Edit Investor Profile Connections
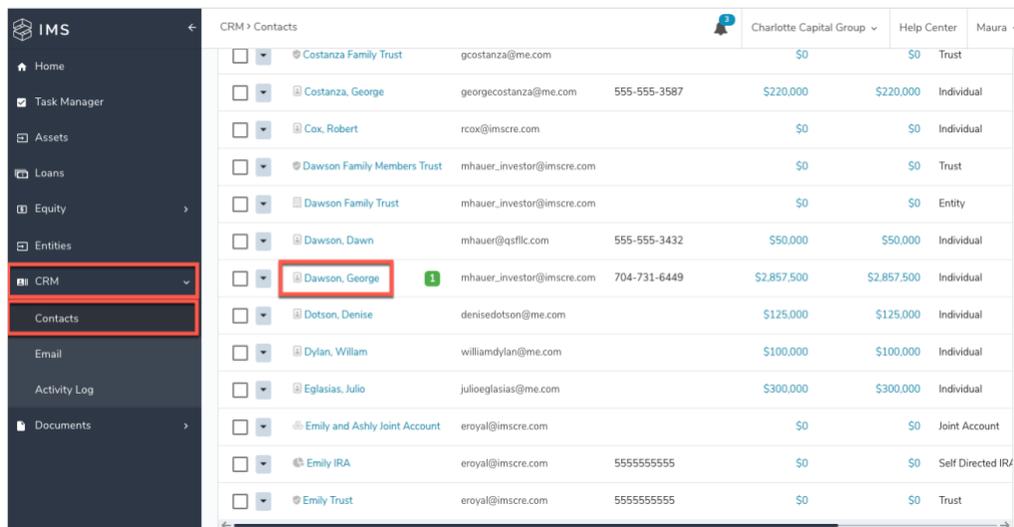(Updated 06/11/2018)

Terms To Know:
Responsible Party: Has full dashboard and document access as well as the ability to update profile information and place an investment within IMS.
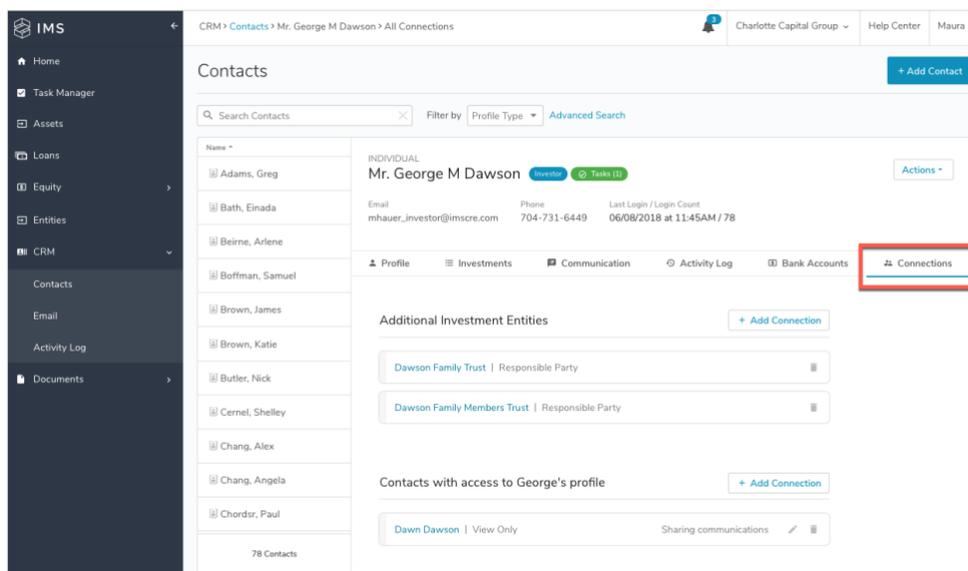
Secondary/View Only: This party can update profile information but cannot place an investment within IMS. This user can still update profile information and place investments under their own profile or any profiles where they are the responsible party.

Step 1: Click the **CRM** tab on the left side of the screen. Click **Contacts**. Search and locate your desired contact. Click their name.

Click the **Connections** tab. This tab lists the additional users with access to the profile you're in.

The Additional Investment Entities section allows you to add an entity that you would like that contact (in this example, George) to have access to. To add a profile for this contact, click **+ Add Connection**.

Additional Investment Entities | + Add Connection

Dawson Family Trust | Responsible Party 🗑

Dawson Family Members Trust | Responsible Party 🗑

Here, you have the option to choose any communications that you would like this contact (ex: George) to receive along with the entity. Click **Save**.
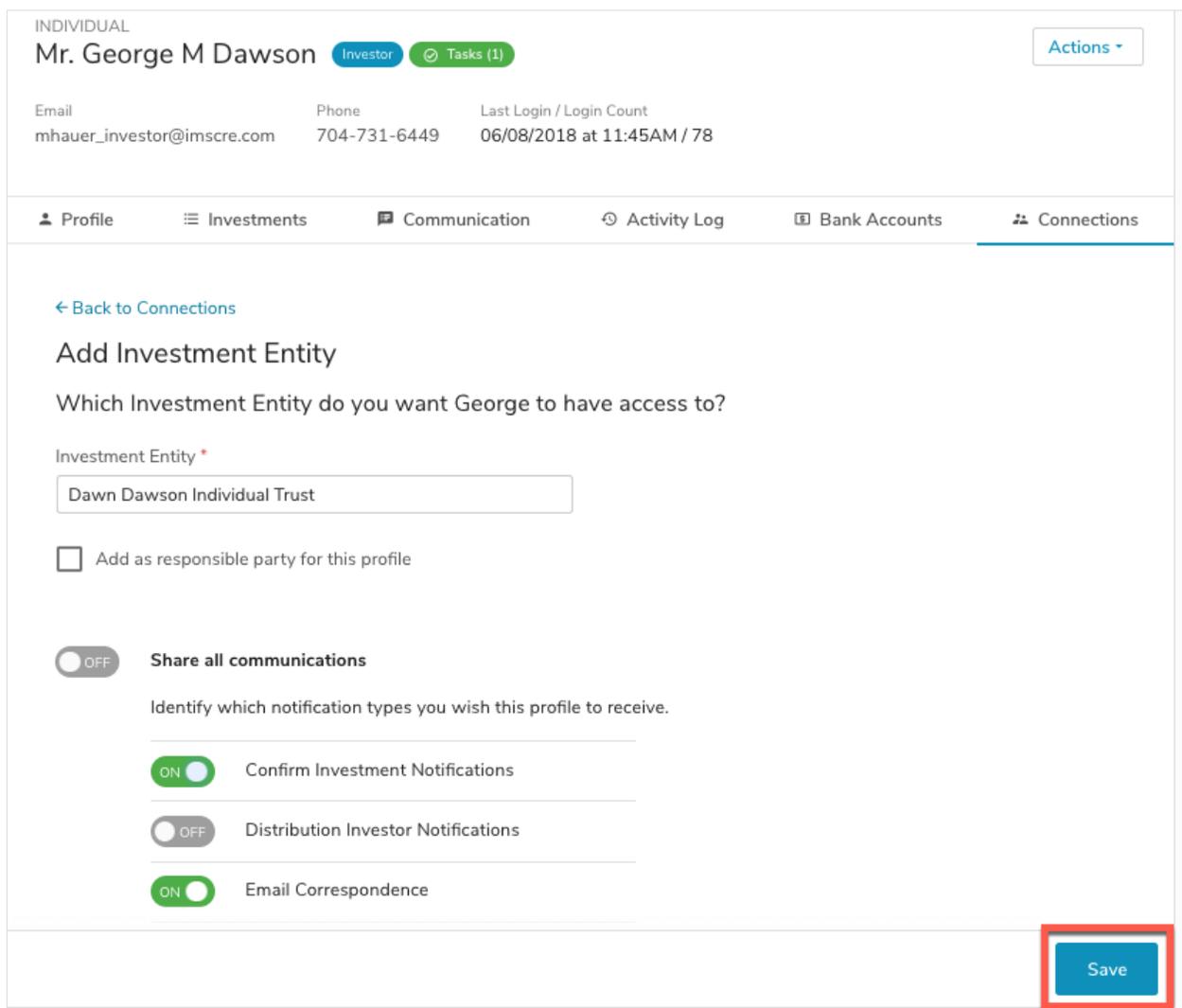
INDIVIDUAL

Mr. George M Dawson [Investor] [✓ Tasks (1)]   [Actions ▾]

Email   Phone   Last Login / Login Count
mhauer_investor@imscre.com   704-731-6449   06/08/2018 at 11:45AM / 78

👤 Profile   ≡ Investments   💬 Communication   🕘 Activity Log   🔲 Bank Accounts   👥 Connections

← Back to Connections

Add Investment Entity

Which Investment Entity do you want George to have access to?

Investment Entity *

Dawn Dawson Individual Trust

☐ Add as responsible party for this profile

(OFF) **Share all communications**

Identify which notification types you wish this profile to receive.

[ON] Confirm Investment Notifications

[OFF] Distribution Investor Notifications

[ON] Email Correspondence

[Save]

The Contacts with access to George's profile section allows you to link additional profiles to George's user account (ex: George). If you would like to give this user access to a new profile, click **+ Add Connection**.
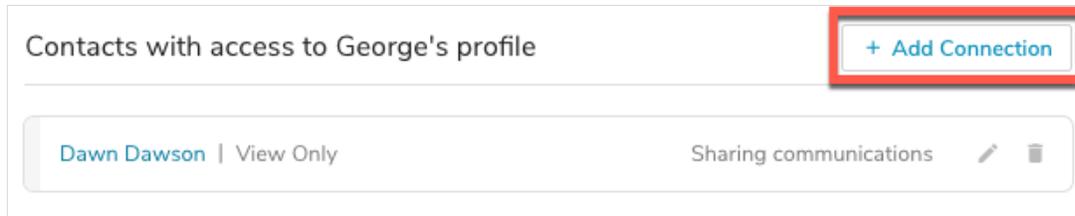
When connecting a profile, you have the option to check a box to mark that the contact (ex: George) the responsible party for this profile. If this box is left unchecked, that contact (ex: George) will have View Only (Secondary) access to this profile. When you pick this profile, you have the option to check a box to mark that the contact (ex: Allison) will share communications with this profile and the option to specify which communication you would like to be shared. For more information on this shared communication, visit our release notes on this feature here. If this box is toggled to "off", that contact (ex: George) will not receive shared communications for that profile (ex: Allison). Click **Save**. If you have any questions regarding Responsible Party or Secondary/View Only, please review the definitions at the top of this PDF.
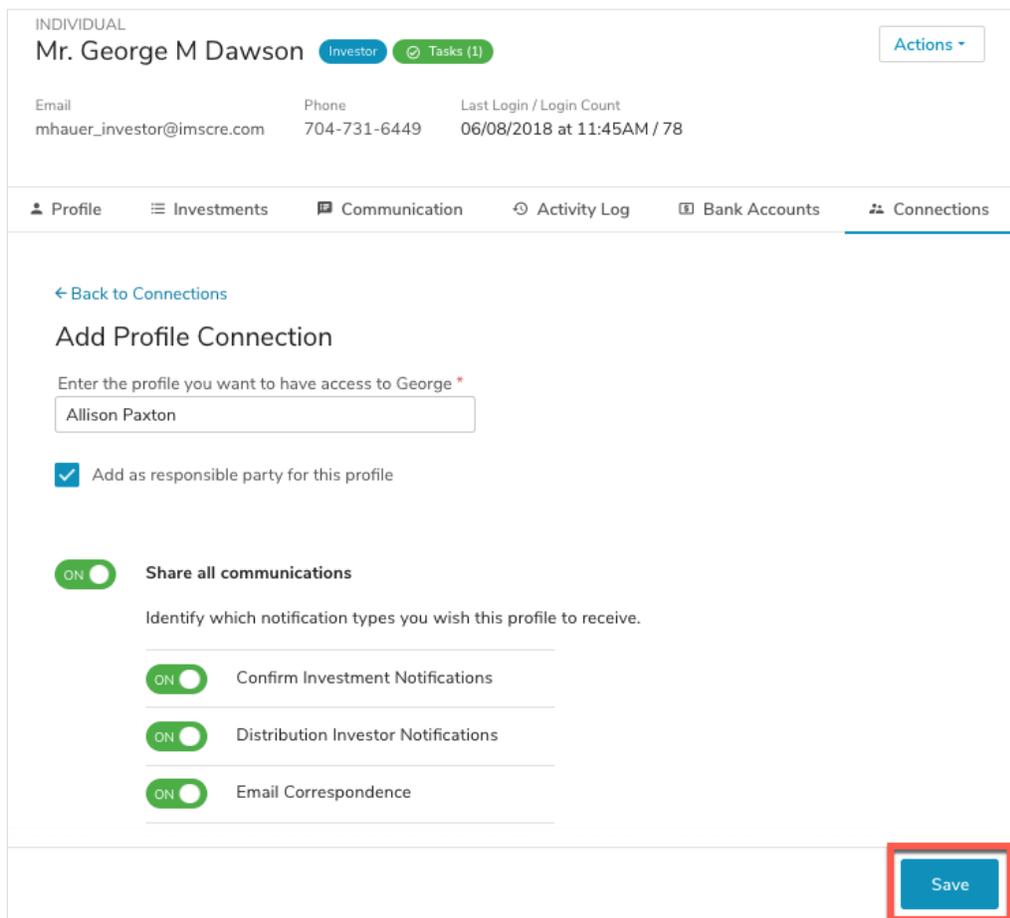
This tab also includes the ability to add Relationship Managers (any internal team members). Click **+ Add Connection**.
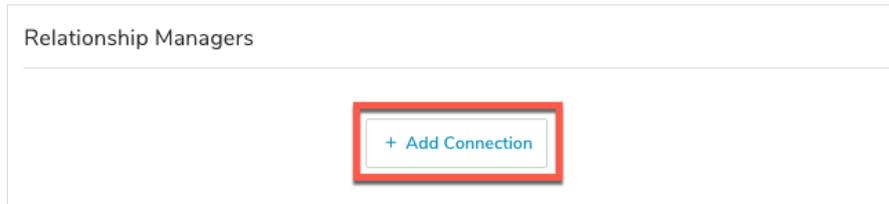
Choose the Relationship Manager (any team member), Relationship (Primary or Secondary), and any Relationship Manager Tags (ex: Broker, Advisor, Relationship Manager). Click **Save**.