

## **INVESTOR360<sup>o</sup> MESSAGES**

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CLIENT QUICK REFERENCE GUIDE

## Investor360<sup>®</sup> Messages: Quick Reference Guide

### MESSAGES TAB





The Messages tab allows you to securely send messages to and receive messages from your advisor's office. **Please note:** In order for you to use this feature, your advisor must first activate the secure messaging function.



#### 1. COMPOSING MESSAGES

You can compose messages and send them to your advisor's office by clicking on the **Compose** button, which can be found in the Messages tab on the left navigational strip (see below).




#### 2. COMPLETE THE FOLLOWING STEPS:

1. Enter a subject in the Subject field (required).
2. Add the contents of the message into the main body.
3. If desired, use the formatting options (     ), found below the main body, to format your content.


4. Attachments (maximum 25 MB) can be added to the message by clicking the  icon. Once you click this icon, you will be instructed to browse your computer to locate the file (s) you would like to attach (15 file limit to each message). Once located, select the file and click **Open**. You also have the option of dragging and dropping files right from your desktop into the body of the message.
5. If you would like to print a copy of the message, click the  icon.
6. Use the spell-check option on your browser to check for spelling errors.
7. When you're ready to deliver the message, click **Send**.



### 3. VIEWING MESSAGES FROM YOUR ADVISOR'S OFFICE

To view a message from your advisor's office, click on the **Inbox** icon on the left navigational strip. All unread messages will appear in bold on the main body of the page. If a message has an attachment, the  icon will be visible in the Inbox to the left of the Date/Time column. You can click on any message in the Inbox to view further details and/or access any attachments.

### 4. REVIEWING SENT MESSAGES

To review a message that you sent to your advisor's office, click the **Sent** icon on the left navigational strip. Any message that has been sent will appear on the main body of the page. Any message that has not been reviewed will appear in bold. If there are any attached files in a sent message, the  icon will be visible in the Inbox to the left of the Date/Time column. You can click on any sent message to view further details and/or access any attachments.