

360 Dotnet

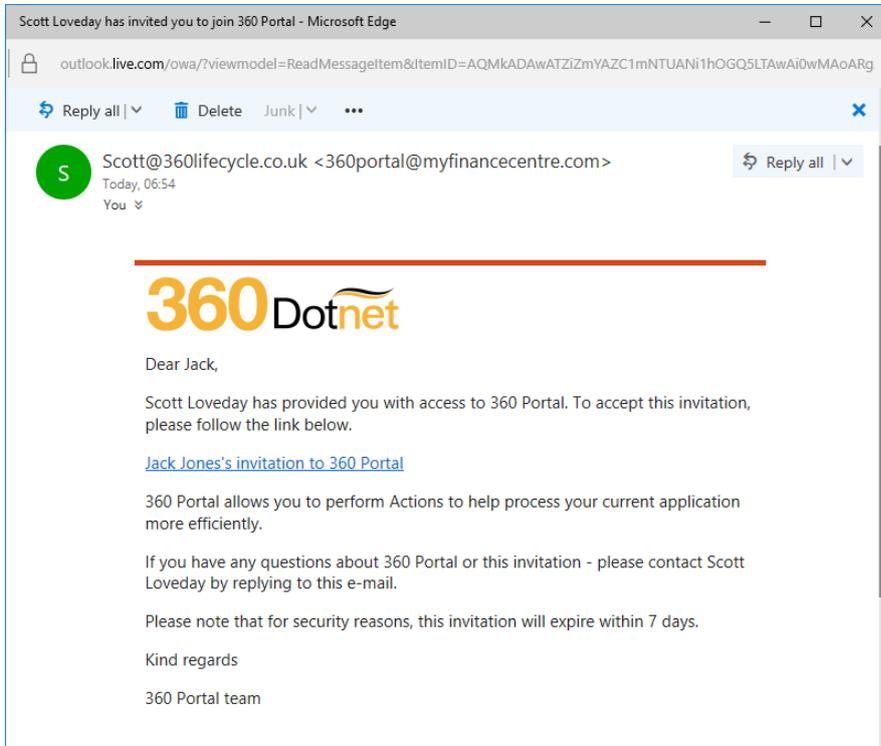
360 Client

Portal

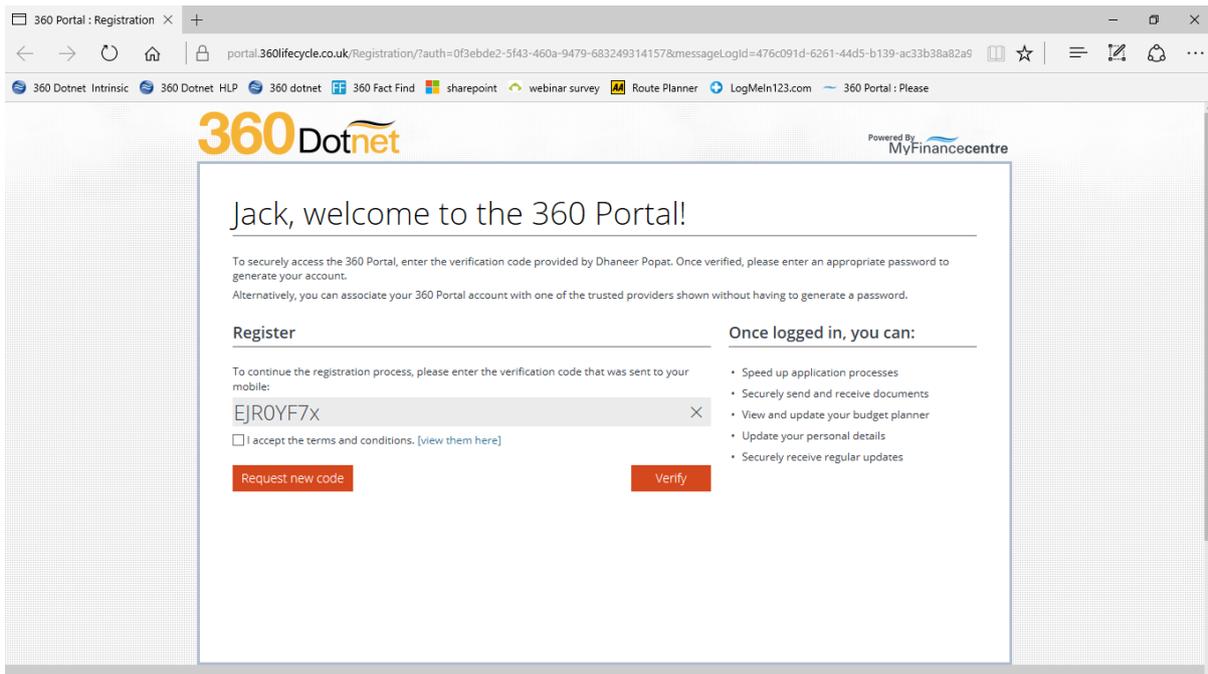
Training Manual

Powered by MyFinancecentre

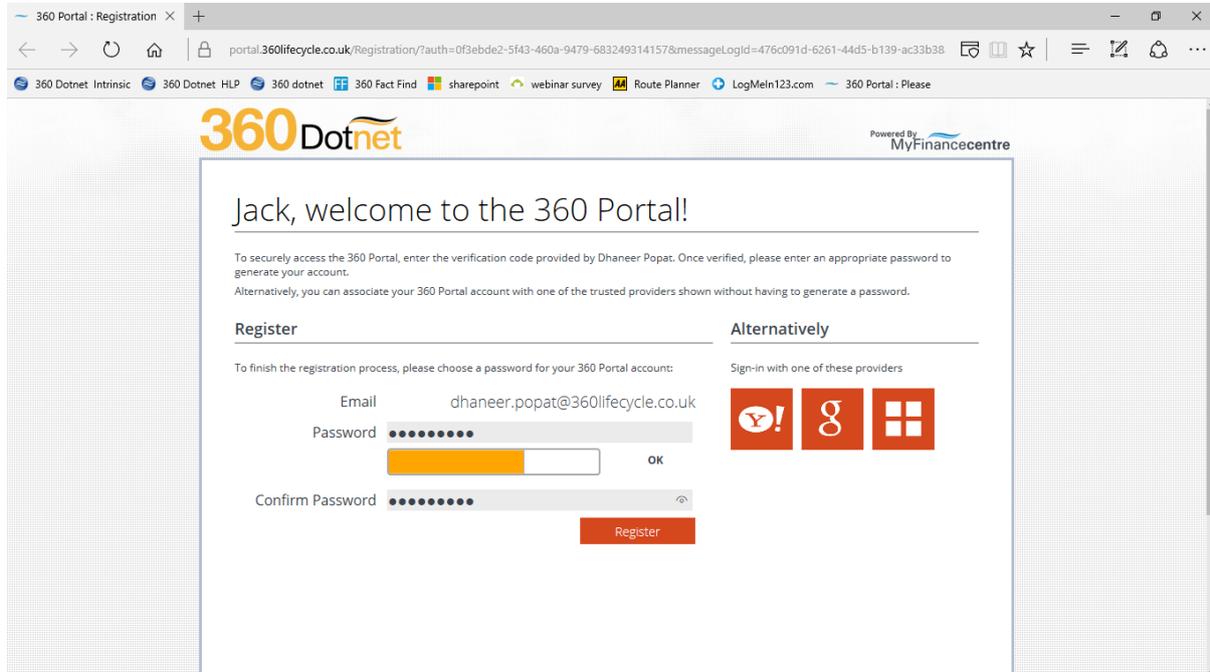
Once your adviser has invited you to the client portal, you will receive an email with the portal hyperlink included and also be sent an activation code by SMS to their mobile number. The invite will last 7 days but can be re-sent from the 360 case record at any time.



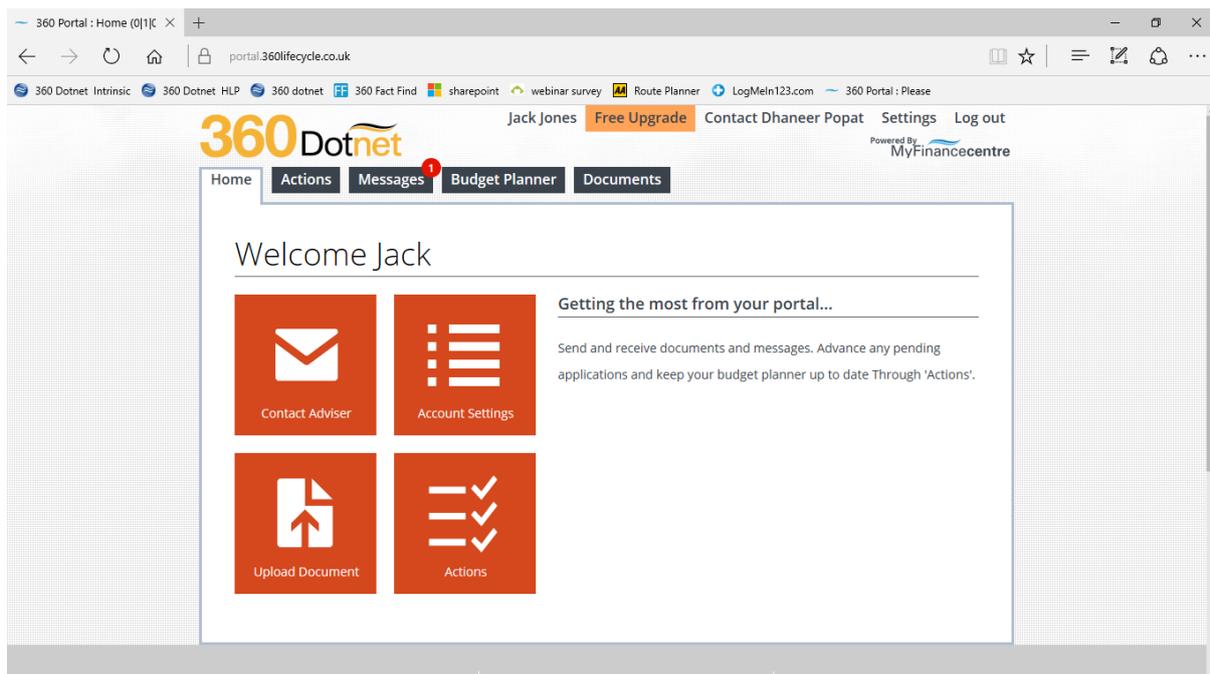
The hyperlink within the email will direct you to your adviser's portal registration site where the activation code sent by SMS can be entered in order to register.



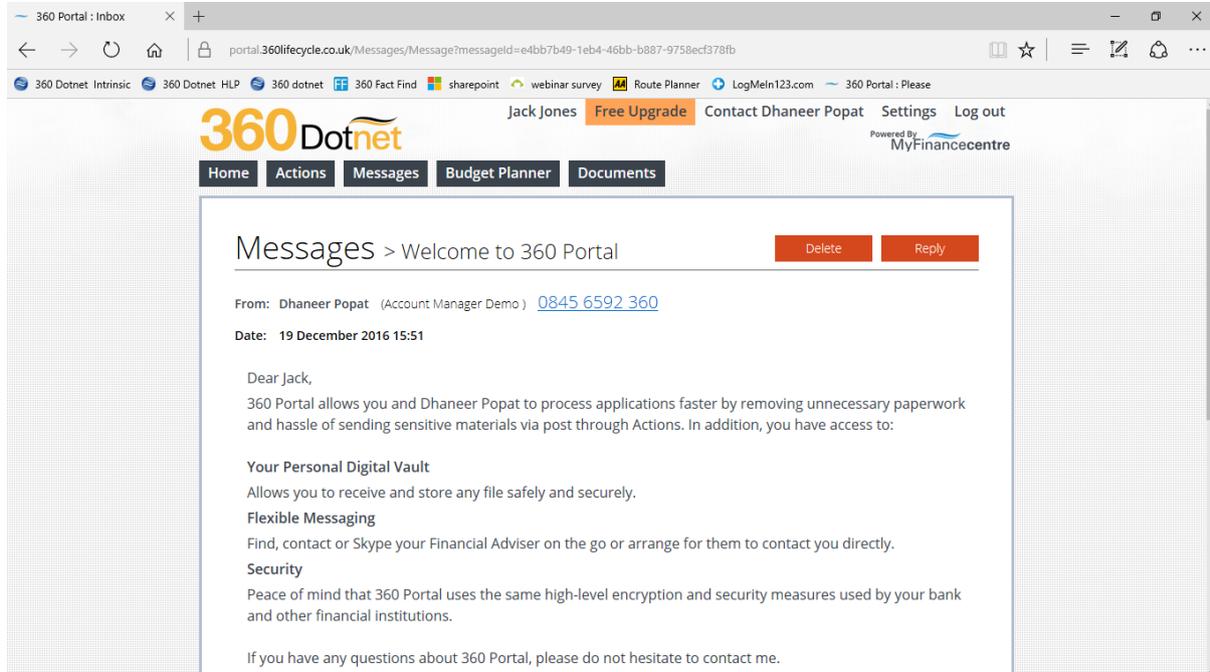
You are asked to enter your email address and choose a password in order to create a portal account. Alternatively if you hold a Yahoo, Google or Windows Live account then if preferred they can use this existing account without creating a portal account.



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).

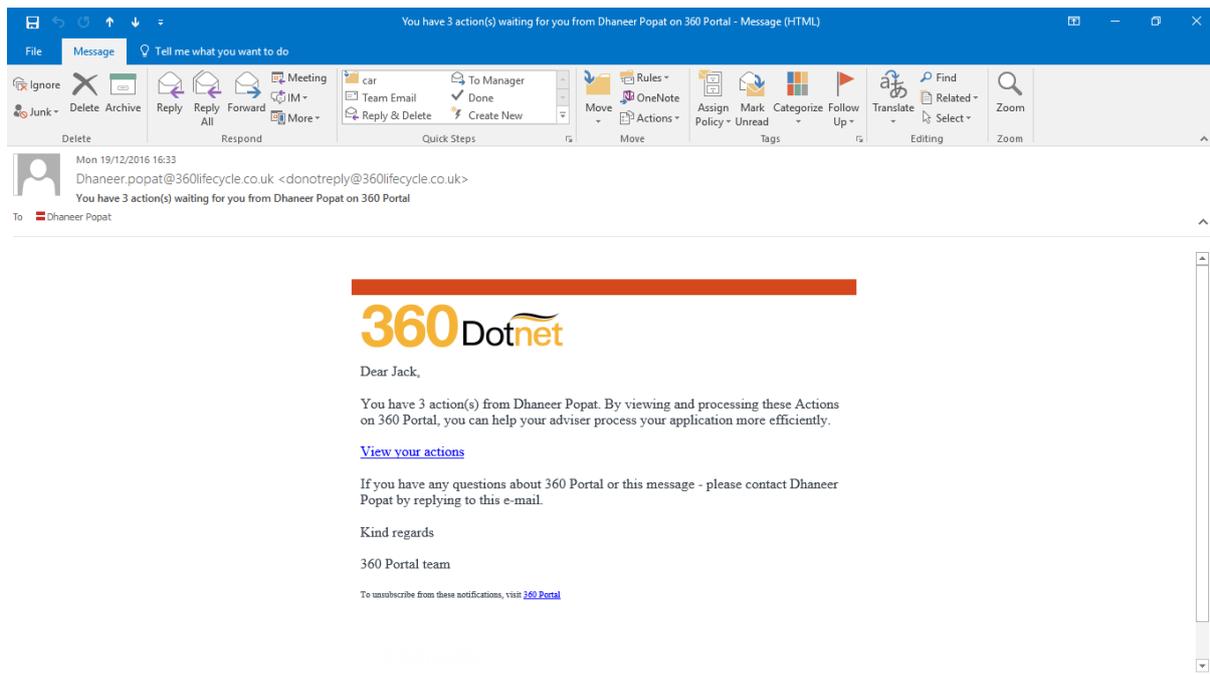


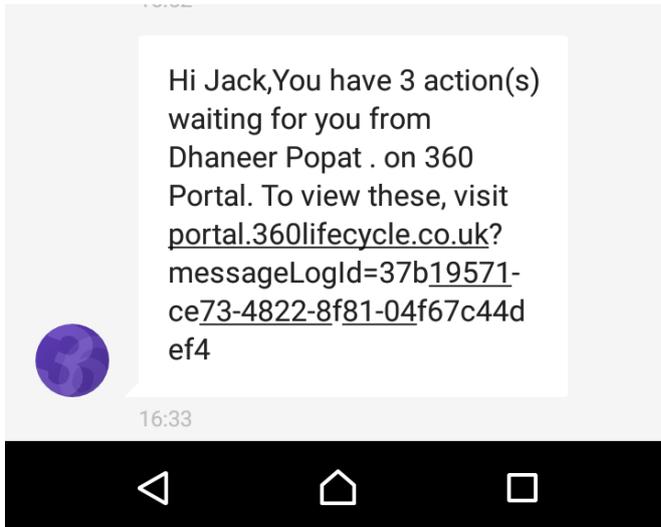
When selecting the 'Message' tab you have the ability to view any messages and choose delete or reply. As below a message is automatically included as part of the portal invitation.



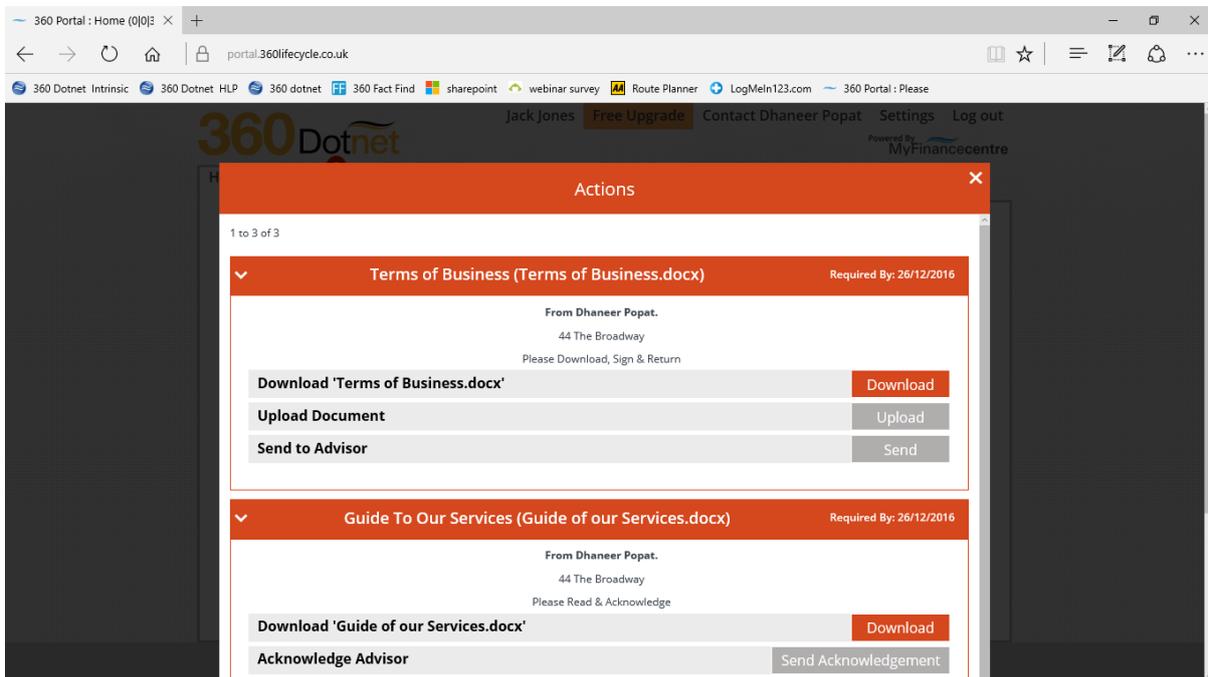
Portal View (Actions)

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.

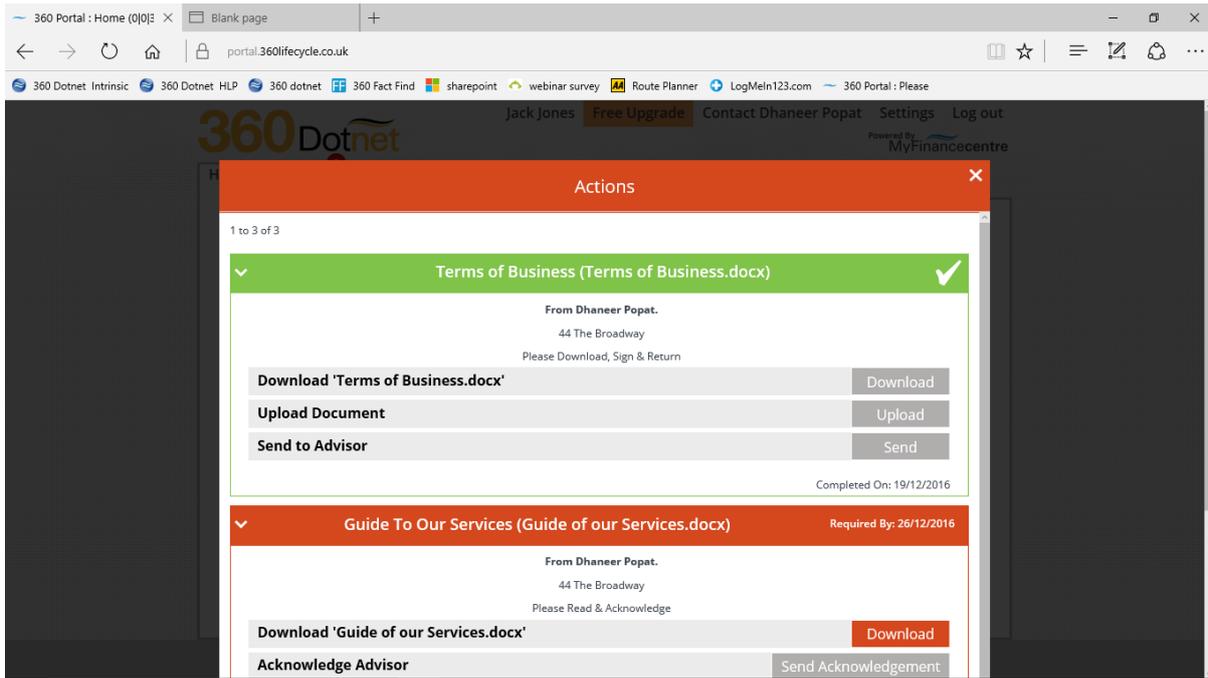




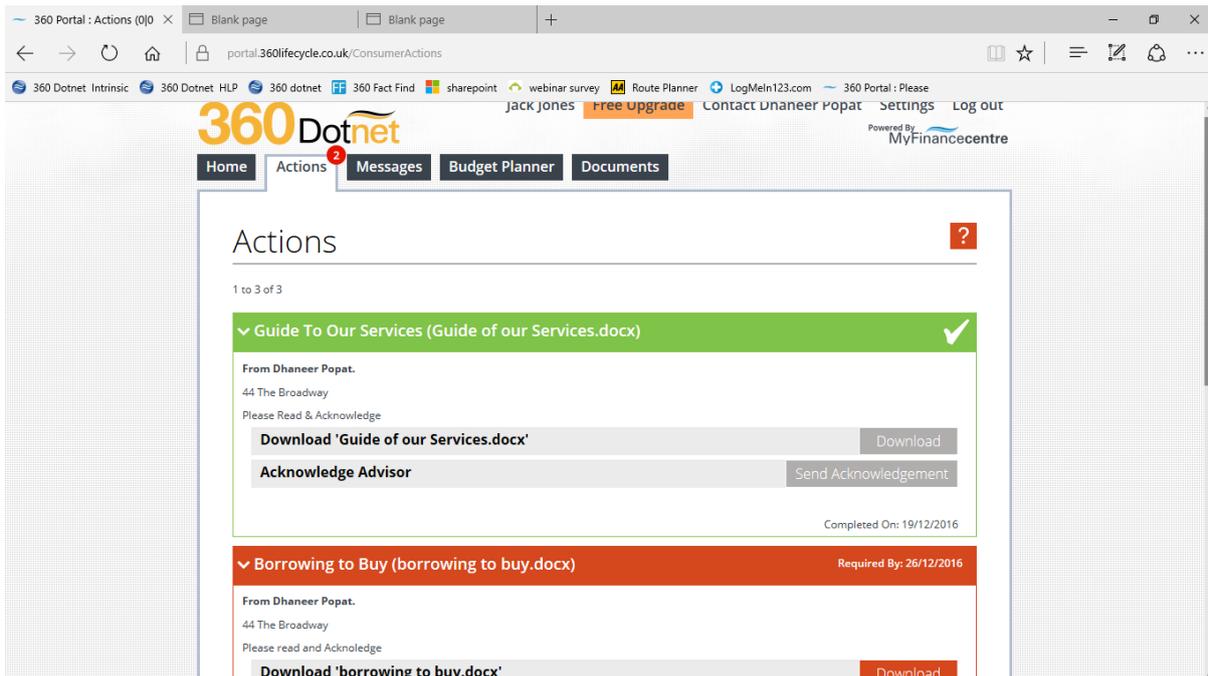
When next logging into the portal, you will immediately be directed to any outstanding Actions. If needed they can close this screen and at a later point simply click on the **'Actions'** tab to again see any outstanding Actions.



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.

The screenshot shows the 360 Portal interface. The top navigation bar includes the 360Dotnet logo, user name 'Jack Jones', a 'Free Upgrade' button, and links for 'Contact Scott Loveday', 'Settings', and 'Log out'. Below the navigation bar are tabs for 'Home', 'Actions', 'Messages', 'Budget Planner', and 'Documents'. The 'Messages' tab is active, displaying a list of messages. A red box highlights the 'Messages' tab, and another red box highlights the 'Contact Scott Loveday (Account Manager Demo)' button. The messages table has columns for Subject, From, and Date.

Subject	From	Date
Subject Here		05/07/2017
✉ Subject Here	Scott Loveday	05/07/2017
Welcome to 360 Portal		05/07/2017
✉ Welcome to 360 Portal	Scott Loveday Account Manager Demo (0845 6592 360)	05/07/2017

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Main Navigation
Home | Actions | Messages | Budget Planner | Documents

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Contact
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T: +44 845 6592 360
Unit 18b, Meridian Business Park

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

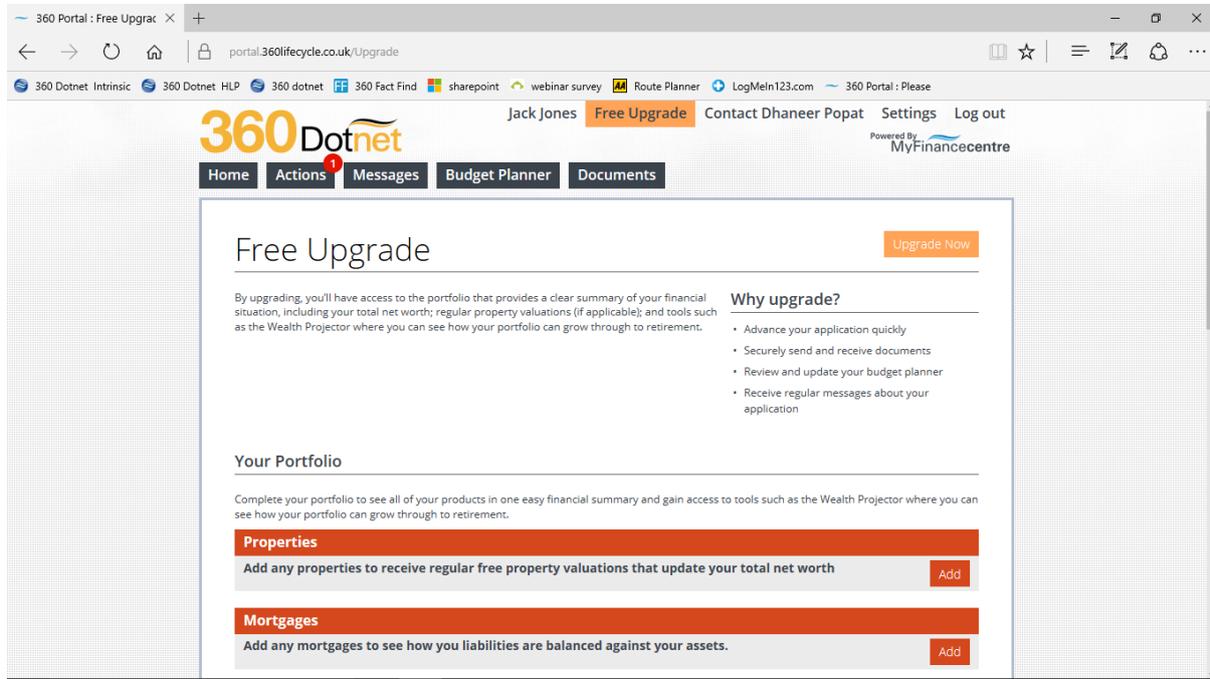
The screenshot shows the 360 Portal interface after a message has been sent. A 'Sent' notification box is displayed at the top of the message list, stating 'Your message to Scott Loveday has been sent.' The 'Messages' tab is still active. The messages table now includes a 'Re: Subject Here' message sent by the user to Scott Loveday. A red box highlights the 'Messages' tab, and another red box highlights the 'Sent' notification box.

Subject	From	Date
Re: Subject Here		05/07/2017
✉ Re: Subject Here	You to: Scott Loveday (Account Manager Demo)	05/07/2017
✉ Subject Here	Scott Loveday	05/07/2017
Welcome to 360 Portal		05/07/2017
✉ Welcome to 360 Portal	Scott Loveday Account Manager Demo (0845 6592 360)	05/07/2017

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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).