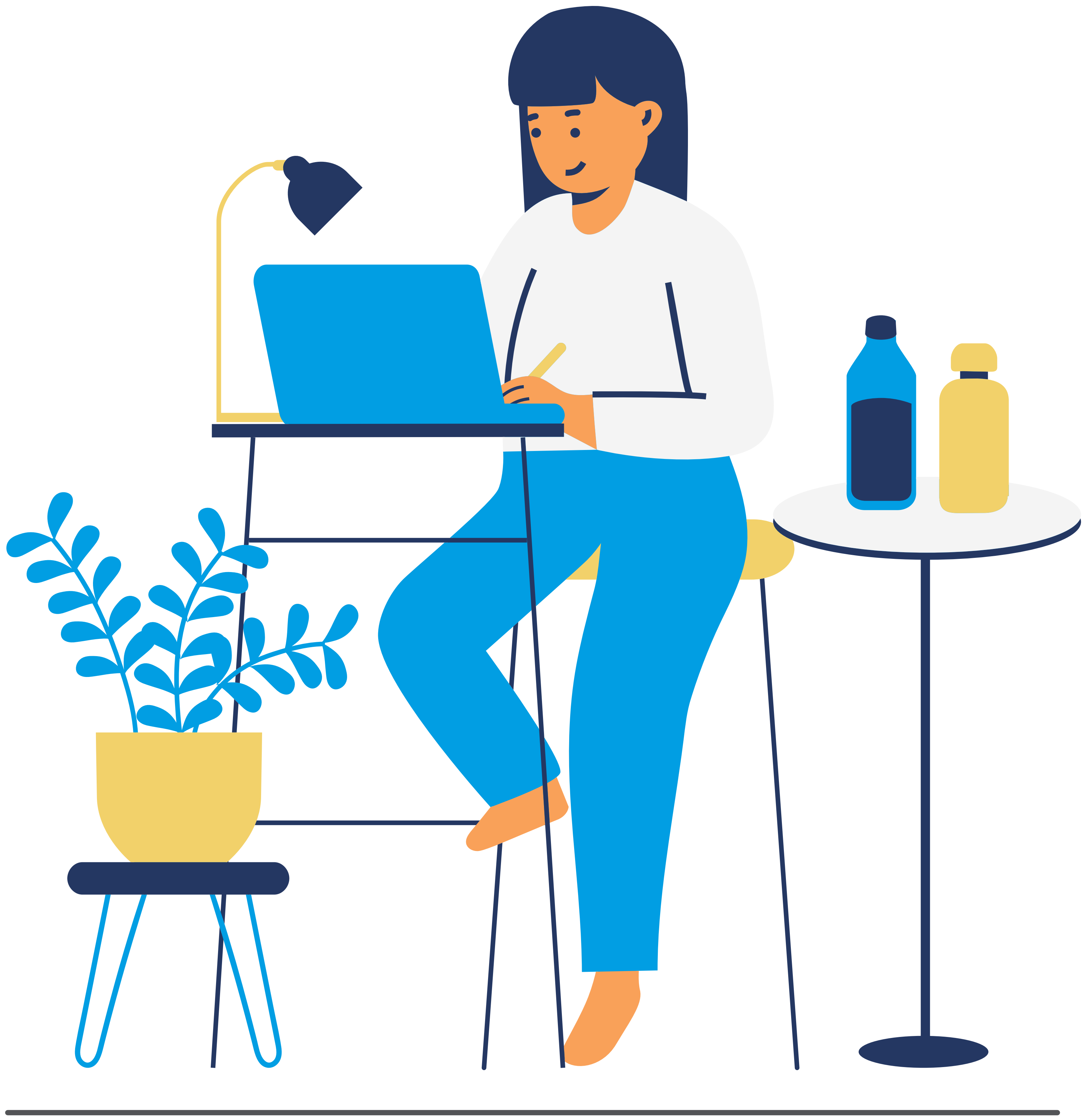
Guide to using the Client Portal

Making it easy for clients to exchange documents and sensitive information



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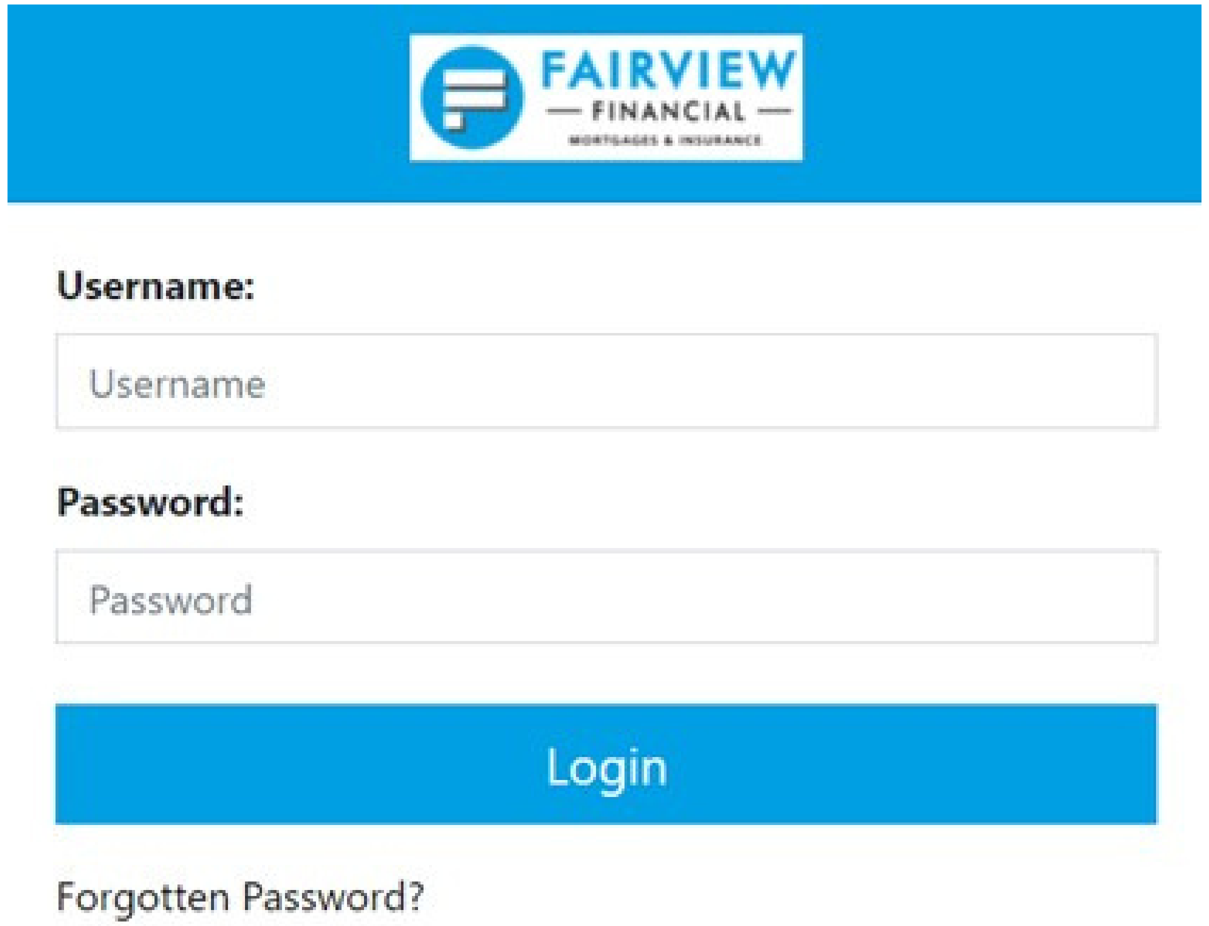
Logging In

When your Adviser creates your portal account, you will receive two emails – one with your user name with the web link for the Portal, and a second one with your initial password. This email may go through to your junk folder, so please check to see if you've received it.



Click on the web link to open the Portal.

Enter your username and password and click Login.

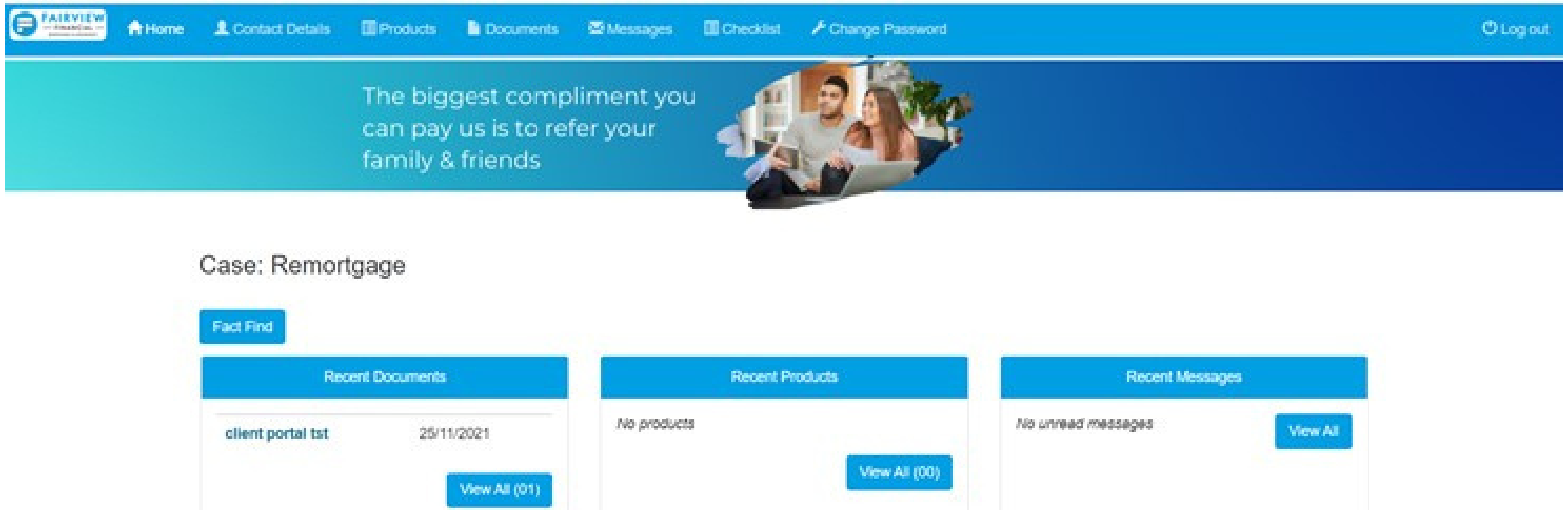
The first time you log in, you will need to change your password. Your new password must be over **seven** characters in length and contain at least one number. Note that your password is case sensitive. If you forget your password, please contact your Adviser who will issue you a new one.

Note

If when you log in, your Adviser is working on your file at the same time, you will only have '**read-only**' access to the portal. To gain full access, please log in again a short while later.

Home Screen

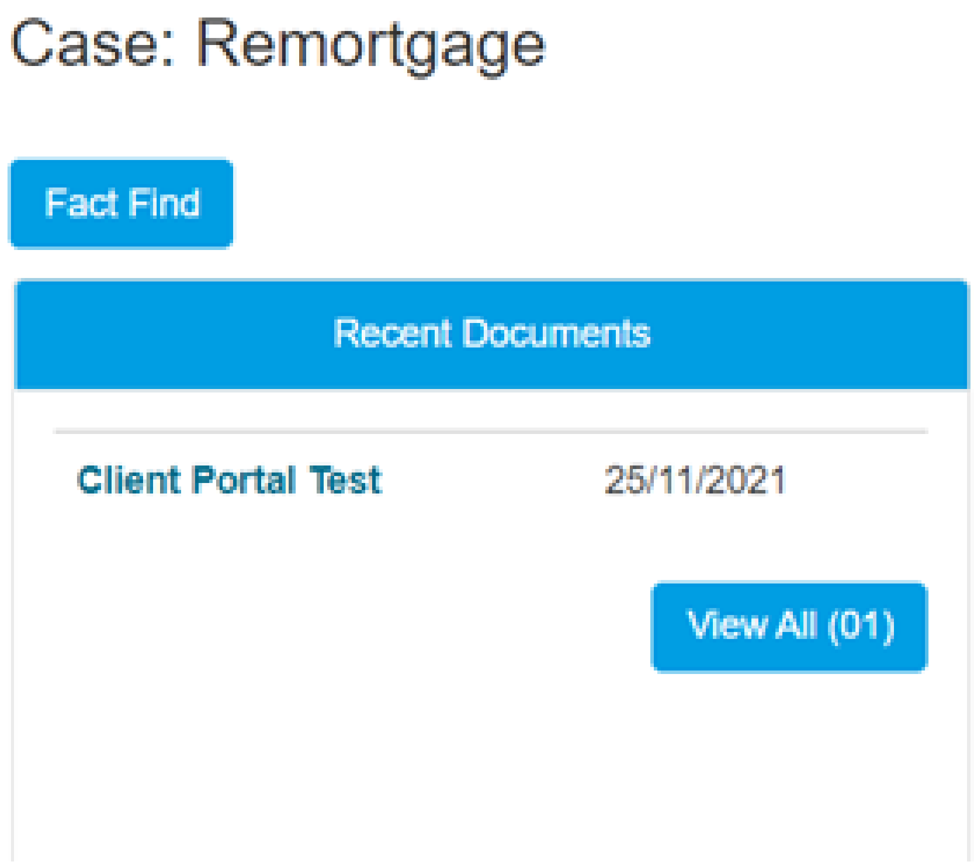
The Home Screen will list any recent documents that have been added by your Adviser, show any recent messages and your current mortgage or insurance cases.



All your dealings with your Adviser are organised by 'case', e.g. 'Remortgage' or 'House Move'. If you have worked with your Adviser previously, you may have multiple 'cases' so please select the correct one using the dropdown list.

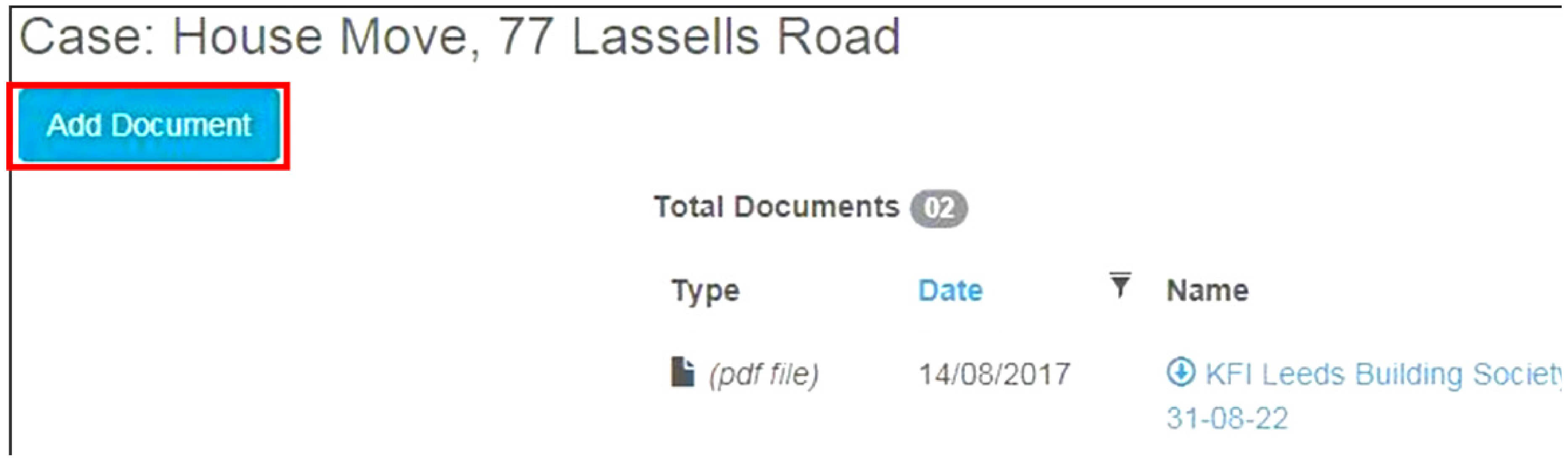
Recent Documents

This section shows the most recently updated documents in the Client Portal.
Click ‘**View All**’ to display all documents available; alternatively, you can select ‘**Documents**’ from the menu. To open a document, simply click on the document name.



Uploading Documents via the Client Portal

The Client Portal makes it easy to send documents to your Adviser electronically, and securely. If you want to upload a document or a file for the Adviser to see, click on the ‘**Add Document**’ button to open the ‘Upload’ screen.



Click the '**Browse**' button to find the document that you wish to upload, give the document a suitable name, and click '**Upload**' to complete the process.

Once uploaded, the screen will return to the list of documents with your newly uploaded file at the top of the list. As soon as you upload a document, your Adviser is alerted through an automatically generated task.

Tips for uploading documents

Once you have chosen the file you want to upload, please name it, eg **Bank Statement June**

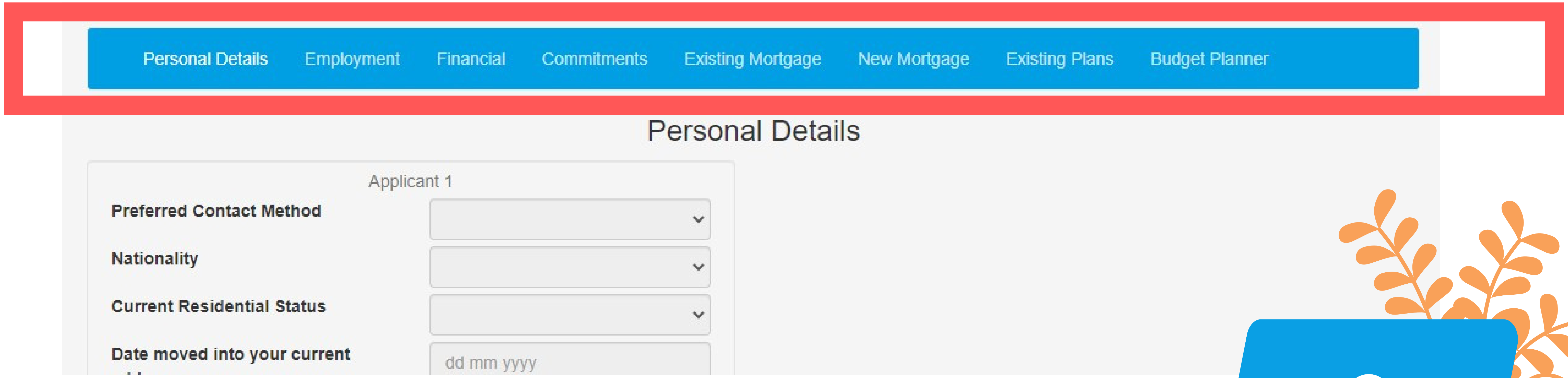
If you do not have access to a scanner, you can photograpgh documents using your mobile device. The pictures must be good quality or they will be rejected.

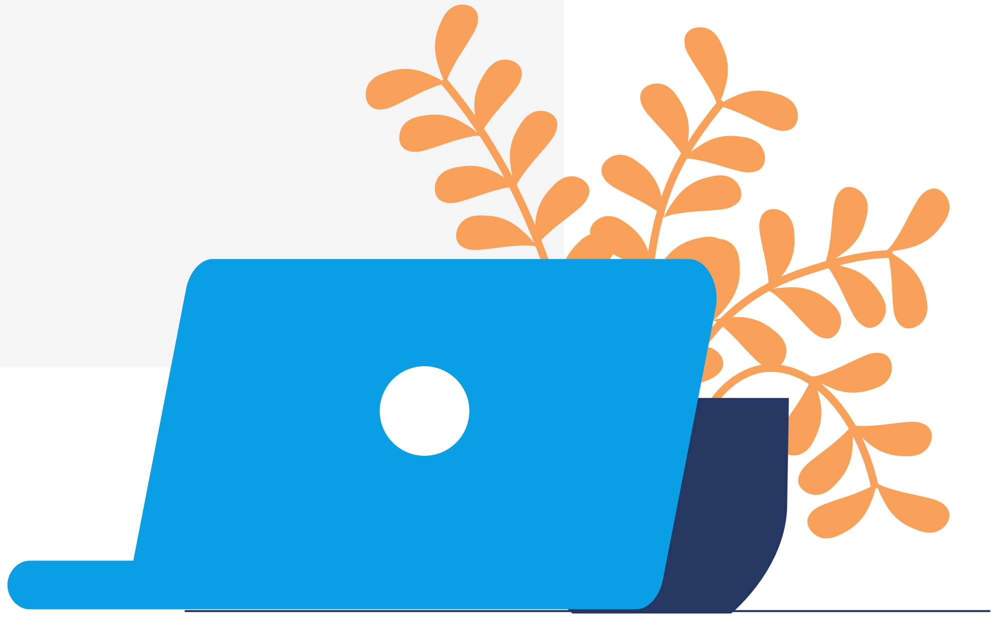
You can use the **free** scanning App **Adobe Scan** to transform images of your documents into high-quality PDFs.

The Fact Find

Your Adviser requires a certain amount of personal information in order to recommend the most suitable products to meet your needs.

Your information is stored in a document known as a ‘Fact Find’. Using the portal, your Adviser can give you access to review the information in your Fact Find. You access the Fact Find by clicking on the Home Screen and clicking the ‘**Fact Find**’ button.You will then see the different areas where you can enter and/or review information.

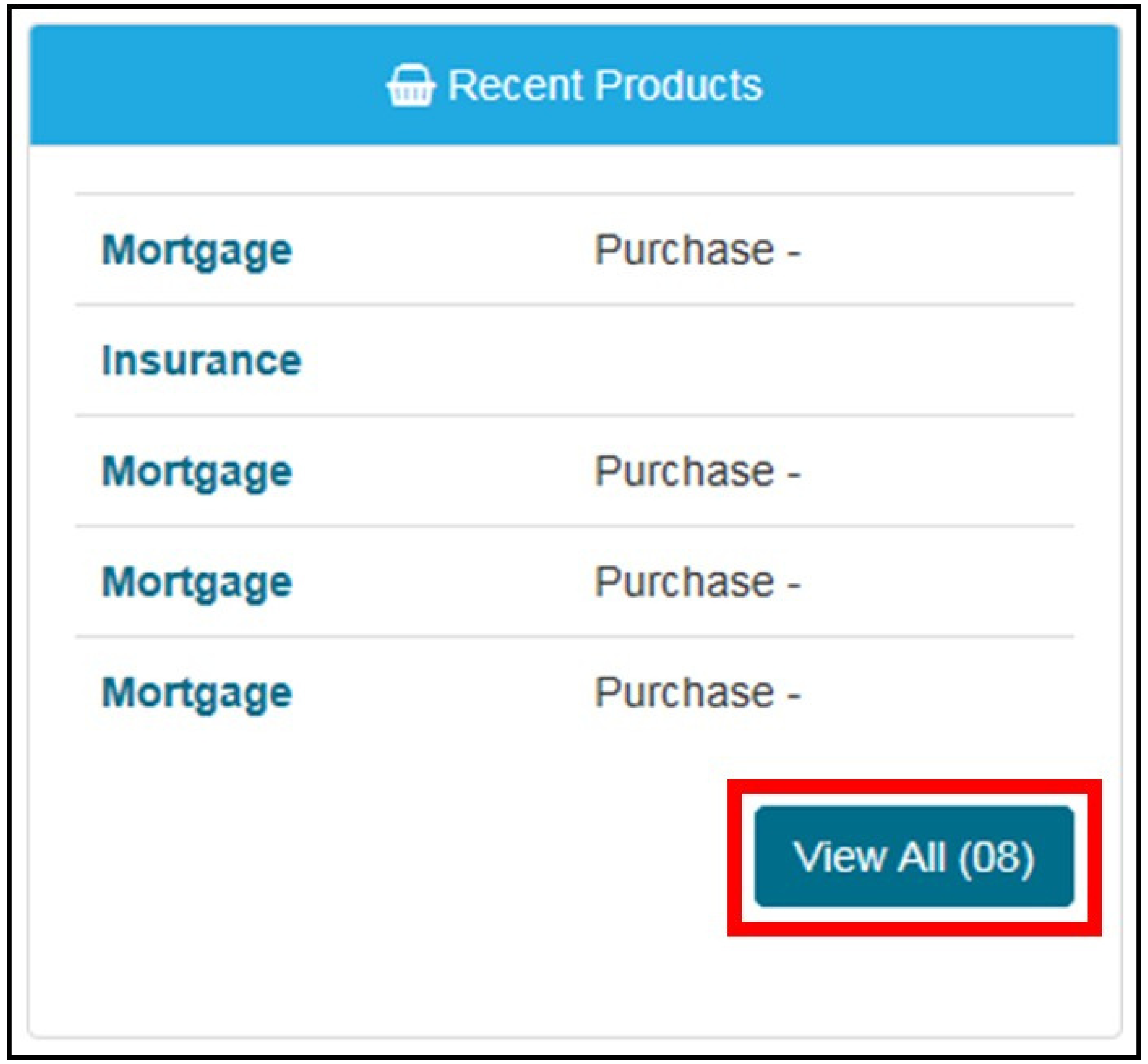




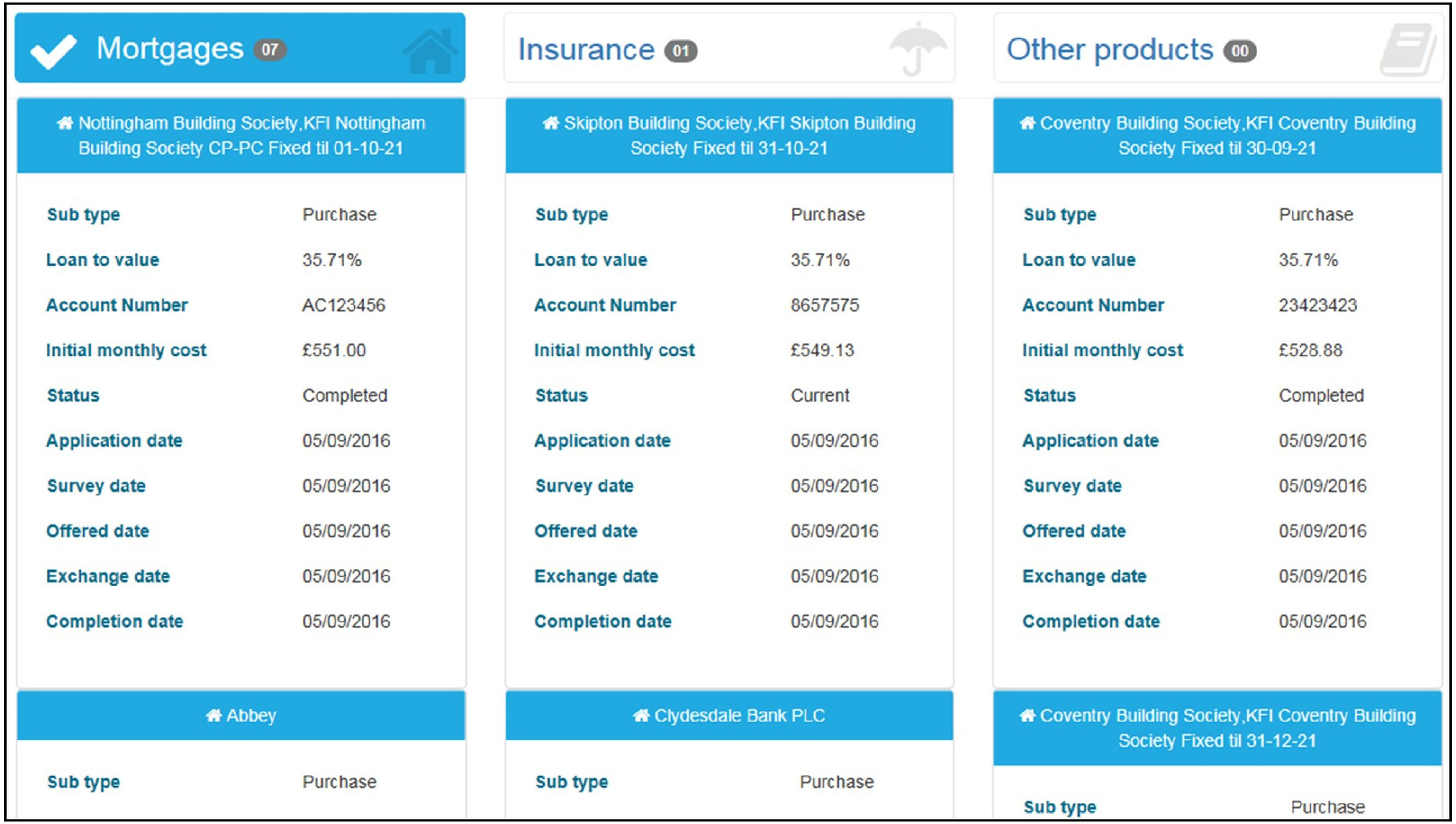
Recent Products

This screen shows all of the products associated with your current file. The screen will show the most recently updated products.

To see all your products, click on the '**View All**' button, or select '**Products**' from the main menu.



Your cases are divided into ‘**Mortgages**’, ‘**Insurance**’ and ‘**Other products**’. A summary of product information is displayed on screen as shown below:



Secure Messaging

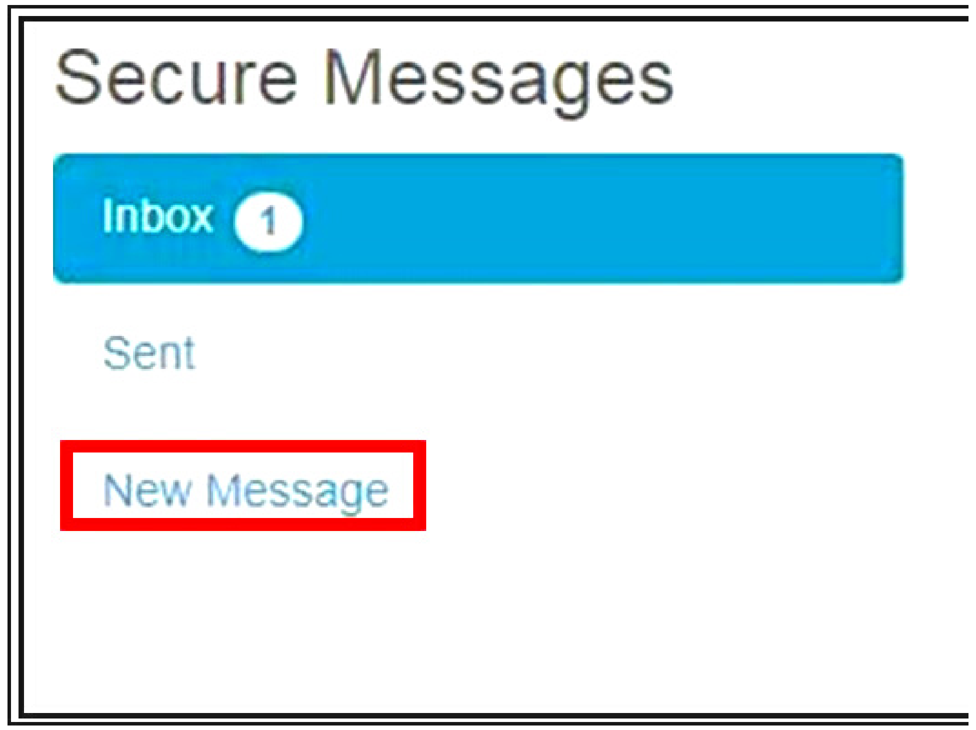
The home page shows a list of the most recent messages (each of which can be viewed by clicking on the message title), and you can open the '**Secure Messages**' area from the home page to see a full list of any existing messages.

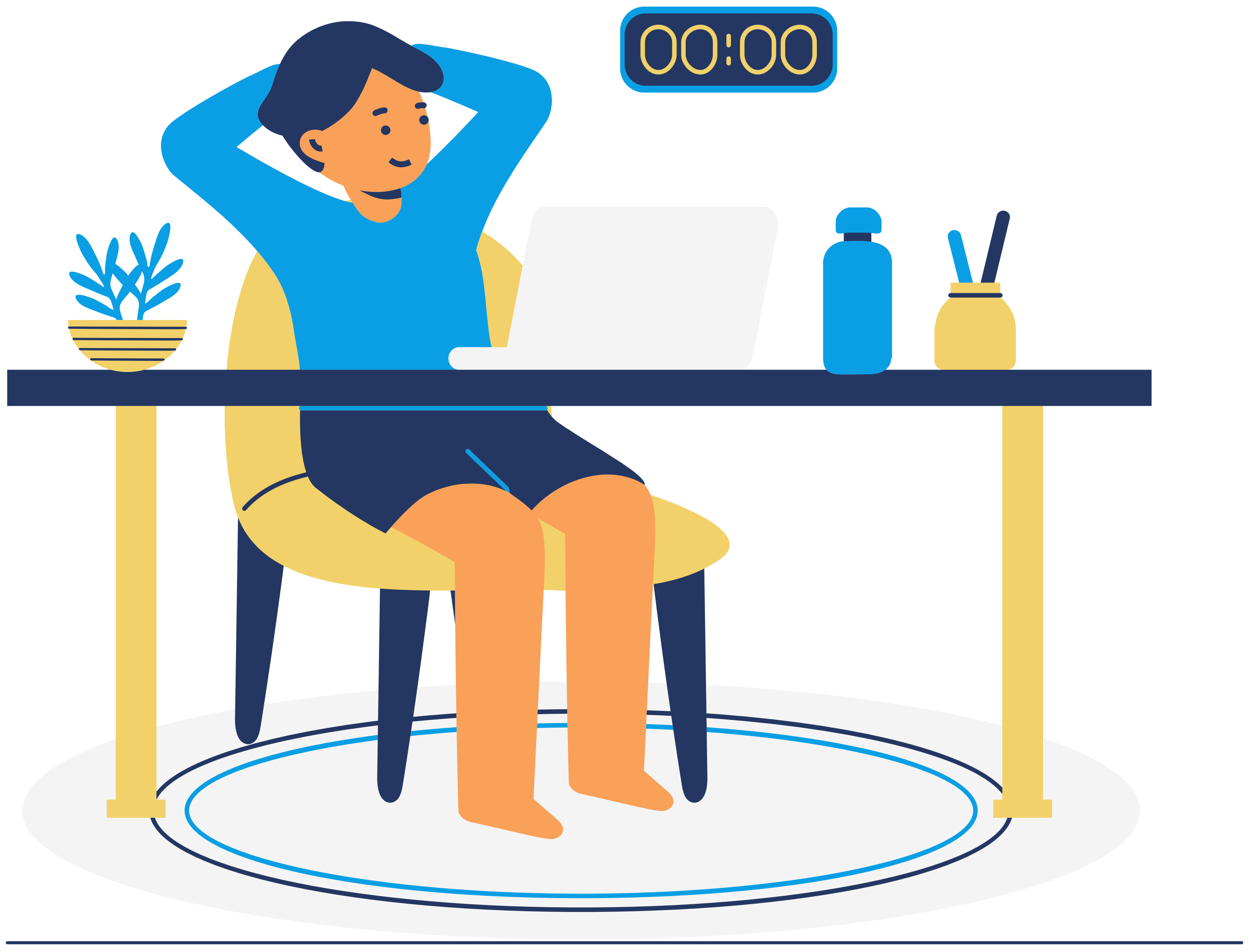
Reading a Message in the Portal

Within the 'Secure Messaging' page, unread messages are identified with an envelope icon. Click '**Read**' to open the message. Once read, the envelope icon is replaced with a tick.

Adding a Message in the Portal

Click '**New Message**' to open a blank message window. You can write a message to your Adviser as you would a standard email and click '**Send**'.





Contact Details Section

The Contact Details screen displays your name, address, phone numbers and email address. You can amend this information; please remember to you click the '**Save**' button to save your changes.

Changing your Password

You can change your password using the '**Change Password**' option. Just enter your existing and new passwords and click 'Save Changes'.

Help using the Portal

If you have any further questions about how to use the Portal account, your Adviser will be able to help you. Please call 01242 697821 for assistance.