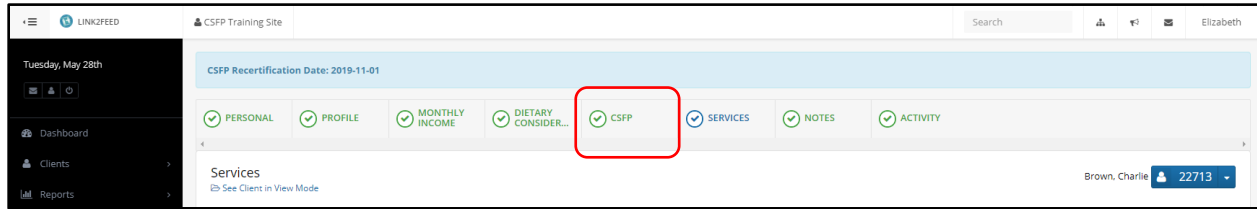
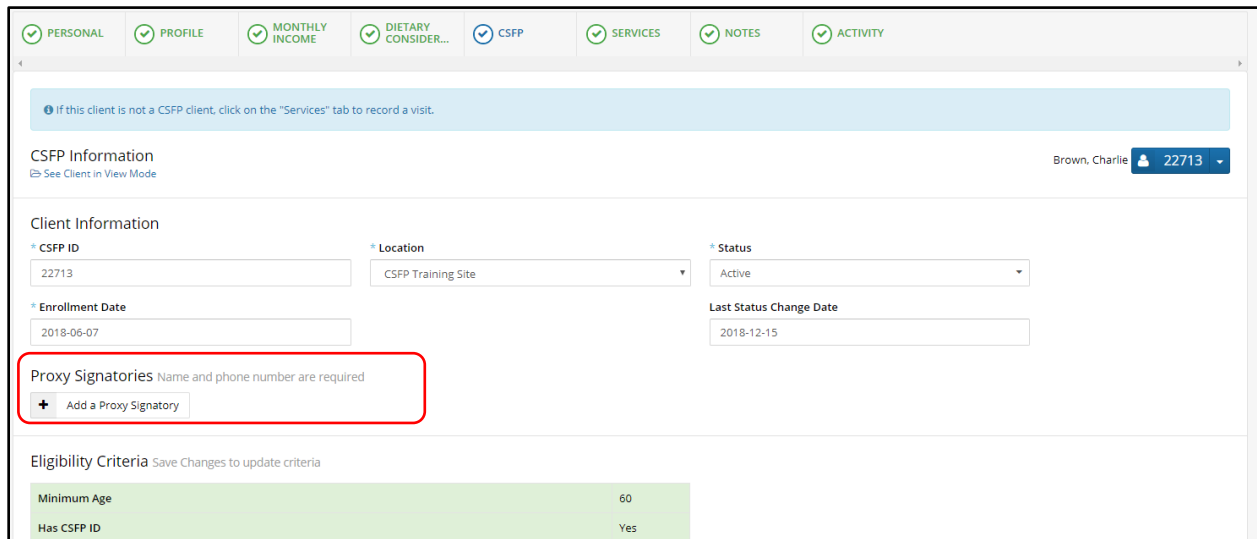


Adding a Proxy in Link2Feed

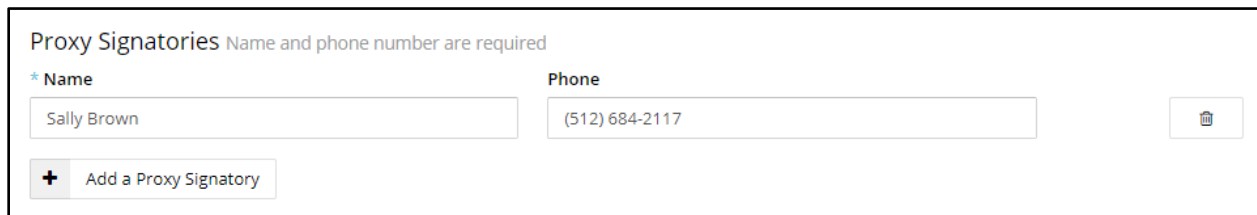
1. Open the client's profile and click on "CSFP" to switch from the "Services" to the "CSFP" tab.



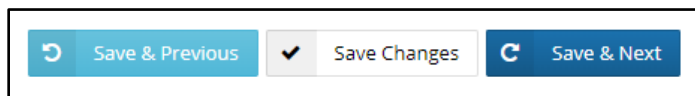
2. A client's proxies are listed under "Proxy Signatories." Click "Add a Proxy Signatory" to add a proxy for a client.



3. Link2Feed will add "Name" and "Phone" fields for the new proxy. Fill in the proxy's first and last name and phone number.



4. Click "Save" (or "Save & Previous" or "Save & Next") at the bottom of the page to save a client's proxy permissions and any other changes you've made on the CSFP tab.



Note: If you click “Add a Proxy Signatory” by mistake, you will need to click the trash can icon to delete the new “Name” and “Phone” fields. If you try to save the tab without putting a name for the proxy, Link2Feed will highlight the field with a “This field is required” message.

You can also use the trash can icon to delete a proxy if the client no longer wants that person to be their proxy.

Proxy Signatories Name and phone number are required

* Name Phone

This field is required.

+ Add a Proxy Signatory

