

Black Diamond Advisor Experience: Portfolio View

Portfolio View is the advisor's home for dynamic client reporting. It features a dashboard of reporting content that can be configured to your preferences.

This User Guide covers the following topics:

- [Activation](#)
- [Settings](#)
- [Card Management](#)
- [Data Table Management](#)
- [Portfolio Search](#)
- [Account Filtering](#)
- [Presentations](#)

Activation

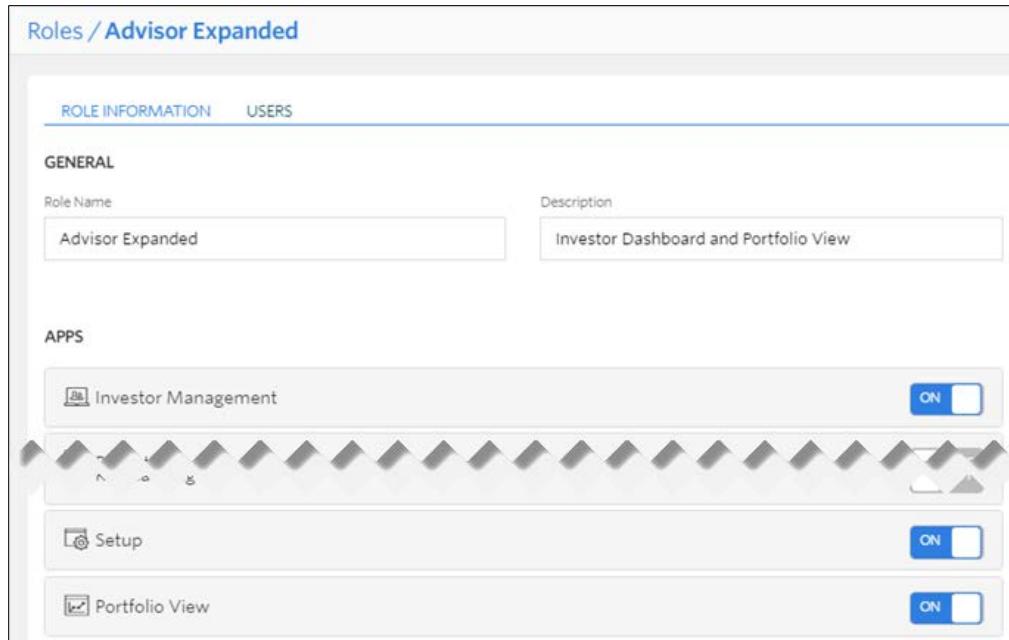
Portfolio View is activated by Role for designated users. The use of Roles allows the firm to control what a user can see and do throughout the platform. Before Portfolio View can be made available by Role, it must be activated for the entire firm, which is done by your Black Diamond representative.

Once the Portfolio View app has been activated for your firm, it appears as a new selection in the application menu. A firm administrator is automatically granted access to this app and can assign it to other firm users by Role.



Add Portfolio View to a Role

The entitlements included in a firm user's Role give the user access to one or more applications (Apps) on the platform, permissioned by the firm administrator. The Portfolio View app must be set to **ON** to allow a user to see Portfolio View in the App menu.



Roles / Advisor Expanded

ROLE INFORMATION USERS

GENERAL

Role Name: Advisor Expanded Description: Investor Dashboard and Portfolio View

APPS

Investor Management (ON)

Setup (ON)

Portfolio View (ON)

If an administrator does not see the Portfolio View app as an option, please check with your Black Diamond representative to make sure Portfolio View is activated for your firm.

The Portfolio View app includes the option to *Enable Presentations* for the user's Role. The default setting is *Full Access*, which allows users assigned to this Role to create Presentations. This setting can be changed to *No Access*.



Enable Presentations:	No Access	View	Assign	Full Access
	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

See [Presentations](#) in this document for more information about this option.

The available options under Portfolio View mirror the cards that are available in the Investor Experience. Portfolio View was designed to provide an advisor with an experience that is close to that of their clients, to minimize any discrepancy between available functionality and reporting. A firm user has much more flexibility and control over the data they see.

★ Conchiglia Family ▾

Account Filter - All Accounts ▾

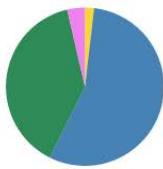
Last 2 Years as of 12/31/2013 ▾

Activity Summary



Beginning Value	33,489,521
Net Additions	17,900,952
Gain/Loss	9,584,776
Ending Value	60,983,248

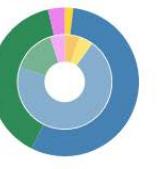
Allocation



Group by: Classes ▾

Portfolio	Value	Percentage
Cash & Equivalents	1,129,861	1.9%
Equities	33,872,482	55.5%
Fixed Income	23,768,822	39.0%
Alternative Assets	2,212,084	3.6%

Allocation vs Target



Actual O	Target O
REITs	0
A	0.0%
T	5.0%
Cash & Equivalents	3,049,162
A	1.9%
T	5.0%
Equities	33,872,482
A	55.5%
T	70.0%

Gain/Loss

Asset Summary

Market Value	60,983,248
Current Cost Basis	51,062,558
Unrealized Gain/Loss	10,018,055
% Gain/Loss	19.6%
Short-Term	1,140,595
Long-Term	8,877,460
Realized Gain/Loss	211,802
Short-Term	31,633
Long-Term	180,169

Performance



Group by: Classes ▾

Conchiglia Family	21.3%
50/50	25.8%

Transactions

Date	Type - Symbol	Amount
12/31/13	Management Fee - CASH	-7,744
12/31/13	Dividend Reinvestment - FTEXX	4
12/31/13	Dividend - FTEXX	4
12/31/13	Management Fee - CASH	-11,849
12/31/13	Dividend Reinvestment - FTEXX	0
12/31/13	Buy - FTEXX	22,645
12/31/13	Dividend - FTEXX	0
12/31/13	Dividend - VNZ	9,446

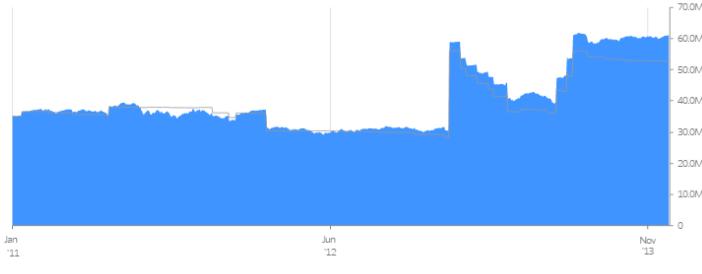
★ Conchiglia Family ▾

Account Filter - All Accounts ▾

Last 3 Years as of 12/31/2013 ▾

Activity Summary

Beginning Value	34,787,482
Net Additions	17,435,872
Contributions	57,858,577
Withdrawals	-40,422,705
Fees	-735,978
Gain/Loss	8,759,894
Market Change	6,259,327
Income	2,500,567
Ending Value	60,983,248



Activity Summary

Beginning Value	34,787,482
Net Additions	17,435,872
Contributions	57,858,577
Withdrawals	-40,422,705
Fees	-735,978
Gain/Loss	8,759,894
Market Change	6,259,327
Income	2,500,567
Ending Value	60,983,248

Show Transactions

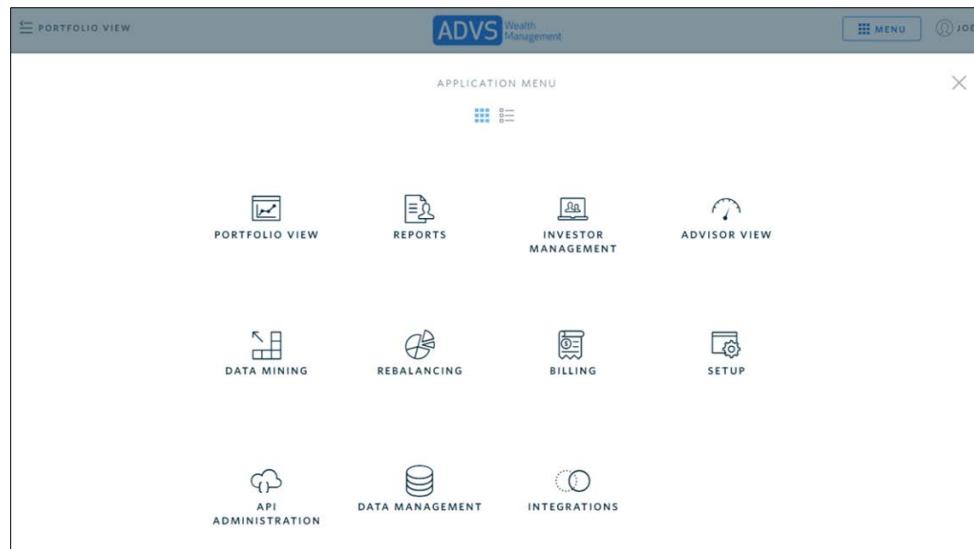
Name	Beginning Value	Contributions	Withdrawals	Market Change	Income	Fees	Ending Value
Conchiglia Family	34,787,482	57,858,577	-40,422,705	6,259,327	2,500,567	-735,978	60,983,248
537812056 - Conchiglia Family Trust (Master)	461,858	35,831,771	-24,402,243	977,048	233,466	-62,272	13,039,629
537926597 - Conchiglia Trust (Master)	16,053,832	3,011,926	-12,190,394	1,033,099	913,357	-10,863	8,810,957
537432093 - Jennifer IRA	978,903	8,335,284	-493,660	733,909	96,693	-40,188	9,610,942
537699306 - Jennifer Trust	8,265,010	3,000,000	-1,226,383	1,476,828	624,125	-346,725	11,792,856
540903302 - Robert Conchiglia (Tax Exempt Bonds)	0	7,577,613	-1,292,256	-81,336	98,428	-21,576	6,280,872
537397796 - Robert IRA	9,027,878	0	42,342	2,107,576	521,688	-251,491	11,447,992
20292500 - Education Funds	0	101,983	-124,133	12,203	12,811	-2,863	0

To view the full-page version of any card, select the card from the Portfolio View sub-menu or expand it through the dashboard view.

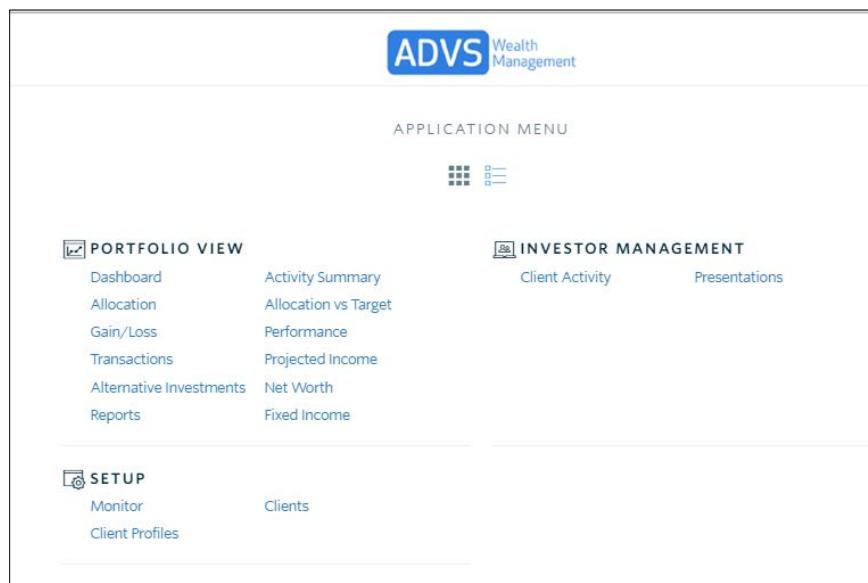
Site Navigation

The Application menu on the platform is available in two alternative views: Grid and Detail. Grid view is the default; Detail view lists all sub-menu options for each application. The user's preferred view will persist until the user changes it.

The left navigation bar displays the sub-menu for the active application. Access the User menu by selecting your name in the top right corner of any page.



Grid View Sample

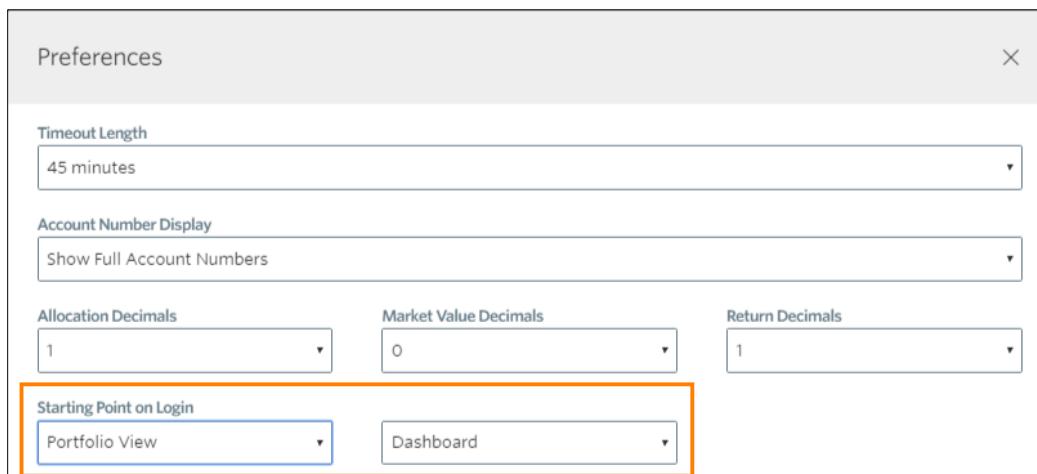
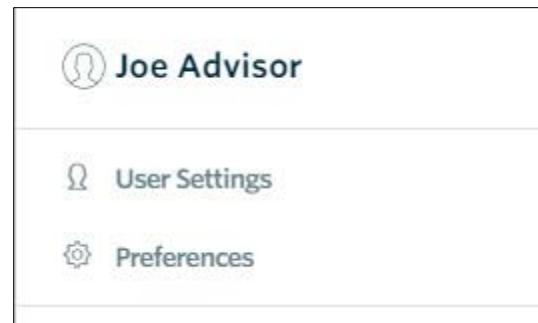


Detail View Sample

The User menu has two principal components: User Settings and Preferences.

User Settings include the user's email address, password, and profile picture. The user must enter a valid password in order to make any changes to User Settings.

The Preferences page includes settings that relate to the user experience on the platform. In addition to selecting how numbers are displayed, the user can select their Starting Point on Login.



Portfolio View Setup Menu

The Setup menu includes a wide range of options for platform maintenance, most of which are only visible to Firm Administrators. Certain setup options apply only to the Black Diamond Wealth Platform (Portfolio View and Investor Experience), but some selections will also update the BlueSky platform.

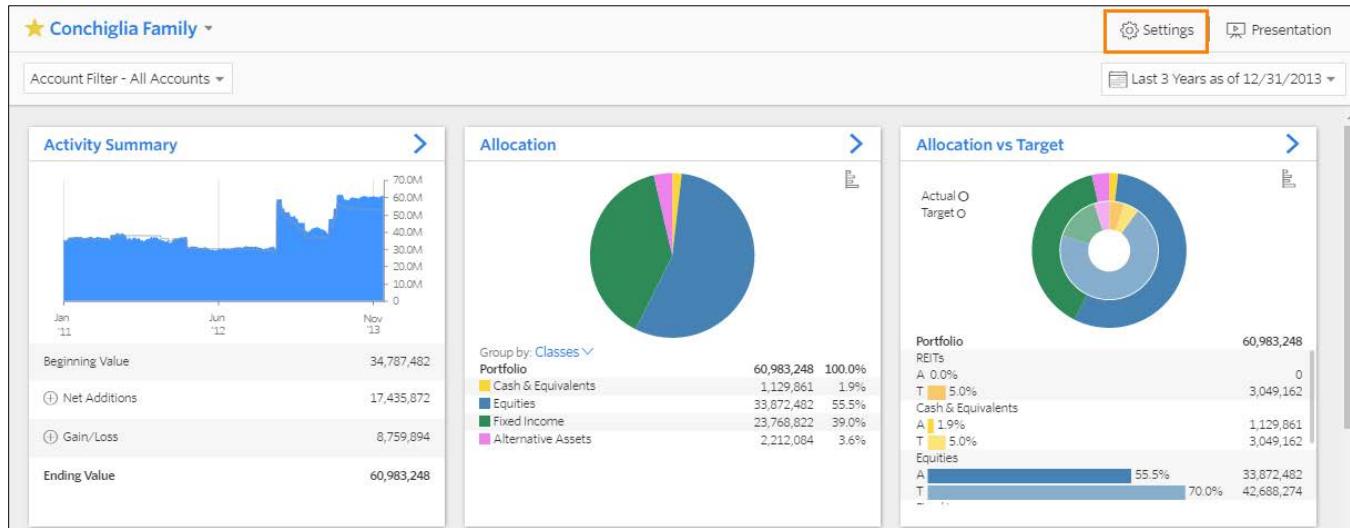
Options that apply only to the Wealth Platform include everything related to user and team setup and assignment of platform permissions. A user who is set up only on the Wealth Platform will not have access to the BlueSky platform. A user who is set up in BlueSky, but assigned a Role using the Wealth Platform, will have access to both platforms. If that user is assigned to a Team, their Team permissions will not carry over to BlueSky. If, for example, the user has access to Targets in BlueSky, they will see all targets, regardless of their team assignment.

All other setup and maintenance completed on the Wealth Platform will carry over to BlueSky. This includes the setup and assignment of Benchmarks, Managers, Accounts, Portfolios, Styles, Targets, and Fee Schedules. If an authorized user updates a benchmark on the Wealth Platform, it will also update that benchmark in BlueSky.

Portfolio Groups on the Wealth Platform are coordinated with Advisors in BlueSky. All of a firm's Advisors appear as Portfolio Groups. A new Portfolio Group will also appear as an Advisor assignment in BlueSky.

Settings

One of the main differences between the Investor Experience and the Advisor Experience is the user's ability to access the settings that are applied to the cards. Select the "Settings" icon at the top right of the Portfolio View dashboard to access these settings.



The Portfolio View Settings allow you to manage all card settings as well as the entire Portfolio View experience. These options have been segmented into those that are global ("All Card Settings") and those that impact a single card. The global settings ensure that data is consistent across all cards.

Portfolio View Settings

All Card Settings

Market Value	Management Fees	Supervised Filter	Classification	Separately Managed Accounts
<input checked="" type="radio"/> Accrued	<input checked="" type="radio"/> In Net Additions	<input checked="" type="radio"/> All Assets	<input checked="" type="radio"/> Capitalization	<input checked="" type="checkbox"/> Compress Accounts
<input type="radio"/> Unaccrued	<input type="radio"/> In Gain/Loss	<input type="radio"/> Supervised Only	<input type="radio"/> Sector	
<input type="radio"/> Unsupervised Only				

Activity Summary

Activity Summary Card Settings

Card Display Name	Activity Summary		
Show Details	<input checked="" type="checkbox"/> Gain/Loss	<input checked="" type="checkbox"/> Net Additions	<input checked="" type="checkbox"/> Fees
Market Value Graph	<input checked="" type="checkbox"/> Include Net Additions		

Manage Cards

Save Changes **Cancel**

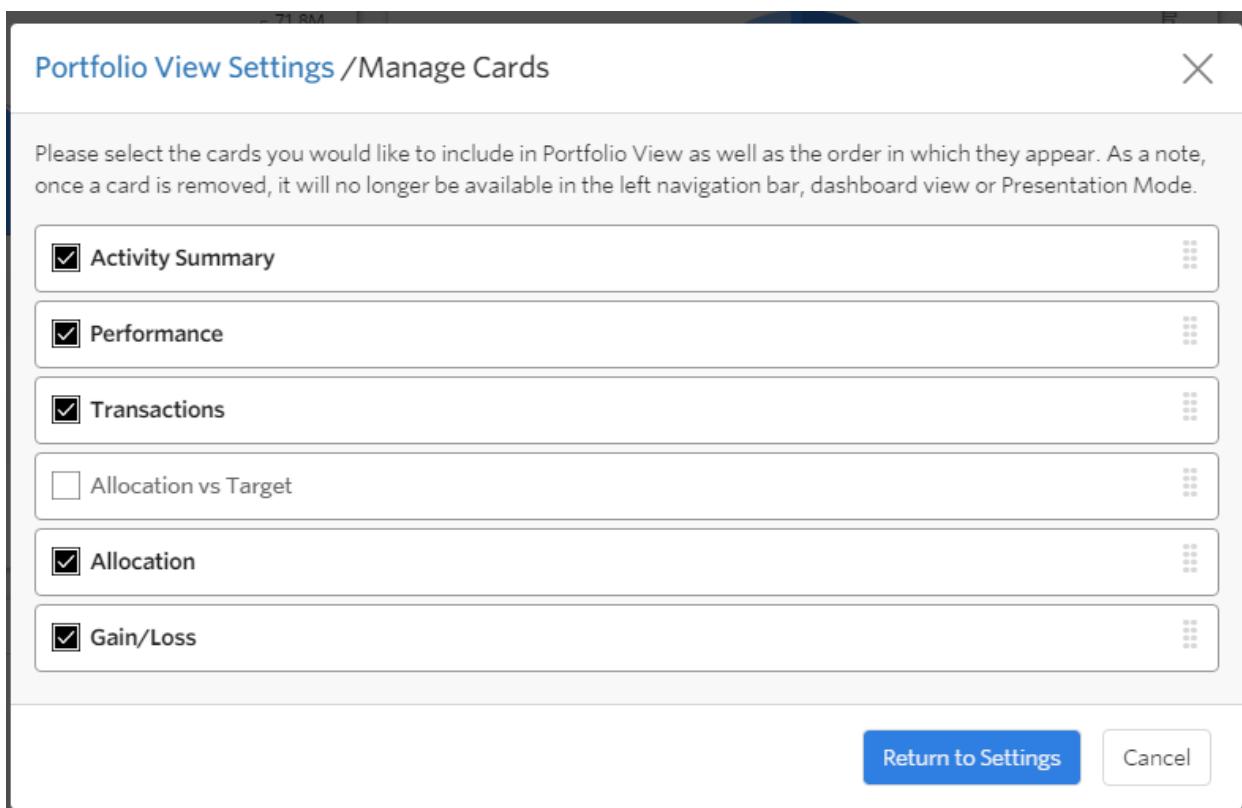
Card Management

Within Advisor Experience, firm users can configure the cards that will appear in the Portfolio View app. Within Portfolio View Settings, select “Manage Cards” in the lower left.



Selecting this link opens a list of all available cards*. You can (1) opt in/out any of the listed cards and (2) set the order in which the cards appear in the Portfolio View app. Please note that when a card has been opted out, you will no longer see it in the Portfolio View app and cannot include it in a presentation.

*The list of available cards is determined by the firm administrator, working with a Black Diamond representative. Individual cards can be turned off at the firm level, which removes them from both the dashboard and the Manage Cards menu.



Note: To implement your selections, select Return to Settings and then select Save Changes from the Portfolio View Settings screen.

Exclude Position Only Accounts

Upon request, a Black Diamond representative can activate a firm-wide setting to enable display of "Position Only" Accounts on certain content cards. Position-only reporting requires execution of an updated contract addendum.

Accounts that are tagged as "Position Only" are always reported on the Net Worth card. The user can also elect to include these accounts on the Allocation, Transactions, and Allocation vs Target cards in Portfolio View. The default setting is to include them.

To exclude position-only accounts, select **Settings** from the top right menu bar in Portfolio View. Select the applicable cards and use the checkbox to **Exclude Position Only Accounts**.

Allocation Card Settings

Card Display Name

Allocation

Exclude Position Only Accounts

Allocation vs Target Card Settings

Card Display Name

Allocation vs Target

Exclude Position Only Accounts

Target Level

- Use Assigned Target Level
- Class
- Segment

Returns

- Net of Fees
- Gross of Fees

Transaction Card Settings

Card Display Name

Transactions

Card Display

- Transaction List
- Transaction Summary

Exclude Position Only Accounts

Data Table Management

Within Advisor Experience, users have complete control over the data they see. Users can design and customize the data tables throughout Portfolio View. On any full-page view that includes a data table, use the “Manage Data Table” link to open a list of all available columns for that table.

Transactions									Back	
Date	Account Number	Account	Type	Asset Name	Symbol	Units	Price	Amount	Manage Data Table	Export
12/31/13	540903302	Robert Conchiglia (Tax Exempt Bonds)	Management Fee	CASH	CASH	--	--	-7,744	>	>
12/31/13	540903302	Robert Conchiglia (Tax Exempt Bonds)	Dividend Reinvestment	FIDELITY MUNICIPAL MONEY MARKET	FTEXX	4	1	4	>	>

Similar to the card management workflow, you can choose which columns to display as well as the order in which they appear.

Manage Data Table

Please select the columns you would like to include in the data table.

<input checked="" type="checkbox"/> Date	11111
<input checked="" type="checkbox"/> Account Number	11111
<input checked="" type="checkbox"/> Account	11111
<input checked="" type="checkbox"/> Type	11111
<input checked="" type="checkbox"/> Asset Name	11111
<input checked="" type="checkbox"/> Symbol	11111
<input checked="" type="checkbox"/> Units	11111
<input checked="" type="checkbox"/> Price	11111
<input checked="" type="checkbox"/> Amount	11111
<input type="checkbox"/> Description	11111
<input type="checkbox"/> Notes	11111
<input type="checkbox"/> Custodian	11111
<input type="checkbox"/> Action	11111
<input checked="" type="checkbox"/> Fee	11111

[Save Changes](#) [Cancel](#)

All cards have a consistent interface with the exception of the Performance card, which includes two separate sections for each of its two tabs: Performance and Risk. For the Performance tab, one section controls data that is related to the As of Date (Market Value, Units, Allocation) and the other controls data that is pertinent to the given date range (Returns, Gain/Loss, et al). A group of measurements associated with Modern Portfolio Theory can also be added to the Data Table.

Data table selections will remain consistent until changed by a user.

Manage Data Table

Please select the columns you would like to include in the data table.

As of Date Columns:

- Ending Value
- Allocation
- Beginning Value
- Units
- Symbol

Date Range Columns:

- Return
- Benchmark Standard Deviation (BM Std Dev)
- Gain/Loss
- Net Additions
- Difference
- Benchmark Return (BM Return)
- Standard Deviation (Std Dev)

Buttons:

Save Changes Cancel

Data Table for the Performance tab

The As of Date columns are repeated for the Risk tab, but the Date Range columns include all of the analytics associated with Modern Portfolio Theory.

Manage Data Table X

Please select the columns you would like to include in the data table.

As of Date Columns:

<input checked="" type="checkbox"/> Ending Value	⋮⋮⋮
<input checked="" type="checkbox"/> Allocation	⋮⋮⋮
<input type="checkbox"/> Beginning Value	⋮⋮⋮
<input type="checkbox"/> Units	⋮⋮⋮
<input type="checkbox"/> Symbol	⋮⋮⋮

Date Range Columns:

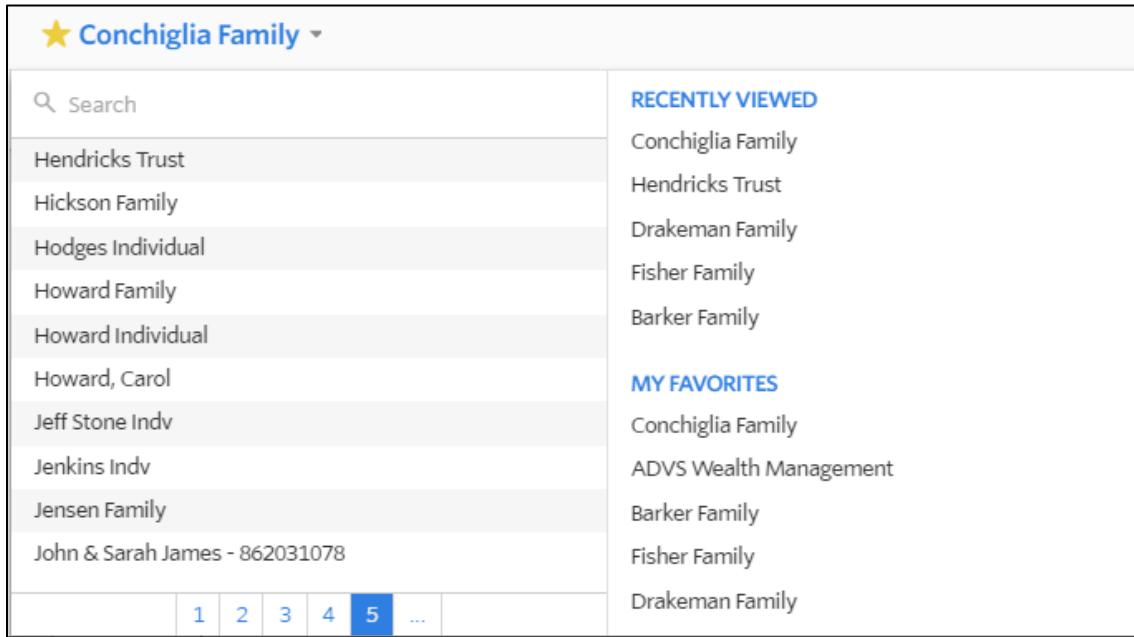
<input checked="" type="checkbox"/> Standard Deviation (Std Dev)	⋮⋮⋮
<input checked="" type="checkbox"/> Return	⋮⋮⋮
<input checked="" type="checkbox"/> Benchmark Return (BM Return)	⋮⋮⋮
<input checked="" type="checkbox"/> Benchmark Standard Deviation (BM Std Dev)	⋮⋮⋮
<input checked="" type="checkbox"/> Alpha	⋮⋮⋮
<input type="checkbox"/> Alpha*	⋮⋮⋮
<input checked="" type="checkbox"/> Beta	⋮⋮⋮
<input type="checkbox"/> Covariance	⋮⋮⋮
<input type="checkbox"/> M-Squared	⋮⋮⋮
<input type="checkbox"/> R-Squared	⋮⋮⋮

Save Changes Cancel

Data Table for the Risk tab (some selections not visible)

Portfolio Search

The layout of Portfolio View makes it easy for a user to move among portfolios. Select the portfolio name on the top navigation bar to open a dropdown list of portfolios with navigation tools.



The screenshot shows a dropdown menu for the 'Conchiglia Family' portfolio. The menu includes a search bar, a list of recently viewed portfolios, and a list of favorite portfolios. The 'Conchiglia Family' portfolio is highlighted as the current selection.

RECENTLY VIEWED	
Conchiglia Family	
Hendricks Trust	
Hickson Family	
Hodges Individual	
Howard Family	
Howard Individual	
Howard, Carol	
Jeff Stone Indv	
Jenkins Indv	
Jensen Family	
John & Sarah James - 862031078	

MY FAVORITES	
Conchiglia Family	
ADVS Wealth Management	
Barker Family	
Fisher Family	
Drakeman Family	

1 2 3 4 5 ...

You can search through all the portfolios to which you have access, but can also access (1) your most recently viewed portfolios, and (2) your “favorite” portfolios, which you might use for families that you look at frequently. Each of these sections will pull back the top five results.

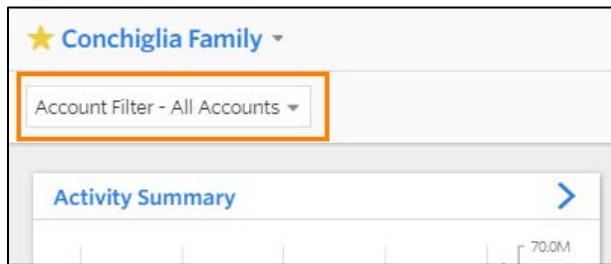
To designate a portfolio as a favorite, select the star icon next to the portfolio name. When a portfolio is favorited, the star icon is highlighted. The star icon will not appear if the user has reached the maximum of five favorites.

 Conchiglia Family ▾

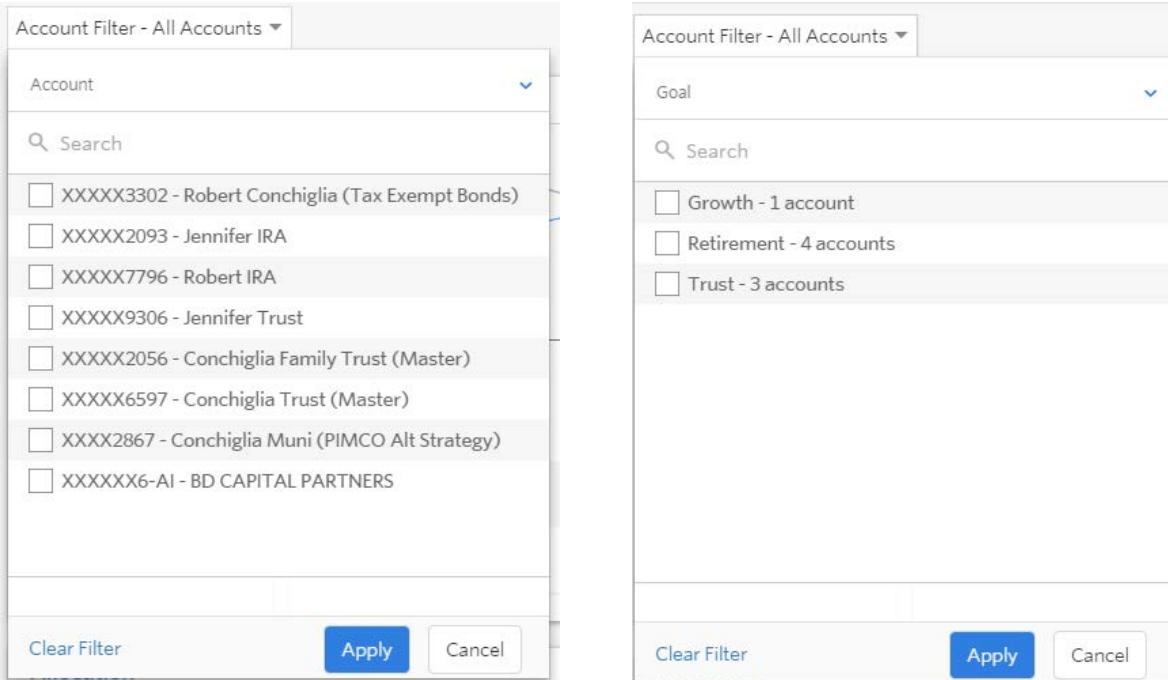
Note: You can only have five favorite portfolios. To assign favorite status to a new portfolio, you must remove that designation from one of your current favorites.

Account Filtering

In Portfolio View, users can use account filtering to view a subset of accounts within a client's portfolio.



Select the Account Filter dropdown to open a list of filtering options. You can select individual accounts or use any of the available account tags (custodian, style, goal, manager, and tax status) to filter your selection.



The image displays two side-by-side dialog boxes for account filtering. Both boxes have a header 'Account Filter - All Accounts' with a dropdown arrow. At the bottom of each box are 'Clear Filter', 'Apply' (in a blue button), and 'Cancel' buttons.

Left Dialog (Account Tab):

- Header: Account Filter - All Accounts
- Section: Account
- Search: Search
- List:
 - XXXX3302 - Robert Conchiglia (Tax Exempt Bonds)
 - XXXX2093 - Jennifer IRA
 - XXXX7796 - Robert IRA
 - XXXX9306 - Jennifer Trust
 - XXXX2056 - Conchiglia Family Trust (Master)
 - XXXX6597 - Conchiglia Trust (Master)
 - XXXX2867 - Conchiglia Muni (PIMCO Alt Strategy)
 - XXXXX6-AI - BD CAPITAL PARTNERS
- Buttons: Clear Filter, Apply, Cancel

Right Dialog (Goal Tab):

- Header: Account Filter - All Accounts
- Section: Goal
- Search: Search
- List:
 - Growth - 1 account
 - Retirement - 4 accounts
 - Trust - 3 accounts
- Buttons: Clear Filter, Apply, Cancel

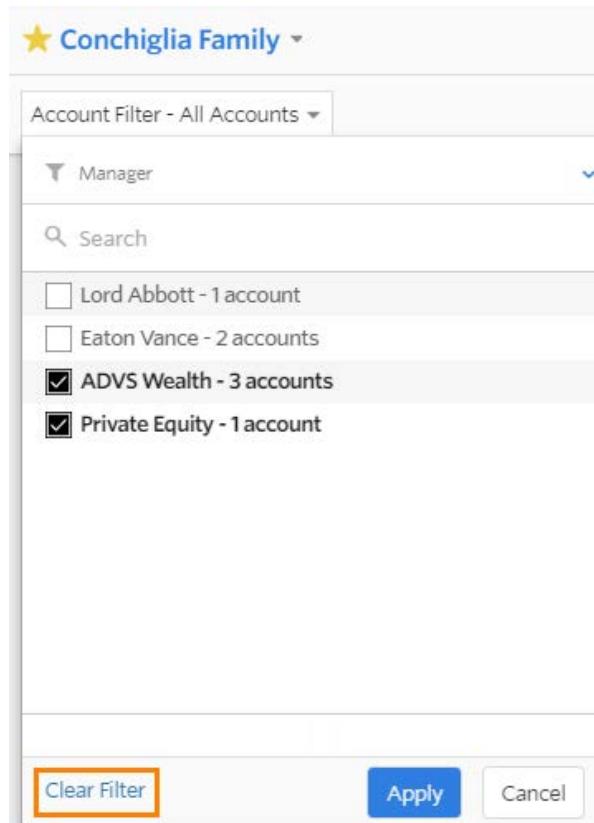
Note: You can only filter by one tag at a time. For example, you cannot create a filter for all taxable Schwab accounts.

Once filters have been applied, all cards will reload based on the selected accounts. Please note that the platform will still behave as if you are looking at the entire portfolio. For example, when viewing Performance, if you are looking at a time period that crosses into loaded historical data, there may be inconsistencies in the data. The platform will pull history for the portfolio just as if all the accounts were being pulled back.

When the filter is applied, you will be notified of the number of accounts you are currently viewing. If you expand the dropdown, you can see which filter has been applied. The “Clear Filter” option will reload all of the portfolio’s accounts.

Note: If a target has been assigned to your current portfolio and you choose to filter accounts, the Allocation vs. Target card will display the message “Not Available While Filtering Accounts” as this data should only be viewed for the entire portfolio.

Filters will only be applied to the current session. If you change portfolios or log out and log back in, the platform will load the entire portfolio to avoid any confusion.

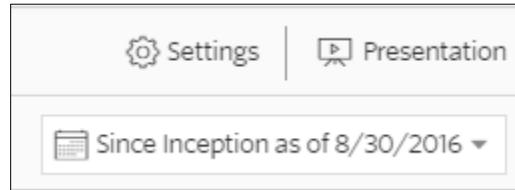


Note: This functionality is only available on the desktop version of Portfolio View.

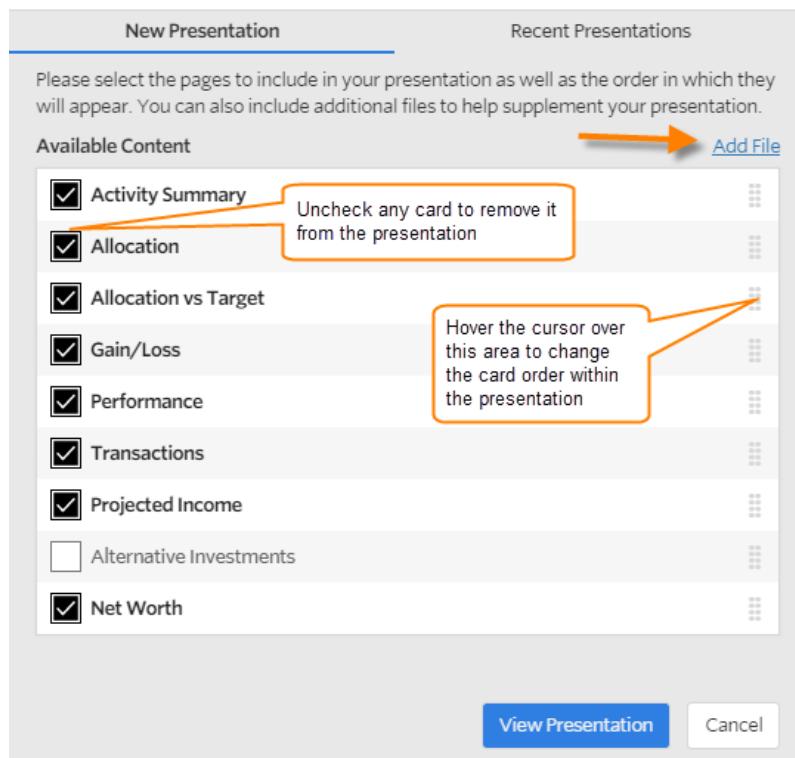
Presentations

While Black Diamond's performance reports are a key part of client meetings, advisors generally need to supplement Black Diamond reports with third-party documents, whether a financial plan or an in-house report. To enable creation of an integrated presentation, the Portfolio View app includes a **Presentations** function, which is enabled by Role. This feature displays third-party documents alongside the rich Black Diamond reporting in a single, cohesive presentation.

To begin, select **Presentation** at the top right of the page, next to **Settings**.



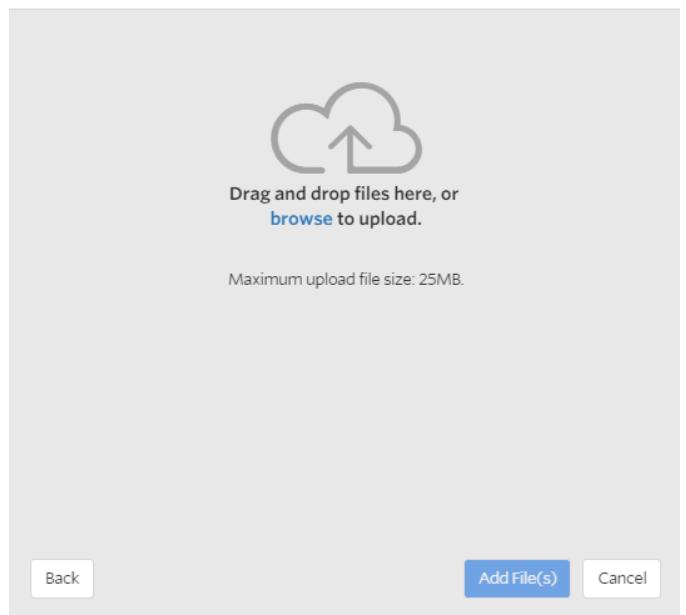
The **Create Presentation** interface is similar in style to the tools for managing cards and data tables. Use the interface to customize the Black Diamond content to be included in the presentation. Uncheck any card on the list to omit it, reorder the cards as needed, and add external files to the presentation.



Although Black Diamond anticipates creating a workflow to add a document from our internal PDF reports or the document vault, the current process requires you to add a document from your desktop. Use the **Add File** interface to drag and drop documents onto the container or browse and upload documents through your file system.

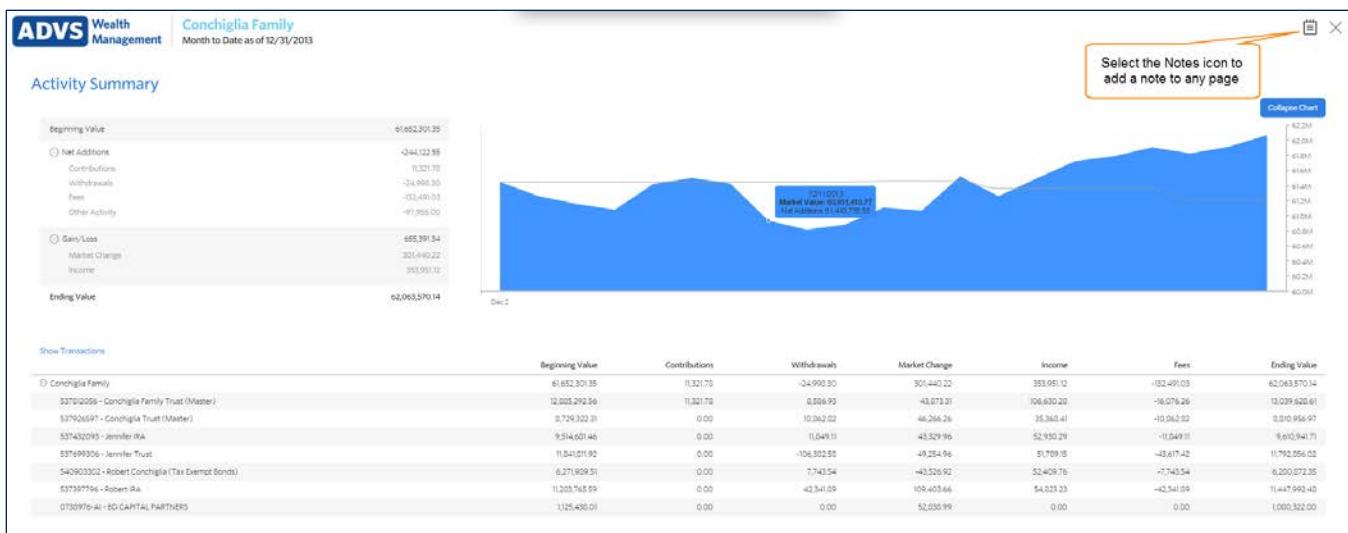
Presentation / Add File

X



Once you add the file, it is visible in Presentation Builder to be incorporated wherever it makes sense in your presentation.

Once the presentation is in your preferred sequence, select **View Presentation**. You will notice that Black Diamond takes over your entire screen and, essentially, creates a virtual PDF report. Your firm's branding will be included along with the portfolio name and applicable date range.



The key advantage of this approach is that the client meeting dictates the data you review. For example, if you are looking at the Activity Summary card and the client has a question about the withdrawal number, you can quickly toggle to look at the underlying transactions, filtering on withdrawals. You can also look at different groupings and drill down into particular classes or segments, providing a powerful toolset to respond to client questions.



The outside documents that are loaded to the presentation have a different feel from the Black Diamond content. The date range is hidden, since it has no effect on the current display, and a toolbar enables document navigation or zoom in/out. Look to the bottom of the page for insight into the previous and next pages of the presentation. Use these callouts to navigate between pages or use the left and right arrows on the keyboard.

Save Presentation

Advisors can save any presentation and use the **Recent Presentations** tab to access the five most recent presentations for the selected portfolio. Select **View All Presentations** to see a complete history.

Presentation

New Presentation	Recent Presentations
Please select the pages to include in your presentation as well as the order in which they will appear. You can also include additional files to help supplement your presentation.	
Available Content <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <input checked="" type="checkbox"/> Activity Summary <input checked="" type="checkbox"/> Allocation <input checked="" type="checkbox"/> Allocation vs Target <input checked="" type="checkbox"/> Gain/Loss <input checked="" type="checkbox"/> Performance <input checked="" type="checkbox"/> Transactions <input checked="" type="checkbox"/> Projected Income <input checked="" type="checkbox"/> Alternative Investments <input checked="" type="checkbox"/> Net Worth </div>	
View Presentation	View Details

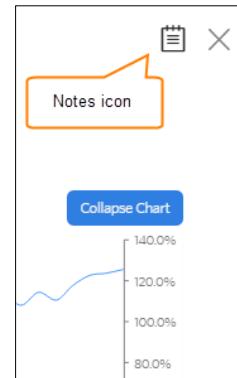
Presentation

New Presentation	Recent Presentations																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Name</th> <th style="width: 30%;">Presenter</th> <th style="width: 40%;">Presented On</th> </tr> </thead> <tbody> <tr> <td>Conchiglia Family Month to Date as of 12/31/2013</td> <td>Nelson, Chris</td> <td>12/18/2015 1:27 pm</td> </tr> <tr> <td>Rogers Family Quarterly</td> <td>McPhail, Doug</td> <td>12/17/2015 11:24 am</td> </tr> <tr> <td>Dr. Barker Household Month to Date as of 12/31/2013</td> <td>43151</td> <td>12/15/2015 4:30 pm</td> </tr> <tr> <td>Barker Family Quarter to Date as of 12/31/2013</td> <td>Firm Admin, Amir</td> <td>12/11/2015 10:47 pm</td> </tr> <tr> <td>Barker Family Custom 05/07/2012 to 12/31/2013</td> <td>Mafinejad, Amir</td> <td>12/11/2015 9:38 pm</td> </tr> </tbody> </table>		Name	Presenter	Presented On	Conchiglia Family Month to Date as of 12/31/2013	Nelson, Chris	12/18/2015 1:27 pm	Rogers Family Quarterly	McPhail, Doug	12/17/2015 11:24 am	Dr. Barker Household Month to Date as of 12/31/2013	43151	12/15/2015 4:30 pm	Barker Family Quarter to Date as of 12/31/2013	Firm Admin, Amir	12/11/2015 10:47 pm	Barker Family Custom 05/07/2012 to 12/31/2013	Mafinejad, Amir	12/11/2015 9:38 pm
Name	Presenter	Presented On																	
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View All Presentations	View Details																		

- The **Save Presentation** prompt appears at the start.
- A saved presentation will automatically retain any notes that are added to a slide. *The presentation must be saved at the start in order to retain the notes.*
- The saved presentation includes the optional description, the presenter's name, and the date and time it was presented to a client.
- Select the Notes icon on any slide to add a note. Notes are included as part of a saved presentation and are only visible to the advisor.

Save Presentation

Presentation Name	<input type="text" value="ADVS Wealth Management Since Inception as of 12/31/2013"/>
Description	
<input type="checkbox"/> Presented to Client	
Proceed Without Saving Save	



The slide displays a line chart with data points at 80.0%, 100.0%, 120.0%, and 140.0%. A blue button labeled "Collapse Chart" is visible. In the top right corner, there is a small notes icon (a white square with a blue outline and a small "i" inside) which is highlighted with an orange box. The entire slide is enclosed in a white frame with a close button in the top right.

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On the Recent Presentations tab, click on any presentation and select View Details.

Select the Notes icon wherever it appears to read a saved note without opening the presentation.

Presentation X

New Presentation		Recent Presentations														
Presentation Name Conchiglia Family Since Inception as of 12/31/2013																
Portfolio Conchiglia Family																
Presented By Mahoney, Ellen	Presented On 9/1/2016 1:50 pm	Modified On 9/1/2016 1:50 pm														
Description <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>																
<input type="checkbox"/> Presented To Client																
Content																
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<input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Start Presentation"/>		<input type="button" value="Cancel"/>														

Important Notes about Presentations

- Only standard document types are currently supported:
 - o PDF, Word, Excel, PowerPoint, .txt files
 - For best results, use PDF versions of your files
- There is currently no ability to print presentations.
- We are also researching the ability to "share" presentations prior to a client meeting. This would allow the client to prepare any questions they might have and enable a smoother meeting.
- We are currently testing functionality that would enable co-browsing sessions for virtual client meetings. This will allow the client to view your screen without having to download plug-ins or additional software.