Activating Instructions

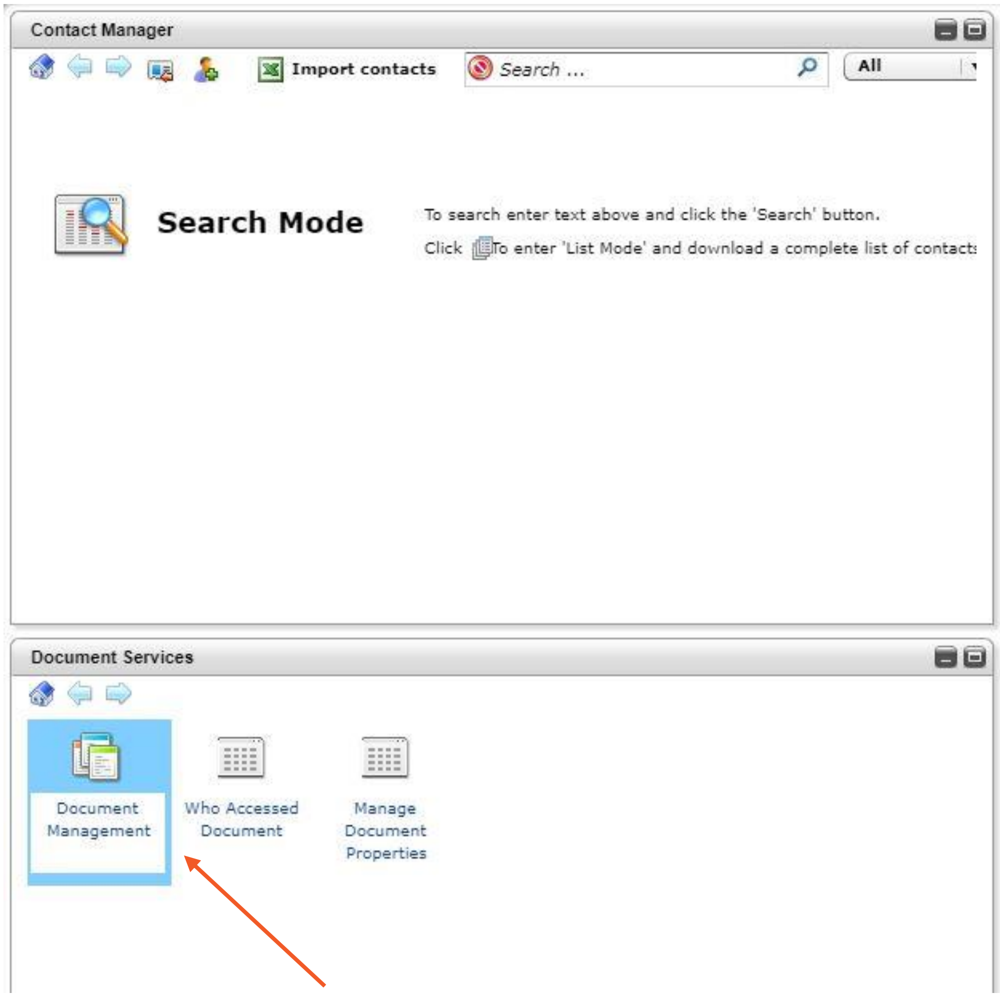
How to activate a pending document
in eFront Investment Café

June 27, 2018

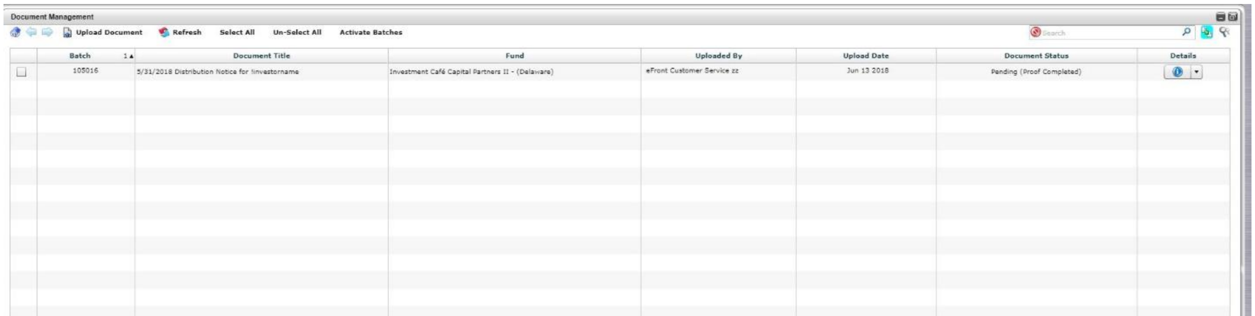
PLEASE READ

- Pending documents are those that are not visible to investors, but are visible only to those authorized at your firm.
- You need to activate a pending document for it to be seen by your investors.
- This document explains how to activate a document.

1. Log into eFront Investment Café and navigate to the Document Services section. Click on the Document Management icon.

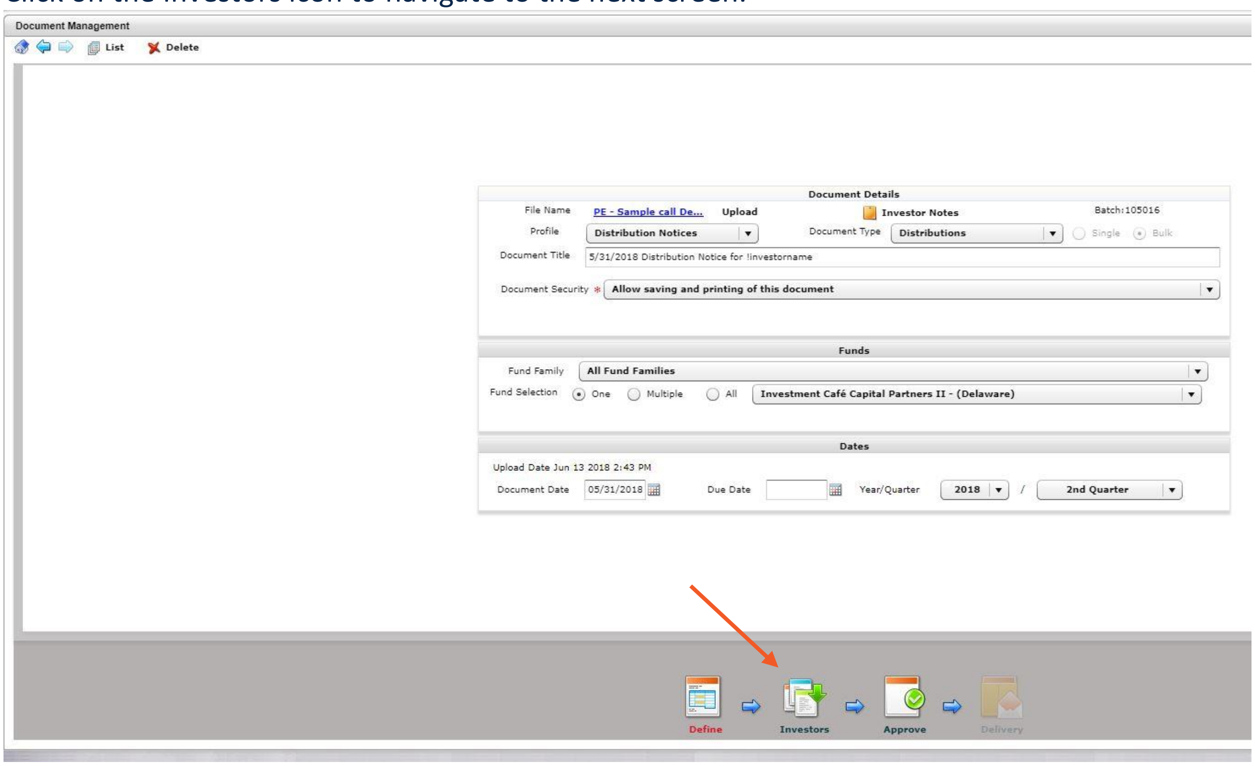


2. The following screen displays a list of documents which are pending. Pending documents are not visible to investors. They are only visible to those authorized employees who have administrative access to eFront Investment Café.

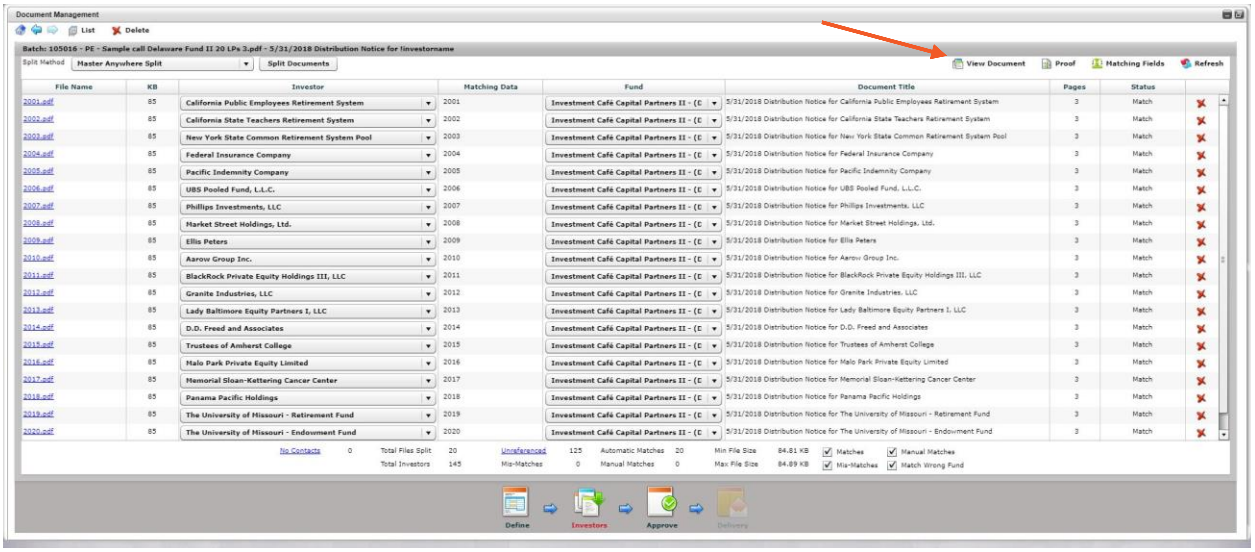


Click on the batch of pending documents to activate. Note the Document Status will be Pending (Proof Completed).

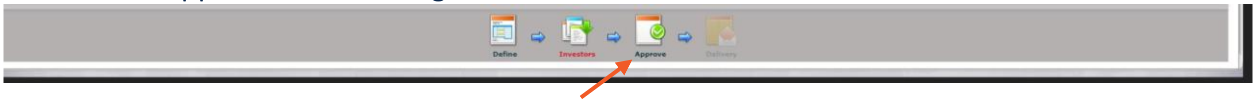
Click on the Investors icon to navigate to the next screen.



Click the View Document button to review the Proof file. Note the Proof file is best viewed in Adobe Acrobat.



Click on the Approve icon to navigate to the next screen.



Click the Approve button above to activate the batch

Once the batch has been activated, the status will change to Active

Need help? Go to https://www.support.efront.com/contact-us