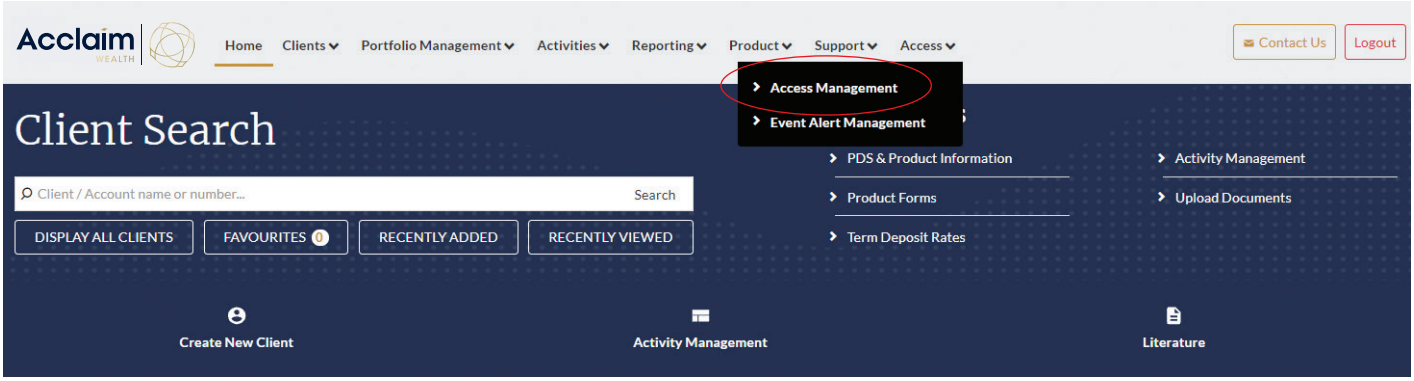
Acclaim WEALTH

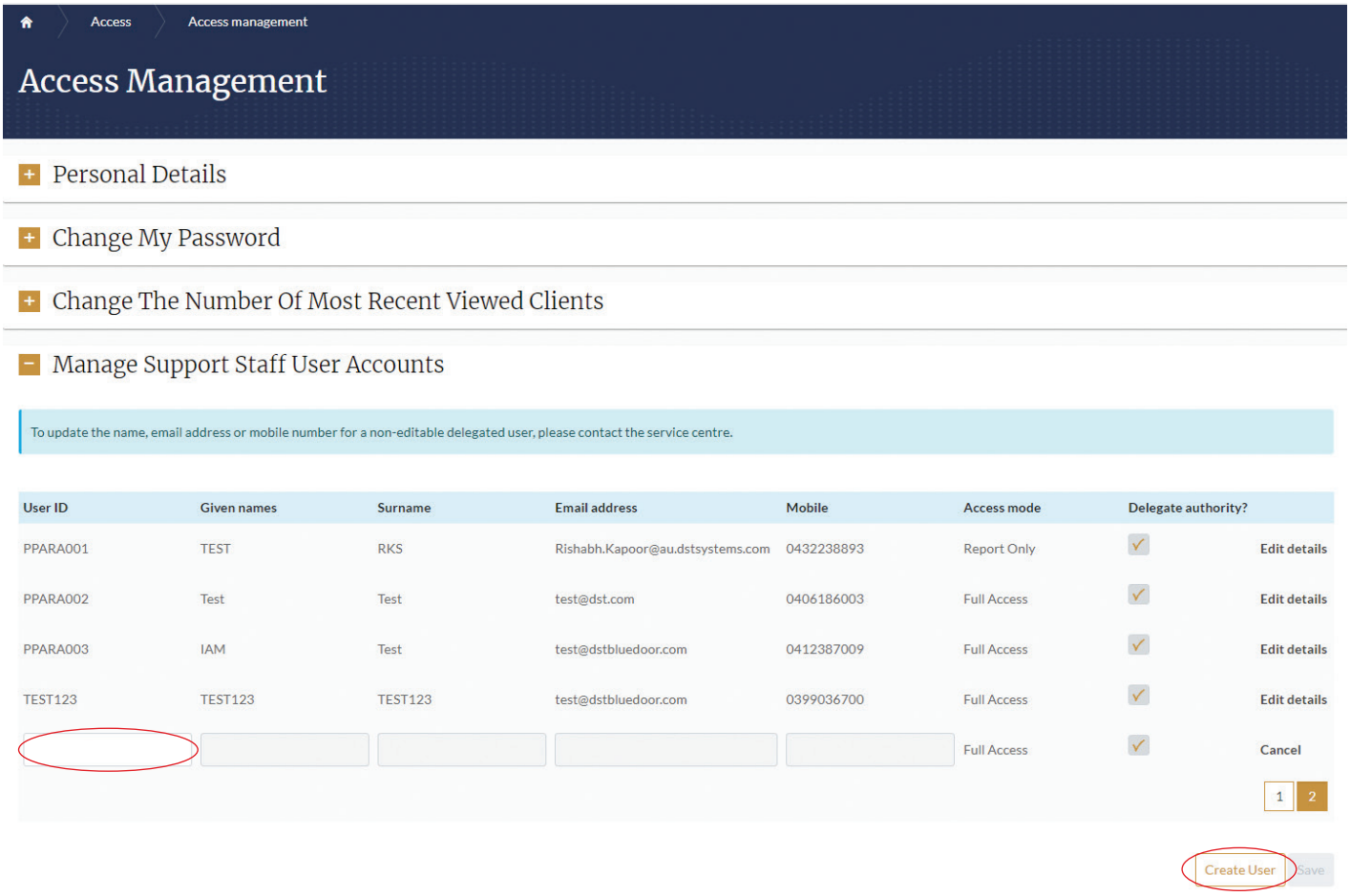
Support Staff Access
Help Guide

Setup a new support staff user

1. Under the *Access* menu on the main banner select 'Access Management'.



2. Expand the section *Manage Support Staff User Accounts*, then click the **[Create User]** button. An input line will appear with an editable box under the *User ID* column.
   a. If your support staff person already has an ID for the portal, enter that User ID here and their details will auto-populate.



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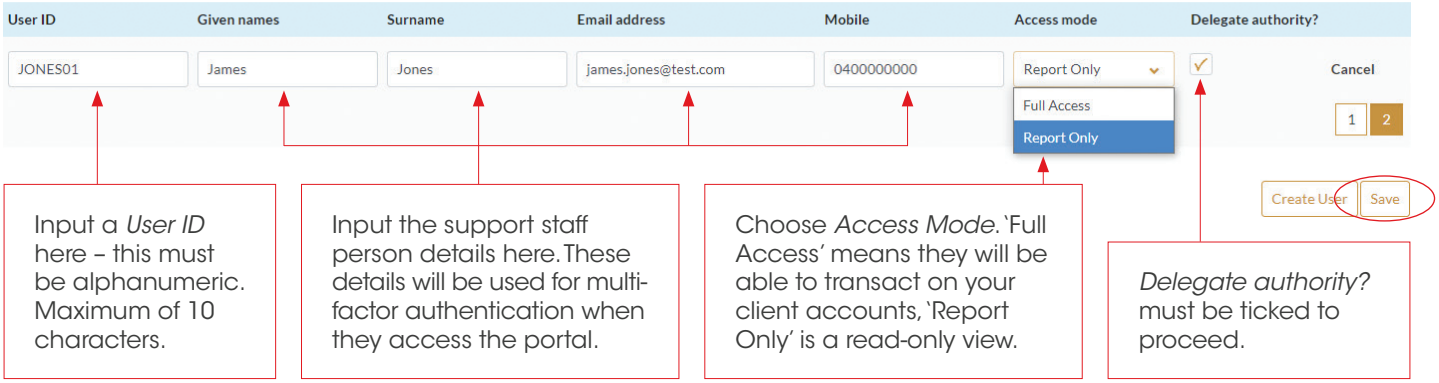
b. If your support staff person has never been issued with a User ID for Acclaim Online, you can create them one now as shown below.



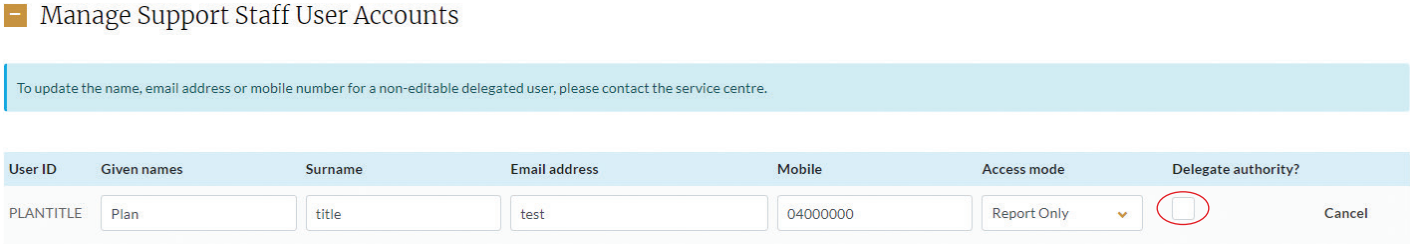
3. Click **[Save]** to create your support staff user. You can now share the User ID you created with your support staff user, who must follow the registration journey on the login page of the portal to gain access. See the Register for Online Access Help Guide for assitance.

4. If your support person already had a User ID, when they next log into the portal they should see your clients and have the ability to transact on your behalf if you granted Full Access.

Revoke support staff access

1. Under the *Access* menu on the main banner select 'Access Management'.

2. Expand the section *Manage Support Staff User Accounts* and find the user whose access you wish to remove.

3. Click 'Edit Details' to the far right of their name, then untick the *Delegate authority* box.

4. Click **[Save]** and the user will no longer have access to view or transact client accounts under this adviser profile.