WEALTH STAKR

HOW-TO GUIDE

Setting up your account

Accept your invitation, sign in, find your way around Wealth Stakr and set up your dashboard.

For: New users who have been invited to a practice (advisers, admin staff, practice MDs)

Time: About 10 minutes

Before you start

- An invitation email from your practice. Wealth Stakr is invitation-only: you cannot sign yourself up.
- Access to the mailbox the invitation was sent to.
- A password you will use for Wealth Stakr (you choose it when you accept).

1. Accept your invitation

Your practice MD (or Head Office) invites you from their Users screen. You then receive an email from Wealth Stakr with the subject "You're invited to <practice name> on Wealth Stakr". It names the practice, the role you are being given and, where known, who invited you.

1. Open the invitation email and click **Accept invitation**. If the button does not work, copy the link under **Or open this link** into your browser.
2. Check the expiry date at the bottom of the email. If the link has expired, ask the person who invited you to resend it.
3. If you do not have a Wealth Stakr login yet, you land on **Accept your invitation**. Your email address is already verified by the invite, so you only enter your **First name**, **Surname** and a **Password**.
4. Click **Join <practice name>**. Your account is created, you are added to the practice and taken straight into the app.
5. If you already have a Wealth Stakr login (for example, you work in another practice), the page shows **Signing you in...** and adds the new practice to your account. There is nothing to fill in.

TIP A resent invitation replaces the old one. The email says "Here is your invitation again" and the earlier link no longer works, so always use the newest email.

TIP **Invitation link not recognised** or **This invitation link has expired or has already been used** means the link cannot be used again. Ask whoever invited you for a new invitation, or click **sign in** if you already joined.

TIP If you see **One more step**, reload the page. If it does not move on, ask for a fresh invitation.

TIP The name you enter here is the name your colleagues see. Your practice cannot change it for you.

2. Sign in and sign out

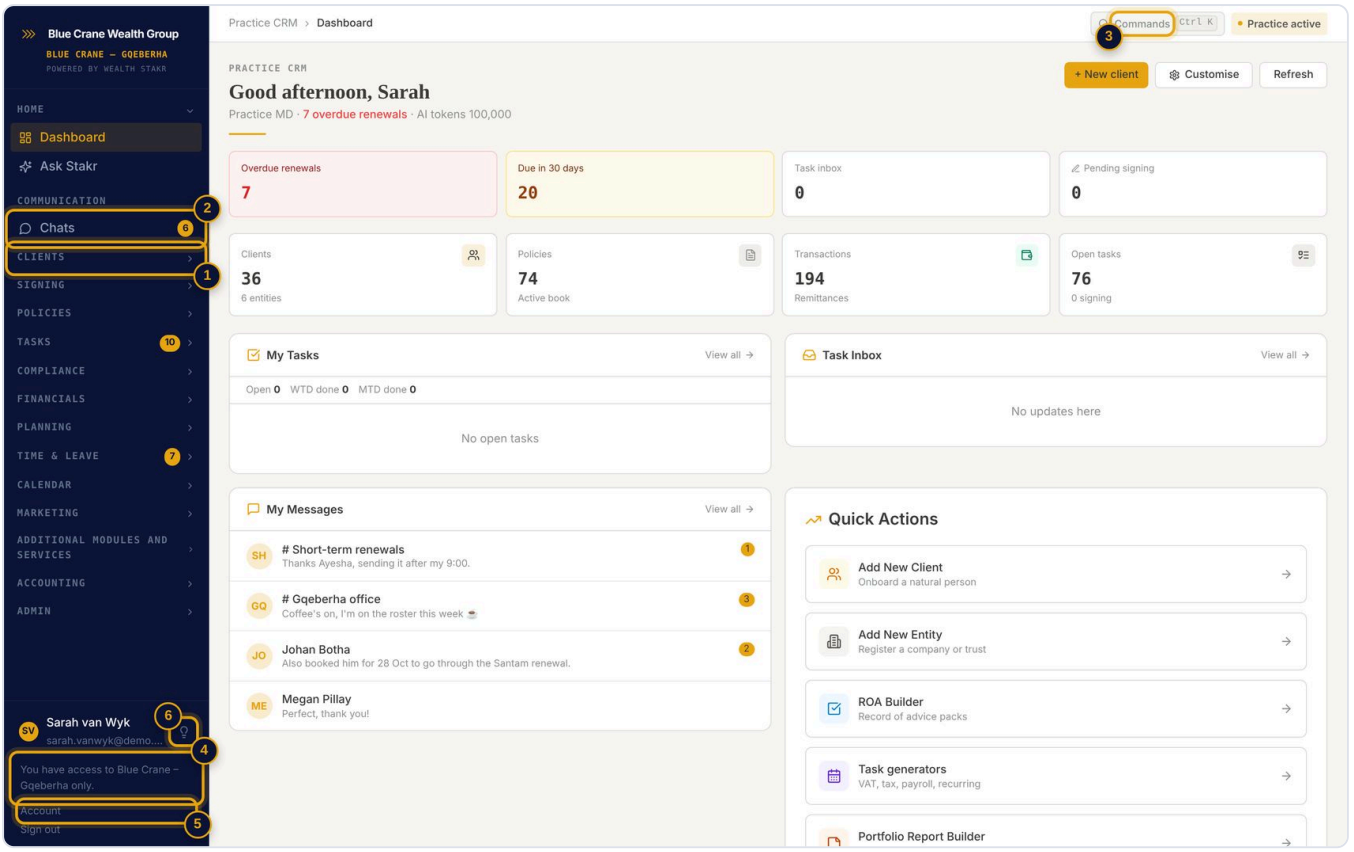
1. Go to the Wealth Stakr sign-in page and sign in with the email address you were invited on and your password.

2. After signing in you go to the page you were trying to open. If there was none, you land on your home: your practice dashboard (or Head Office, if that is where you work).
3. To sign out, click **Sign out** at the bottom of the sidebar.

> **TIP** There is no public sign-up. The **Invite only** screen means you need an invitation from your practice MD or Head Office first.

3. Find your way around the sidebar

Everything you can open is in the dark sidebar on the left. You only see the pages your role allows, so a colleague's sidebar may look different from yours.



The practice sidebar, the Commands search and the account block at the bottom.

1. Click a group heading such as **Clients**, **Policies**, **Tasks** or **Time & Leave** to open it and see its pages. Click it again to close it. The group you are working in opens by itself.
2. **Chats** sits in its own **Communication** group that is always open, so its unread count is always visible. Yellow numbers on a closed group show how many items inside it need attention.
3. To jump to a page without scrolling, click **Commands** at the top of the screen (or press Ctrl K, Cmd K on a Mac) and type the page name.
4. The account block at the bottom shows who is signed in and which workspace you are in. If you belong to only one practice it reads "You have access to <practice> only."
5. Click **Account** to open your Account settings (section 5).
6. Click the lightbulb next to your name to **Report an Issue** or **Share an Idea** with the Wealth Stakr team.

> **TIP** Groups under **Additional Modules and Services**, such as Co-Sec & Trusts and Estates, only appear once your practice has that add-on and your role includes it.

TIP If a page you need is missing, ask your practice MD to check your role. Only they can change it.

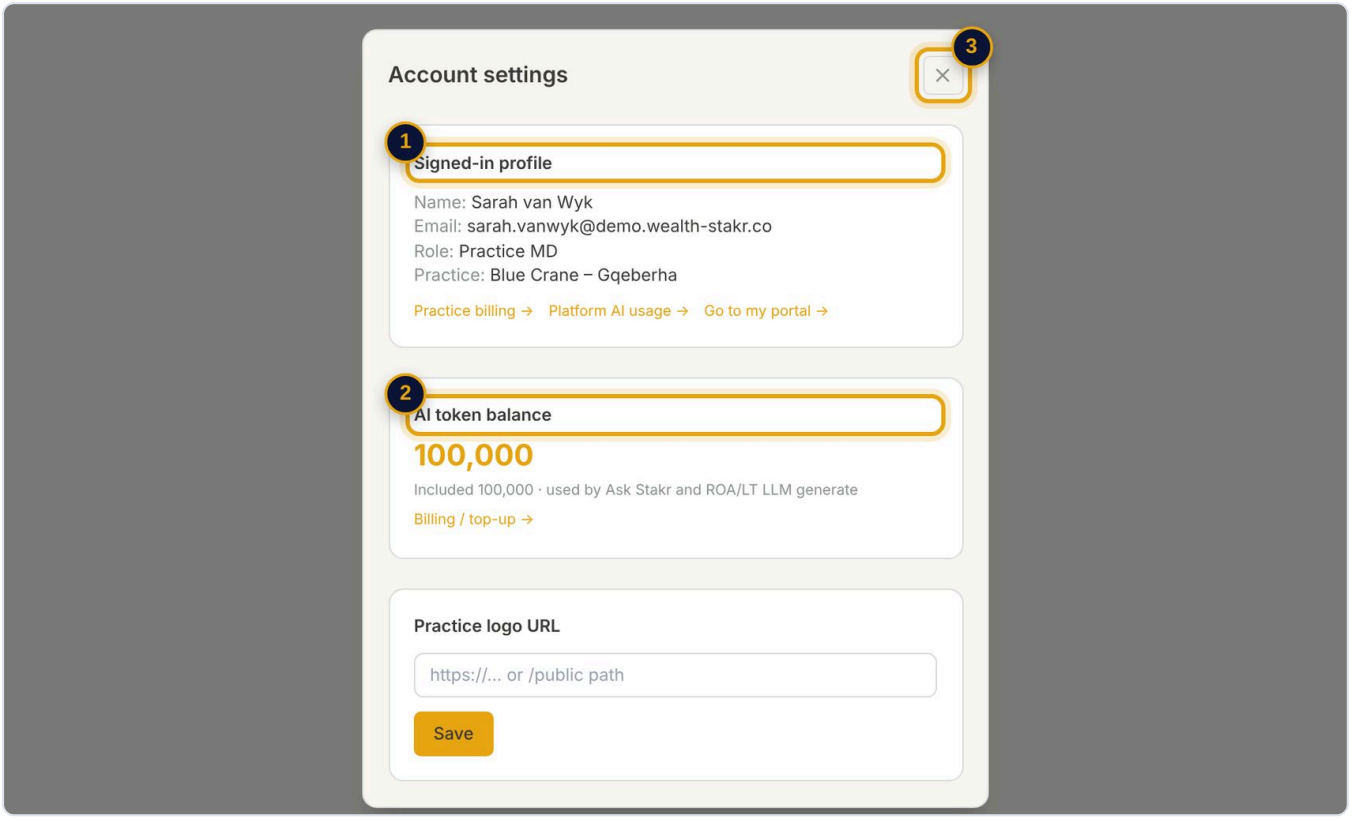
4. Switch between practices or Head Office

If you work in more than one practice, or in a practice and its Head Office, you switch between them from the account block. There is no separate login for each.

1. At the bottom of the sidebar, click **Switch workspace**.
2. A **Go to** list opens with your places grouped under **Head office** and **Practices**. Your current workspace is highlighted with a dot.
3. Click the practice or head office you want. The app opens its home page and the sidebar changes to that workspace.
4. If you have many workspaces, type in **Search organisations and practices…** at the top of the list to filter it.

TIP Each practice keeps its own clients, roles and settings. Check the practice name at the top of the sidebar before you capture anything.

5. Check your Account settings



Account settings opens over the page you were on.

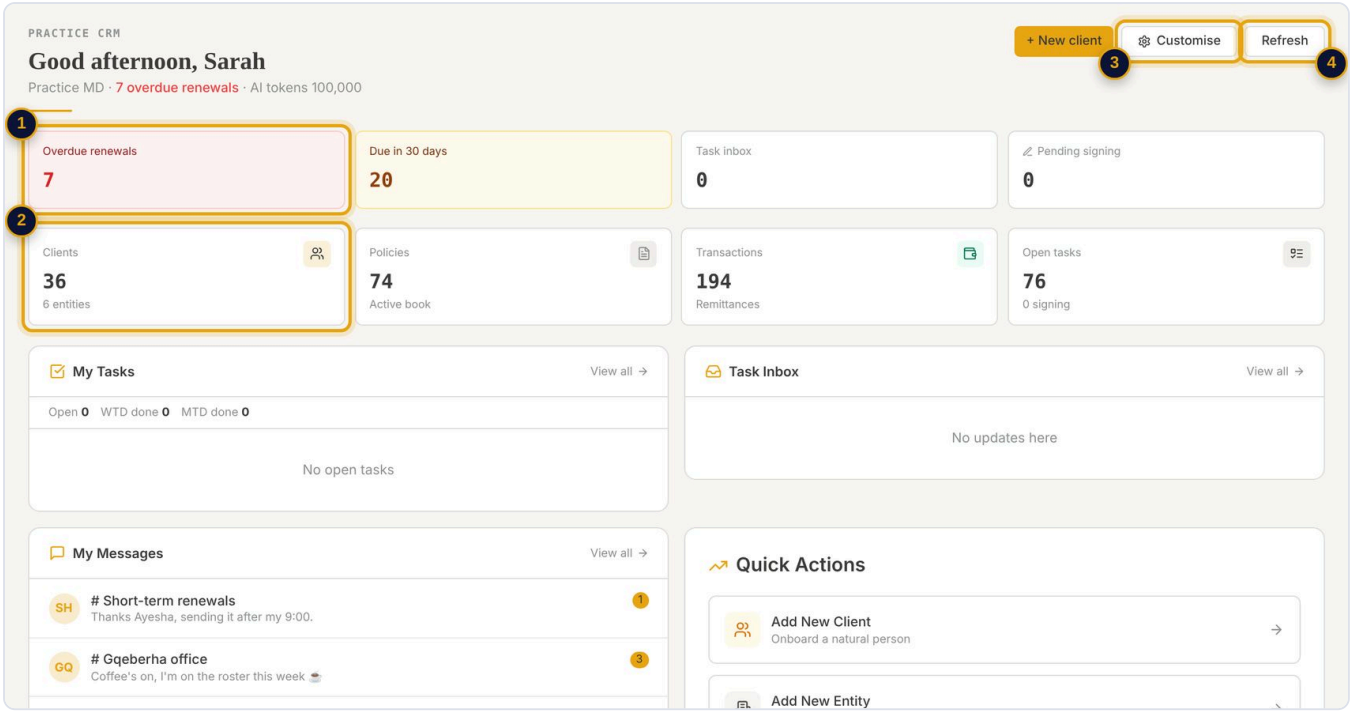
1. Click **Account** at the bottom of the sidebar. **Signed-in profile** shows your **Name**, **Email**, **Role** and **Practice**. Check that the role is what you expected.
2. **AI token balance** shows the practice's remaining AI tokens, used by Ask Stakr and AI drafting in ROA and long-term reviews. **Billing / top-up** takes admins to the practice billing page.
3. Click the **X** (or press Esc) to close the panel and return to where you were.

TIP Your name and email come from your sign-in account, not from the practice. To change your name or password, use your sign-in account menu, which opens when you click your initials or photo at the bottom of the sidebar.

TIP The **Practice logo URL** box is a practice setting for admins. If you are not the practice MD, leave it alone. The practice logo is managed under **Admin › Branding**.

6. Get to know your dashboard

Home › Dashboard is the first page you see in a practice. It greets you by name and shows your role.

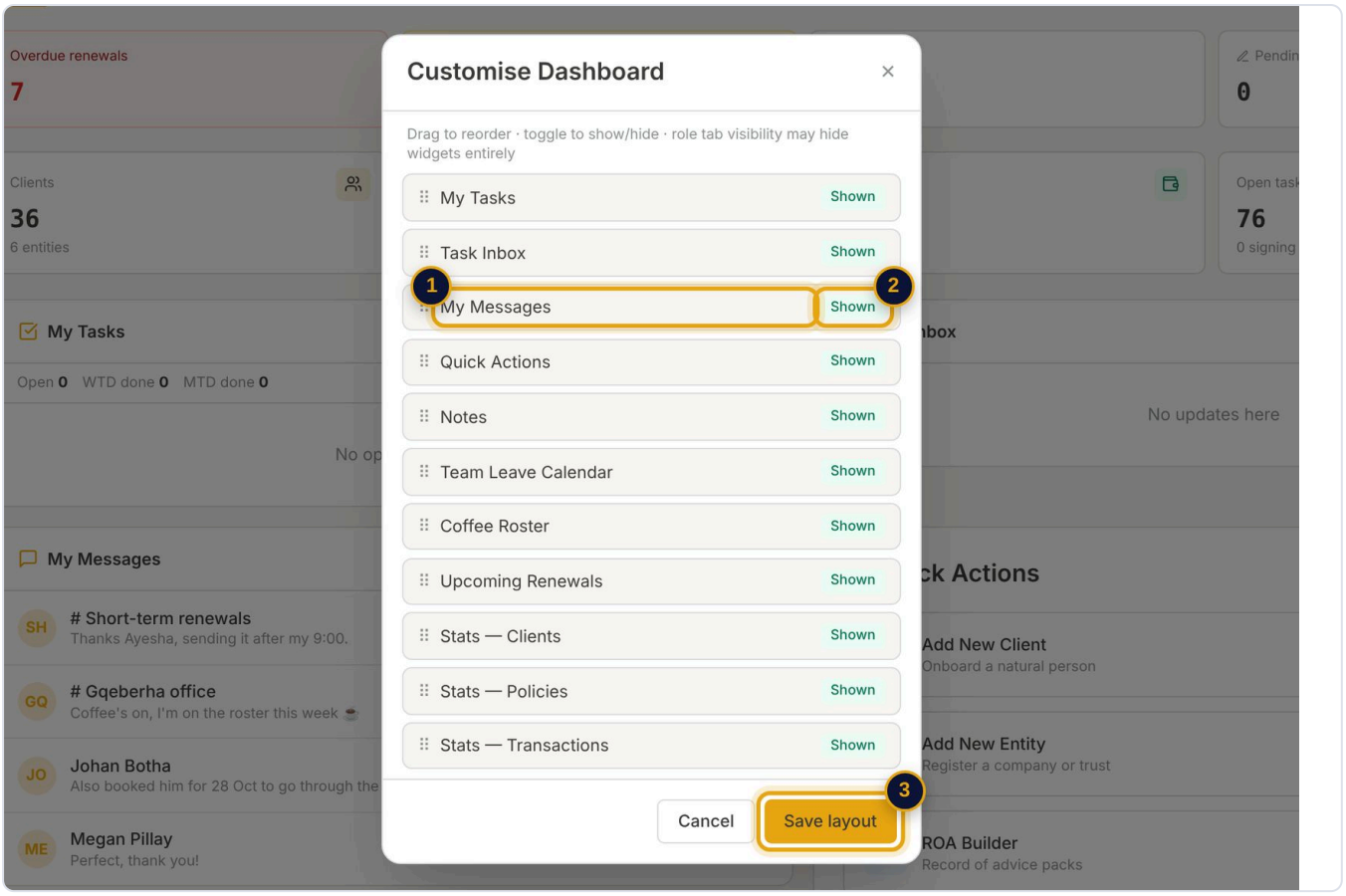


The top of the practice dashboard.

1. The top row shows **Overdue renewals**, **Due in 30 days**, **Task inbox** and **Pending signing**. Click a tile to open that list.
2. The second row shows totals for **Clients**, **Policies**, **Transactions** and **Open tasks**. Click a tile to go to that page.
3. Click **Customise** to choose which widgets you see and in what order (section 7).
4. Click **Refresh** to reload the figures without leaving the page.

TIP Which widgets you can have depends on your role. For example, the commission widgets are for the practice MD and roles that can view all commission, and **My Earnings** is for roles with My Earnings.

7. Customise your dashboard



Customise Dashboard: drag to reorder, click Shown/Hidden to toggle.

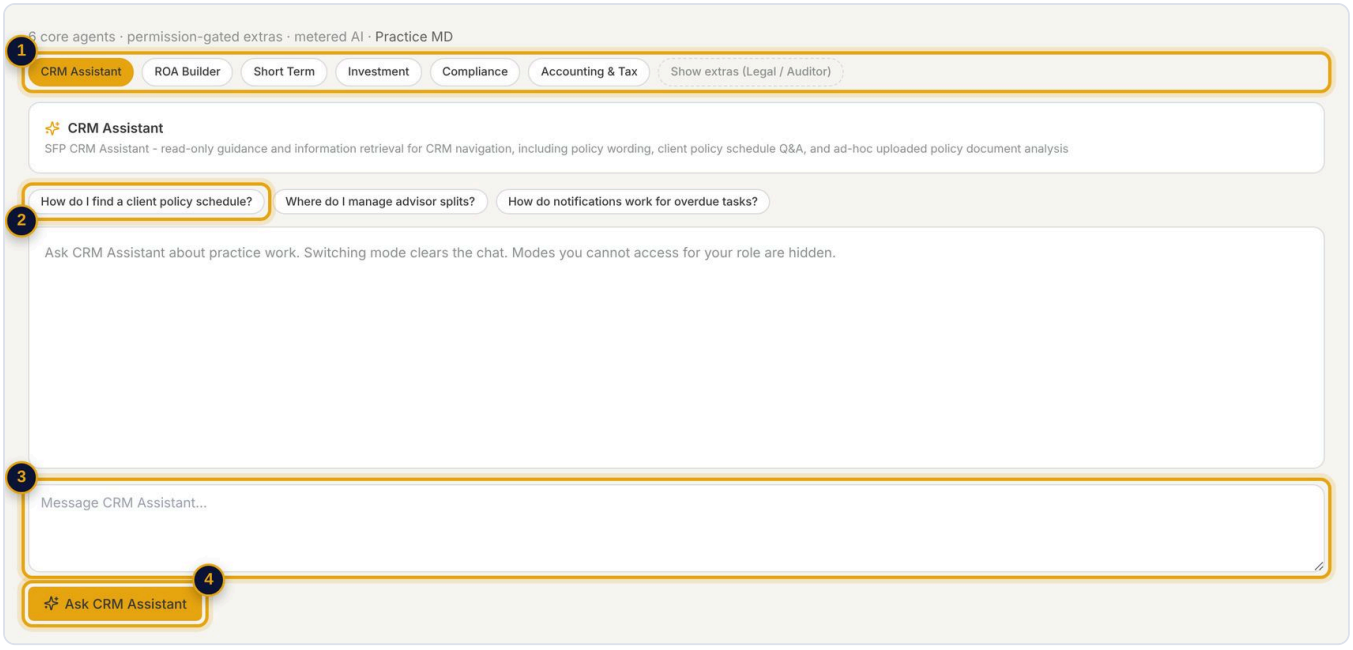
1. Click **Customise** on the dashboard. Drag a widget by its row to move it up or down the list.
2. Click **Shown** to hide a widget (it changes to **Hidden**). Click again to show it.
3. Click **Save layout**. Click **Cancel** to close without changes.

TIP Your layout is saved in the browser you are using. On another computer or browser you start with the standard layout.

TIP If the dashboard says no widgets are visible, your role may restrict them. Ask an admin to check your role's dashboard tab visibility.

8. Get help from Ask Stakr

Ask Stakr is the built-in assistant under **Home › Ask Stakr**. It answers questions about how to use Wealth Stakr and about practice work. It can read information but never creates, changes or deletes records.



Ask Stakr with the CRM Assistant mode selected.

1. Pick a mode: **CRM Assistant** (how to use the CRM), **ROA Builder**, **Short Term**, **Investment**, **Compliance** or **Accounting & Tax**. Switching mode clears the conversation.
2. Click a suggested question to ask it straight away.
3. Or type your own question in the message box.
4. Click **Ask** (the button shows the mode name, such as **Ask CRM Assistant**) and wait for the answer.

TIP Modes your role cannot use are hidden. ROA Builder, Short Term, Investment and Legal are not available to clerk, reception and support-staff roles.

TIP **Show extras (Legal / Auditor)** adds the Legal mode and, for practice admins, the Health Auditor.

TIP Each answer uses AI tokens from the practice balance. If Ask Stakr says AI is not available, the balance may be used up: tell your practice MD.

Questions

My invitation link says it has expired or was already used. What now?
Ask the person who invited you to click Resend on their Users screen. The new email has a fresh link and the old one stops working.

Can I sign up without an invitation?
No. Wealth Stakr is invitation-only. Your practice MD or Head Office must invite you.

I work in two practices. Do I need two logins?
No. Accept the second invitation with your existing login, then use Switch workspace at the bottom of the sidebar to move between them.

Why can't I see a menu item my colleague has?

The sidebar only shows pages your role allows, and some groups need a paid add-on. Ask your practice MD to check your role.

How do I change my name or password?

Through your sign-in account menu (click your initials or photo at the bottom of the sidebar). Your practice cannot change your name for you.

My dashboard layout disappeared on a new computer.

Customise saves the layout in your browser only. Set it again with Customise and Save layout.

Ask Stakr

Stuck? Open **Ask Stakr** in the sidebar and ask in your own words, for example:

- How do I accept my Wealth Stakr invitation?
- My invitation link has expired, what do I do?
- How do I switch between practices?
- How do I hide widgets on my dashboard?
- Where do I see my role and AI token balance?