

USER PREFERENCES QUICK REFERENCE GUIDE

Web ATIDS

HOW DO I ACCESS USER PREFERENCES?

- Login to Web ATIDS.
- From Main menu click on the “Preferences” link.
- This will launch the User Preferences page in a new window.

HOW DO I ENTER/UPDATE USER PREFERENCES?

- Fill in the fields on the User Preferences page that you would like to have auto-populated in other transactions.
- Click the “Save” button.
- Click the “Exit” button.

WHERE IS THE DATA I ENTERED IN USER PREFERENCES AUTO-POPULATED IN WEB ATIDS?

- Search Menu: Delivery Options
- Add a File: Ordered By
- Policy Search and Order: Phone, Fax, Ordered By, Extension, Responsible Party & Deliver By
- Order Documents Menu: Phone, Fax, Ordered By, Extension, Responsible Party & Deliver By
- Order Branch Products: Ordered By, Responsible Party, Deliver By, Address, Phone, and Fax
- Report Document Error: Requested By, Name, Phone, Extension

WHAT IF I USE WEB ATIDS ON MORE THAN ONE COMPUTER?

User Preferences are unique for each PC and FundNet ID.

If you log into multiple PCs, you will have to setup your preferences on each PC.

WHAT IF OTHER PEOPLE USE MY PC TO DO SEARCHES IN WEB ATIDS?

User Preferences are unique for each PC and FundNet ID.

Other people using your PC can set their own user preferences as long as they are using a different FundNet ID to access Web ATIDS.

WHAT IF I CLEAR MY COOKIES?

User Preferences are saved as a “Cookie” on your PC.

If you clear your cookies, your User Preferences will be deleted.

You can set up your User Preferences again the next time you log into Web ATIDS.

WHAT IF THE “DELIVER BY” METHOD I CHOSE IN USER PREFERENCES IS NOT A VALID DELIVERY OPTION IN THE TRANSACTION I AM IN?

Web ATIDS will default to an alternative option if no Deliver By method was set in User Preferences or if the method you chose is not a valid option. Deliver By method for Propel customers will default to ProPel.