



Dashboard Walk-Thru

- REPRESENTATIVE DASHBOARD
- HOUSEHOLD**
- HOUSEHOLD FAVORITES
- SMART QUESTIONS
- REMOTE INQUIRIES
- APPOINTMENTS
- REP DIRECT
- ACTIVITY LOGS
- ALTERNATIVE PARTNERS

HOUSEHOLD

Search by Name or Email | Status

ID	NAME	EMAIL	STATUS	ACTIONS
<input type="checkbox"/>	10			
<input type="checkbox"/>	13	Brian Fitzgerald	brian@eyeballsadvisors.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	14	Ryan Fitzgerald	ryan@eyeballsfinancial.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	15	Mitch Morrison	mitch@eyeballsfinancial.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	16	Bill Burks	bill@eyeballsfinancial.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	116	Peter & Joan Sample	appledev@eyeballsfinancial.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	132	Alexis Michael Rizon	alexismichael2015@gmail.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	1797	Mitch Morrison	androiddev@eyeballsfinancial.com	ACTIVE DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	60	Byerson and constance Swindell	INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	61	Timothy Regular	INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	63	Martin and Debbie Schwinn	INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS

Records per page: 10 | 1-10 of 20



Peter & Joan Sample

Client ID: 116

Email: appledev@eyeballsfinancial.com

Representative: Jina Horton

Cash Balance: 1,542,030.00

AUM Amount: 15,361,016.45

[EDIT DETAILS](#)

STATUS

ACTIVE

ACTIVE

ACTIVE

ACTIVE

ACTIVE

ACTIVE

ACTIVE

INACTIVE

INACTIVE

INACTIVE

[ACTIVITY LOGS](#)[SMART QUESTIONS](#)[REMOTE INQUIRIES](#)[STATEMENTS](#)

Search by Logs

Select Date Range

**Activity Logs****DATE**

VIEW_REPRESENTATIVE_INFO	05/13/2022 00:24:56 AM
VIEW_REPRESENTATIVE_INFO	05/13/2022 00:25:30 AM
VIEW_REPRESENTATIVE_INFO	05/13/2022 00:25:30 AM
VIEW_REPRESENTATIVE_INFO	05/13/2022 00:31:35 AM
VIEW_REPRESENTATIVE_INFO	05/13/2022 10:10:09 AM

Records per page: 5 1-5 of 4937 << < > >>

- REPRESENTATIVE DASHBOARD
- HOUSEHOLD**
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<input type="checkbox"/>	ID	NAME	EMAIL	STATUS	ACTIONS
<input type="checkbox"/>	13	Brian Fitzgerald	brian@eyeballsadvisors.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	14	Ryan Fitzgerald	ryan@eyeballsfinancial.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	15	Mitch Morrison	mitch@eyeballsfinancial.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	16	Bill Burks	bill@eyeballsfinancial.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	116	Peter & Joan Sample	appledev@eyeballsfinancial.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	132	Alexis Michael Rizon	alexismichael2015@gmail.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	1797	Mitch Morrison	androiddev@eyeballsfinancial.com	ACTIVE	DEACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	60	Byerson and constance Swindell		INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	61	Timothy Regular		INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS
<input type="checkbox"/>	63	Martin and Debbie Schwinn		INACTIVE	ACTIVATE ADD TO FAVORITES VIEW DETAILS

Records per page 1-10 of 20

REPRESENTATIVE DASHBOARD

HOUSEHOLD

HOUSEHOLD FAVORITES

SMART QUESTIONS

REMOTE INQUIRIES

APPOINTMENTS

REP DIRECT

ACTIVITY LOGS

ALTERNATIVE PARTNERS

★ HOUSEHOLD FAVORITES

Search by Name or Email

Status

<input type="checkbox"/>	ID	NAME	EMAIL	STATUS	ACTIONS
<input type="checkbox"/>	13	Brian Fitzgerald	brian@eyeballsadvisors.com	ACTIVE	DEACTIVATE REMOVE FROM FAVORITES
<input type="checkbox"/>	15	Mitch Morrison	mitch@eyeballsfinancial.com	ACTIVE	DEACTIVATE REMOVE FROM FAVORITES
<input type="checkbox"/>	116	Peter & Joan Sample	appledev@eyeballsfinancial.com	ACTIVE	DEACTIVATE REMOVE FROM FAVORITES
<input type="checkbox"/>	60	Byerson and constance Swindell		INACTIVE	ACTIVATE REMOVE FROM FAVORITES

Records per page:



REPRESENTATIVE DASHBOARD



HOUSEHOLD



HOUSEHOLD FAVORITES



SMART QUESTIONS



REMOTE INQUIRIES



APPOINTMENTS



REP DIRECT



ACTIVITY LOGS



ALTERNATIVE PARTNERS



? SMART QUESTIONS

Search by Client

QUESTIONS

Peter & Joan Sample	How much is the total value of my Helen of Troy Corp stock?
Peter & Joan Sample	What is the total Mutual Fund under Equities?
Peter & Joan Sample	What is the total US Equity under Equities?
Peter & Joan Sample	What is the total Large Cap Growth under Equities?
Peter & Joan Sample	What is the current details of Apple Inc under Individual?
Peter & Joan Sample	What is the current details of 2009 Cadillac under Joint?
Peter & Joan Sample	What is the current details of 3M Company under Individual?
Peter & Joan Sample	What is the current details of 2009 Cadillac under Joint?
Alexis Michael Rizon	What is the current value of Boeing Co under 401(k)?
Alexis Michael Rizon	What is the current shares of Boeing Co?



SMART QUESTIONS

Search by Client

Search by Question

Select Date Range

CLIENT NAME	QUESTIONS	COUNT	DATE	ACTIONS
Peter & Joan Sample	How much is the total value of my Helen of Troy Corp stock?	2	02/28/2023 01:18 AM	APPOINTMENT DELETE
Peter & Joan Sample	What is the total Mutual Fund under Equities?	5	02/24/2023 17:34 PM	APPOINTMENT DELETE
Peter & Joan Sample	What is the total US Equity under Equities?	1	02/24/2023 16:19 PM	APPOINTMENT DELETE
Peter & Joan Sample	What is the total Large Cap Growth under Equities?	13	01/31/2023 15:50 PM	APPOINTMENT DELETE
Peter & Joan Sample	What is the current details of Apple Inc under Individual?	6	01/31/2023 10:18 AM	APPOINTMENT DELETE
Peter & Joan Sample	What is the current details of 2009 Cadillac under Joint?	3	01/31/2023 08:12 AM	APPOINTMENT DELETE
Peter & Joan Sample	What is the current details of 3M Company under Individual?	8	01/14/2023 14:53 PM	APPOINTMENT DELETE
Peter & Joan Sample	What is the current details of 2009 Cadillac under Joint?	3	12/15/2022 08:22 AM	APPOINTMENT DELETE
Alexis Michael Rizon	What is the current value of Boeing Co under 401(k)?	1	11/25/2022 08:52 AM	APPOINTMENT DELETE
Alexis Michael Rizon	What is the current shares of Boeing Co?	1	11/25/2022 08:52 AM	APPOINTMENT DELETE

Records per page: 10 ▾ 1-10 of 23 |<

Email Form

To
Psample@gmail.com

Subject
Smart Question

Body
Dear Peter & Joan Sample,

I noticed you asked the (EB) app the question "What is the Total Mutual Fund Under Equities?"
Would you like to have a conversation concerning this?

CLOSE

SEND

What is the current details of Apple Inc under Individual?

6

01/31/2023 10:18 AM

What is the current details of 2009 Cadillac under Joint?

3

01/31/2023 08:12 AM

What is the current details of 3M Company under Individual?

8

01/14/2023 14:53 PM

What is the current details of 2009 Cadillac under Joint?

3

12/15/2022 08:22 AM

What is the current value of Boeing Co under 401(k)?

1

11/25/2022 08:52 AM

What is the current shares of Boeing Co?

1

11/25/2022 08:52 AM

Search by Question

DATE



REPRESENTATIVE DASHBOARD



HOUSEHOLD



HOUSEHOLD FAVORITES



SMART QUESTIONS



REMOTE INQUIRIES



APPOINTMENTS



REP DIRECT



ACTIVITY LOGS



ALTERNATIVE PARTNERS



REMOTE INQUIRIES

Search by Client

CLIENT NAME

QUESTIONS

Peter & Joan Sample

Should I sell my real estate

Peter & Joan Sample

How much is the total value of my Advisorshares Dorsey Etf stock?

Peter & Joan Sample

Should I buy Apple Inc stock

Peter & Joan Sample

Should I buy Shopify Inc

Peter & Joan Sample

Can I buy Tesla Inc stock

Peter & Joan Sample

How much is the total value of my Zscaler Inc stock?

Peter & Joan Sample

Why aren't you answering my questions

Peter & Joan Sample

What is the current share of Baidu Inc?

Peter & Joan Sample

What is the current share of Capital One Financial Corp?

Peter & Joan Sample

How many shares of avon products do I o





REMOTE INQUIRIES

CLIENT NAME	QUESTIONS	COUNT	DATE	ACTIONS
Peter & Joan Sample	Should I sell my real estate	1	02/28/2023 06:12 AM	APPOINTMENT D
Peter & Joan Sample	How much is the total value of my Advisorshares Dorsey Etf stock?	2	02/27/2023 14:45 PM	APPOINTMENT D
Peter & Joan Sample	Should I buy Apple Inc stock	1	02/21/2023 10:29 AM	APPOINTMENT D
Peter & Joan Sample	Should I buy Shopify Inc	1	02/09/2023 11:37 AM	APPOINTMENT D
Peter & Joan Sample	Can I buy Tesla Inc stock	2	01/27/2023 03:44 AM	APPOINTMENT D
Peter & Joan Sample	How much is the total value of my Zscaler Inc stock?	9	01/05/2023 10:23 AM	APPOINTMENT D
Peter & Joan Sample	Why aren't you answering my questions	1	01/05/2023 10:19 AM	APPOINTMENT D
Peter & Joan Sample	What is the current share of Baidu Inc?	3	11/19/2022 09:24 AM	APPOINTMENT D
Peter & Joan Sample	What is the current share of Capital One Financial Corp?	1	11/19/2022 09:24 AM	APPOINTMENT D
Peter & Joan Sample	How many shares of avon products do I o	1	11/19/2022 09:04 AM	APPOINTMENT D

Records per page: 10 1-10 of 4

RIQ Email Form

To

Psample@gmail.com

Subject

Remote Inquiry Question

Body

Dear Peter & Joan Sample,
I noticed you asked the (EB) app the question " Should I sell my real estate?"
Would you like to have a conversation concerning this?

Thank you,

CLOSE

SEND

Search by Question

DATE

02/28/2023 06:12 AM

02/27/2023 14:45 PM

02/21/2023 10:29 AM

02/09/2023 11:37 AM

Can I buy Tesla Inc stock

2

01/27/2023 03:44 AM

How much is the total value of my Zscaler Inc stock?

9

01/05/2023 10:23 AM

Why aren't you answering my questions

1

01/05/2023 10:19 AM

What is the current share of Baidu Inc?

3

11/19/2022 09:24 AM

What is the current share of Capital One Financial Corp?

1

11/19/2022 09:24 AM

How many shares of avon products do I o

1

11/19/2022 09:04 AM



REPRESENTATIVE
DASHBOARD



HOUSEHOLD



HOUSEHOLD FAVORITES



SMART QUESTIONS



REMOTE INQUIRIES



APPOINTMENTS



REP DIRECT



ACTIVITY LOGS



ALTERNATIVE PARTNERS



APPOINTMENTS

NAME

Peter & Joan Sample

Peter & Joan Sample

Peter & Joan Sample

Peter & Joan Sample

Peter & Joan Sample

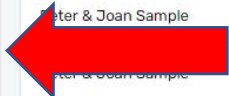
Peter & Joan Sample

Peter & Joan Sample

Bill Burks

Mitch Morrison

Ryan Fitzgerald



APPOINTMENTS

NAME	DATE	STATUS	ACTIONS
Peter & Joan Sample	02/08/2023 08:00 AM	CANCELLED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	02/07/2023 03:00 AM	CANCELLED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	02/03/2023 03:00 AM	CANCELLED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	02/03/2023 02:00 AM	PENDING	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	01/26/2023 03:00 AM	PENDING	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	01/25/2023 03:00 AM	PENDING	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Peter & Joan Sample	01/18/2023 06:00 AM	PENDING	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Bill Burks	10/01/2022 06:00 AM	APPROVED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Mitch Morrison	09/26/2022 23:00 PM	APPROVED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>
Ryan Fitzgerald	09/24/2022 02:00 AM	CANCELLED	<button>APPROVE</button> <button>REJECT</button> <button>CANCEL</button>

Records per page: 10 1-10 of 12

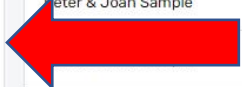
REPRESENTATIVE DASHBOARD

- HOUSEHOLD
- HOUSEHOLD FAVORITES
- SMART QUESTIONS
- REMOTE INQUIRIES
- APPOINTMENTS
- REP DIRECT**
- ACTIVITY LOGS
- ALTERNATIVE PARTNERS



REP DIRECT

CLIENT NAME	TOPIC
Peter & Joan Sample	Best time to sell apple shares
Peter & Joan Sample	Facebook
Peter & Joan Sample	Testing
Peter & Joan Sample	Facebook
Peter & Joan Sample	Tesla stock
Peter & Joan Sample	Should I buy facebook shares?
Mitch Morrison	Best time to sell Ailibaba



TOPIC**Status****DATE****ACTIONS**

Best time to sell apple shares

Read

01/16/2023 06:07 AM

OPEN

DELETE

Facebook

Read

01/16/2023 08:18 AM

OPEN

DELETE

Facebook

Read

02/02/2023 02:16 AM

OPEN

DELETE

Tesla stock

Unread

02/23/2023 04:29 AM

OPEN

DELETE

Should I buy facebook shares?

Read

03/21/2023 16:01 PM

OPEN

DELETE

Best time to sell Aibaba

Unread

02/01/2023 12:34 PM

OPEN

DELETE

Records per page:

Send Email

To
Psample@gmail.com

Subject
Rep Direct [Best time to sell apple shares]

Body
Hello Peter & Joan Sample,
I saw you asked "When would be the best time to sell my Apple shares?"
When would you like to have a conversation concerning this?

Thank you,

CLOSE

SEND

Should I buy facebook shares?

Read

Best time to sell Alibaba

Unread

Search by

DATE

01/16/2023 06:07 AM

01/16/2023 08:18 AM

02/02/2023 02:16 AM

02/23/2023 04:29 AM

03/21/2023 16:01 PM

02/01/2023 12:34 PM

- REPRESENTATIVE DASHBOARD
- HOUSEHOLD
- HOUSEHOLD FAVORITES
- SMART QUESTIONS
- REMOTE INQUIRIES
- APPOINTMENTS
- REP DIRECT
- ACTIVITY LOGS**
- ALTERNATIVE PARTNERS

ACTIVITY LOGS

Search by Name or Activity

ID	NAME	ACTIVITY
116	Peter & Joan Sample	VIEW_REPRESENTATIVE_INFO
116	Peter & Joan Sample	VIEW_REPRESENTATIVE_INFO
116	Peter & Joan Sample	VIEW_REPRESENTATIVE_INFO
116	Peter & Joan Sample	ASK_EYEBALLS
116	Peter & Joan Sample	ASK_EYEBALLS
116	Peter & Joan Sample	VIEW_SMART_QUESTIONS
116	Peter & Joan Sample	VIEW_FAVORITE_QUESTIONS
116	Peter & Joan Sample	VIEW_SMART_QUESTIONS
116	Peter & Joan Sample	VIEW_SMART_QUESTIONS
116	Peter & Joan Sample	VIEW_REPRESENTATIVE_INFO



- REPRESENTATIVE DASHBOARD
- HOUSEHOLD
- HOUSEHOLD FAVORITES
- SMART QUESTIONS
- REMOTE INQUIRIES
- APPOINTMENTS
- REP DIRECT
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Eyeballs Financial Alternative Investment Partners

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SEARCH [input] [input] [input] [input]



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News	Equity	Equity	Equity	Equity	Equity
Equity	Equity	Equity	Equity	Equity	Equity

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