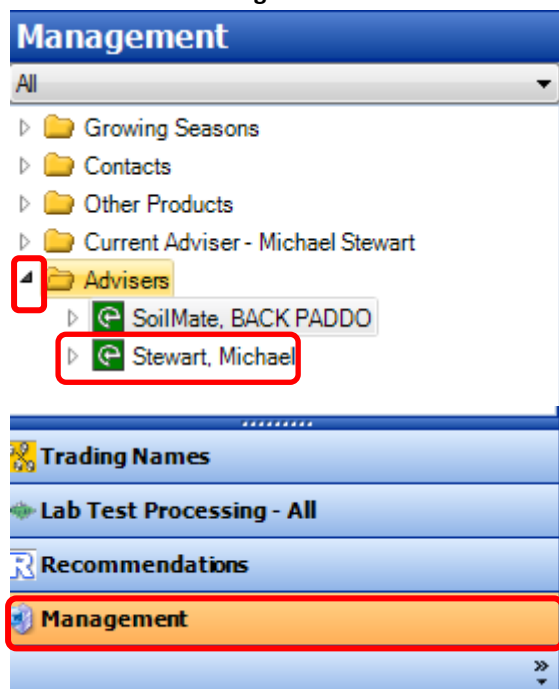


## 2. Setting Up Advisor Details

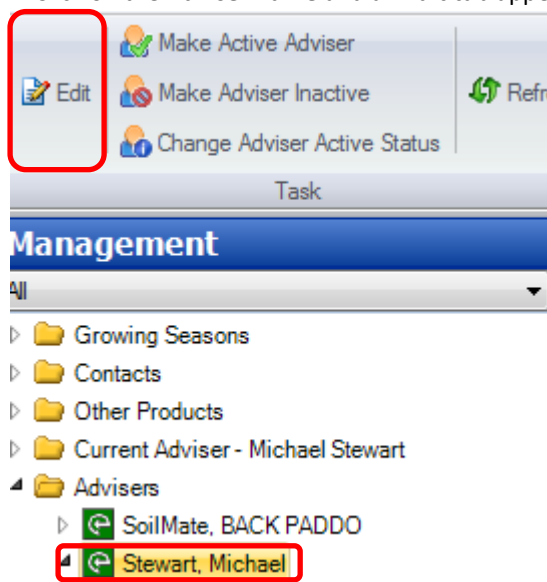
It is important to enter the details of the Advisor as this prevents problems with downloading results.

- a. Click on the **Management** bar in the bottom left of the screen.



- b. Click on the clear arrow to the left of the Advisers heading. The name of the license holder will appear.

- c. Click on the **Advisor name** and an **Edit tab** appears at the top of the screen.



- d. Click on the **Edit** and the **Edit Adviser** screen appears.

- e. Note: At a minimum - ensure that the **Company** and the **Branch** are entered.
- f. Click **Save** after details have been entered.

The screenshot shows a window titled "Edit Adviser" with the following fields and values:

Login Name	Stewart, Michael		
Contact Details			
Surname	Stewart		
First Name	Michael		
Company	Back Paddock		
Branch	Cleveland		
Address	PO Box 823		
City	CLEVELAND		
State	QLD	Postcode	4163
Country	Australia		
Phone Work	1800 557 166		
Phone Home	1800 557 166		
Phone Mobile	0409 893 368		
Fax	07 3821 3544		
Email	MStewart@backpaddock.com.au		

Active User (allowed to login)

Buttons: Save, Cancel