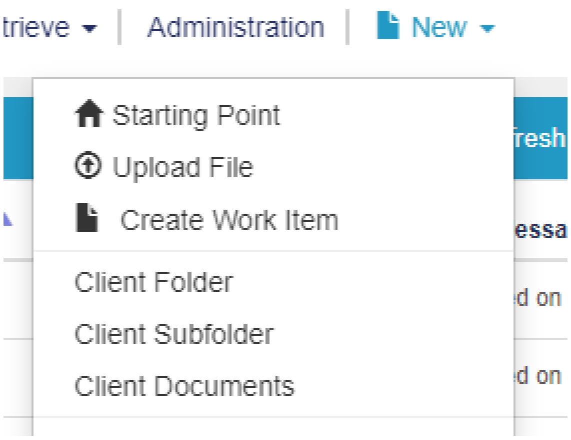
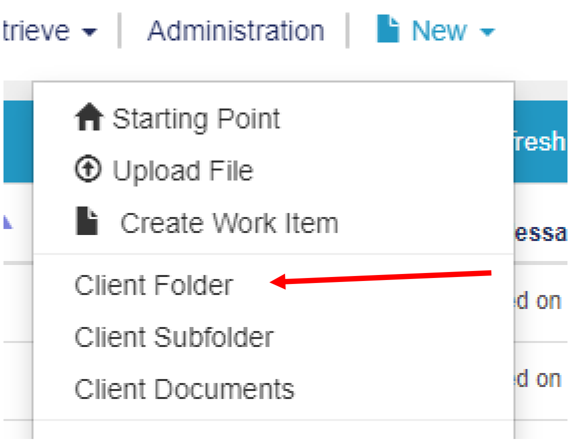
COMET Guide: Create a Client Folder and Subfolder

1. Click on the **New** link in the upper right hand corner of the screen.

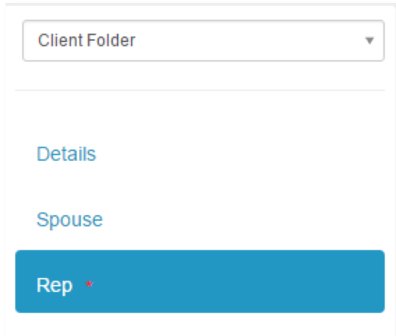


2. Choose Client Folder.

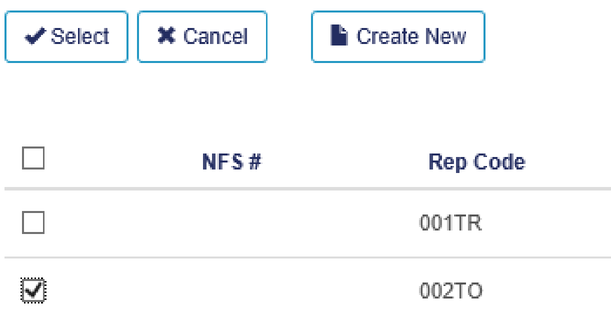


3. This will take you to the screen where you will enter in the client information. The minimum information needed to create a client includes; rep number, first name, last name, SSN and DOB. Other information is optional to enter, this is beneficial if you use the information to pre-populate information on client paperwork going forward via Starting Point.

4. To add a rep code to the client folder scroll down to the Rep area.

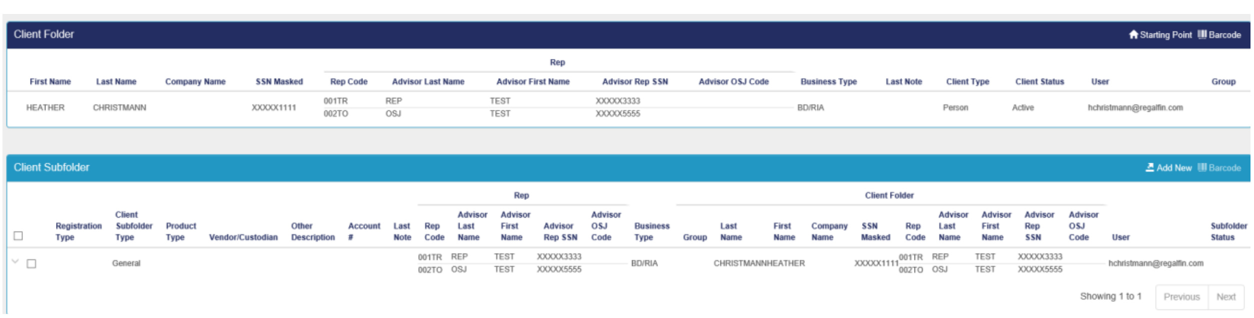


5. Click on the Add link, a new screen will show that would include the authorized rep codes. Check the box next to the proper rep code and click Select.

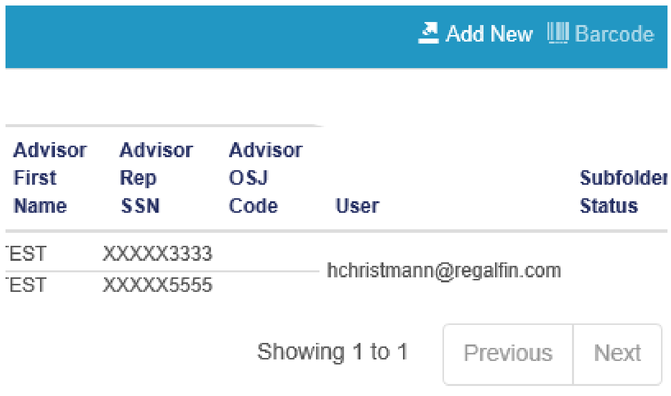


6. Once all information desired is entered click the Save button in the upper right corner of the screen.

7. You will then be brought to the Client Folder/Subfolder view.



8. COMET will automatically create a General subfolder that can be used to store documents that are not account specific (i.e. meeting notes, drivers license, etc). To create a new Subfolder click the **Add New** link on the Client Subfolder level.



9. You will be brought to a screen where you can enter the new Client Subfolder details. As a reminder, each account should have its own subfolder to allow you to keep documents organized. On this screen you should enter the subfolder type, product type, registration type and vendor/custodian. This information will help you to identify the subfolder in the future. If you are setting up a new account the Regal/Regulus Service Team will update the account number once the account is fully set up.

10. Once the information is completed click **Save** to finish completion of the Client Subfolder.