
How to Guide

# Using the Client Profile Page in moneyinfo Manager (MIM)

## Client Profile Page

Client Profile Page is a newly released feature that allows an operator to access important client information onto one page in MIM. It allows an operator to view messages, contact details, relationships, and other important information. The Profile Page allows you to perform key actions more efficiently, such as:

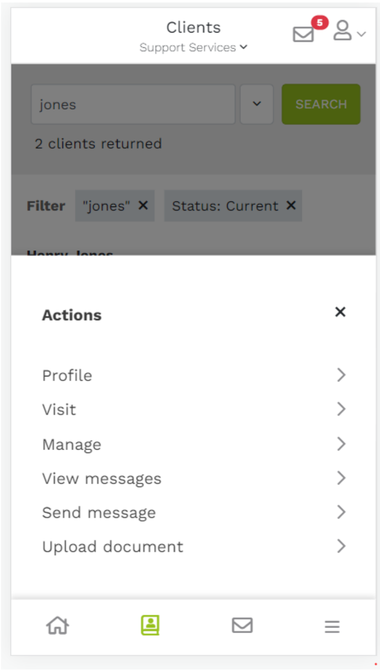
1. Uploading Documents
2. Sending Messages
3. Viewing a clients' Net Worth Pod and Portfolio Breakdown

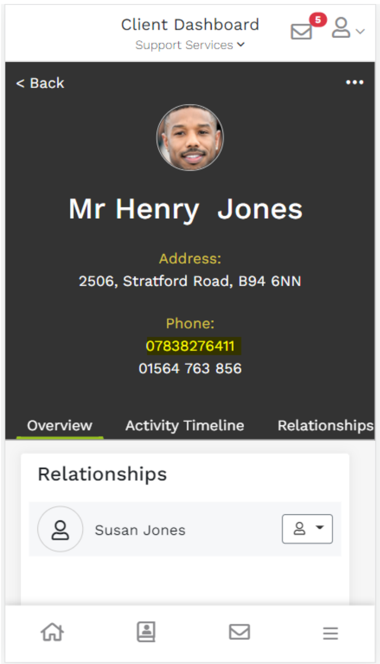
The Client Profile Page is also available on the MIM Mobile App, and all the above features are available on the App for operators. Not only that, but we have also released the ability for operators to contact their clients via their mobile device through the profile page. This gives you the ability to call your client directly from the App. See below:

## Call Function

Select your client and click on Profile

Select number and make a call from your mobile device



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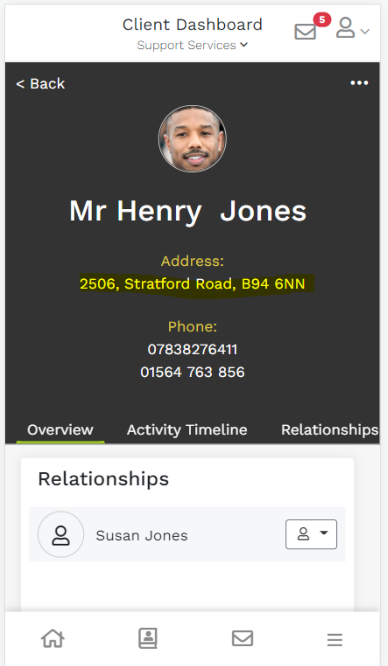
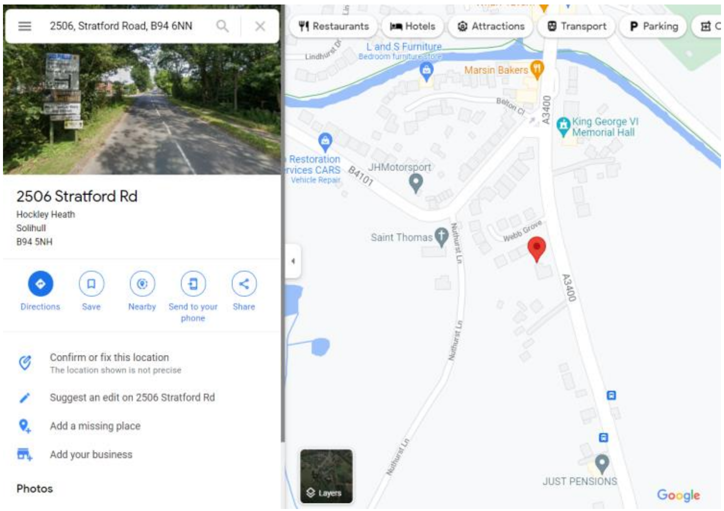
**Links to Maps and Addresses**

You can click on a specific address from the Profile Page, and it will link into Google Maps. See below:

Click on the address line and the map will open in Google Maps:




These enhanced features will make client interaction and communications much more efficient and convenient for operators, whether they are at their desk or out visiting clients.

If you've not told your advisers about the Profile page – don't delay as we think this will be really valuation for client/adviser interactions.

For more information on the Profile page, please contact our Support Team on 03303 600 300 or at support@moneyinfo.com