


Account Setup Guide

View the Number of Licences Available in Your Subscription

1. To view the number of adviser, paraplanner, and consumer licences available in your firm's subscription, visit our website <http://www.planwithvoyant.co.uk>.
Voyant-Elevate Users: Go to the Voyant-Elevate website at <http://elevate.planwithvoyant.co.uk>.
2. Sign in using your user Voyant account.
3. Click **My Subscription** in the website's top navigation bar.
4. A count of the number of used and allowed adviser, paraplanner, and consumer licences will be shown on this screen.

 If additional licences are needed, arrangements can be made by contacting us at Voyant customer support at support@planwithvoyant.co.uk.

Home	Plan	My Subscription	Users	Clients	Support
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Subscription

Actions	Owner(s)	Christopher Perry
Edit Subscription	Member Since	June 25, 2009
View Users In Subscription	Paid Start Date	
	Activated	October 26, 2009
	Payment Type	Free
	Used/Allowed Advisers	1 of 3
	Used/Allowed Paraplanners	0 of 1
	Used/Allowed Consumers	1 of 10
	Email Client Registration	Yes
	Notifications	
	Email Client Plan Updates	No

Invite a Colleague into Your Firm's Voyant Subscription

When you are ready to grant a licence to a colleague, follow the steps below to invite your colleague into your subscription.

1. Visit our website <http://www.planwithvoyant.co.uk> and sign in using your user account.
Voyant-Elevate Users: Go to the Voyant-Elevate website at <http://elevate.planwithvoyant.co.uk>.

 User name and password reminders are available on the login page as is a password reset function, should you need them.



2. Click **Users > Create Invite**.
3. Enter your colleague's email address.
4. In the **Product** drop down, select **Voyant Advisor – UK**.
5. If you are inviting a paraplanner into the subscription, select instead the **Voyant Paraplanner – UK** product.
6. Click **Submit**.

Pass code HLYQY-54Q25-Y7Y5C-N3Q2W-DRE5G-4P

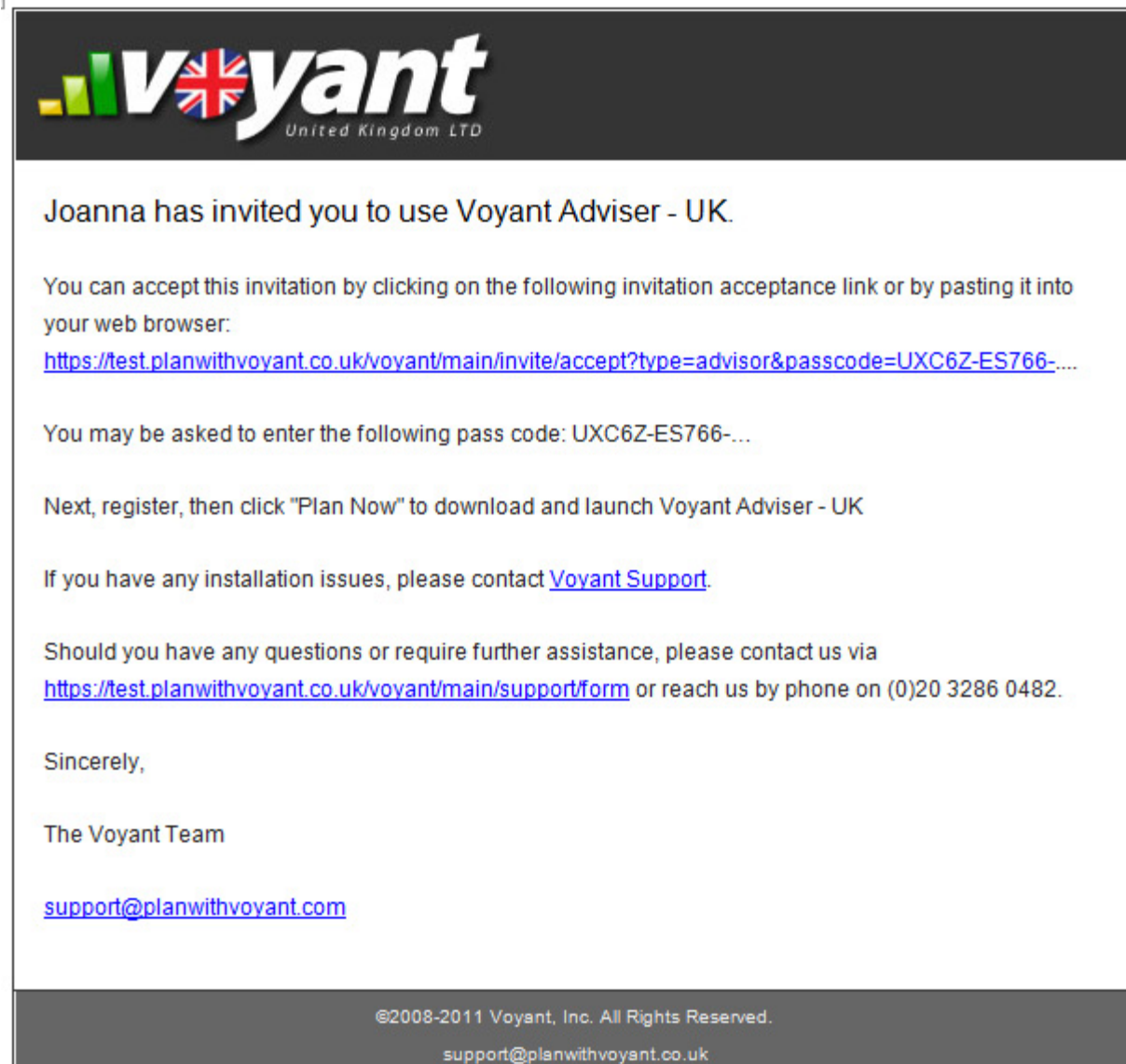
Email Invited

Product

 **This completes your initial steps as an administrator.**


Next, Your Colleague will Register and Activate Their Account

1. An invitation will be emailed to the address entered.



2. Upon receipt, you colleague will click the link in the email.

3. A browser window will open displaying a registration form. Your colleague will need to enter the basics required to create a new Voyant user account. This is the account they will later use to access the Voyant Adviser software.

 **Voyant-Elevate Users:** This process differs slightly for Voyant-Elevate Users. [View additional information.](#)



Registration

Please enter the following registration information to get started with Voyant.

Username *	<input type="text"/>
Password *	<input type="password"/>
Confirm Password *	<input type="password"/>
Password Hint	<input type="text"/>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
E-Mail *	<input type="text"/>
Confirm E-Mail *	<input type="text"/>

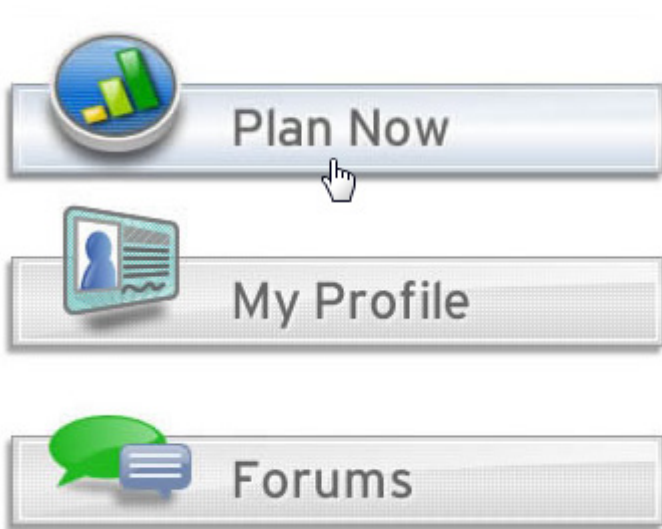
4. Once the form is completed, the registrant will click **Submit**. A screen will display the new profile. The registrant will need to click **Submit** again to confirm the update.


An account activation email will be sent automatically to the registrant.

5. Your colleague will need to activate this new account by clicking the link sent in the account activation email or by simply visiting <http://www.planwithvoyant.co.uk> and signing in using the user name and password they chose when registering.

6. The account will be activated once they sign into the website.

Your colleague can then install the software by clicking the **Plan Now** button.



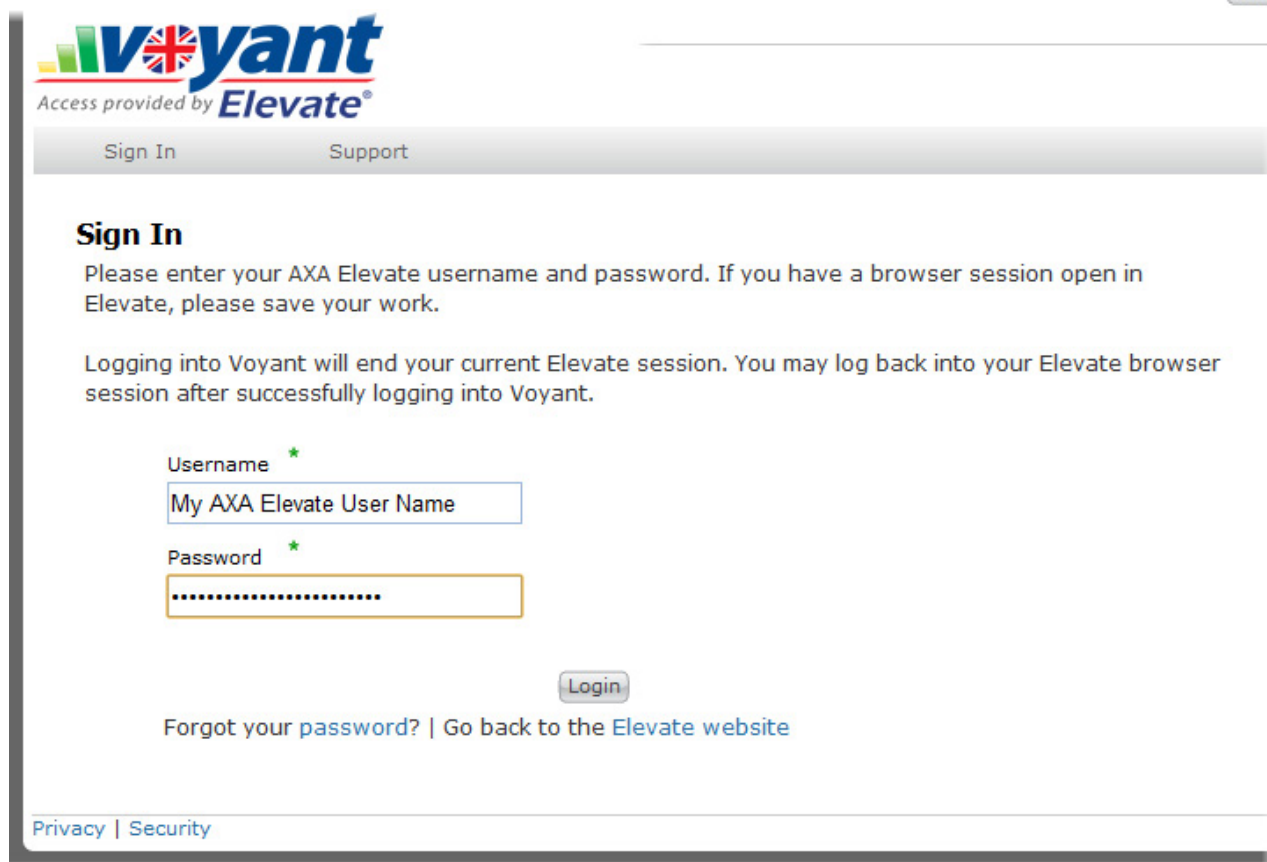
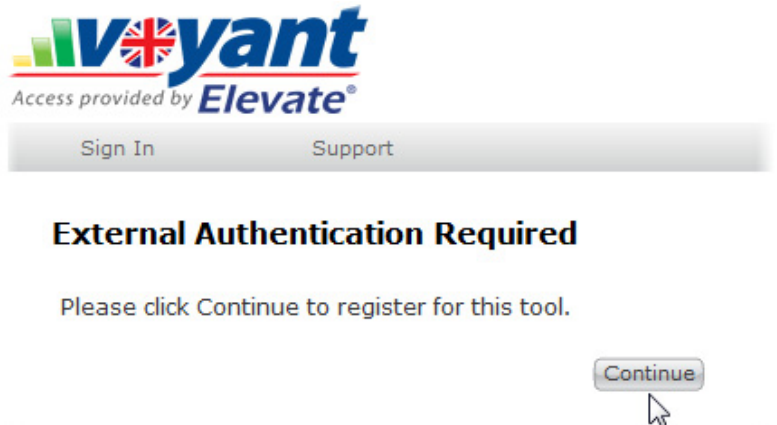
 **Note:** To run the software, your colleague's computer must also be running **Java 6 Update 14 or later**. Java can be downloaded and installed, free of charge, from the Java website, <http://java.com>.


Additional information on installing the software can be found in our [installation guide](#), if needed.

Voyant-Elevate Users will Enter Their Elevate Platform Credentials

The procedure is slightly different for Voyant-Elevate users.

1. The user will receive your invitation by e-mail and click the link therein.
2. A browser window will open. Your colleague will click Continue.
3. Your colleague will enter his or her AXA Elevate platform user name and password.



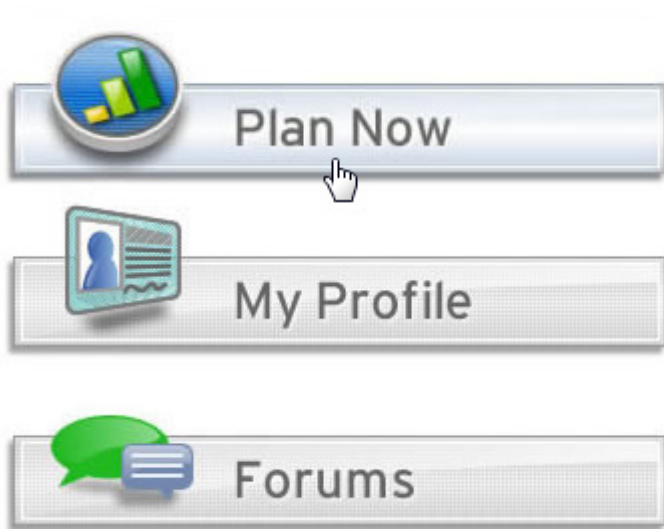
 **Note:** If any problems are encountered with this user name and password, try using the same credentials to log into the AXA Elevate platform website (<https://ads.elevateplatform.co.uk/Home.aspx>).


If you are prompted to reset your password or accept terms of service, do so and then return to the Voyant Elevate website and try logging in again. If this user name / password combination is not accepted on that site, contact AXA Support for assistance with the account.

Your colleague will need to activate this new account by clicking the link sent in the account activation email.

4. The account will be activated once they sign into the website.

Your colleague can then install the software by clicking the **Plan Now** button.



 **Note:** To run the software, your colleague's computer must also be running **Java 6 Update 14 or later**. Java can be downloaded and installed, free of charge, from the Java website, <http://java.com>.

Additional information on installing the software can be found in our [installation guide](#), if needed.

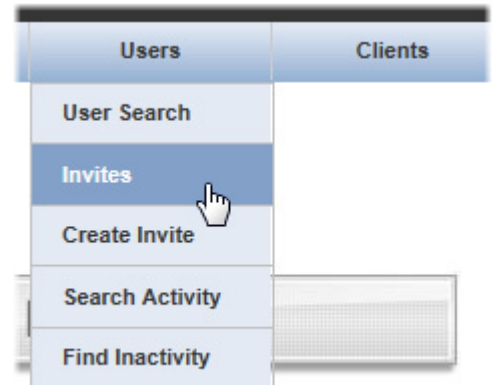
How to Check the Status of an Invitation

As the account owner, you should also be emailed once the invitation has been accepted


You might also ask your colleague e-mail you once he or she has registered; however, you can also use our website to later check the status of the invitation to determine whether the user has registered their new user account.

To check the status of the invitation / registration:

1. Return to the website (www.planwithvoyant.co.uk) and sign in, if you are not logged in already.
Voyant-Elevate Users: Please visit instead the Voyant-Elevate website at <http://elevate.planwithvoyant.co.uk>.
2. Select **Users > Invites**.
3. Either enter your colleague's e-mail address and click **Search** or simply click the **Search** button to view all invitations.



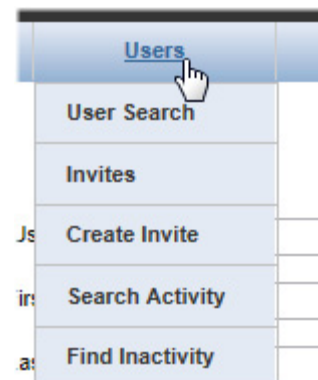
An **Accepted** date will be shown once this person has registered. Once registered, his or her account will appear in **My Subscription > View Users in Subscription**.

 6 Invitations found, displaying all Invitations.

ID	Email Invited	Product	Sent	Accepted	Rejected	Withdrawn	Sent By	Edit
183	cperry@planwithvoyant.co.uk	Voyant Consumer - UK	Jul 13, 2010	Jul 13, 2010		<input checked="" type="checkbox"/>	212	Edit
452	cperry@planwithvoyant.com	Voyant Paraplanner - UK	May 9, 2011			<input type="checkbox"/>	212	Edit
716	cperry@planwithvoyant.com	Voyant Advisor - UK	Jan 6, 2012			<input type="checkbox"/>	212	Edit

Export options: CSV | Excel | XML | PDF

You can also simply click the **Users** option in the top navigation (or select **My Subscription > View Users in Subscription**).



Click the **Search** button to view all of the users within the subscription.

The user's account will appear once the invitation has been accepted and the user has created a new user account. The **Enabled** column will indicate whether the user has signed into the website, enabling their new user account.

5 Users found, displaying all Users.

Full Name	FQ Usernames	E-Mail	Date Created	Enabled	Reg. Code	Type
Christopher Perry	christophperry ...	cperry@planwithvoyant.co.uk	2009-06-25 21:13:31.0	true		Adviser Subscription Owner
Doreen Preston	christophtestclient11 ...	cperry@planwithvoyant.co.uk	2010-07-13 16:56:18.0	true		Consumer
Chris Perry	christoph ...	cperry@voyantplanner.com	2009-04-17 16:23:28.0	false		Adviser All Client Access in Subscript...
Stephen Davidson	christophtestclient10 ...	cperry@planwithvoyant.co.uk	2010-07-13 16:54:31.0	false		Consumer
Harvey Smith	christophtestclient12 ...	cperry@planwithvoyant.co.uk	2010-07-13 16:57:36.0	false		Consumer

Export options: CSV | Excel | XML | PDF

Setting Permissions on Users Accounts to Share Client Files

Default Permissions – The Adviser Role

New user accounts will be granted the adviser role, which will give your colleague the ability to create and edit his or her own client files. Your colleague will not have access to read or edit any of the client files owned by you or any other users in the subscription. You may, however, change these permissions or grant your colleague access to all of the client files within the subscription, sharing files in common.

Option 1 - Grant Your Colleague Full Access to All Client Files within the Subscription

To grant your colleague full access to all of the client files within the subscription:

1. Return to <http://www.planwithvoyant.co.uk> and log in. **Voyant-Elevate Users**, go instead to the Voyant-Elevate website at <http://elevate.planwithvoyant.co.uk>.

2. Click **My Subscription**.

3. Click **View Users in Subscription**.

4. Click the **Full Name** of the new user.

5. An overview of the user's profile will display. Click **Edit Profile**.

 5 Users found, displaying all Users.

Full Name	FQ Usernames
Christopher Perry	christopherry ...
Doreen Preston	christophertestclient11 ...
Chris Perry	christoph ...
Stephen Davidson	christophertestclient10 ...
Harvey Smith	christophertestclient12 ...


Export options: CSV | Excel | XML | PDF

Subscription

Actions

- [Edit Subscription](#)
- [View Clients](#)
- [View Users In Subscription](#)
- [Search Activity](#)

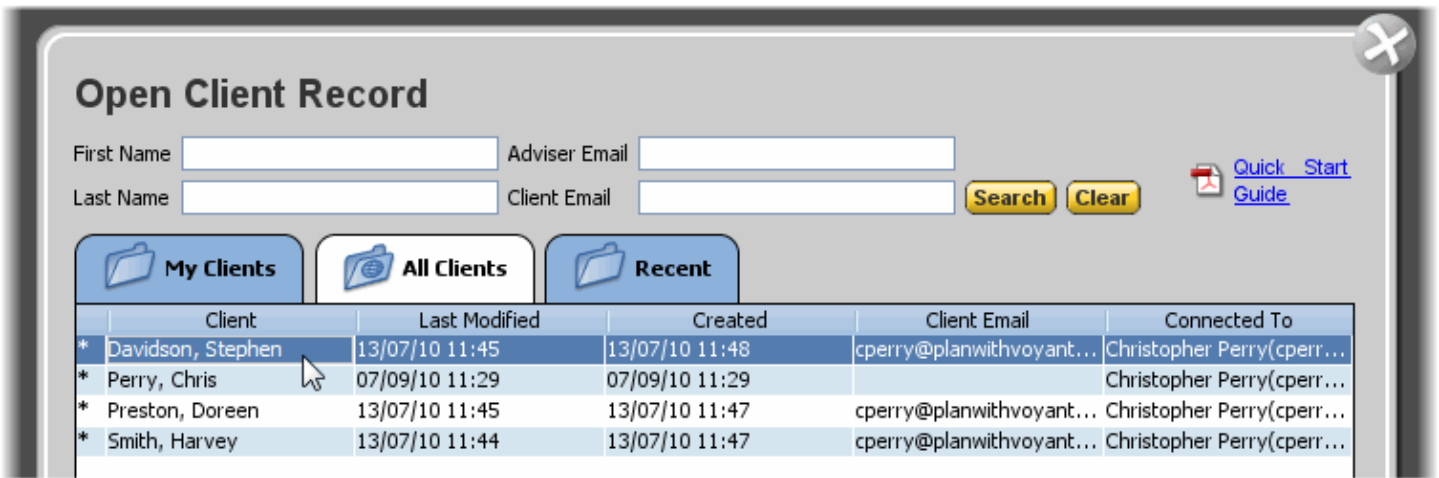
Beneath the user profile will be a list of current roles granted to the user account. Leave the **User** and **Adviser** (or **Paraplanner**) roles selected if your colleague is to use the Voyant software.

 **Note:** Descriptions of these roles can be viewed in the lower section of the screen.

6. Also tick the **All Client Access in Subscription** role. This role will allow the user to have full read and edit access, in common, to all of the client files within your subscription.
7. Click the **Submit** button to save this update.

- Current Roles
- Adviser
 - Consumer
 - Paraplanner
 - Snapshot User
 - All Client Access in Subscription
 - Subscription CSR
 - Subscription Manager

Upon logging into the software, all the client files within the subscription can be viewed and accessed from the **All Clients** tab of the **Open Client Record** dialogue.



Open Client Record

First Name Adviser Email
 Last Name Client Email **Search** **Clear** [Quick Start Guide](#)

My Clients **All Clients** **Recent**


	Client	Last Modified	Created	Client Email	Connected To
*	Davidson, Stephen	13/07/10 11:45	13/07/10 11:48	cperry@planwithvoyant...	Christopher Perry(cperr...
*	Perry, Chris	07/09/10 11:29	07/09/10 11:29		Christopher Perry(cperr...
*	Preston, Doreen	13/07/10 11:45	13/07/10 11:47	cperry@planwithvoyant...	Christopher Perry(cperr...
*	Smith, Harvey	13/07/10 11:44	13/07/10 11:47	cperry@planwithvoyant...	Christopher Perry(cperr...

The **My Clients** tab will display the client files owned by your user account.

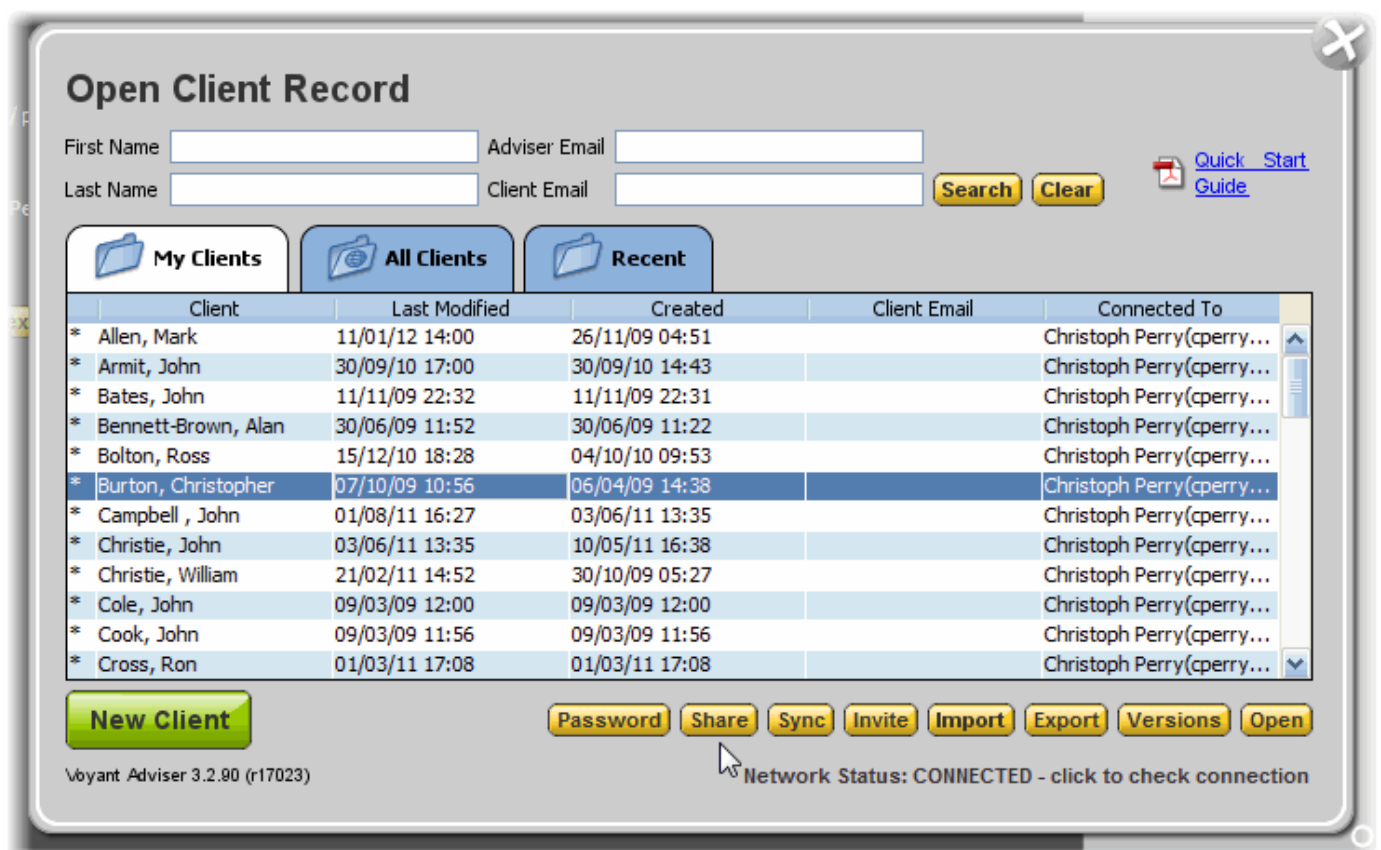
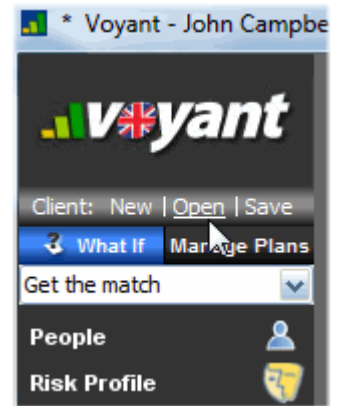
Option 2 - Share Client Files Individually

Firms can also have their Voyant subscriptions configured to allow for client files to be shared on a discretionary basis, by invitation only.

- To invite a colleague to share an individual client file, first open Voyant Adviser software. Click your desktop link to the software. If you are already working in the software, click the **Client: Open** button, top-left.

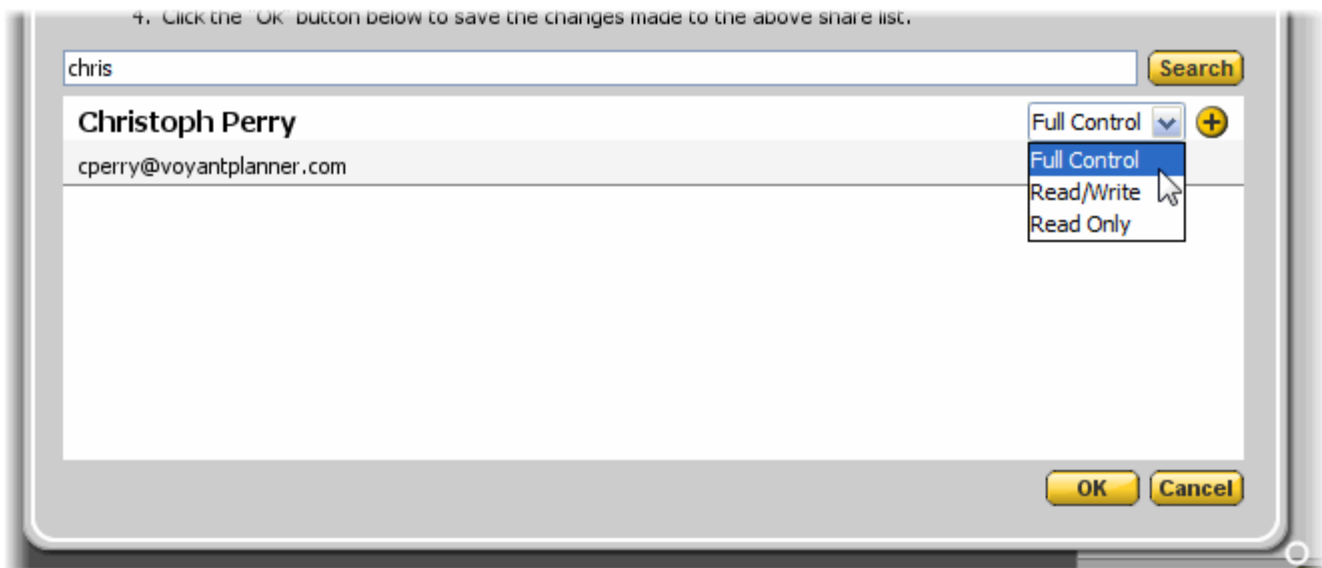
 **Note:** The following steps are performed in the Voyant Adviser software, not on the Voyant website. To access the software, click on the desktop link to it or to install the software, sign into the [Voyant website \(http://www.planwithvoyant.co.uk\)](http://www.planwithvoyant.co.uk) or for Voyant-Elevate users <http://elevate.planwithvoyant.co.uk> and click the **Plan Now** button.

- The **Open Client Record** dialogue will display. Select the client record you want to share. Click the **Share** button.



- Enter your colleague's first name, last name, or e-mail address and click **Search**.

4. Select the level of permissions that will be granted to your colleague:
 - **Full Control** - Full access to read, edit, and share the file with others in your firm. Importantly, full control permissions also grants your colleague access to the client case when working offline (i.e. in offline mode).
 - **Write** - View and edit the client file.
 - **Read** – Read-only access to the client file.



5. Click the **plus (+) button** to add this person to the list of those sharing the client file shown at the top of the dialogue.
6. Click **OK** to save the change.

Where to Access All Client Files

Access to all client files is available only when working online. To access these files, open the software, sign in, and navigate past any initial announcements.

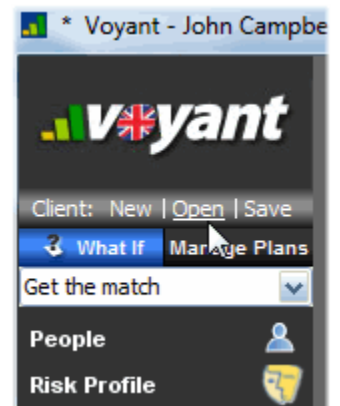
The **Open Client Records** dialogue will display.

If you are already working in a client case, you may access this dialogue at any time by clicking the **Client: Open** button in the top-left corner of the screen.

The **My Clients** tab will show all of the client files owned by your user account. These are the files stored for your user account on the computer you are using. The files shown on this tab are those that would be available when using the software offline.

Select the **All Clients** tab. All of your firm's client records will be shown on this tab.

The **"Connected To"** column will show who owns the file. Note that there is a limited amount of space in this column so you may move your cursor over the name of the owner to view the complete list of owners, should multiple users already have ownership of the client file.



Client Email	Connected To
cperry@planwithvoyant...	Christopher Perry(cperr...
	Christopher Perry(cperr...
cperry@planwithvoyant...	Chris Christopher Perry(cperry@planwithvoyant.co.uk), Chris Perry(cperry@voyantplanner.com)
cperry@planwithvoyant...	Christopher Perry(cperr...

Open Client Record

First Name Adviser Email

Last Name Client Email **Search** **Clear** [Quick Start Guide](#)

My Clients

All Clients

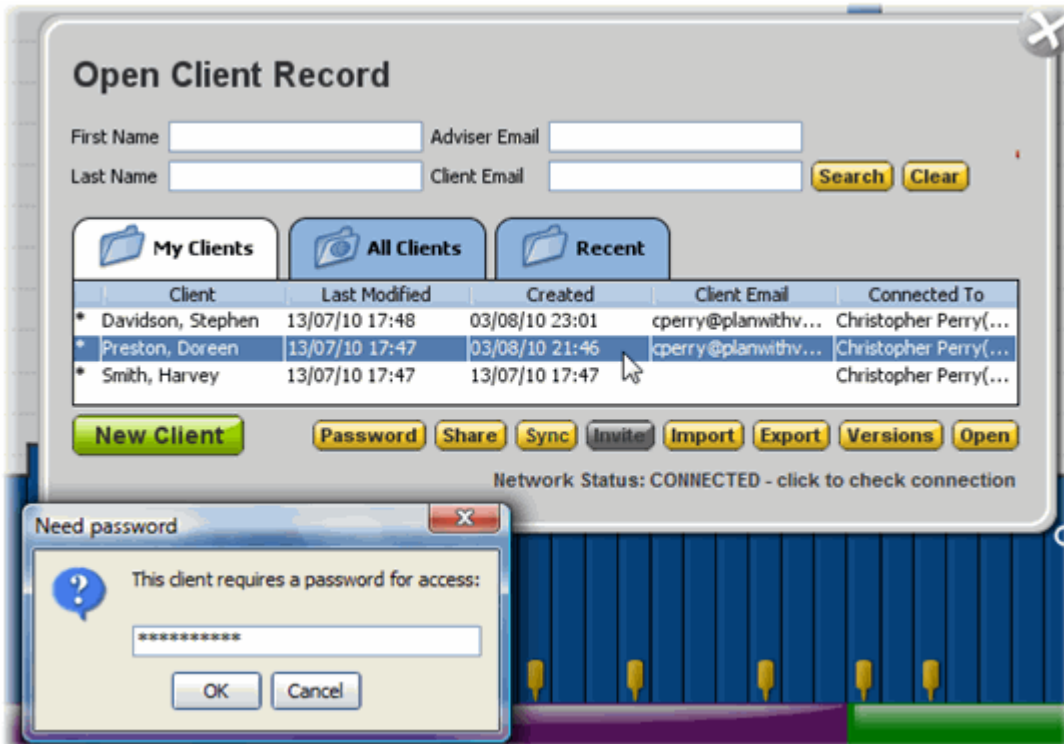
Recent

Client	Last Modified	Created	Client Email	Connected To
* Davidson, Stephen	13/07/10 11:45	13/07/10 11:48	cperry@planwithvoyant...	Christopher Perry(cperr...
* Perry, Chris	07/09/10 11:29	07/09/10 11:29		Christopher Perry(cperr...
* Preston, Doreen	13/07/10 11:45	13/07/10 11:47	cperry@planwithvoyant...	Christopher Perry(cperr...
* Smith, Harvey	13/07/10 11:44	13/07/10 11:47	cperry@planwithvoyant...	Christopher Perry(cperr...

Password Protect Client Files Individually

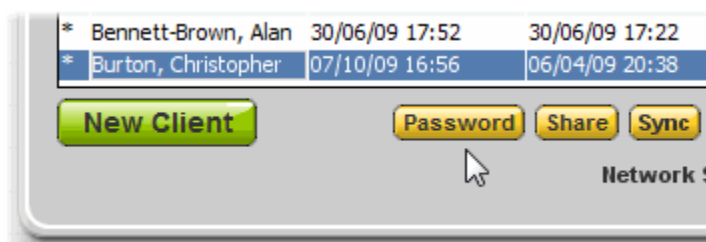
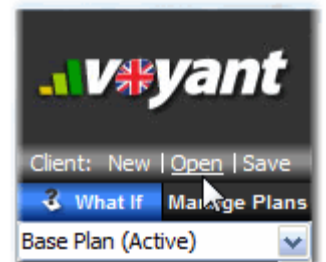
Many advisers use Voyant to fashion their own personal financial plans. But what if your firm grants advisers general access to client records? Or perhaps you share all of your records with a paraplanner or assistant. Can an individual financial plan, possibly your own, be assigned a unique password?

A password protection feature is available expressly for these situations. You can select and further protect individual client records by assigning them file-specific passwords.



How to Password Protect an Individual Client File

1. Go to the **Open Client Record** dialogue. This dialogue displays automatically after first logging into the software or open it by clicking the **Client: Open** link in the top-left corner of the screen.
2. On the **My Clients** or **All Clients** tab, select the client record that is to be password protected.
3. Click the **Password** button.



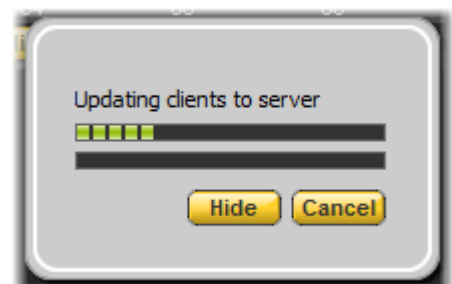
- Enter and then confirm the password for the client file. Not that these passwords are case sensitive.



- Click the **Save** button.

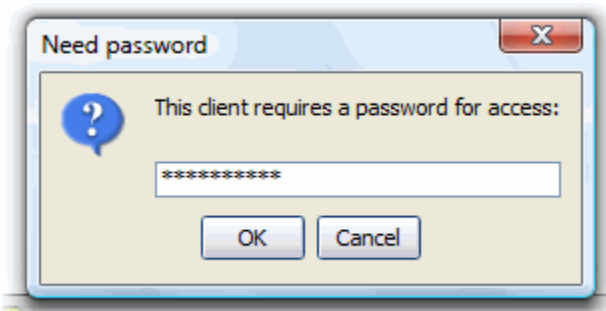
The password information will be encrypted and synchronised with the Voyant servers.

Once the password is saved, any subsequent attempts to open the client file will receive a password prompt.



Opening Password Protected Client Files

Once the password is saved, any subsequent attempts to open the client file will receive a password prompt.

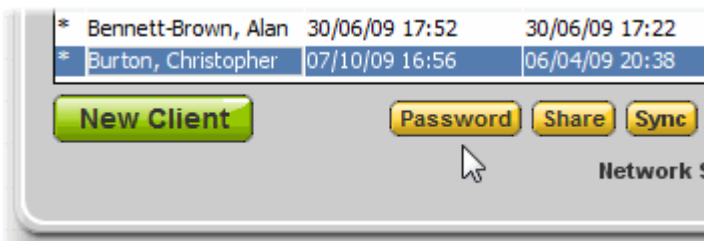


After the correct password has been entered, the client file will remain unlocked for the duration of the session, until the software is closed.

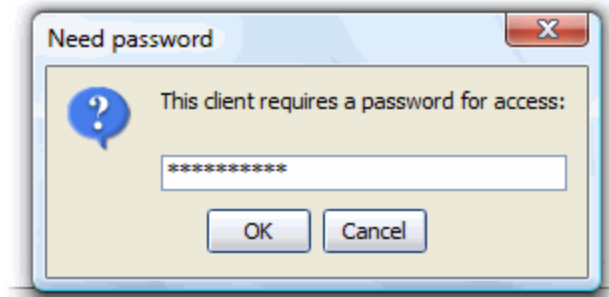
Remove or Update a Client File Password

You must be able to enter the current password first before password protection can be removed from a client file or the password updated.

1. To update or remove a password, first go to the **Open Client Record** dialogue. This dialogue is displayed automatically after first logging into the software or click the **Client: Open** link in the top-left corner of the screen.
2. Select the client file and click the **Password** button.



3. Enter the current password to access the client file's password settings.
4. Click **OK** to continue.
5. Password settings for the client file will be displayed.
 - To **change** the current password, enter and confirm the new password, then click **Save**. **Note:** Passwords are case sensitive.
 - To **remove password protection** from the client file, click the **Remove** button.



Assistance with Forgotten Passwords

There are no plan-specific password reminder or reset features. Please contact Voyant Support support@planwithvoyant.co.uk if you are unable to access a plan due to a forgotten password. Our staff can assist in resetting the password.

Questions, Assistance?

Should you have any questions regarding Voyant @Home, please feel free to contact our support staff by e-mailing support@planwithvoyant.co.uk.