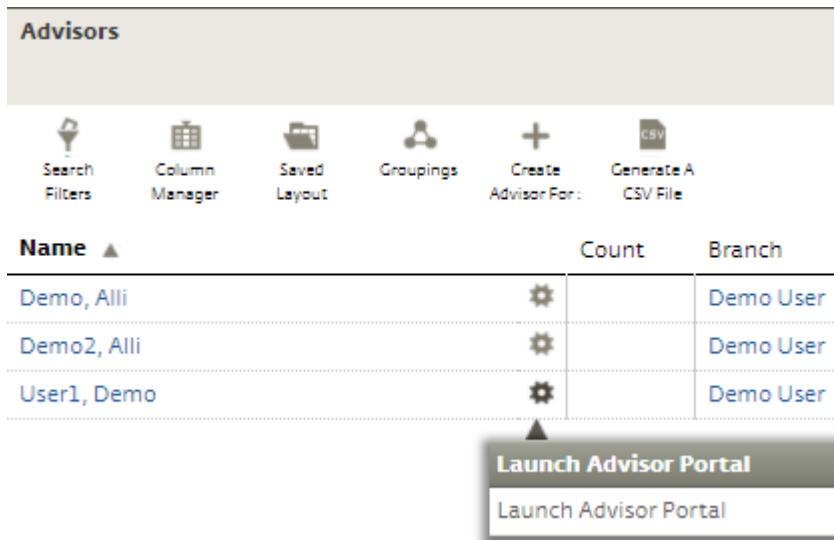


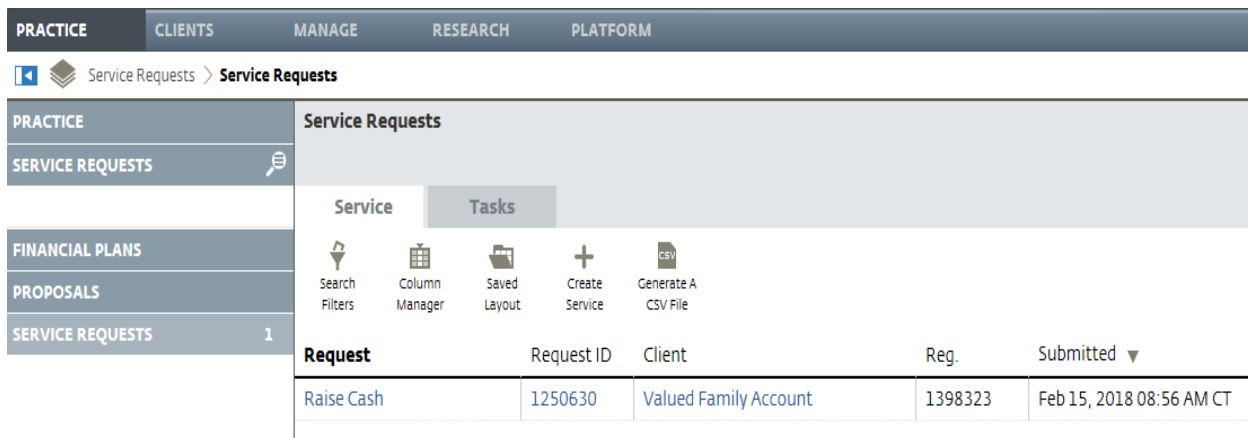
NAVIGATING SERVICE REQUESTS

1. Launch into the Advisor's Portal via Advisor Search (only for Staff, if you are the advisor go to step 2)
  - You will see the Advisor's Name in the top right hand corner if you have done this correctly.



Name ▲	Count	Branch
Demo, Alli		Demo User
Demo2, Alli		Demo User
User1, Demo		Demo User

2. Navigate to the **Practice Tab**
  - Locate **Service Requests** in the left sidebar menu
  - Click the **List Magnifier**



Request	Request ID	Client	Reg.	Submitted ▼
Raise Cash	1250630	Valued Family Account	1398323	Feb 15, 2018 08:56 AM CT

NAVIGATING SERVICE REQUESTS

3. Use the **Search Filters** icon to filter and locate specific requests

