



How to link other parties via Relationships

On moneyinfo Manager, find the client you wish to add a relationship for, then navigate to:
Actions > Edit > Relationships

| | |
|----------------|------------------------|
| 22-Jun-20 | Visit |
| 14-Jul-202 | Manage |
| Client | Edit |
| Relationships | Login |
| Provider feeds | Messaging |
| CLIENTS - | Workflow |
| parding | 21-Jun-20 |
| 05-Nov- | Signatures |
| 2020 | Comms |
| 29-Oct-20 | Reset Dashboard Layout |
| 21-Oct-20 | Delete client |

Search for the person to be linked to the client (this could be a 3rd Party/Spouse/Child/Power of Attorney).
Select Type > Add > Close

Client Relationships - Portfolio Wealth apptesterportfolio

Persons related to 'Portfolio Wealth apptesterportfolio'

| Client | Relationship |
|--------|--------------|
|--------|--------------|

Search name, NI or postcode... Type Partner

| Name | NI Number | Partner | Related Party | Postcode |
|------|-----------|---------|---------------|----------|
|------|-----------|---------|---------------|----------|

Client Relationships - Portfolio Wealth apptesterportfolio

Persons related to 'Portfolio Wealth apptesterportfolio'

| Client | Relationship | |
|-------------|---------------|--------|
| Teresa Test | Related Party | Delete |

Test Type Related Party

| Name | NI Number | Postcode |
|---|-----------|----------|
| <input checked="" type="checkbox"/> Teresa Test | | |
| <input type="checkbox"/> Terry Test | | |

Under the same client go to > Actions > Manage
Once in the client view go to Me > Settings

Last logged in 16/06/2021 13:09:33



How to link other parties via Relationships

Go to My Views > Add View

Viewing as Portfolio Wealth

My notification settings
My views
My profile photograph

Customise your Portfolio Wealth views

Add View

Portfolio Wealth

This is a standard view which cannot be changed

Mine
 Teresa (RelatedParty)

View options

Owners of holdings displayed must match parties included in this view
 Hide this view

Save Changes

Name the View i.e., the name of the person being added to the view list.

Give your new view a name

Test

OK **Cancel**

Select this person > Save Changes

Customise your Portfolio Wealth views

Add View

Portfolio Wealth

Test

Choose the data that appears when this view is selected

Mine
 Teresa (RelatedParty)

View options

Owners of holdings displayed must match parties included in this view

Save Changes



How to link other parties via Relationships

Go back to Home/Dashboard.

This view can now be chosen on the dropdown list under 'Viewing As'

