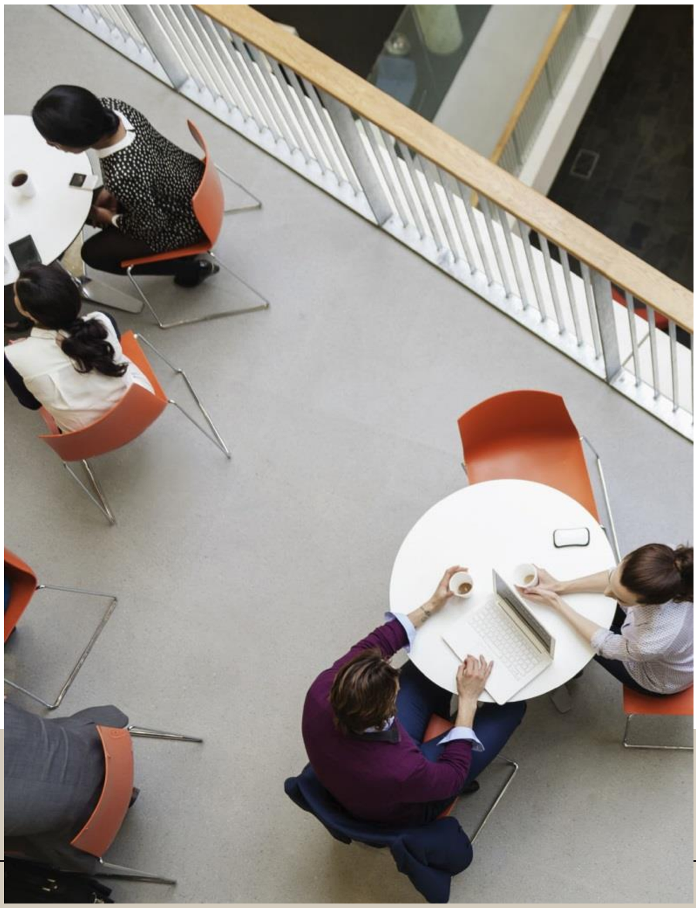
Fitzpatricks
Private Wealth

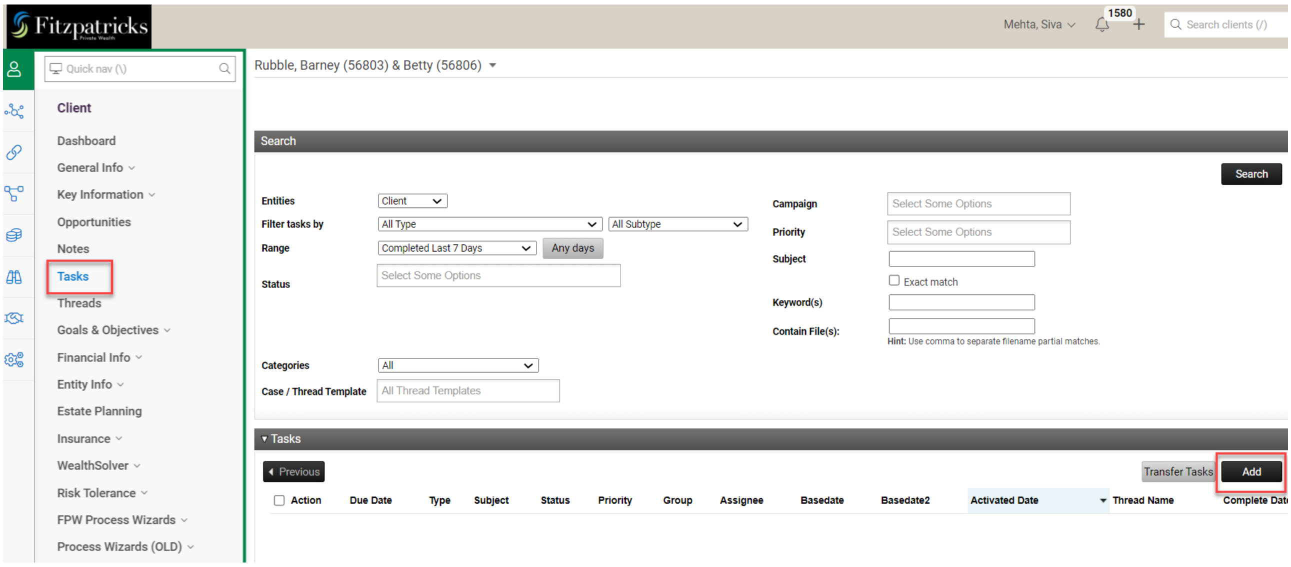


XPLAN- HOW TO ADD YOUR CLIENTS TO THE DBA CSO USER GROUP

How

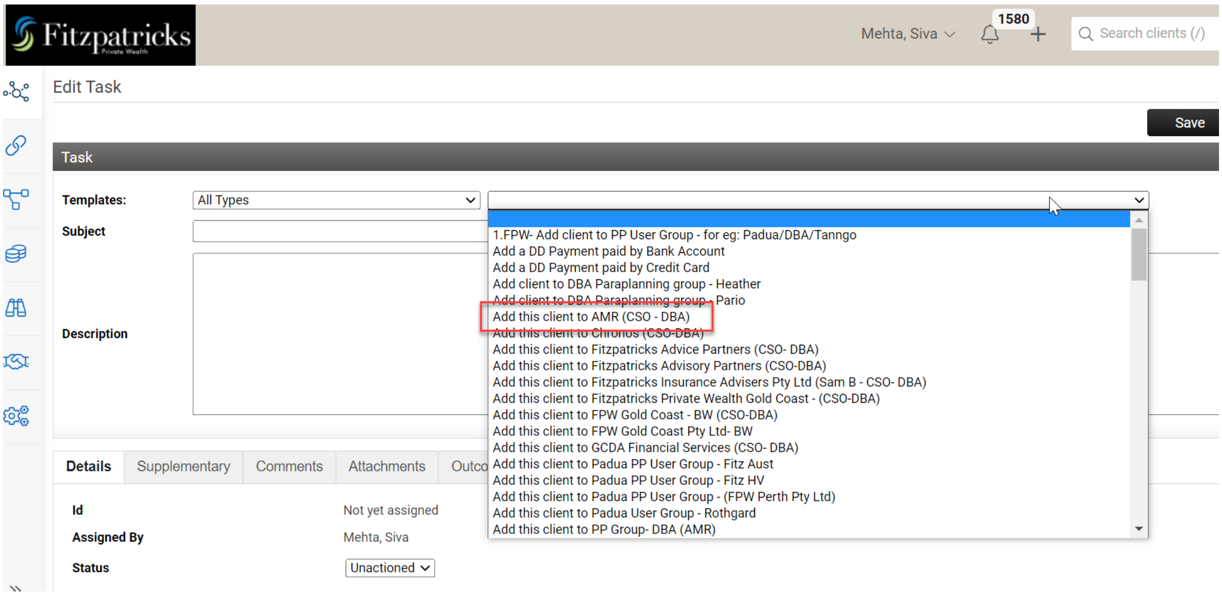
To add a client to the CSO User Group (DBA), please follow the below steps:

1. Under the client's record, click on **Tasks** > Click on **Add** on the right-hand side under the **Tasks** heading to select the Task template.



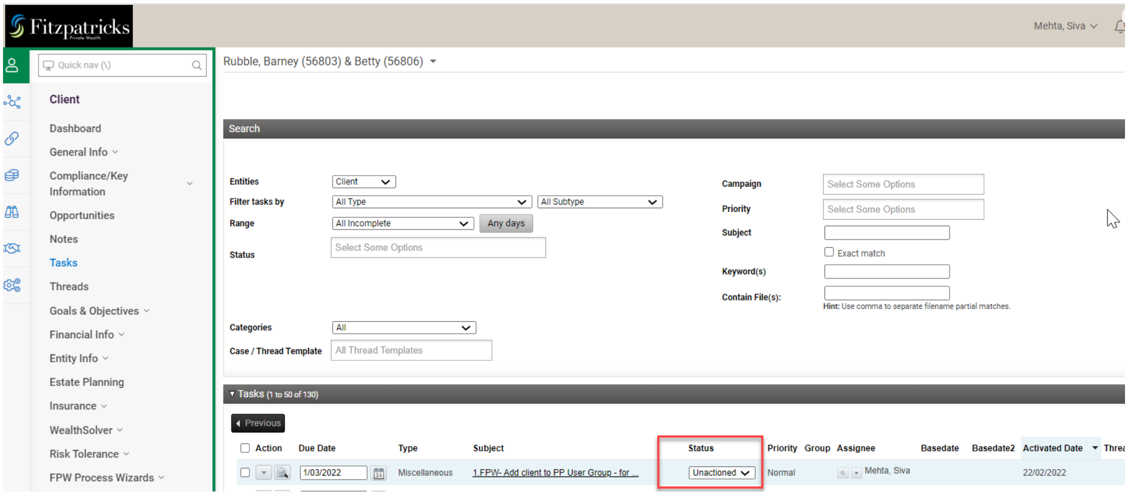
2. Within the Templates area, click on the dropdown option to select the relevant task template. e.g.

Add this client to (Practice name) (CSO – DBA)

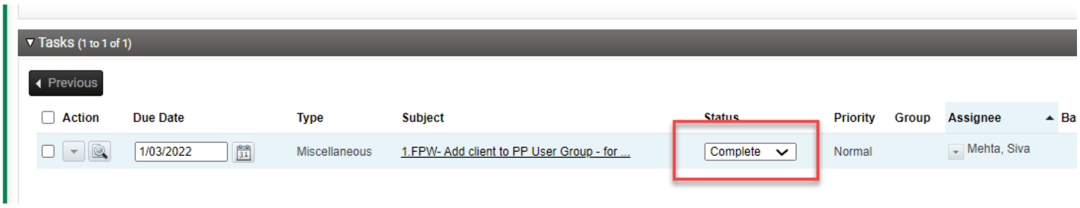


2. Once the template is selected, you can click **Save**.

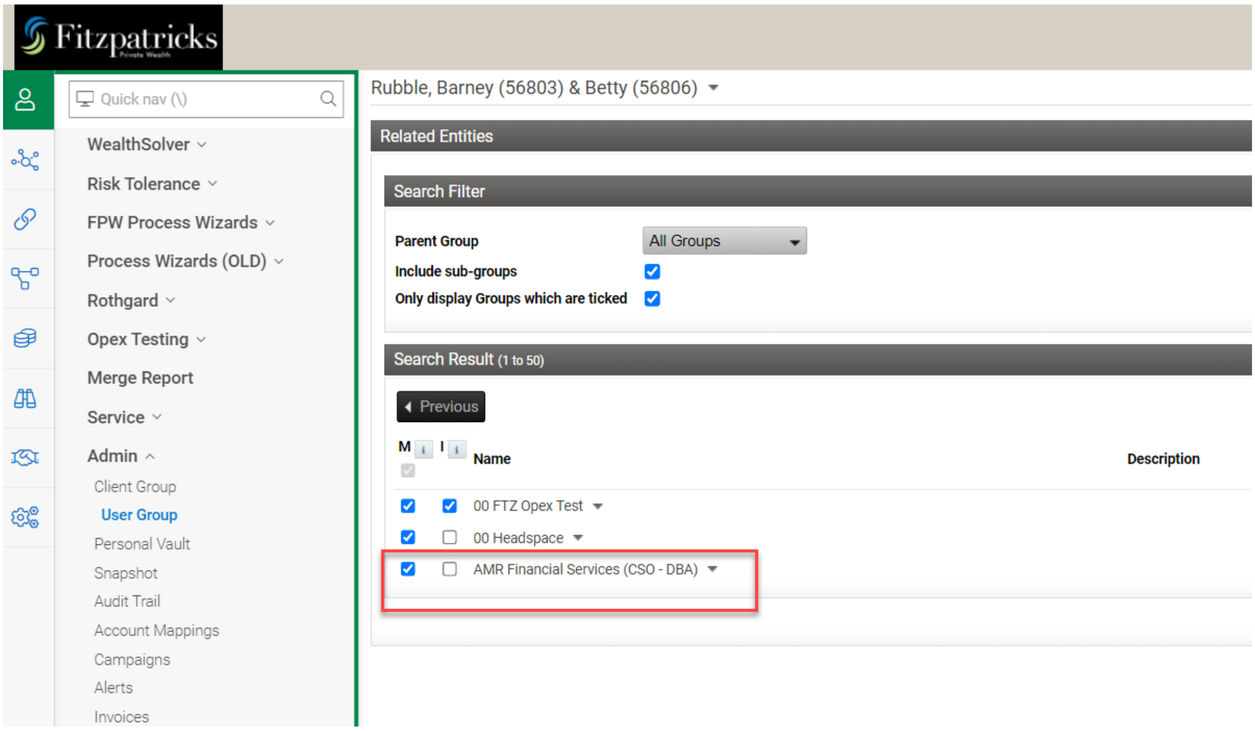
3. You will see the task item in the list of your Incomplete Tasks list saved as an **Unactioned** item as shown below.



For the client to be automatically added to the CSO User Group, you will need to **complete** this task.

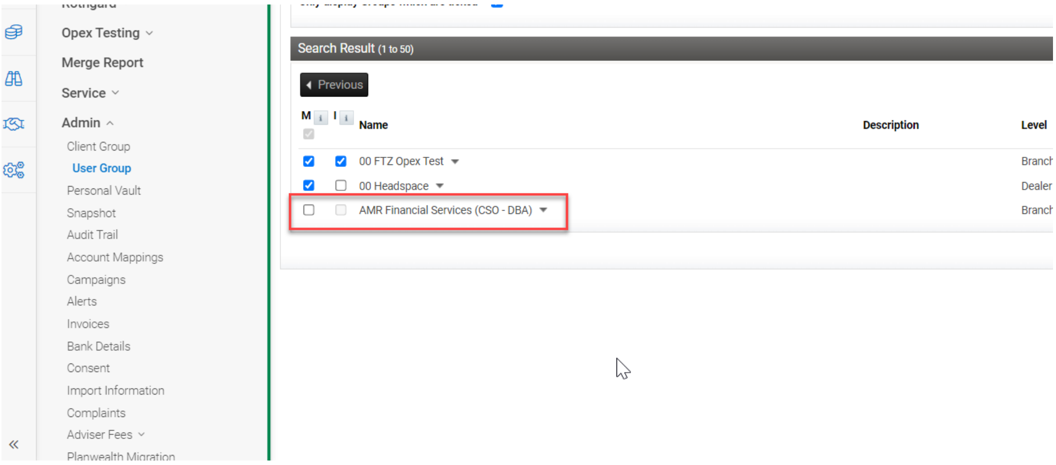


You will see that the client has now been added to the CSO User Group.



4. Once the work has been completed on your client, you will need to remove the client from the relevant CSO user group

To do this, within the client record, click on Admin > User Group. The **untick** the box next to the CSO user Group.



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