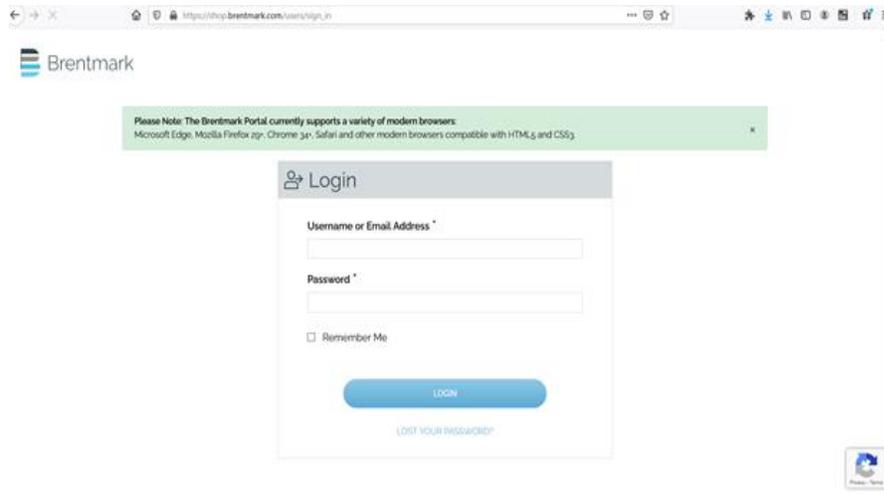


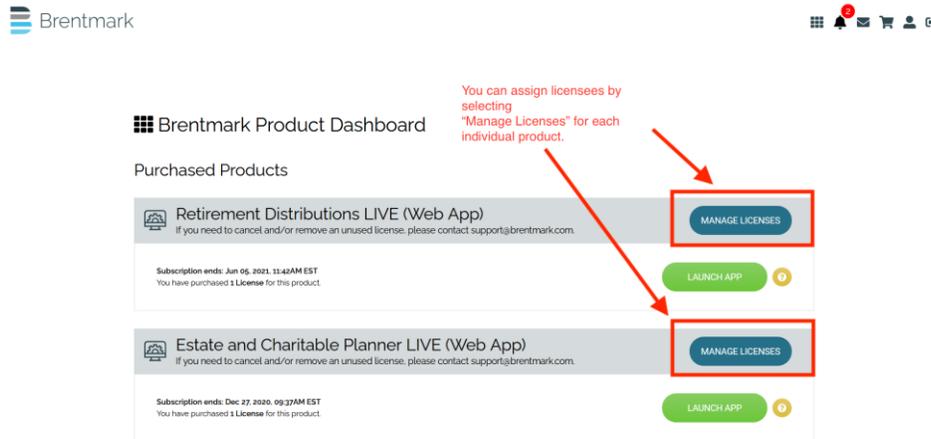
Assigning a License for Web Applications and Multiple License Desktop Products.

NOTE: This action does NOT add a new license to your account. This is simply assigning your already purchased software licenses to the correct person/user within your organization.

- 1) Use the Client Portal to log in to your dashboard:



- 2) Once in your dashboard, you can view the products you have licensed. If you have a product that allows you to assign the license, click on the "Manage Licenses" button.



SCENARIO 1: By default, if there is only one license for a web application, the licensee assigned is the user for the dashboard.

SCENARIO 2: In some cases, the user for the dashboard is NOT the active user. In these cases, the system allows the dashboard user to assign the use of the license to someone else. An example of this would be an Office Manager who handles the billing and profile information for the account but is not the primary user of the software itself. The Office Manager would assign the license.

- 3) Once you have selected “Manage Licenses” in the previous step, you will see one of the following screens and options:

Retirement Distributions LIVE Licenses

License : liveRDP-382060

Subscription ends: Jun 05, 2021, 11:42AM EST
Assigned To : kwrnote@yahoo.com
Assigned At : Jul 29, 2020, 09:33AM EST

REMOVE LICENSEE

If the “Remove Licensee” button is shown, this means that there is a user assigned to the license. You may also reassign this license by clicking on the ‘Remove Licensee’ button. This will free up the license to be assigned.

Retirement Distributions LIVE Licenses

License : liveRDP-382060

Subscription ends: Jun 05, 2021
Assigned To : N/A
Assigned At : N/A

ASSIGN LICENSEE

To add new licensee, click on the "Assign Licensee" button.

NOTE: This action does NOT add a new license to your account. This is simply assigning your already purchased software licenses to the correct person/user within your organization.

4) Enter the First Name, Last Name, and Email for the user that will be assigned to this license. Then select 'Assign'.



Assign License

First Name *

Last Name *

Email *

ASSIGN

To Assign A New License, Complete The Required Fields & Select "Assign".

5) If the user is NOT already in our database, the user will be notified via email from the email account info@brentmark.live. This email will contain a username and password, needed for the new licensee to gain access to the application. The email generated will resemble this:



Hi [Name],

Your corporate Administrator has provided you access to the Brentmark Portal and assigned you a single, individual license to the following product: **Retirement Distributions LIVE (Web App)**.

To access your portal account, please take note of the following username and temporary password:

https://shop.brentmark.com//users/sign_in

USERNAME or EMAIL:

[Redacted]

TEMPORARY PASSWORD:

[Redacted]

If the user is already in our database and uses other products, an email will be sent to inform them that they have access to the application by means of their current account dashboard.



Hi [Name],

Your corporate Administrator has provided you access to the Brentmark Portal and assigned you a single, individual license to the following product: **Estate and Charitable Planner LIVE (Web App)**.

To view the license detail, please login to your existing account:

https://shop.brentmark.com//users/sign_in

If you experience any issues, please do not hesitate to [Contact Us](#).

Thank you and Welcome to the Brentmark Portal!