

Correcting the Advisor Office Work Item Folder

To correct the Folder, open the Work Item and click on Details (pencil icon) within Advisor Office Work Items section.

Field Advisor NIGO ⚙️ Actions ➔ Reassign 📁 Work Item Client Documents

➡ Send to Field OSJ Review 🗳 Archive

Advisor Office Work Items

Work Item Id	Request Type	Folder Name	Rep Code	Advisor Last Name	Advisor First Name	Advisor Rep SSN	Advisor OSJ Code	Advisor Office Type	SLA Start	SLA Stop
16506	Correspondence	SUPERVISORY LOGS	BD123	REP	BD	XXXXX3333	BD1	Log	1.44	1.44

Note: A red box highlights the 'Details' (pencil) icon in the SLA Start column of the first row.

Work Item Advisor Office Documents ➕ Add 📄 Barcode 🗳 Combine & Print 🔄 Merge 📄 Create WI

Document Type	Form Name	Folder Name	Rep Code	Advisor Last Name	Advisor First Name	Advisor Rep SSN	Advisor OSJ Code	Advisor Office Type	Document Date
<input type="checkbox"/>	Compliance	CORRESPONDENCE COVER SHEET	SUPERVISORY LOGS	BD123	REP	BD	XXXXX3333	BD1	Log

Showing 1 to 1 Previous Next

Click on Advisor Office Folder, click the checkbox next to the Folder, then click Remove.

Advisor Office Work Items

Advisor Office Folder ➕ Add 🗳 Remove

Folder Name	Rep Code	Advisor Last Name	Advisor First Name	Advisor Rep SSN	Advisor OSJ Code	Advisor Office Type
<input checked="" type="checkbox"/>	SUPERVISORY LOGS	BD123	REP	BD	XXXXX3333	BD1

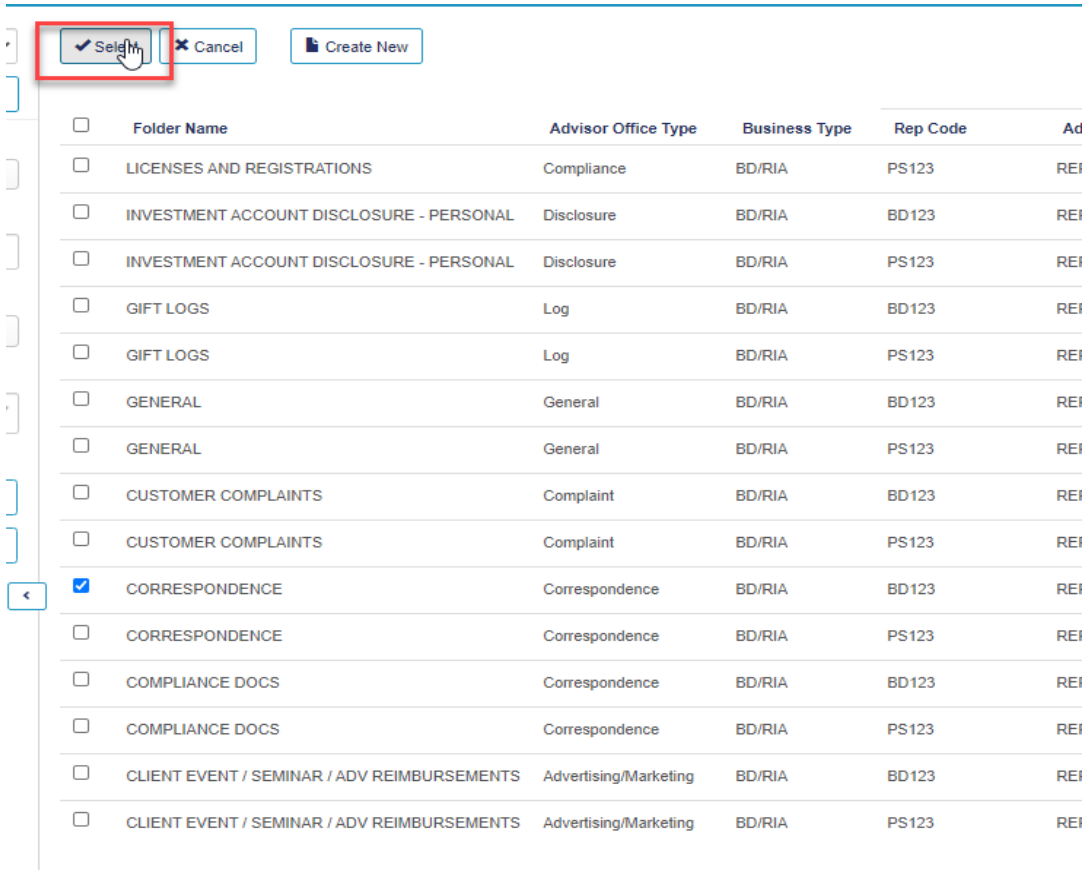
Note: A red box highlights the 'Remove' button in the top right corner, and another red box highlights the checkbox in the first row of the table.

Event History

Click Add.



Browse for the appropriate Folder under the appropriate Rep Code based on the Request and Document Type. Click the checkbox and choose Select.



On the next screen, click Save and Close.

AdvisorDashboard | Tracker BI | Dashboard | Monitor | Retrieve - | Administration | New - | bd rep -

Items #10506 / Details Save Save and Close Cancel

Details

Request Type: Correspondence

Request Status: NIGO

Merge into Work Item Number:

Draft NIGO Subject:

Draft NIGO Email:

Draft Reject Subject:

Draft Reject Email:

Advisor Notes:

GUID:

Advisor Office Folder + Add Remove

Rep							
<input type="checkbox"/>	Folder Name	Rep Code	Advisor Last Name	Advisor First Name	Advisor Rep SSN	Advisor OSJ Code	Advisor Office Type
<input type="checkbox"/>	CORRESPONDENCE	BD123	REP	BD	XXXXX3333	BD1	Correspondence

Confirm the Request Type and Folder Name are correct, then you can Send for Review.