



# Trovata - Capital One

## Client Resource Guide

Updated - December 2021

[www.trovata.io](http://www.trovata.io)



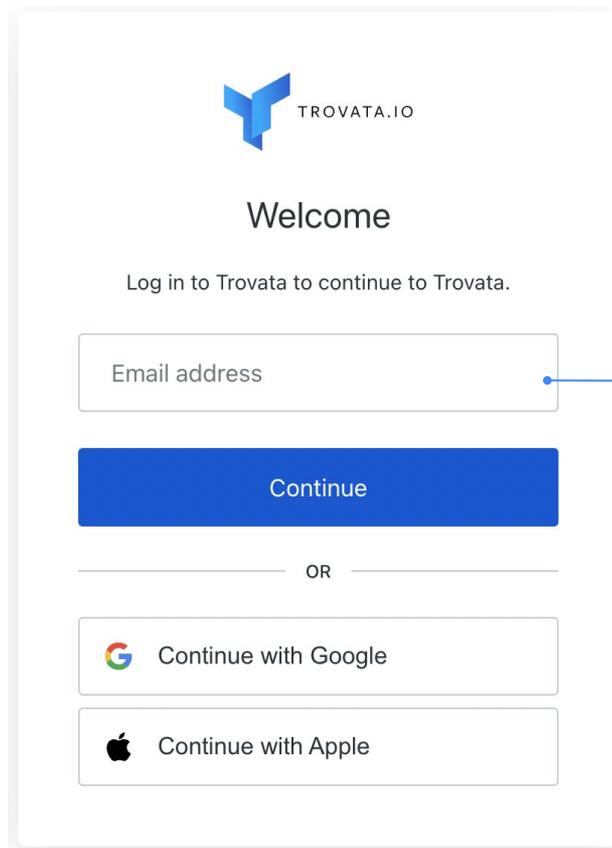
## Trovata Credentials

- The initial set-up to add the primary user is done by Trovata
- Following the primary user set-up, Trovata is a self administered tool
- Each **user** is provided with a **unique password** credential email when their profile is created
  - *The email address from which the email is sent is [Support@Trovata.io](mailto:Support@Trovata.io)*
  - The credential set-up email for the **initial password reset** will only be valid for two business days
  - Any assistance request should be emailed to [CS@Trovata.io](mailto:CS@Trovata.io) or [Support@Trovata.io](mailto:Support@Trovata.io)



## Logging into Trovata

- Navigate the client to **app.trovata.io**
- The page will be redirected to the Trovata login page
  - *If the page is not redirected click*  
  
*on the top right corner*



TROVATA.IO

### Welcome

Log in to Trovata to continue to Trovata.

Continue

OR

 Continue with Google

 Continue with Apple

The client will enter the **email address** associated with their Trovata credentials and click **continue**

*Should they have any questions on what if they have set-up credentials please have them email **CS@Trovata.io***



# Logging into Trovata

TROVATA.IO

## Enter Your Password

administrator+acme-five@trovata.io [Edit](#)

Password  
.....

[Forgot password?](#)

Continue

The client will enter their **password** and click **continue**

*The **forgot password** button may be prompted once the initial password has been set. This feature won't apply to those users that have a SSO setup (they will need to contact their SSO administrator) For assistance please email **CS@Trovata.io***



# Communicating with Trovata



This chat icon will appear on the bottom right corner of the client's Trovata page.

Clients may click on the icon to open the Trovata support resources.

The screenshot shows the Trovata chat interface. At the top left is the Trovata logo. Below it, the text reads "Hi Wile" followed by a waving hand emoji. Underneath is the prompt "Ask us anything, find help, or share your feedback!". The main content area is divided into three sections: 1. "Start a conversation" which includes a profile picture of a woman, the text "Our usual reply time" and "A few minutes" with a clock icon, and a blue button with a right-pointing arrow and the text "Send us a message". 2. "See all your conversations" with a blue link. 3. "Search for help" which includes a search bar with a magnifying glass icon and the placeholder text "Search articles...". At the bottom is a section titled "Balances Tour" with the text "View your connected bank account balances, all in one place".

Client's may click on the **send us a message button** to begin a direct secure conversation with the Trovata team

- *We respond from 7am to 7pm PST*

Client's are able to search the **resource library** for additional support documents and training guides