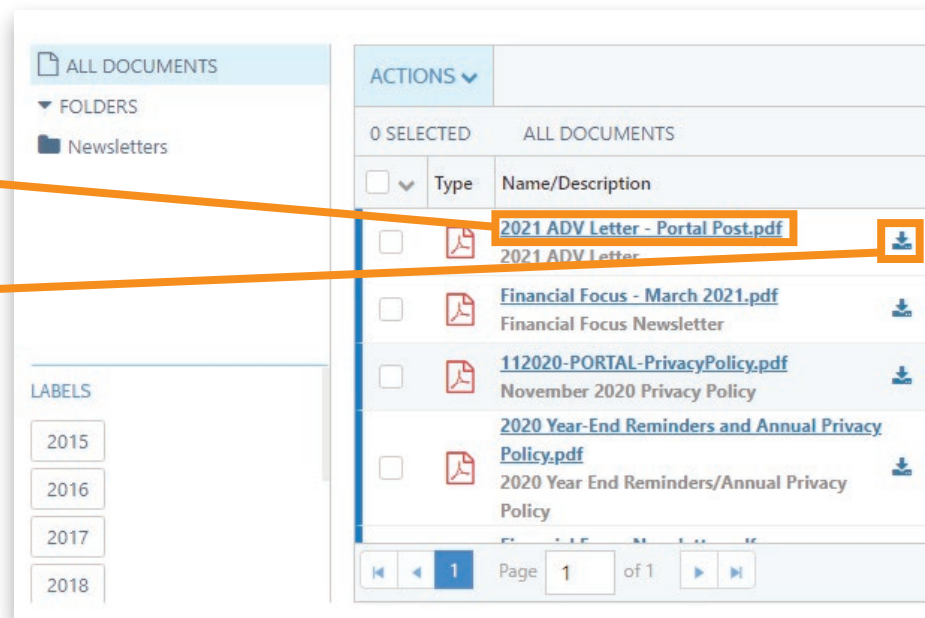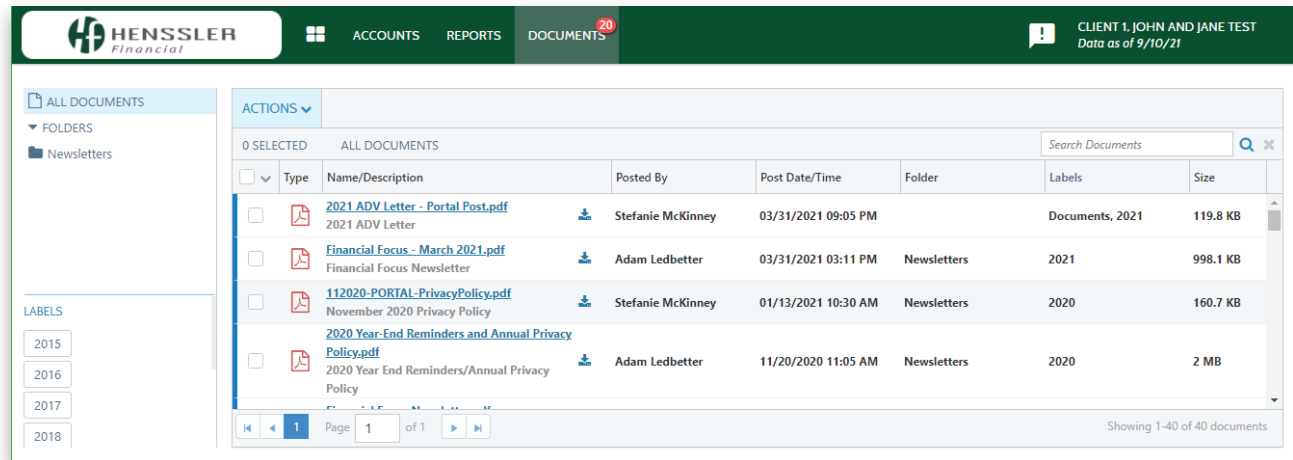# Working with Documents

The Documents view enables your Henssler team to post documents to you and you to post documents to your Associate. For example, your Associate can post a review document to you that requires your signature. You can open the document, sign it, and post it back to the Planning Portal for your Associate/team to view. Advisor View will send your Associate/team an e-mail when the document is posted.

Note: You may also use this area as a lockbox for other important documents, such as your Will. Keep in mind your Associate will have access to these documents.

1. Viewing Documents

- You can open documents directly from the Documents page by clicking the file name link.
- If you are accessing a prefilled form from your Associate, click on the download link to the right of the Name/Description of the document. The icon next to the file name represents the document type.

Working with Documents

2. Filtering Documents

There are two key ways in the Documents view to locate a specific document or type of document.

View Labels

A label is a way to categorize documents by type or function. Your adviser can create the labels and apply more than one label to any given document. To view by label:

• Select one or more labels from the Labels list. Clicking it again will deselect it.
• Choosing Any will display all documents with any of the selected labels.
• Choosing All will only display documents with all of the selected labels.

For example, filtering by the Billing label will show all invoices.

Sorting the View

You can sort the displayed list of files using the column headers. The default lists files in ascending order by name.

• Click a column header to sort the view by that column.
• To reverse the sort order, click the column header again.
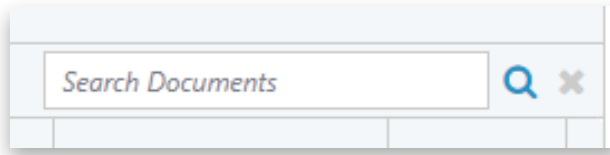• The arrow indicates the column the list is sorted by and whether the list sort is ascending or descending.

Working with Documents

3. Searching Documents

You can search the list of displayed documents according to the terms entered in the Search Documents box.

The search capability provides full-text search for words in either the File Name or the Description column. If you have labels selected, the search terms will only apply to the documents in the label criteria.

For example, if you have a label selected to display only reports and you try to search for a review document, the search will not locate the document because of the label. In most cases, it is best to clear all labels on the Documents page before searching for a document.

When you are finished with your search or to clear the labels or the search terms, click the X.

Working with Documents

4. Posting Documents

You can post and update documents in the Planning Portal that you want your Associate to see. When you post or update a document, your Associate does not receive an e-mail notification. Please let them know when you post documents to the Portal.

To post a document, simply select a file from your computer and enter a description. While the description is optional, it is important to provide some context of the document's purpose. Your adviser may see a large number of documents each day, and it is important to provide a good description of the document you are posting. You can only post one document at a time. Once you post a document, you will not be able to delete it.

To post a document, follow these steps:

• On the Documents page, click Actions then click Post Document.
• Click Select or Drop Files Here. When you have located the file you want to post, click it and then click Open. Alternatively, you can drag-and-drop files onto the Select or Drop Files Here box.
• Enter a description or select a folder to upload the document to. These are optional but useful.
• Click Post.