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Part 1 - Managing Adviser Access and Permissions

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.

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Subscription

Owner(s)  Christopher Parry

Member Since  June 25, 2009
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.

   Note: 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.

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.

   Joanna has invited you to use Voyant Adviser - UK.

   You can accept this invitation by clicking on the following invitation acceptance link or by pasting it into your web browser:

   You may be asked to enter the following pass code: UXC6Z-ES766-...

   Next, register, then click “Plan Now” to download and launch Voyant Adviser - UK

   If you have any installation issues, please contact Voyant Support.

   Should you have any questions or require further assistance, please contact us via [https://test.planwithvoyant.co.uk/voyant/main/supportform](https://test.planwithvoyant.co.uk/voyant/main/supportform) or reach us by phone on (0)20 3286 0482.

   Sincerely,

   The Voyant Team

   support@planwithvoyant.com

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.

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](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 account activation procedure is slightly different for Voyant-Elevate users.

4. The user will receive your invitation by e-mail and click the link therein.

5. A browser window will open. Your colleague will click Continue.

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

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

![Plan Now](image)

![My Profile](image)

![Forums](image)

**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](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*.

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.

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<tr>
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<th>FQ Usernames</th>
<th>E-Mail</th>
<th>Date Created</th>
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</table>

Export options: CSV | Excel | XML | PDF
Setting Permissions on Users Accounts to Share Client Files

Default Permissions – The Adviser or Paraplanner 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.

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 found 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.
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.

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.

1. 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.

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

3. 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.
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.
4. Enter and then confirm the password for the client file. Not that these passwords are case sensitive.

5. 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.
How to Deactivate the Adviser or Paraplanner Licence of a Former Employee

1. Visit the Voyant UK website www.planwithvoyant.co.uk and log in using your Voyant user name and password.

   Voyant-Elevate Users, go instead to the Voyant-Elevate website at http://elevate.planwithvoyant.co.uk.

   Note: Your Voyant user account must be the subscription owner or have administrative rights to be allowed to deactivate user accounts.

2. Select My Subscription.

3. Click View Users in Subscription.
A complete list of users within the subscription will display.

4. In the **Full Name** column, click the name of the user whose account is to be deactivated.

![User list](image)

The user's profile will display.

5. Click **Disable User**.

![User summary](image)

Doing so will deactivate the account and free the licence slot it occupied previously.
To view this update, select **View Subscription**. The adviser, paraplanner or @Home user licence that was disabled will be added to the count of available licences for the subscription.

See the "**how to invite a colleague into your subscription**" section of this guide for instructions on how to invite a new employee into your subscription to take this open licence.
How to Reactivate a Deactivated User Account

A deactivated user account can be reactivated at any time by clicking the **Enable User** link, which will display after the account is disabled.

To reactivate an account, your subscription must have at least one adviser or paraplanner licence available for the reactivated account to use, depending on the account's permissions.

1. To view the number of adviser or paraplanner licences available in your firm's subscription, visit our website [http://www.planwithvoyant.co.uk](http://www.planwithvoyant.co.uk).
   - **Voyant-Elevate Users**: Go to the Voyant-Elevate website at [http://elevate.planwithvoyant.co.uk](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.

5. Next, select My Subscription.

6. Click View Users in Subscription.
A complete list of users within the subscription will display.

7. In the **Full Name** column, click the name of the user whose account is to be deactivated.

The user's profile will display. You may scroll to the bottom of the user's profile to verify whether the account has the Adviser or Paraplanner role. This is the type of licence that will need to be available to reactivate the account.

8. Click **Enable User**.

Doing so will reactivate the account, provided a licence is available.
Note that a waiting period is enforced on deactivated accounts. This is done to prevent licensing abuse. If you have disabled an account in error and need it reactivated immediately, please contact Voyant Support at support@planwithvoyant.co.uk.
Part 2 - Managing Client Access through Voyant @Home

View the Number of @Home Licences Available in Your Subscription

Before inviting a client to create an @Home user account and access their plan, it is a good idea to check your subscription for the number of @Home (consumer) licences available in your subscription. Voyant @Home is add-on service for which there is a monthly charge; however, every Voyant subscription comes equipped with at least two free licences which you are welcome to use with two of your clients. Moreover, these licences can be used and then reassigned to other users later. For more information on managing @Home licences, see the "managing @Home user accounts" section of this guide.

1. To view the number of @Home 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 and select Adviser.

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 consumer (@Home) licences will be shown on this screen.

   Voyant @Home is an optional add-on service to the standard Voyant Adviser licence.

   The @Home service is offered at a flat rate and provides an unlimited number of @Home user licences to the adviser. For pricing information, visit the Voyant UK website. To arrange to have the @Home service added to your subscription, contact Voyant customer support at support@planwithvoyant.co.uk.

Two Options for Using Voyant @Home

Provided that you have @Home licences available, as an adviser or paraplanner you can use Voyant @Home with your clients in two different ways.

**Option 1** - Invite a client to access, view, and possibly complete a plan created initially by you or one of your colleagues.

**Option 2** - Invite a client to create an entirely new client case for themselves, using @Home as an online fact find.

In either case, the client will register with the Voyant website and create their own personal @Home user account. Their access is granted and controlled through your subscription and you may deactivate and reassign a licence to another client at any time.
Option 1 - Invite a Client to Access an Existing Plan

Clients are invited to access the plans you have created for them from the Voyant Adviser software. To send a client an invitation to access an existing plan, first open Voyant Adviser and sign in.

Note: Before sending an invitation, we recommend that you first verify that @Home consumer licenses are available in your subscription.

If you are already working in the software, click the Client: Open link in the top left corner of the screen in Voyant.

1. The Open Client Record dialogue will open. Select the client’s record and click the Invite button.

2. Enter the client’s email address and a PIN number, which can be any value you like.

3. Note: The adviser will need to let the client know what this PIN number is offline; that is to say, outside of the software (e.g. by email or by phone). This PIN is simply an additional security precaution should the @Home email invitation fall into the wrong hands.

Until a user has accepted an invitation and activated an account, you can send invitations to connect to a plan to any number of email addresses.

Next, your client will register, creating a user account, download the software, and access their plan.
Option 2 - Invite a Client to Create a New Client Case (Use @Home for Fact Finding)

If you intend to use Voyant @Home as a fact finding tool, you may invite a client to create their own plan, rather than create the plan first and invite them to connect to it.

Note: Before sending an invitation, we recommend that you first verify that @Home consumer licenses are available in your subscription.

To send a client an invitation to create an account, download @Home, and begin their own plan:

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.

2. Click Users > Create Invite.

3. Enter your client’s email address.

4. In the Product drop down, select Voyant Consumer – UK.

5. Click Submit.

Next, your client will register, creating their own user account, download the software, and begin work on their plan.
Next Steps - Your Client Sets Up a Voyant @Home Account

An email invitation will be sent offering the client an opportunity to view the plan using Voyant @Home.

1. The client will need to click the link in this email.

2. The client will be prompted to confirm the PIN number provided by the adviser offline. Again, this PIN, chosen by the adviser, is simply an additional security precaution. Enter the PIN in the PIN field and click Signup.
After the PIN is validated, the client will be prompted to create his or her own Voyant @Home user account. This @Home account will be linked to both the client file and the adviser’s subscription.

3. The client will enter some very basic information to create a Voyant user account: user name, password, password hint, first name, last name, email address, postal code and country. Once the service agreement is accepted, the client will click **Submit**.

It is at this point in the invitation process that the @Home account becomes linked to client record. If you were to attempt to send another invitation related to this record you would receive an intentional error. Presently Voyant allows only a one to one relationship between client records and @Home client accounts.
4. An activation message will be sent to the client’s email address.

5. Receiving this account activation email message, the client will click the link therein to go to the Voyant website. The account will be activated automatically. We send this message to confirm that the user has provided a valid email address in the user profile.

This completes the initial one-time setup of the client’s @Home account. The @Home account is now linked to your adviser subscription and to the record you created for the client.

The client will then log into the web site using his or her user name and password, both of which were selected by the client when registering.
Accessing the Plan - The Client Installs Voyant @Home and Opens the Plan

6. The client will click **Plan Now** to open and view the plan in a browser.

No software needs to be downloaded unless a compatible version of the Java Runtime Environment (JRE) is not found on the user’s computer. A downloadable version of the client software is available, however, for users who encounter browser related issues.

**Installation and System Requirement – Java**

The website will check the client’s computer for a compatible version of the Java Runtime Environment (JRE). If one cannot be found, it will attempt to install the JRE.

**Note:** To run the software, your client’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](http://java.com).

Depending on the security settings in his browser, the client may need to click on and accept a security prompt (e.g. “…do you want to install this program?”) before the JRE can be installed. Security features like these vary from browser to browser. In Internet Explorer, for example, the prompt will appear as a white bar immediately beneath the toolbar.

If there are any issues installing the software, the client should first visit the Java website, [http://java.com](http://java.com) and click the “Do I have Java?” link. Their computer will be checked for the latest version of Java. If a message indicates that the latest version of Java is not installed, we recommend that the user install it.
7. Voyant @Home will need to be installed on the client’s computer.

8. Once installed, Voyant @Home will launch displaying the client’s plan.

Clients who will only be able to open his or her own client file in Voyant @Home.

The client may update the plan and save changes to the client if updates are necessary. You will be able to view these changes the next time you open Voyant Adviser or if you already have the plan open in Voyant Adviser, synchronize to receive the latest saved version of the client.

Files are synchronized automatically when Voyant is first opened or can be synchronized by command by clicking the Client: Open link, selecting the client file in the Open Client Record dialogue, and clicking the Sync button.
Accessing the Plan Going Forward

When Voyant @Home is installed, a desktop shortcut to the software will be placed on the user’s desktop. If this is a Windows computer, a link to Voyant @Home will also be added to the Start Menu > All Programs > Voyant Consumer - UK folder.

Your client will click either of these shortcuts to open the software in the future. After clicking the shortcut, they will be prompted to sign in using their personal Voyant @Home user name and password.

Note: Unlike Voyant Adviser, your client must be online to use Voyant @Home. We require this to confirm that continued access to the plan is being granted through your adviser licence.
Managing @Home Invitations

Do @Home Invitations Expire?

No, @Home invitations do not expire unless you rescind the invitation or the user accepts the invitation and creates an account.

Viewing the Status of Invitations – Is Your Client is Registered and Connected to Their Client Record?

To check the status of the invitation / registration:

1. Visit the Voyant UK website (www.planwithvoyant.co.uk) and sign in, if you are not logged in already. Voyant-Elevate users, go instead to http://elevate.planwithvoyant.co.uk, select Voyant Adviser and sign in.
2. Select Users > Invites.
3. Either enter this person’s email 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.

<table>
<thead>
<tr>
<th>ID</th>
<th>Email Invited</th>
<th>Product</th>
<th>Sent</th>
<th>Accepted</th>
<th>Rejected</th>
<th>Withdrawn</th>
<th>Sent By</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>183</td>
<td><a href="mailto:cperry@planwithvoyant.co.uk">cperry@planwithvoyant.co.uk</a></td>
<td>Voyant Consumer - UK</td>
<td>Jul 13, 2010</td>
<td>Jul 13, 2010</td>
<td></td>
<td></td>
<td>212</td>
<td>Edit</td>
</tr>
<tr>
<td>184</td>
<td><a href="mailto:cperry@planwithvoyant.co.uk">cperry@planwithvoyant.co.uk</a></td>
<td>Voyant Consumer - UK</td>
<td>Jul 13, 2010</td>
<td>Jul 13, 2010</td>
<td></td>
<td></td>
<td>212</td>
<td>Edit</td>
</tr>
<tr>
<td>185</td>
<td><a href="mailto:cperry@planwithvoyant.co.uk">cperry@planwithvoyant.co.uk</a></td>
<td>Voyant Consumer - UK</td>
<td>Jul 13, 2010</td>
<td>Jul 13, 2010</td>
<td></td>
<td></td>
<td>212</td>
<td>Edit</td>
</tr>
<tr>
<td>220</td>
<td><a href="mailto:cperry@planwithvoyant.com">cperry@planwithvoyant.com</a></td>
<td>Voyant Consumer - UK</td>
<td>Sep 7, 2010</td>
<td></td>
<td></td>
<td></td>
<td>212</td>
<td>Edit</td>
</tr>
</tbody>
</table>
You could also click the **My Subscription** option in the top navigation and select **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.

![Users table](image)

Another quick way to confirm whether a client is already connected to their case file is by opening the software and going to the **Open Client Record** dialogue. If you already have the software open, click the **Client: Open** link, top-left.

Search for your client’s case file.

If an email address is shown in the Client Email column, the client has accepted your invitation and is already registered with Voyant. Your client's @Home user account has access to this client record.

![Open Client Record](image)
My Client did not Receive the Invitation. Can Another be Sent?

Yes. You may resend any number of invitations to a user. These will all remain active until your client accepts one of them and creates an @Home user account.

How to Withdraw an Invitation

Suppose you invite a prospective client to use Voyant @Home and they never accept your invitation. You may rescind any unaccepted invitation to use Voyant @Home.

1. Visit the Voyant UK website (www.planwithvoyant.co.uk) and sign in, if you are not logged in already. Voyant-Elevate users, go instead to http://elevate.planwithvoyant.co.uk, select Voyant Adviser and sign in.

2. Select Users > Invites.

3. Either enter this person’s email address and click Search or simply click the Search button to view all invitations.
If no value is shown in the **Accepted** column, the invitation is outstanding and can still be withdrawn, if necessary.

Note: Once a user has accepted an invitation, you can still revoke their access to Voyant @Home, when necessary, by **deactivating their @Home user account**.

4. Click the **Edit** link. Details about the invitation will display.

5. Click the **Edit** button.

6. Click the **Withdrawn** checkbox.

7. Click **Submit**. A message will display confirming your changes have been made.

8. Click the **Cancel** button to leave this screen.

You will be returned an updated list of invitations. The **Withdrawn** checkbox will be ticked for the invitation you withdrew a moment ago.
Can Multiple @Home User Accounts be Connected to a Single Client Case File?

No. Only one @Home user account can be connected to a given client case. For example, you have a client case for a married couple. The husband and wife could not each have their own login credentials to access their plan. They would need to share a single user account to access the case. If separate client cases were created for the wife and husband, each could then have their own @Home credentials to access their own respective case files.

In turn, a single @Home user account cannot be connected to multiple client case files. Each @Home user account has access only to the client record to which it is connected. Voyant @Home operates differently than Voyant Adviser, which is used to create and access multiple client cases.
Managing @Home User Accounts

Where to View All of Your @Home Clients

You can also assist your client with their password by visiting http://www.planwithvoyant.co.uk.

Note: Voyant-Elevate users, go instead to http://elevate.planwithvoyant.co.uk, select Voyant Adviser and sign in.

1. Sign in using your user name and password.

2. Select My Subscription.

3. Click View Users in Subscription, left.

4. Click the Search button to view all of the users within the subscription or search for a specific client by first name, last name, email address or any of the other criteria provided in the search form.

@Home user accounts will have an account Type of Consumer.

To view a client’s profile, click their name in the Full Name column.
Assisting Your Clients - Forgotten User Names and Passwords

If your client has forgotten how to access their account, you can visit http://www.planwithvoyant.co.uk and click the Log In button. User name and password reminder and password reset tools are available on the Log In page.

1. You can also help your client find their user name by visiting http://www.planwithvoyant.co.uk. Voyant-Elevate users, go instead to http://elevate.planwithvoyant.co.uk and select Voyant Adviser.

2. Sign in using your user name and password.

3. Select My Subscription > View Users in Subscription.

4. Click the Search button to view all of the users within the subscription or search for your client by first name, last name, and/or email address.

Your client’s user name will be shown in the FQ Usernames column.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>FQ Usernames</th>
<th>E-Mail</th>
<th>Date Created</th>
<th>Enabled</th>
<th>Reg. Code</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christopher Penny</td>
<td>christophpenny ...</td>
<td><a href="mailto:openny@planwithvoyant.co.uk">openny@planwithvoyant.co.uk</a></td>
<td>2009-05-25 21:13:31</td>
<td>true</td>
<td></td>
<td>Subscription Owner</td>
</tr>
<tr>
<td>Stephen Davidson</td>
<td>christophstevend10 ...</td>
<td><a href="mailto:openny@planwithvoyant.co.uk">openny@planwithvoyant.co.uk</a></td>
<td>2010-07-13 19:34:21</td>
<td>true</td>
<td></td>
<td>Consumer</td>
</tr>
<tr>
<td>Dwayne Preston</td>
<td>christophstevend11 ...</td>
<td><a href="mailto:openny@planwithvoyant.co.uk">openny@planwithvoyant.co.uk</a></td>
<td>2010-07-13 18:56:18</td>
<td>true</td>
<td></td>
<td>Consumer</td>
</tr>
<tr>
<td>Christopher Smith</td>
<td>christoph ...</td>
<td><a href="mailto:openny@voyantage.com">openny@voyantage.com</a></td>
<td>2009-04-17 18:28:28</td>
<td>false</td>
<td></td>
<td>Advisor (All-Client Access in Subscript...)</td>
</tr>
<tr>
<td>Harvey Smith</td>
<td>christophstevend12 ...</td>
<td><a href="mailto:openny@planwithvoyant.co.uk">openny@planwithvoyant.co.uk</a></td>
<td>2010-07-13 16:57:36</td>
<td>false</td>
<td></td>
<td>Consumer</td>
</tr>
</tbody>
</table>

Export options: CSV | Excel | XML
How to Disable an @Home User Account

1. Log into the Voyant UK website www.planwithvoyant.co.uk using your Voyant user account.

2. Click My Subscription.

Details about your subscription will be displayed, including the number of used and allowed consumer licenses within your subscription.

3. To continue, click the “View Users in Subscription” link, top-left.

A list of all the users (user accounts) within your description will display.
4. Click the **Full Name** of the client whose account you want to disable.

Details about the account will be displayed.

5. Click the **Disable User** link to disable the user’s @Home license.
How to Reactivate a Disabled @Home Account

You may reactivate the client’s @Home license at any time by revisiting the user’s account details and clicking the Enable User link.

**Note:** Once an @Home or Voyant Adviser account has been disabled, a waiting period will go into effect. This waiting period increases each time an account is deactivated. For example, the first time an account is disabled, it cannot be reactivated for 1 hour. For each subsequent disabling of the same user account, the waiting period increases by the number of times the count has been disabled – first 1 hour, then 2 days, then 3 days, etc.

We enforce this waiting period as a safeguard against licensing abuse. If you have deactivated an account in error and require assistance reactivating an account prior to the end of this waiting period, please contact Voyant Support at support@planwithvoyant.co.uk.
Managing Plans

Locking Scenarios, Make a What-if Plan Read-Only

You can lock plans (scenarios) within a client file, making them read-only.

Bear in mind that a locked plan is non-editable to everyone, including you, your client and your colleagues, until you unlock the plan. Plans can be easily locked and unlocked though.

1. To lock a plan, open the client file and click the Manage Plans button in the top-left corner of the screen.

2. Select the plan within the client file that you want to lock and click the Lock button.

3. A message will display asking you to confirm that you want to lock the plan. Click Yes to lock the plan.

4. A padlock icon will appear in the Locked column.

Repeat these steps for any other plans that need to be locked. Once locked, the plan cannot be edited until it is unlocked. Consumers do not have the option to unlock plans whereas advisers do.
5. To unlock a plan, to make it editable again, do the same, only click the Unlock button.

Note that unused plans (scenarios) or those that are works in progress can also hidden, save the Base plan. Plans are hidden by clicking the Hidden column of the Plan Management dialogue. A bullet will appear in the column if a plan is to be hidden from the client. Click the Hidden bullet, removing it, whenever you are ready to reveal the plan to your client.

**Control the Visibility of What-If Scenarios**

If the client file contains numerous what-if plans, you can control which of these are shown to the client.

1. Click the **Manage Plans** button in the top left corner of the screen, next to What If.

The **Manage Plans** dialogue will display.

2. Click the **Hidden** column to hide various plans from the client’s view. All but the Base plan can be hidden. A grey bullet will appear in the row of each plan that is hidden from the client’s view.

![Plan Management Dialogue](image)

Hidden plans will not be shown to the client in the drop-down menu, but the **Base Plan** will always remain visible.
**Track Client Updates in the Plan Overview**

For a quick view of your client’s changes, first select the client review plan from the plans drop down menu (top left).

Go to the **Overview, General** screen.

---

### Changes in the client version of the plan will be tracked in the overview:

- **Additions** are noted with `+` plus signs,

- **Deletions** with **red strikethrough** text,

- Modified amounts are shown beside their original values, which are displayed in **black strikethrough** text.

- **Items** that have been modified in any other ways (e.g., changes to settings such as growth rates) are noted with a triangular bullet ``.

Any of these deleted or updated items can be easily restored or reverted to their original values with a right-click. Also note that all of the items in the overview are active links to guide you directly to individual plan entries where additional updates or corrections could be made.
You can also make a higher level comparison of the base to client reviewed/edited plan in the *Let's See* charts, *Compare Plans* view.
Versions - Track and View Earlier Versions of a Plan

1. To view the version history of a client file, click the Manage Plans link in the top left corner of the screen, next to What If.

2. The Manage Plans dialogue will display. Click the View Versions button.

The Version Management dialogue will display.

Note, the Version Management dialogue can take approximately one minute to open if you are working with a plan that has numerous versions.

Details about each version, including comments, will display when selected. You may view any former version of the client file by selecting the version and clicking Open.
**How to Revert to an Older Version of a Client Case**

If you wish to work in the selected version going forward, simply save your changes, once finished, and the opened version will be saved as the latest version of the plan. This copy of an older version of the case becomes the latest version, effectively reverting case back to a previous version. This is the version of the plan that will be opened the next time you open the client file.

**Other Related Plan Management Features**

The **Active Plan** column determines which of the what-if plans will be presented to the client in **Snapshot**.

Snapshot is a web based worksheet/checklist of planning goals available on our website, [http://www.planwithvoyant.co.uk](http://www.planwithvoyant.co.uk) or for Voyant-Elevate users, [http://elevate.planwithvoyant.co.uk](http://elevate.planwithvoyant.co.uk).

Sign into the website using the same user account you use when logging into the software.

**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.