Creating accounts using account discovery in AccountView

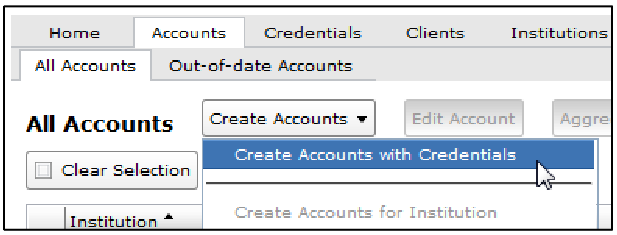
Account discovery is a feature of AccountView that helps the system automatically find all the accounts that may be available under a specific login at a financial institution site.

Enter the credentials and discover the accounts

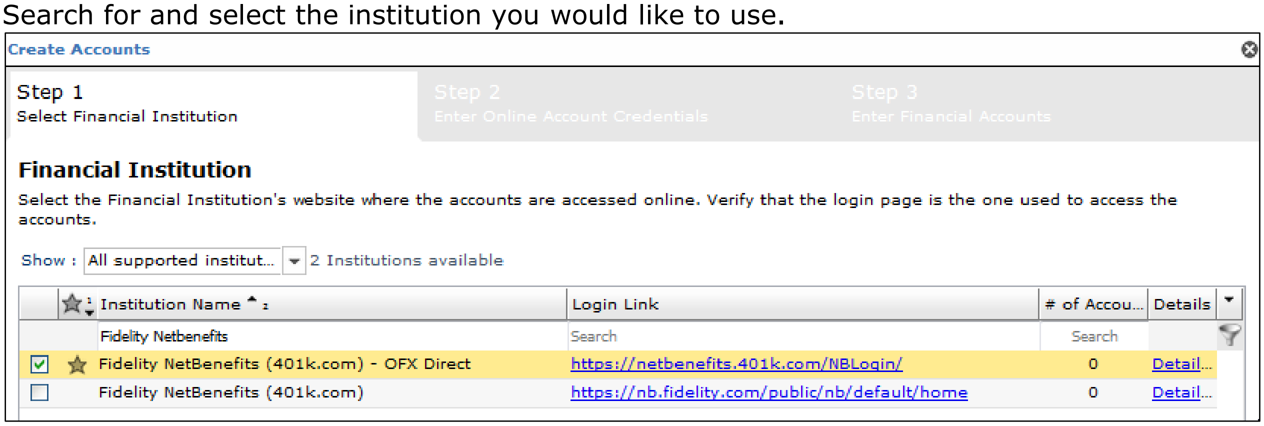
Use this method to find accounts with a new set of user credentials.

Tip: This feature is available when the financial institution supports it. If the financial institution does not support account discovery, you can manually add the accounts.

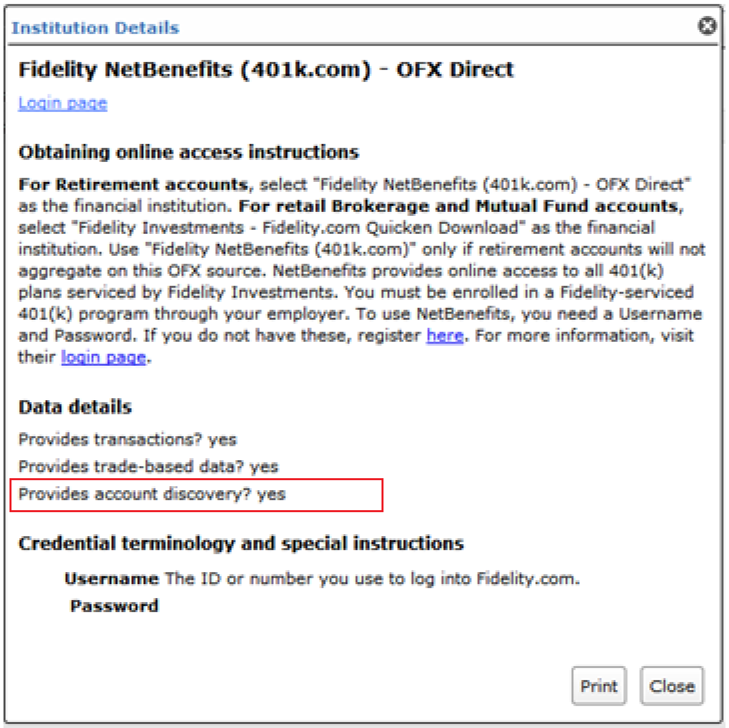
1. While logged into [AccountView](), navigate to the **Accounts** > **All Accounts** tab, then select **Create Accounts** > **Create Accounts with Credentials**.



2. Search for and select the institution you would like to use.



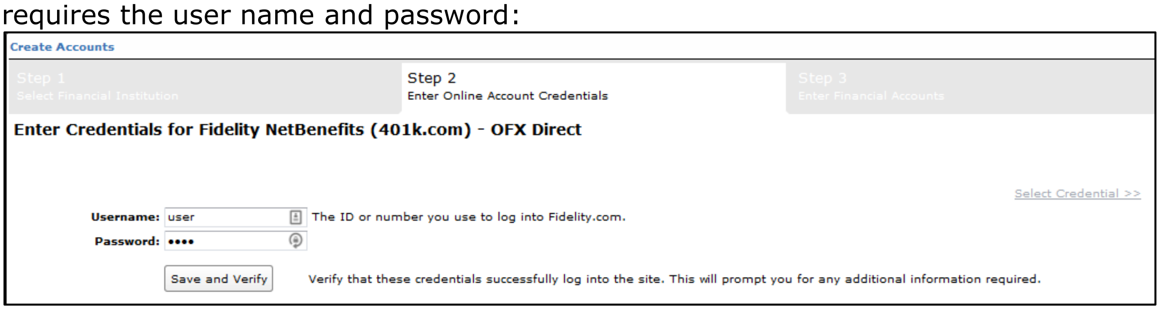
Tip: To confirm whether an institution supports account discovery, click the **Details** link for the institution and review the Institution Details.



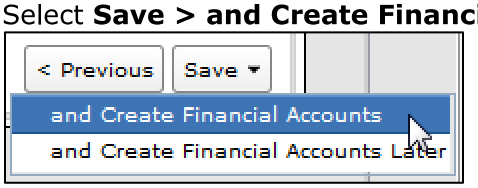
When you are done, click **Close**.

3. Click **Next**.

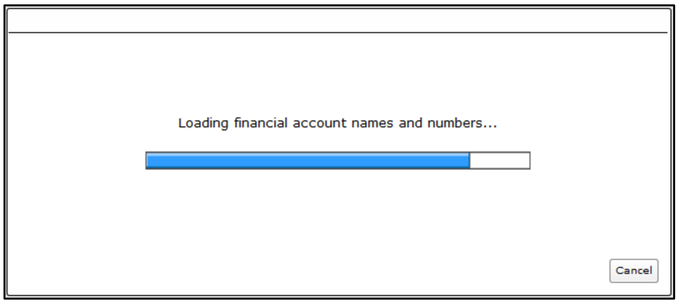
4. Enter the credential information required by the institution site. For example, this one requires the user name and password:



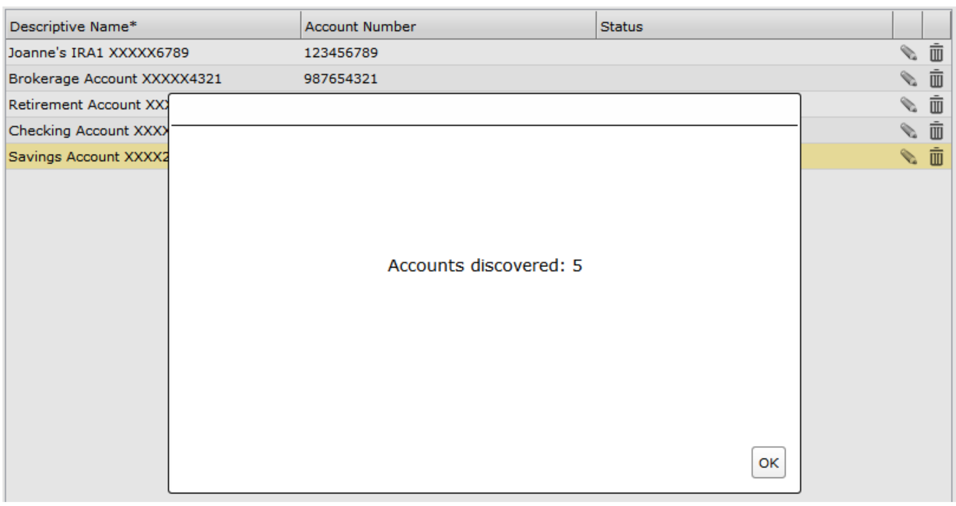
5. Select **Save > and Create Financial Accounts**.



The system will begin searching the custodian site for available accounts:

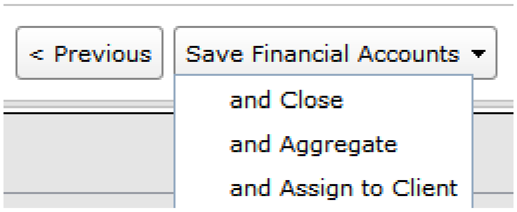


The number of accounts discovered will be shown.



Tip for advisors: If the system discovers more than 10 accounts, the behavior will be different than described below. The system will show you a preview of the list of some of the accounts. When you save and close or save and aggregate, that selection will apply to all the accounts found, not just those in the preview. Also, if you want to associate the accounts with a client you can do that from the All Accounts screen.

6. Click **OK** to see the list.
7. From here you can:
   - Select **Save Financial Accounts** > **and Close** to save the accounts and allow the system to run the aggregation overnight.
   - Select **Save Financial Accounts** > **and Aggregate** to save the accounts and begin the aggregation process immediately.
   - [Advisor's only] Select **Save Financial Accounts** > **and Assign to Client** to associate selected accounts with an existing client. If the client you want is not listed, you can create a new one there.



Tip: To cancel without adding accounts to the system, click **Cancel Account Creation**.

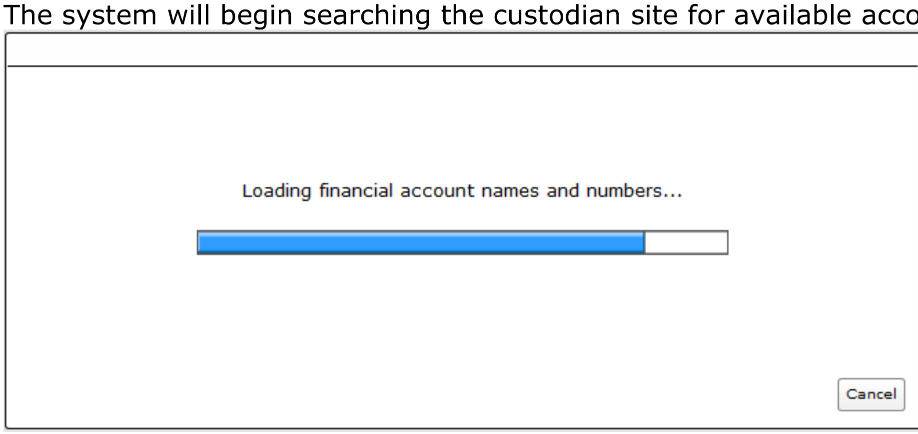
Discover accounts for existing credentials

Use this method when the credential already exists in AccountView, and you'd like to see if any additional accounts may be available at the custodian site for the same login.

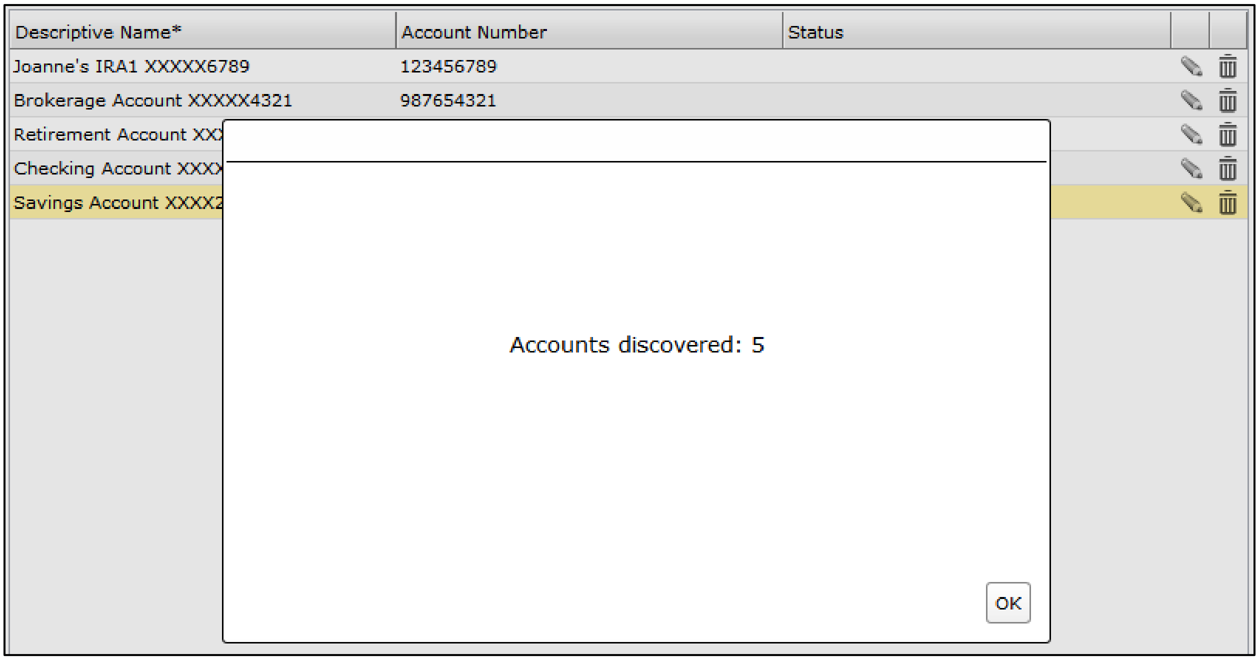
Tip: This feature is available when the financial institution supports it. If the financial institution does not support account discovery, you can manually add the accounts.

1. While logged into AccountView, navigate to the **Credentials** > **All Credentials** tab, then select the credential for which you'd like to initiate the account discovery process, then click **Add Accounts**.

   The system will begin searching the custodian site for available accounts:



   The system will return a list of new accounts, and show the quantity.



This process only find accounts that are not yet set up in the system under the same credential. For example, if you already have two accounts configured, and there are five accounts available to this login, then the account discovery process will only return the three accounts that have not already been configured in the system.

Tip for advisors: If the system discovers more than 10 accounts, the behavior will be different than described below. The system will show you a preview of the list of some of the accounts. When you save and close or save and aggregate, that selection will apply to all the accounts found, not just those in the preview.

2. Click **OK**.
3. From here you can:
   - Select **Save** > **and Close** to save the accounts and allow the system to run the aggregation overnight
   - Select **Save** > **and Aggregate** to save the accounts and begin the aggregation process immediately.