Flourish

Guide to the Flourish-eMoney Data-Feed Connection

Our direct advisor connection allows you to incorporate your client's Flourish balances into eMoney Advisor without the need for clients to enter their Flourish credentials within eMoney.

Setting up the integration is an easy, three-step process. **If your firm has already enabled the Flourish-eMoney connection, please skip to Step 2 to add the Flourish advisor connection within eMoney, or Step 3 if you have personally already added the connection.**

Step 1: Enable the Connection

This is a one-time process for your firm.

If your firm uses eMoney and Flourish, email integrations@flourish.com and ask us to begin sending Flourish data to eMoney. The request should come from an individual who is both a Flourish Firm Executive and eMoney user; if not, please include the contact information of someone at your firm who has an advisor account with eMoney.

We will reach out to let you know when data is available within eMoney, which typically takes a few business days.

Step 2: Add the Flourish advisor connection within eMoney

This is a one-time process per advisor at your firm.

Once we begin sending Flourish data to eMoney, you'll need to complete a one-time authorization process so that you can access the Flourish advisor connection within eMoney.

1. Log in to your advisor account at flourish.com
2. Click on the "Profile" page of the advisor dashboard
3. Copy your Rep ID and Authentication Code—you'll need these in a minute
4. Log in to eMoney
5. Add the Flourish advisor connection
    a. Click on Connections
    b. Click Add Connection
    c. Toggle "Advisor Managed"
    d. Search for Flourish

6. Enter your Representative ID and Authorization Code and click “Connect.” It may take a minute to authenticate the connection.

Step 3: Link Flourish clients to eMoney profiles

This process needs to be completed for each client.

Please note: the eMoney Knowledge Base provides a comprehensive outline for managing advisor connections. You may be able to follow this link; otherwise, follow these steps

Log in to eMoney → click “Help” → “Go to Courses” → “Connections” → “All about connections” → “Adding accounts and linking manual facts”

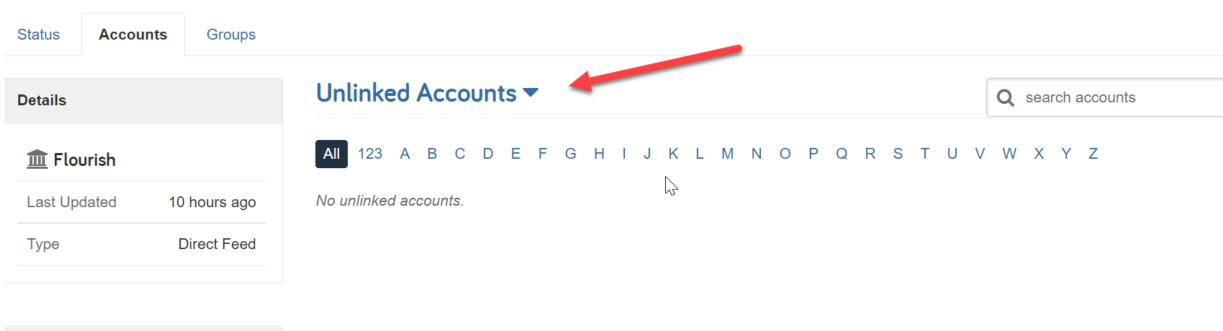
Now that you can access the Flourish advisor connection within eMoney, you can link Flourish accounts to existing eMoney client profiles.

1. Log in to your advisor account at flourish.com and navigate to the “Clients” tab
2. You will need to find the Flourish “Client ID” of the clients you are linking to eMoney profiles
    a. **If you are linking multiple households**, you can bulk download all of your clients’ Flourish “Client IDs”. Click the download icon ( ) that appears above the Clients table to download a .CSV containing all of your client account information. You’ll need this spreadsheet in Step 7
    b. **If you are only linking a small number of households**, you can find individual clients’ Client IDs in their household page. On the “Clients” tab, find the household in question and click on their row to go into their household page. Navigate to the “Household settings” tab and each household member’s Client ID can be found in the “Members” section under their name and email
3. Log in to eMoney and click “Connections” from the top navigation bar
4. Select the Flourish connection
    a. You can filter by “Advisor Connections” in the “Connection Filter” dropdown to help quickly locate the Flourish connection
5. Click on the “Accounts” tab, then click “+Add Accounts” from the Actions box
6. Within the search box, enter the first or last name of your client. This will search within your eMoney client list and populate the relevant matches. Select the client from the drop-down menu, then click “Next.”
7. Enter the Flourish “Client ID” from Step 2 to match the eMoney profile with the correct Flourish household
    a. If you downloaded the CSV in Step 2a, you can find the Client ID in Column D of the CSV you downloaded in Step 2, where it is called “Account Primary Client ID”

    b. If you cannot find the "Client ID," simply [reach out](#) to our support team
8. Finishing linking the client's Flourish account(s) with their existing eMoney profile by classifying the accounts, then click "Link"
    a. The accounts listed will be displayed as A New Fact
    b. Use the Type drop-down to classify the accounts if it doesn't populate automatically. You can always change this later in the Client's Facts
        i. Flourish Cash accounts can be categorized as "Savings"

You're all set. The client's Flourish account(s) will now appear on the client's profile in eMoney, and the balances will automatically update daily.

Step 3a: Adding new accounts for an existing linked client



Any accounts that are opened <u>after</u> a client's Flourish accounts have been linked with an eMoney profile will need to be manually linked by the advisor, as eMoney does not link new accounts automatically.

Within eMoney, advisors can navigate to the unlinked accounts section of the Flourish connection. From there, advisors can link the newly opened account with the correct eMoney client profile by clicking on the "Link" button to the right of the account and then following the steps on the screen.

Additional notes on visibility

- **As an advisor, you will only be able to view client data within eMoney that you can view within Flourish**; i.e., if you cannot see a client within Flourish, you will not be able to see that client's Flourish account(s) within eMoney
    - Flourish "Executives" can see all Flourish clients within eMoney
- Multiple advisors may be able to see the same client within Flourish, but each client only needs to be linked to an eMoney profile one time by a single advisor

- An advisor’s ability to view client account information is subject to applicable privacy laws and clients’ consent to such sharing.