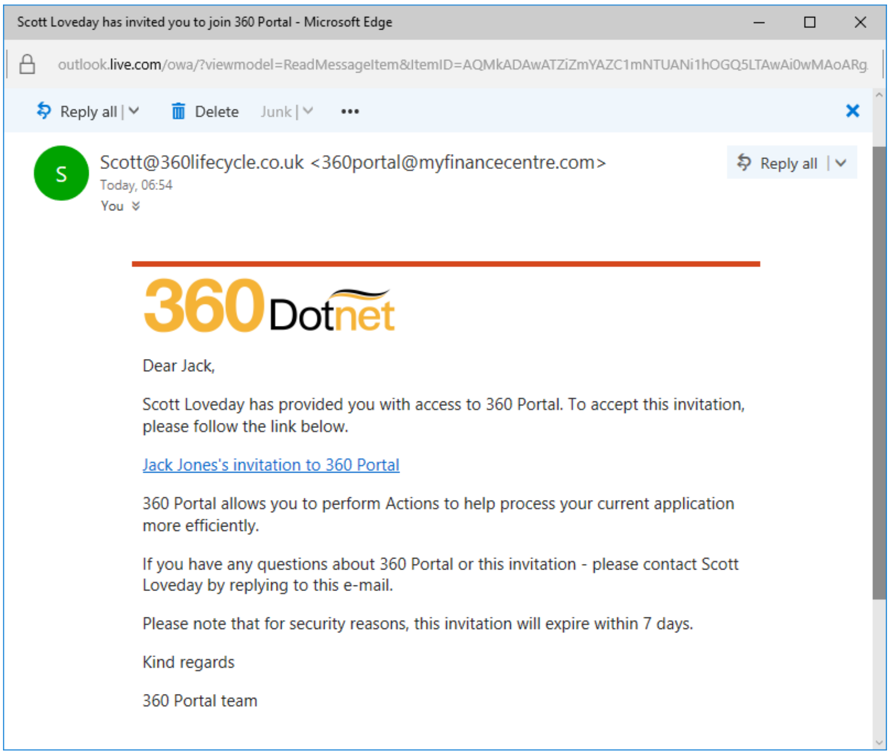
360 Client Portal

Training Manual

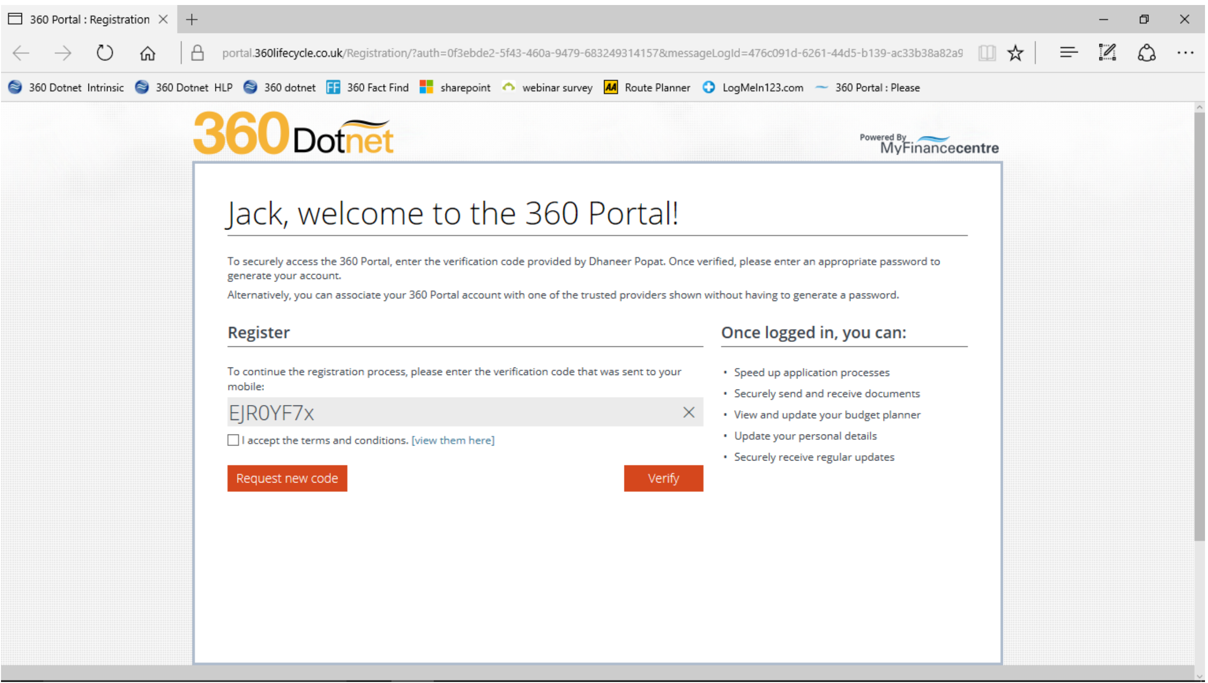
Powered by MyFinancecentre

Client Portal

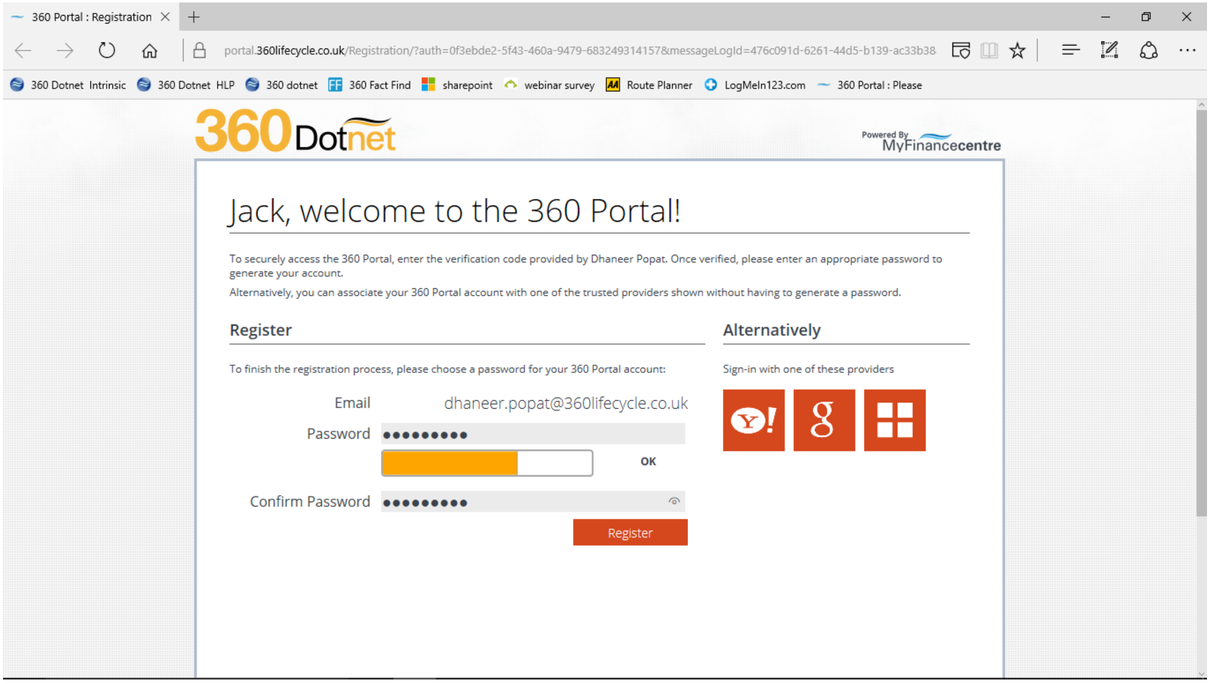
Once your adviser has invited you to the client portal, you will receive an email with the portal hyperlink included and also be sent an activation code by SMS to their mobile number. The invite will last 7 days but can be re-sent from the 360 case record at any time.



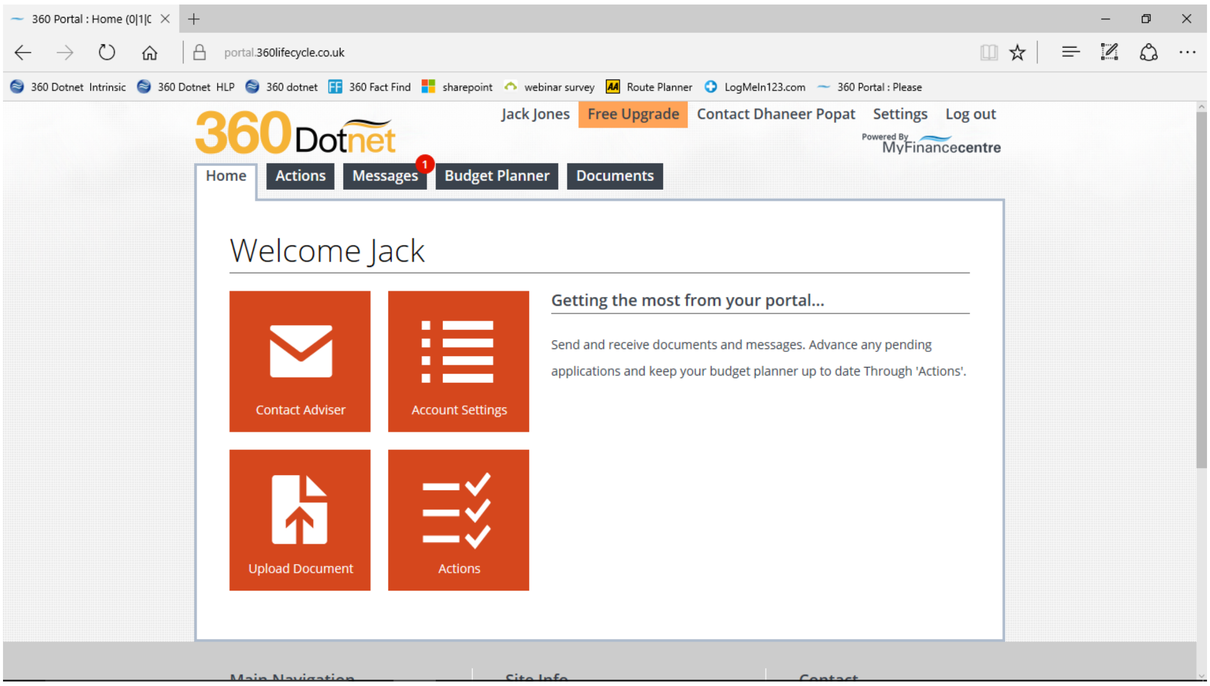
The hyperlink within the email will direct you to your adviser's portal registration site where the activation code sent by SMS can be entered in order to register.



You are asked to enter your email address and choose a password in order to create a portal account. Alternatively if you hold a Yahoo, Google or Windows Live account then if preferred they can use this existing account without creating a portal account.

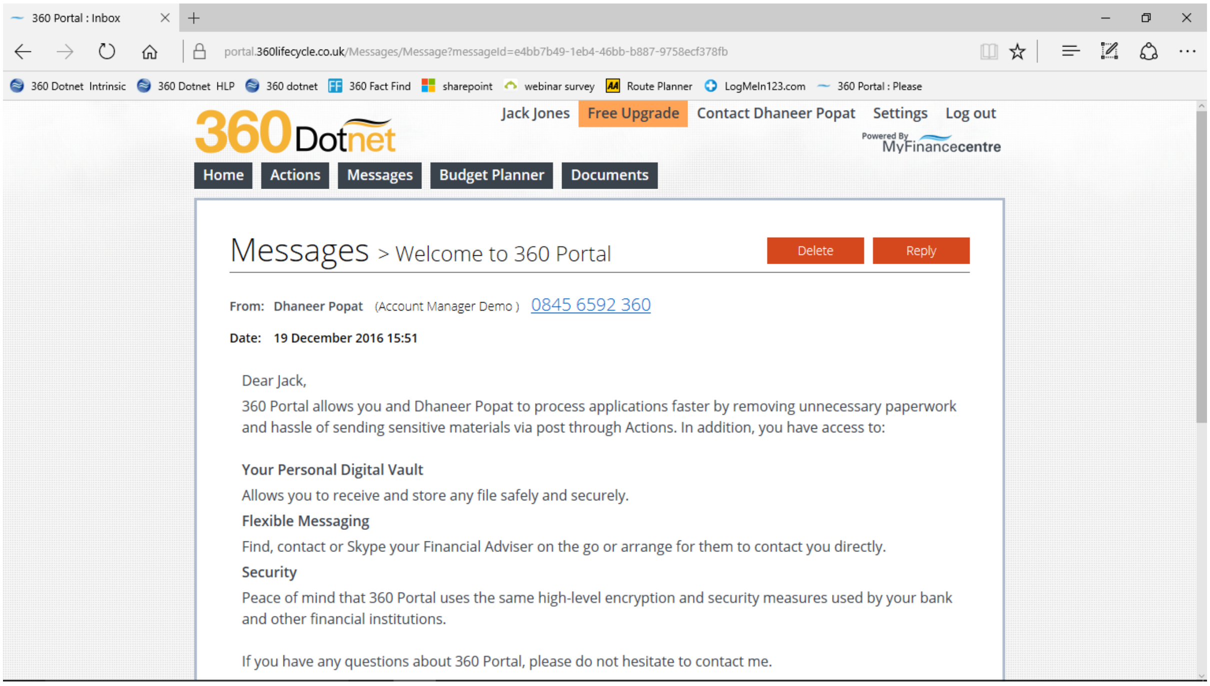


Once logged in you will then be able to access some of the portal features. You have the ability to view their **Actions, Messages, Budget Planner and Documents** as well having access to contact your adviser, amend your portal account settings and choose to **Upgrade** (see Portal Upgrade section)**.**



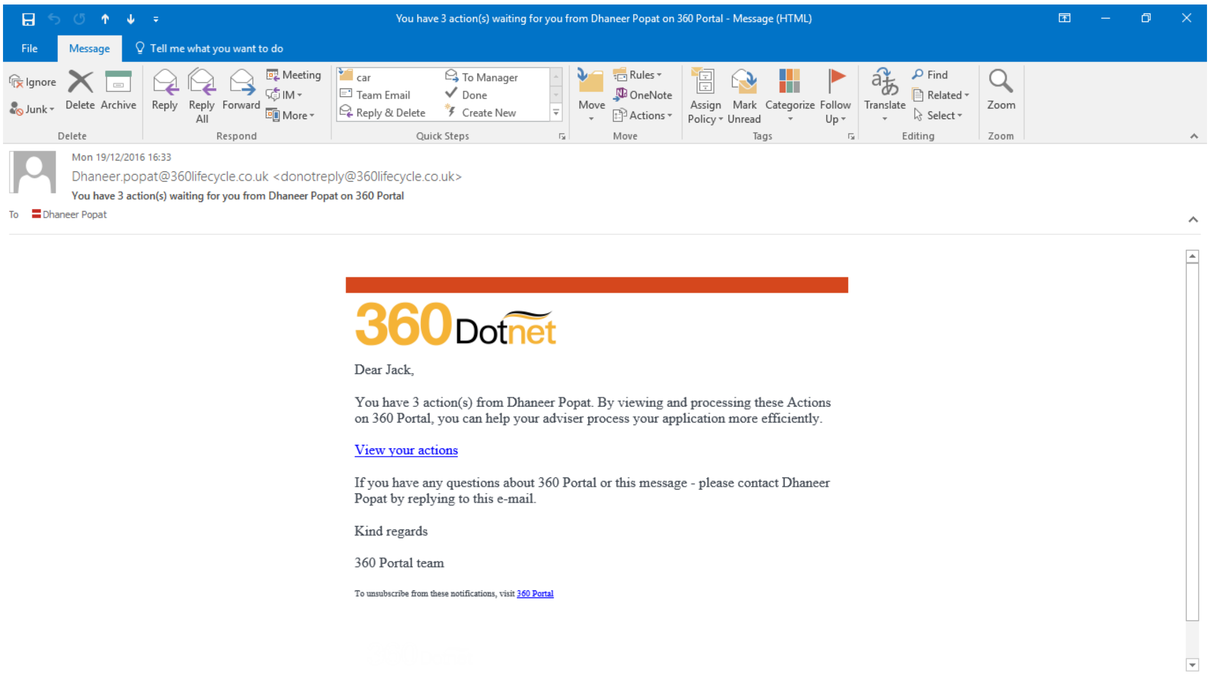
Client Portal

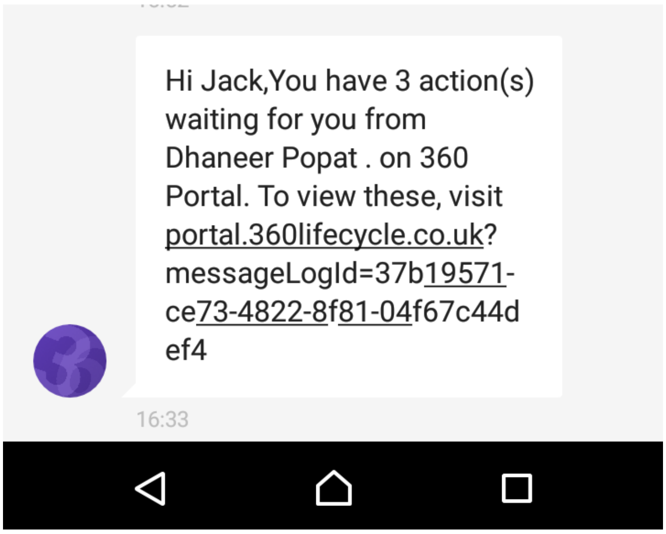
When selecting the **'Message'** tab you have the ability to view any messages and choose delete or reply. As below a message is automatically included as part of the portal invitation.



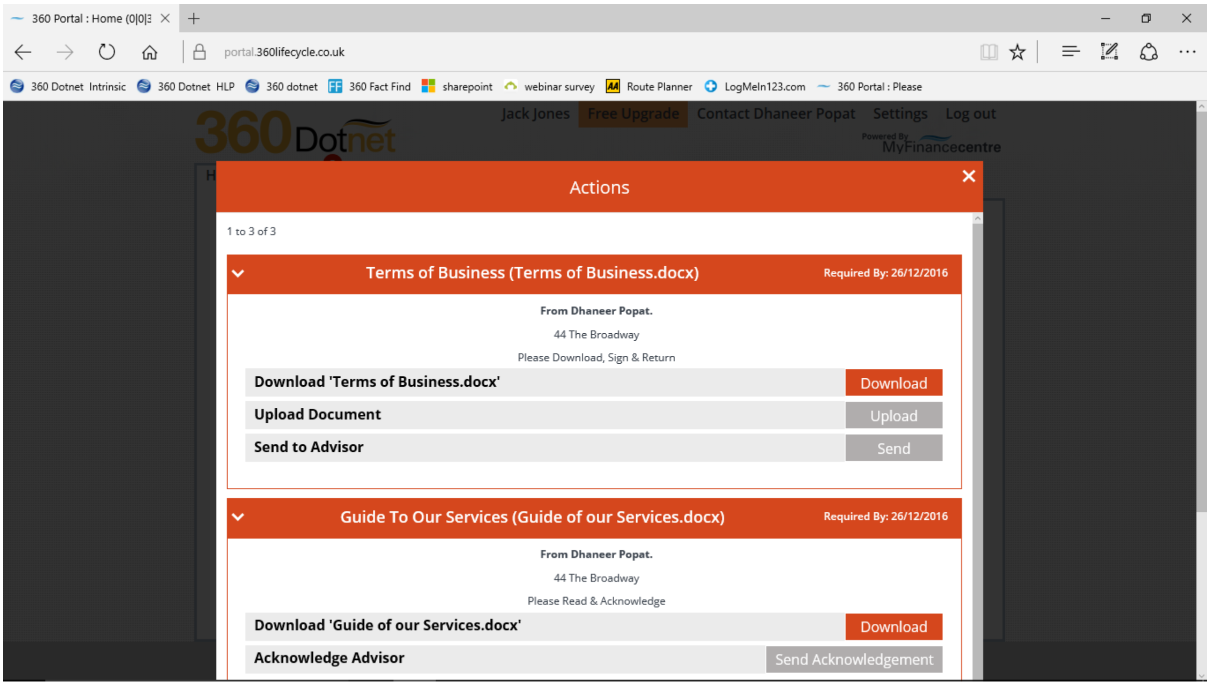
Portal View (Actions)

Posting Actions into the client portal will send an automatic email and SMS message to you alerting you that an Action requiring attention has been sent.

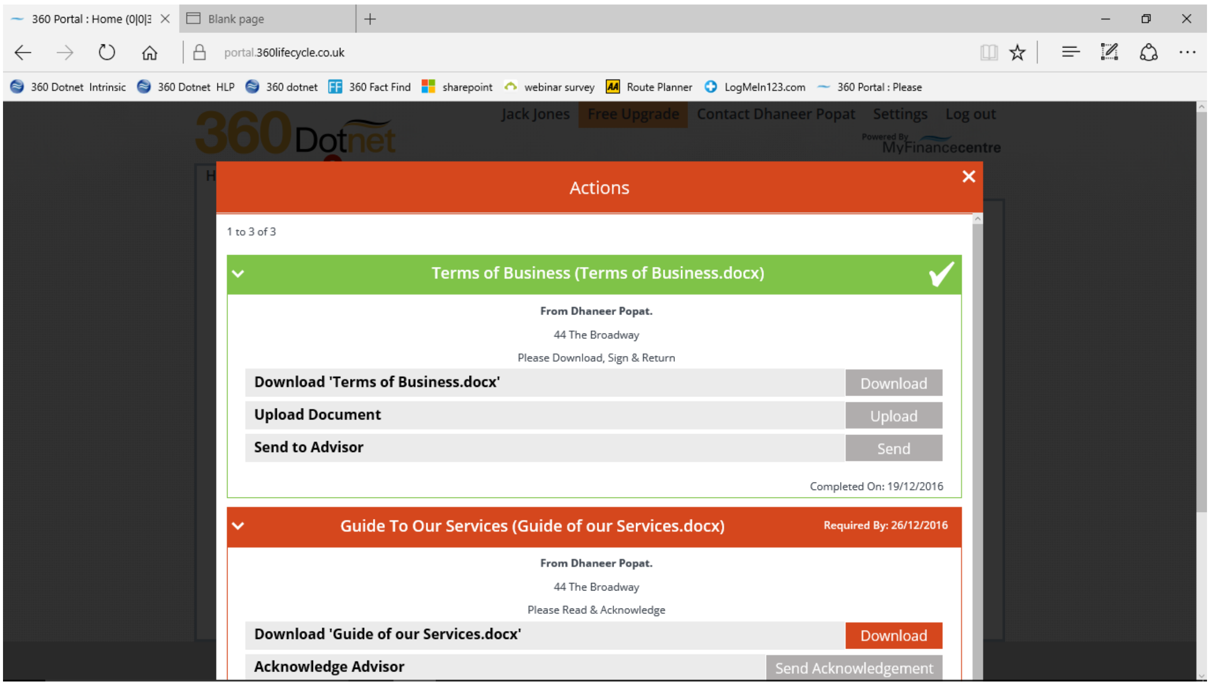




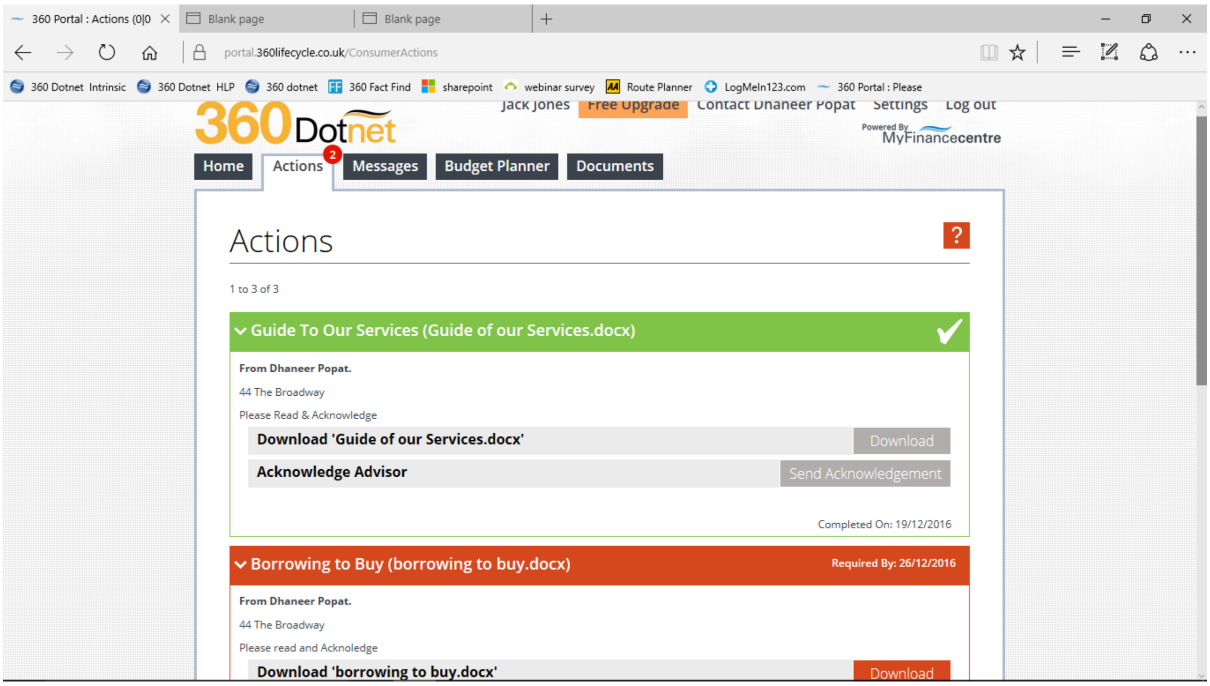
When next logging into the portal, you will immediately be directed to any outstanding Actions. If needed they can close this screen and at a later point simply click on the **'Actions'** tab to again see any outstanding Actions.



Depending on the Action type, you will either '**Download'** or '**Upload'** the required documents and '**Send Acknowledgment'** or '**Send'**. This will then complete the outstanding Action.



Within the portal completed Actions are displayed GREEN.



Key Colours for Actions

Blue – The Action is still **Outstanding** but has not reached overdue stage.

Grey – The Action has been manually **Cancelled** and therefore the Client does not need to complete the Action.

Green – The Action has been **Completed** either by the client or the Adviser has manually chosen to **'Complete'** on the Action.

Red – The Action is **Outstanding and Overdue**.

Different Views

Timeline View – This will show each and every contact in terms of Invites, Actions and Messages, all date and time stamped, with most recent displayed at the top.

Outstanding Actions – This will show all **Blue** Actions.

Overdue Actions – This will show all **Red** Actions.

Completed Actions – This will show all **Green** Actions.

Messages – This will show all Messages sent and received via the portal.

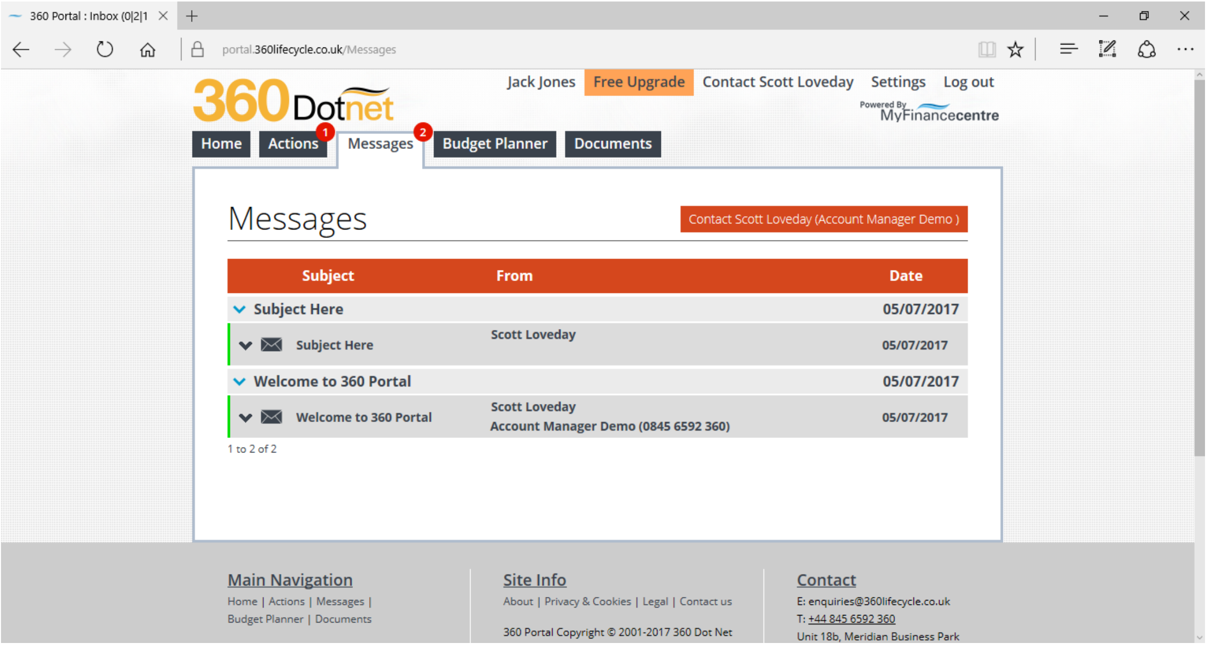
Invites – This will show all client invites (usually only one invite will be sent at the beginning of the process).

Portfolio Shares – This will show any **Portfolio** updates into the portal or 360 case record (the portal will need to be upgraded for this to be applicable – see Portal Upgrade section).

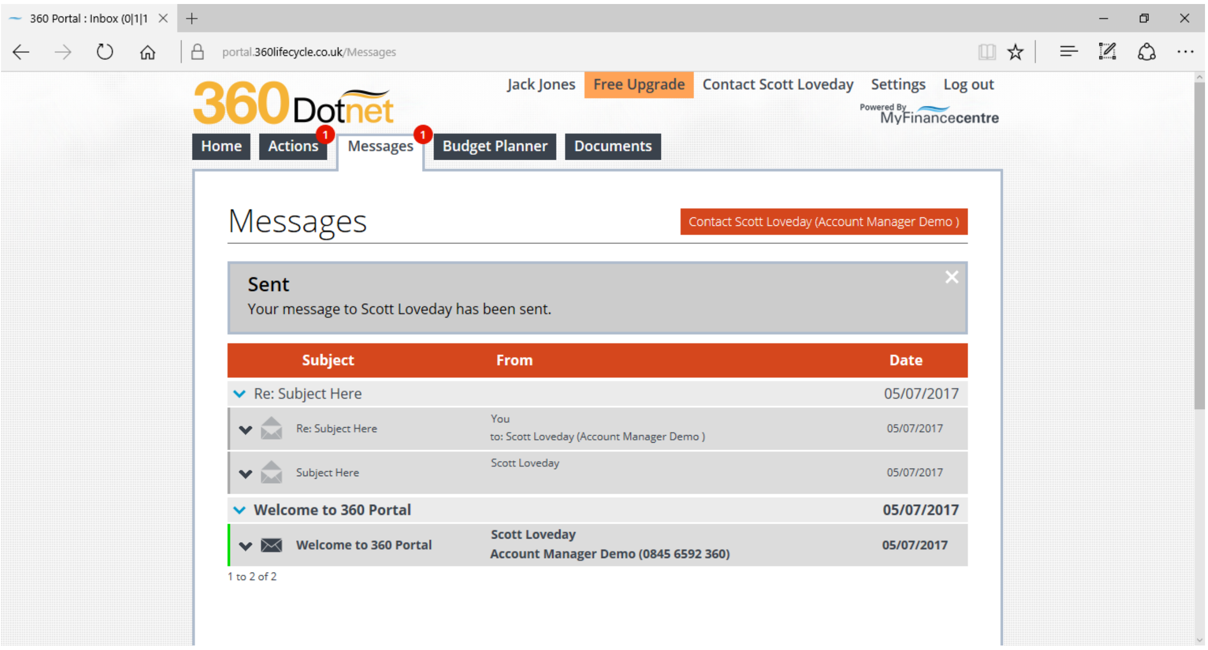
Document Shares – This will show all **Documents** shared via the portal.

Portal View (Messages)

You can view the message from the **'Messages'** tab in the portal.

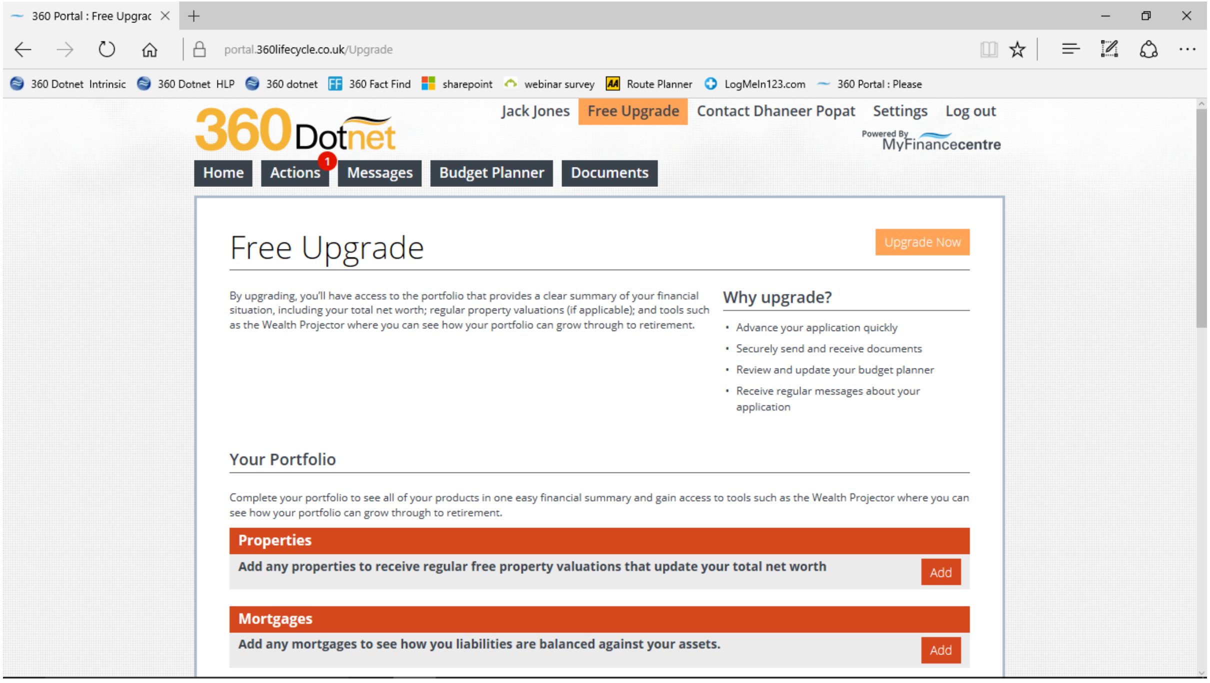


You will have the option to reply and see that the message has been successfully sent.



Portal Upgrade

You have the ability to upgrade your portal by selecting the **'Free Upgrade'.**



This means you will have further tabs to select from such as **My Wealth, Portfolio & Concierge** and with a range of additional portal tools available. On upgrading this will display any Portfolio items and allow future Portfolio changes to be shared between you and your adviser (or vice versa).