

Wealth Manager

Last Revised: 10/25/2023

Recommended System Settings

Browser and Operating Systems

To ensure a satisfactory experience, Wealth Manager has been verified for compatibility for use with the following browsers and operating systems. The browsers are verified through the two most recent versions available. This information is also contained in the Help section on the website.

Compatible Browser	Compatible Operating Systems
Internet Explorer	Windows 7, Windows 8, Windows 8.1, Windows 10
Edge	Windows 10
Firefox	Windows 7, Windows 8, Windows 8.1, Windows 10
Google Chrome	Windows 7, Windows 8, Windows 8.1, Windows 10
Safari	Mac OS X v10.9 "Mavericks" Mac OS X v 10.10 "Yosemite" iOS iPad 2,3, and 4

PC and Browser Settings

To run the product effectively, adherence to the following minimum workstation characteristics is recommended. Performance issues may arise if workstations fall below these minimum recommendations:

Component	Standard
CPU	Pentium Dual-Core/Athlon X2 minimum, Core 2 Duo/Athlon II X2 or higher recommended
RAM	RAM 1G required minimum, 2G recommended
Video Adaptor	1024 x 768 or greater resolution, 4:3 Aspect Ratio
Web Browser	Compatible browser
Additional Software Recommended	Microsoft ® Excel ® 2003, 2007 or 2010 Adobe® Reader 11.0 or newer



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Screen Resolution

To maximize the amount of data displayed on the pages, it is recommended that each workstation's resolution be set to 1024 x 768 pixels or higher.

Windows Settings

Use the following procedure to adjust the Folder Options in Windows Explorer:

1. Click the Windows Start icon
2. Click Control Panel
3. Click Default Programs
4. Click Associate a File Type or Protocol with a Program
5. Find the .xls extension on the list, and if it is not associated with Microsoft Excel, select the .xls extension to highlight the record.
6. Click Change Program
7. Select or browse to select Microsoft Excel
8. Click OK to close the window and save the selection

Browser Settings

- Browser cache option set to Every Time.
- Cookie options set to On.
- Enable automatic prompting for downloaded files.
- Text size set to smaller.
- Enable active scripting.
- Allow META REFRESH.

Need to Contact Commerce Trust Tech Support?

Call 888-345-4366 Monday through Friday 8 a.m. - 4:30 p.m.



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