



AccountView Training

March 9, 2013

Overview

The Overview consists of a “big picture” description of AccountView, and will briefly touch on the purpose of, and functionalities within each tab.

Account Creation - Standard

- Standard account creation – Creating an account with an available set of credentials
- Account Creation linked to existing credential – Adding an account to AccountView that can be accessed with a credential set previously entered in AccountView
- Security Question Discovery
- Account Discovery

Accounts Tab

- All Accounts – The options when view all accounts configured within AccountView
- Out-of-date Accounts – Troubleshooting tips for accounts that are failing to aggregate

Credential Tab

- All Credentials – The options when view all credentials configured within AccountView
- Credentials Needing Edit – Troubleshooting tips for credentials that are failing to access the required financial institution

Clients Tab

- Client Creation – Creating a client that will be logging into AccountView to enter the credential information used to access their accounts
- Assign Accounts – Allocating accounts to existing clients

Account Creation - Credential Access Client

- [Credential Access Client](#) – Creating a shell account, in which the credentials will be entered by a client
- [Client Credential Access](#) – Entering credentials for an existing shell account, as a client

Institutions Tab

- Supported Institutions – View information relating to all 4000+ BAA supported institutions
- Requested Institutions – Pending requests for new institution support
- Validations – Validation status for configured institutions

Financial Data Tab

- Position and Transactions detail
- Position and Transaction export

Additional Features

- Profile
- Settings
- Help
- Contact Us