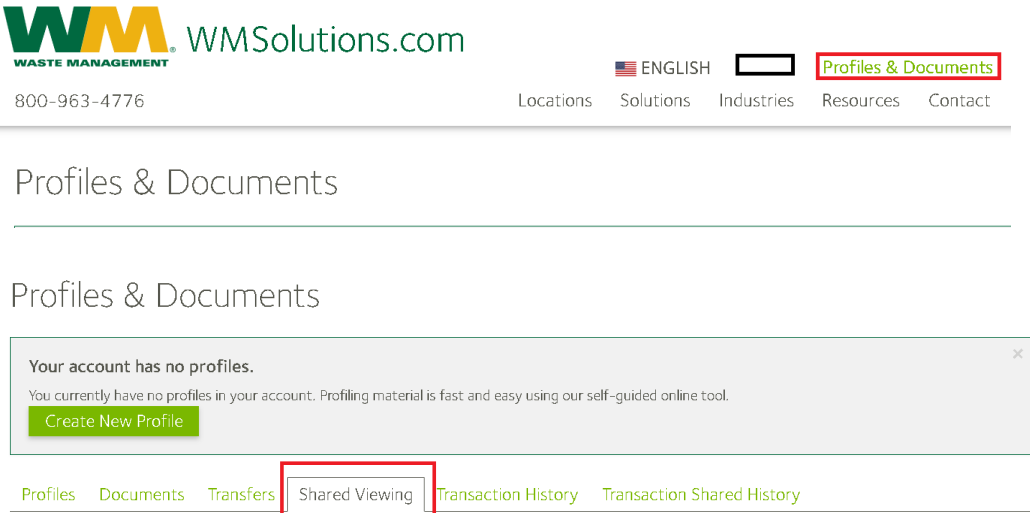
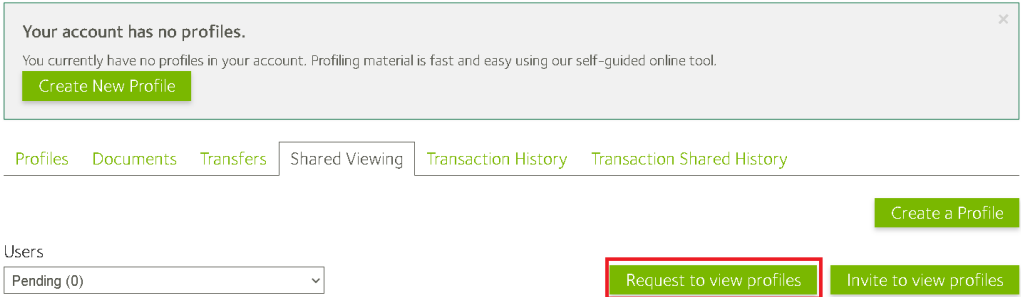


WMSolutions – How to Request Shared Viewing of Profiles

Use these instructions to request shared viewing of others' profiles. Starting from www.wmsolutions.com Profiles and Documents page (homepage):

Action	Screen Image
<ol style="list-style-type: none"> 1. Login to your www.wmsolutions.com account with your username and password 2. Click on Profiles & Documents 3. Choose the Shared Viewing Tab 	 <p>The screenshot shows the WMSolutions.com homepage. At the top left is the WMSolutions logo and name. Below it is the phone number 800-963-4776. On the right, there is a language selector set to 'ENGLISH', a search bar, and a 'Profiles & Documents' tab highlighted in red. Below these are navigation links: Locations, Solutions, Industries, Resources, and Contact. The main content area is titled 'Profiles & Documents'. A message box states 'Your account has no profiles.' with a 'Create New Profile' button. At the bottom, a navigation menu includes 'Profiles', 'Documents', 'Transfers', 'Shared Viewing' (highlighted in red), 'Transaction History', and 'Transaction Shared History'.</p>
<ol style="list-style-type: none"> 4. Click on Request to view profiles. 	 <p>The screenshot shows the 'Shared Viewing' page. It features the same 'Your account has no profiles.' message box with a 'Create New Profile' button. The navigation menu is the same, but 'Shared Viewing' is now the active tab. Below the navigation menu, there is a 'Users' section with a dropdown menu showing 'Pending (0)'. To the right of the dropdown are two buttons: 'Request to view profiles' (highlighted in red) and 'Invite to view profiles'. A 'Create a Profile' button is also visible in the top right corner.</p>

5. Type in recipient email address and any comments.

6. Click Send Request.

Note: The system will send a request to the recipient and they will need to accept the request before the profile can be viewed.

Request to View A User's Profiles ✕

Recipient Email Address *

example@wm.com

Comments

Hello - I would like to view profile XXXXXX.

The recipient will be sent an email notification of your Shared Viewing request on WMSolutions.com.

Note: Please use caution when sharing records that may contain confidential information.

Cancel

Send Request