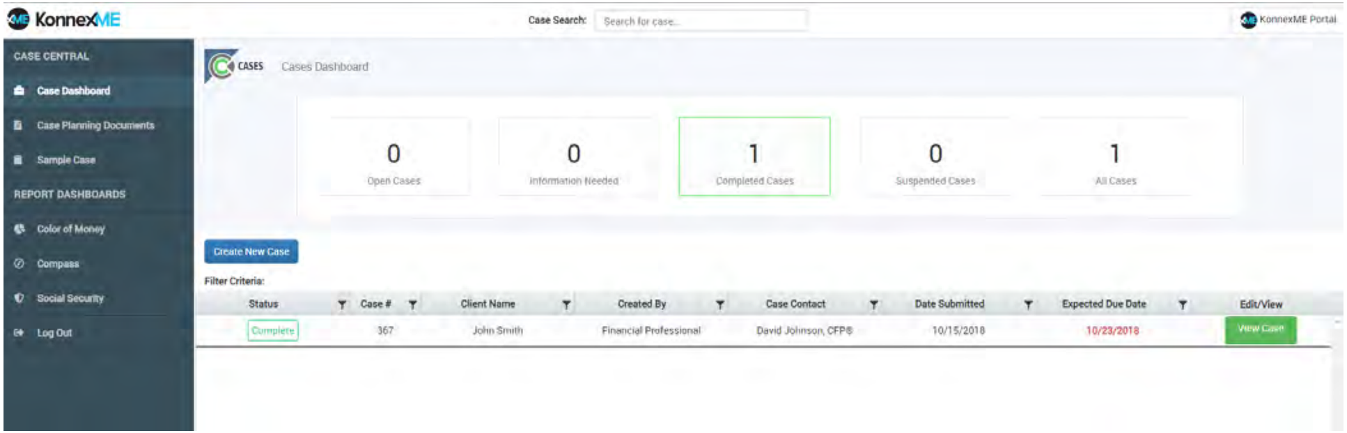
This is where you indicate who will have access to the case.



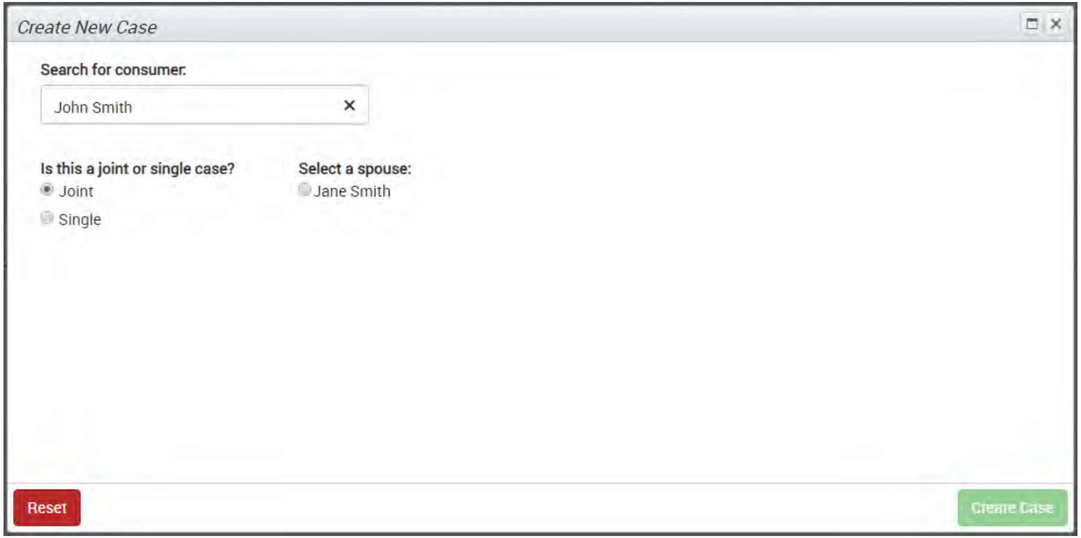
“Household” the relationship.

This links the couple, and is required in order to submit a **joint** case.

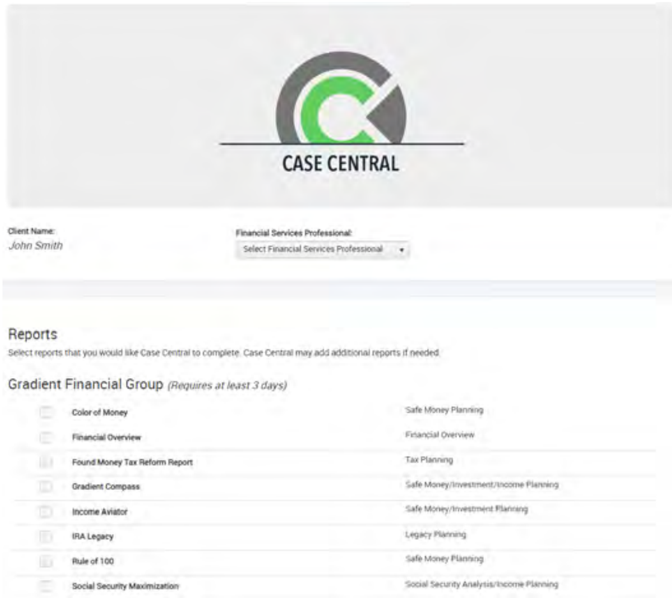
Next, access the Case Central Dashboard through **portal.konnexme.com**. To initiate the case creation, select the “**Create New Case**” button (blue button).



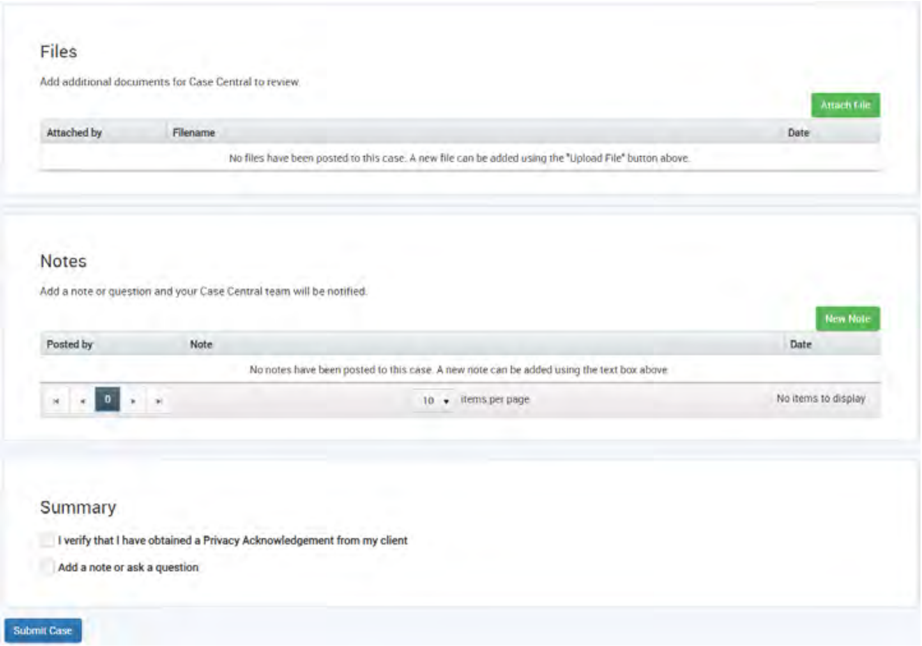
Then search and select the consumer. For joint cases, if you created the spouse's profile and linked the relationship using the "**Household**" function, you will be able to select the spouse here.



The next screen is the primary case creation screen. At the top of the page, you will select the **“Financial Services Professional”** and the key reports that you are looking for.



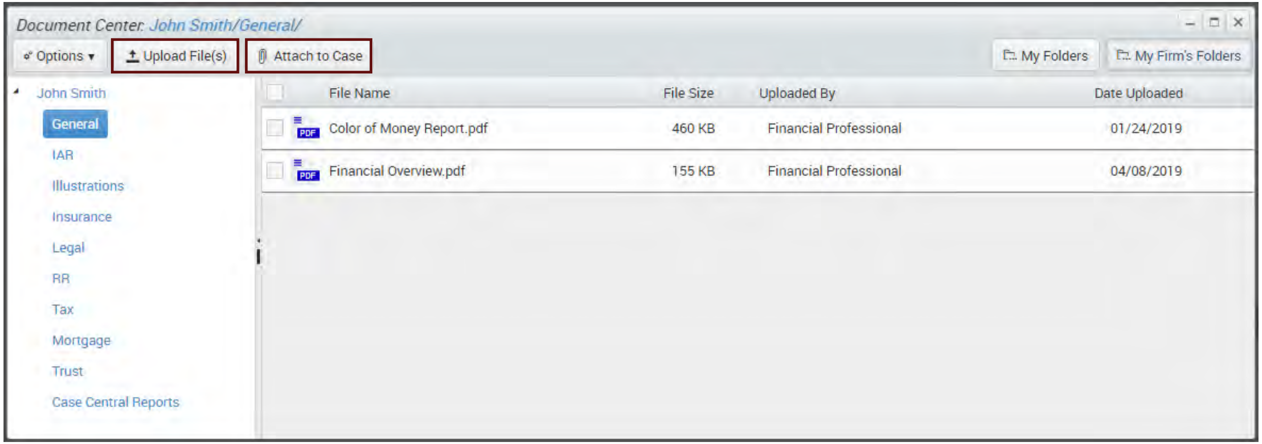
On the bottom half of the primary case creation screen, you can add documents and add notes for your Case Central team to review.



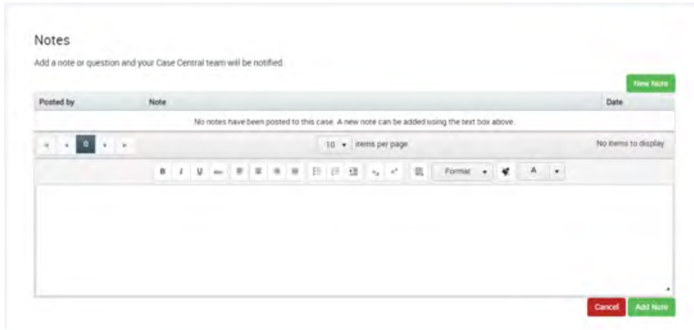
When you click “**Attach File**,” the Document Center for this consumer profile appears. From here, there is a two-step process:

1. Select the “**Upload Files**” button to pull documents from your computer to the Document Center on your screen. New documents are saved to the “General” file in the Document Center.

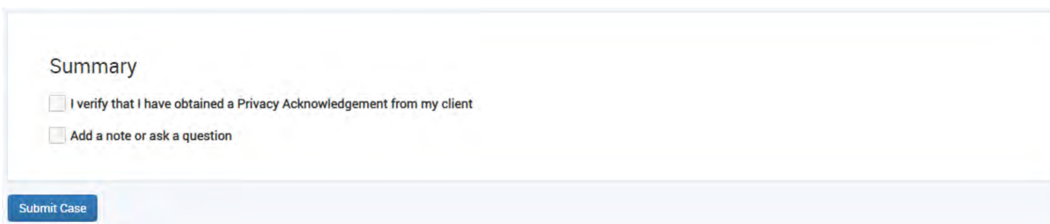
2. To add the documents to the case, check the box next to the document and select “**Attach to Case**.”



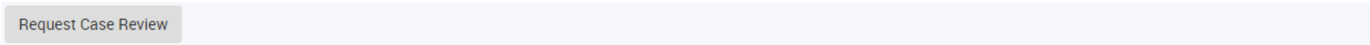
Add notes for your Case Central team to view.



Prior to selecting “**Submit Case,**” you are required to check the box below indicating that you have obtained a Privacy Acknowledgement from your prospect. You are **not** required to provide us with this document. You can keep it for your own records. You can find a copy of this one-page document under “**Case Planning Documents**” on the Case Central Dashboard.



Once the case has been created, you can request a phone call from Case Central.



When your Case Central team completes your case, you are able to access the completed reports through the Case Central Dashboard or in Virtual Advisor. If you choose to view the completed reports in Virtual Advisor, they can be found in two different locations.

To view the Color of Money Report, Social Security Maximization Report, and Compass Report, go to the **"People"** tab and select the individual. Once the individual has been selected, go to the **"Profile"** tab. If the Profile section has not been set up, go to the "Widgets" section on the right to add the "Report History" for these three reports.

To view all other completed reports, instead of clicking "**Profile**" under the individual people record, select "**Documents**" (not to be confused with the documents tab at the top of the webpage). When the case is completed, a yellow folder appears titled, "**Case Central Reports.**"