

Connected Parties

Quick Start User Guide

Login

1. At the login screen, enter your **Depend** username and password in the username and password fields.
2. Choose the Depend environment that you wish to use.
3. Click the Login button and wait a few seconds for the application to log you in and configure the environment.

Create Connection

1. Click the “**Connected Parties**” tab (at the top of the window) if not already selected
2. Click the “**Create New Connection**” button.
3. Start entering the Key Member’s Depend account number and select the member from the auto-complete list
4. Start typing the Connected Party’s Depend account number and select the member from the auto-complete list
5. Now select the relationship
6. Click save

Find Connections

Connections are found by using the Key Member’s account number.

1. Click the “**Connected Parties**” tab (at the top of the window) if not already selected
2. In the “**Find Connections**” section, start entering the Key Member’s account number and selected the correct member from the auto-complete list
3. Click “**See Connections**”

Adding/Updating Symbol Notes

1. Click the “**Symbol Notes**” tab (at the top of the window) if not already selected
2. Select the a symbol from the auto-complete dropdown list
3. If the “**Note for**” box is empty then the Symbol has no notes.
 - a. Type a note in the box if desired
 - b. Click “**Save Changes**” to create and save the new note
4. If the symbol has a note, you may change the note and then click “**Save Changes**”