My Resolution Life How to Guide Managing support staff

A step by step guide to managing support staff



Onboarding new staff



Onboarding new staff

Resolution Life

Step 1

- Log in to My Resolution Life
- Haven't used My Resolution Life before? <u>Learn</u> more here

Step 2

- Once logged in, select [Manage] then [Adviser Staff Credentials]
- Select [Invite New Adviser Staff] in the top corner
- Fill in the required information to send your staff member an invite

 	
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Onboarding new staff

Step 3

- Your staff member will receive an email in their inbox - they will need to click on the link within 24 hours of receiving the email to complete their login
- Your new staff member will then need to enter their details. Their username will be their staff email address.

To Scott Wyman				
ere are problems with how this message is displayed, click here to	view it in a web browser.			
		Resolution L	.ife	
Scott				
u have been invited to register for the My Resolutio	n Life website by KLQLDCF BFRLJCMLIZD. This wi	l enable you to perform t	the actions of an Adviser S	taff member on KLQLDCF's adviser acc
ou would like to accept the invitation please click of	n the link below. You will then need to complete	a short form to setup and	d activate your account.	
Accept Invite				
ou would not like to register for My Resolution Life	or if you have received this invitation in error, pl	ease ignore this email. It	will expire in 24 hours.	
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Updating support staff details



Updating support staff details

Resolution Life

Step 1

- Once logged in, select [Manage] then [Adviser Staff Credentials]
- A list of [Active Adviser Staff Accounts] and [Deactivated Adviser Staff Accounts] will display.

Step 2

• Select [Manage adviser staff details] next to the chosen record. Then select [Edit] in the top right corner.

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Updating support staff details

Resolution Life

Step 3

On the next screen, you can edit the following details:

- The adviser portfolio attached
- · First name and last name
- Contact details

Select [Save] to confirm changes.

Note:

By assigning the relevant portfolio to the staff member, each adviser in your practice can give the staff member access to their portfolio. By doing this, you can create a wholepractice view for dedicated support staff members.

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	Username bobsmith@rewadviser.com	Status Active	
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Activate or deactivate staff access



Activate or deactivate staff access

Resolution Life

Step 1

- Once logged in, select [Manage] then [Adviser Staff Credentials]
- In the [Actions] column, you can:
 - Select [Activate] to activate a staff's account or
 - Select [Deactivate] to deactivate a staff's account

Username	Name	Email accounts	Actions	
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qfqgsft776@hopeon.xyz	Inviteadvisor test	qfqgsft776@hopeon.xyz	O Deactivate	🏟 Manage adviser staff details
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Thank you

What you need to know

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