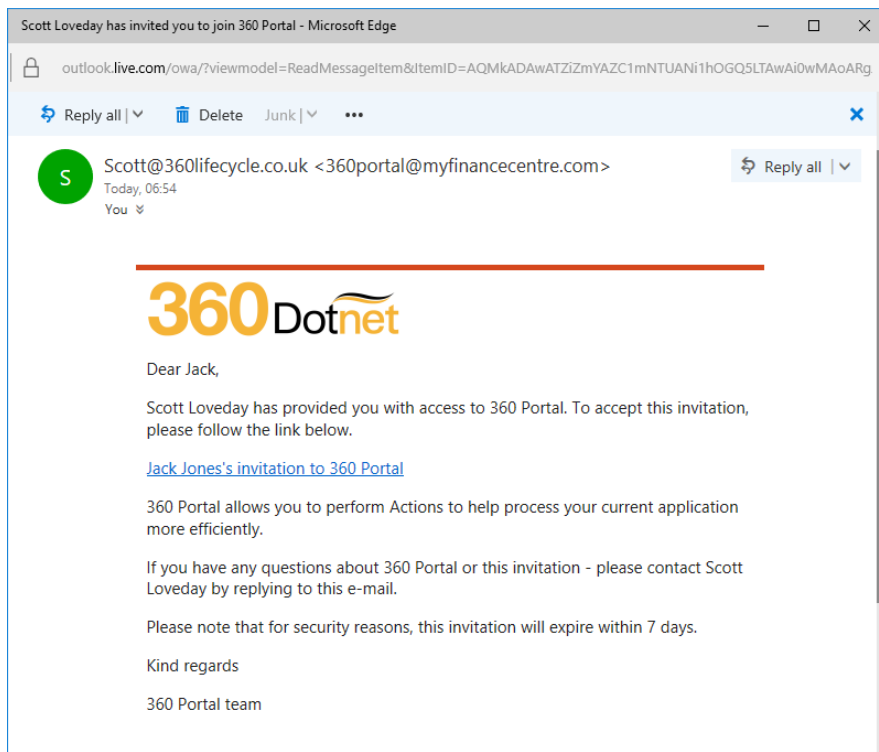




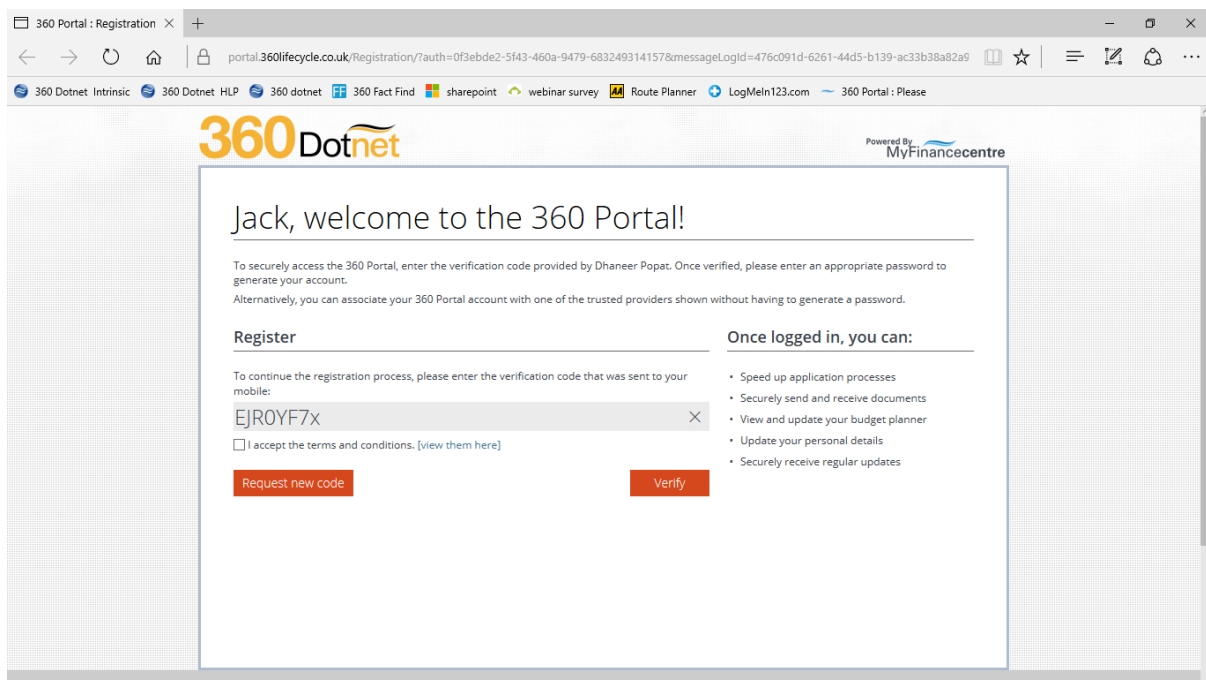
360 Client Portal Training Manual

Powered by  MyFinancecentre

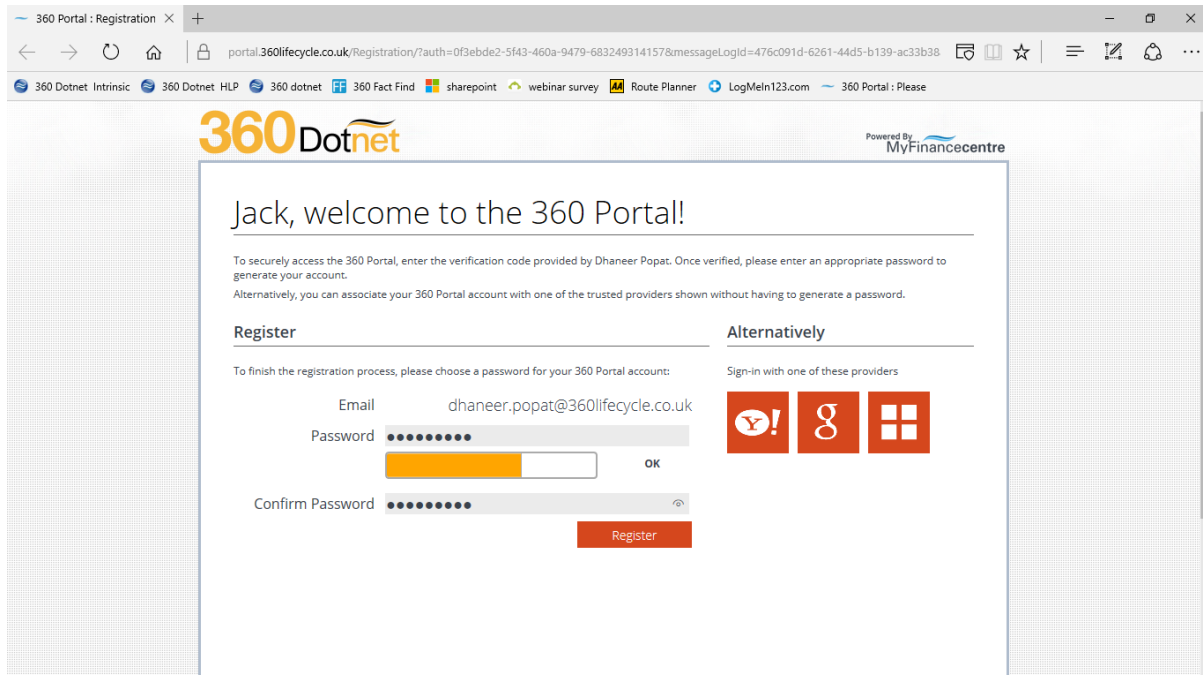
Once your adviser has invited you to the client portal, you will receive an email with the portal hyperlink included and also be sent an activation code by SMS to their mobile number. The invite will last 7 days but can be re-sent from the 360 case record at any time.



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.

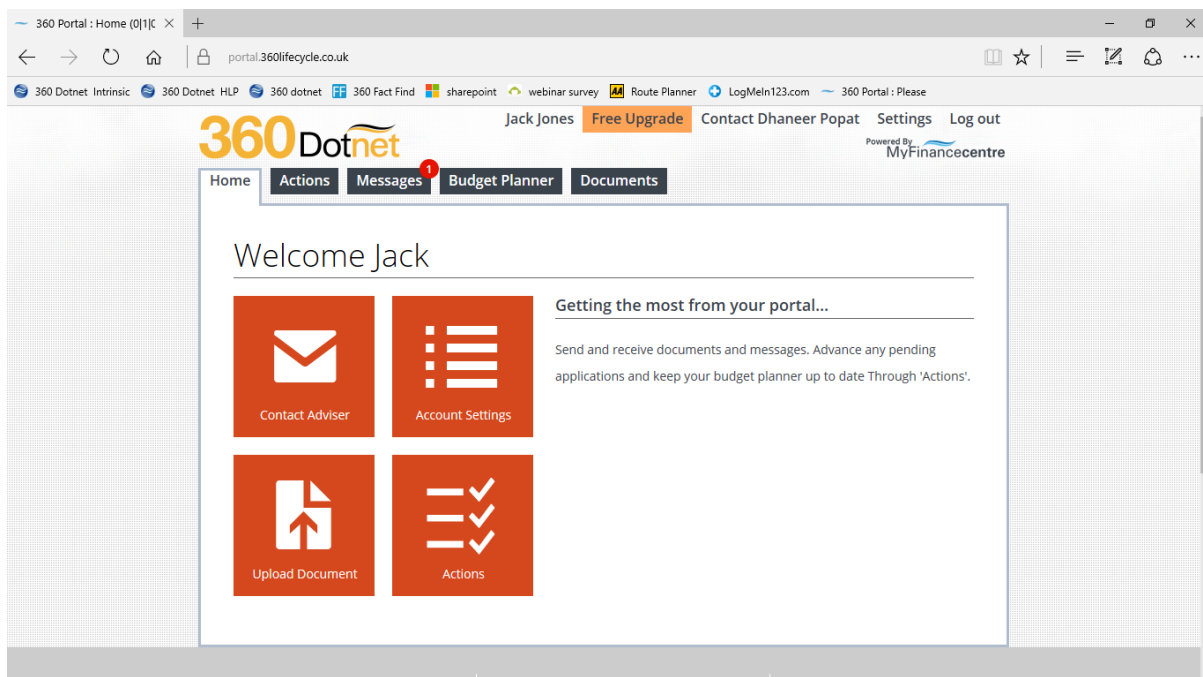


You are asked to enter your email address and choose a password in order to create a portal account. Alternatively if you hold a Yahoo, Google or Windows Live account then if preferred they can use this existing account without creating a portal account.



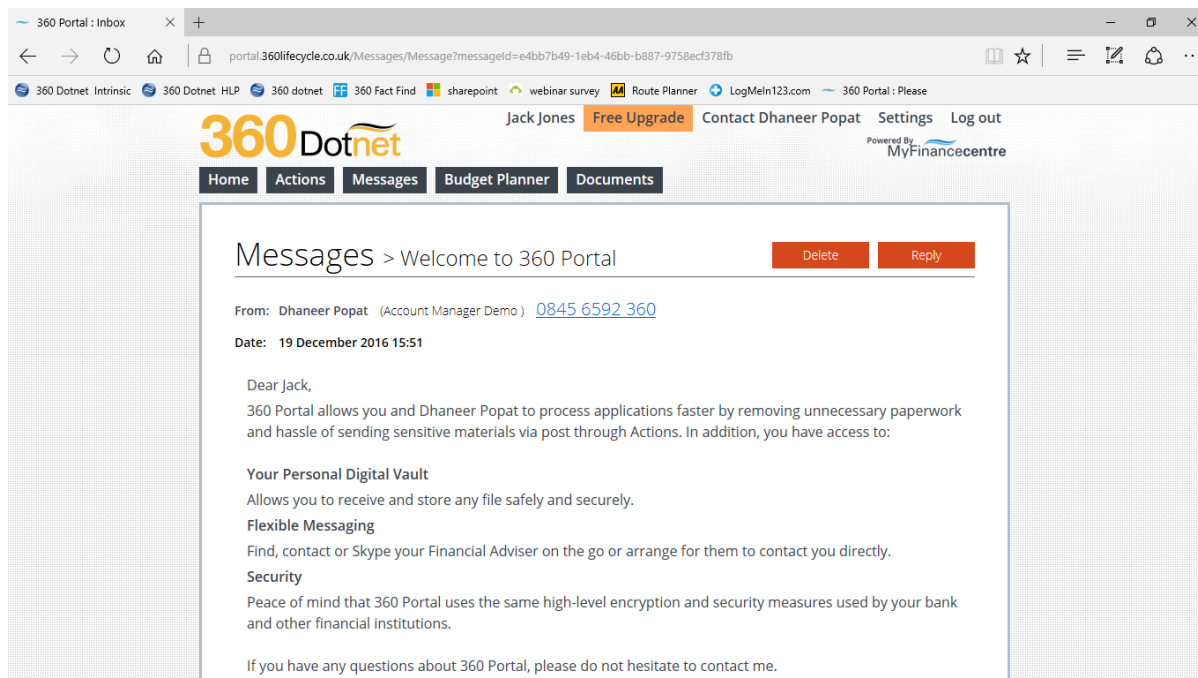
The screenshot shows the registration page for the 360 Portal. The browser address bar displays the URL: `portal.360lifecycle.co.uk/Registration/?auth=0f3ebde2-5f43-460a-9479-683249314157&messageLogId=476c091d-6261-44d5-b139-ac33b38`. The page header includes the 360Dotnet logo and a "Powered By MyFinancecentre" badge. The main content area greets the user with "Jack, welcome to the 360 Portal!". Below this, a message states: "To securely access the 360 Portal, enter the verification code provided by Dhaneer Popat. Once verified, please enter an appropriate password to generate your account. Alternatively, you can associate your 360 Portal account with one of the trusted providers shown without having to generate a password." The "Register" section prompts the user to "To finish the registration process, please choose a password for your 360 Portal account:" and provides input fields for "Email" (pre-filled with `dhaneer.popat@360lifecycle.co.uk`), "Password", and "Confirm Password". An "OK" button is next to the password field, and a "Register" button is at the bottom. The "Alternatively" section, titled "Sign-in with one of these providers", shows icons for Yahoo, Google, and Windows Live.

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).



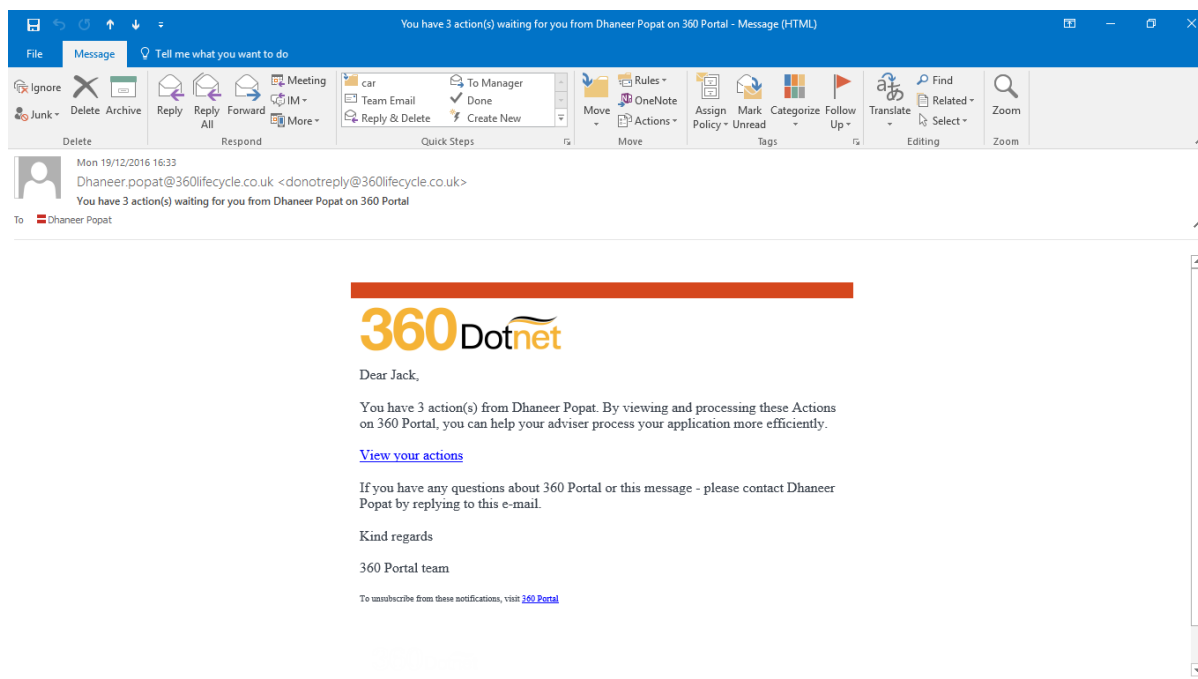
The screenshot shows the home page of the 360 Portal after login. The browser address bar displays the URL: `portal.360lifecycle.co.uk`. The page header includes the 360Dotnet logo, the user's name "Jack Jones", a "Free Upgrade" button, and links for "Contact Dhaneer Popat", "Settings", and "Log out". The "Powered By MyFinancecentre" badge is also present. The main navigation bar includes "Home", "Actions", "Messages" (with a red notification badge), "Budget Planner", and "Documents". The main content area greets the user with "Welcome Jack". Below this, there are four large orange buttons: "Contact Adviser" (with an envelope icon), "Account Settings" (with a list icon), "Upload Document" (with a document and arrow icon), and "Actions" (with a list and checkmark icon). To the right of these buttons, a section titled "Getting the most from your portal..." contains the text: "Send and receive documents and messages. Advance any pending applications and keep your budget planner up to date Through 'Actions'." The footer of the page includes "Main Navigation", "Site Info", and "Contact".

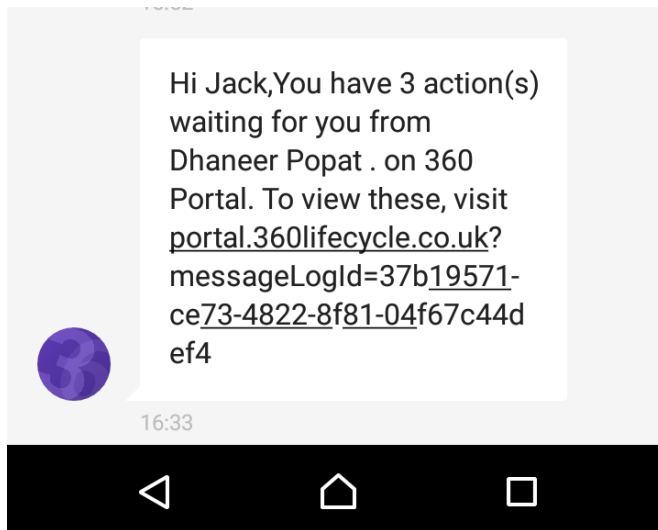
When selecting the **'Message'** tab you have the ability to view any messages and choose delete or reply. As below a message is automatically included as part of the portal invitation.



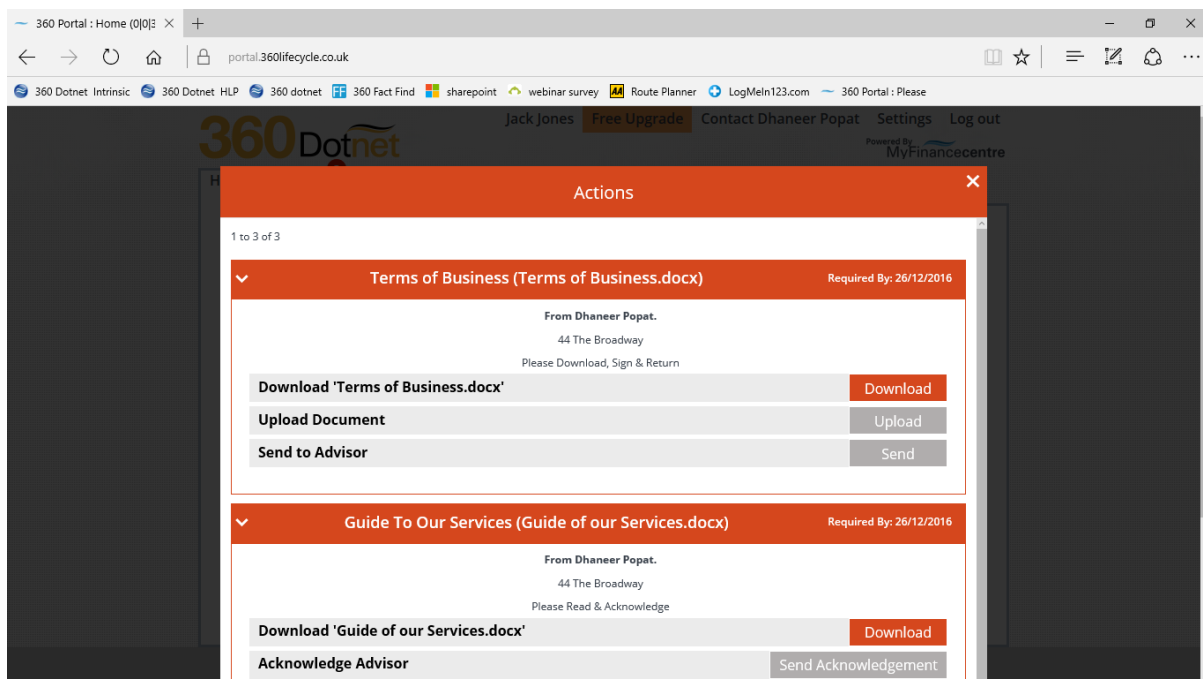
Portal View (Actions)

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.

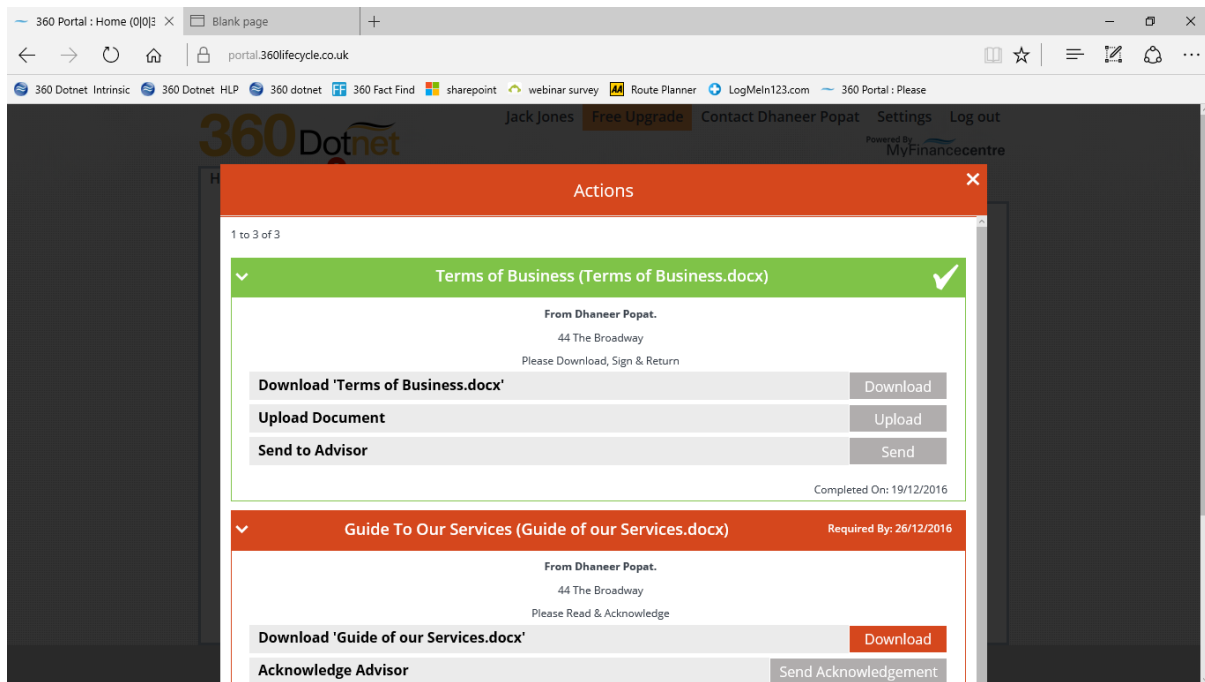




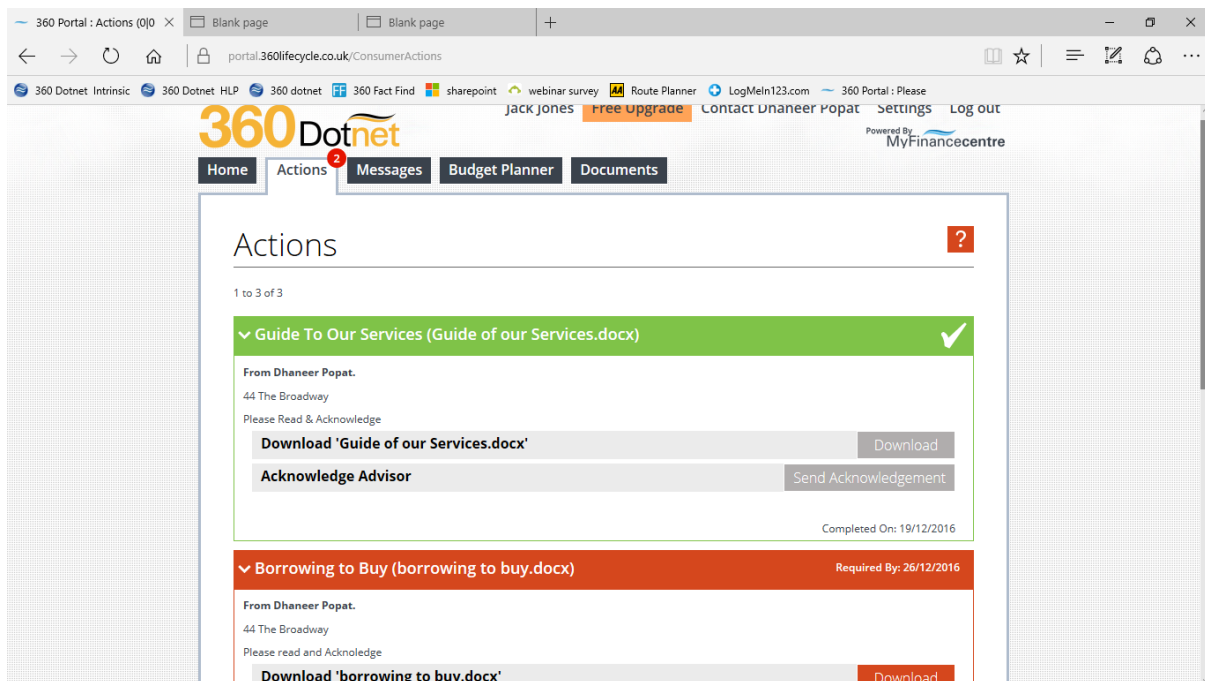
When next logging into the portal, you will immediately be directed to any outstanding Actions. If needed they can close this screen and at a later point simply click on the **'Actions'** tab to again see any outstanding Actions.



Depending on the Action type, you will either **'Download'** or **'Upload'** the required documents and **'Send Acknowledgement'** 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.

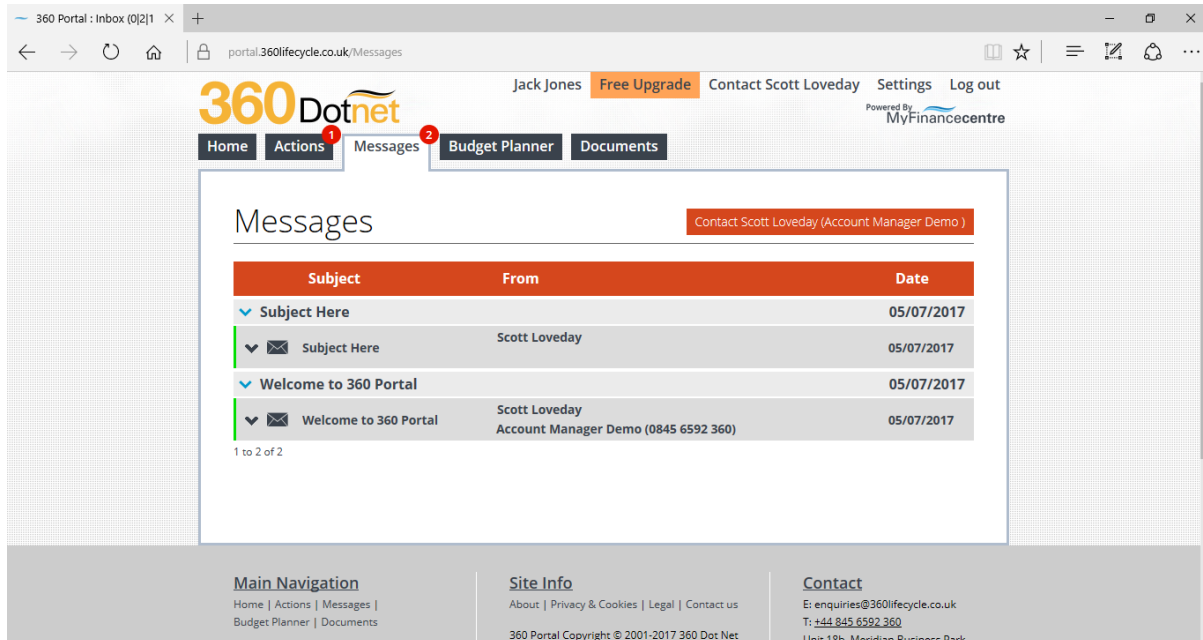
Invites – This will show all client invites (usually only one invite will be sent at the beginning of the process).

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.

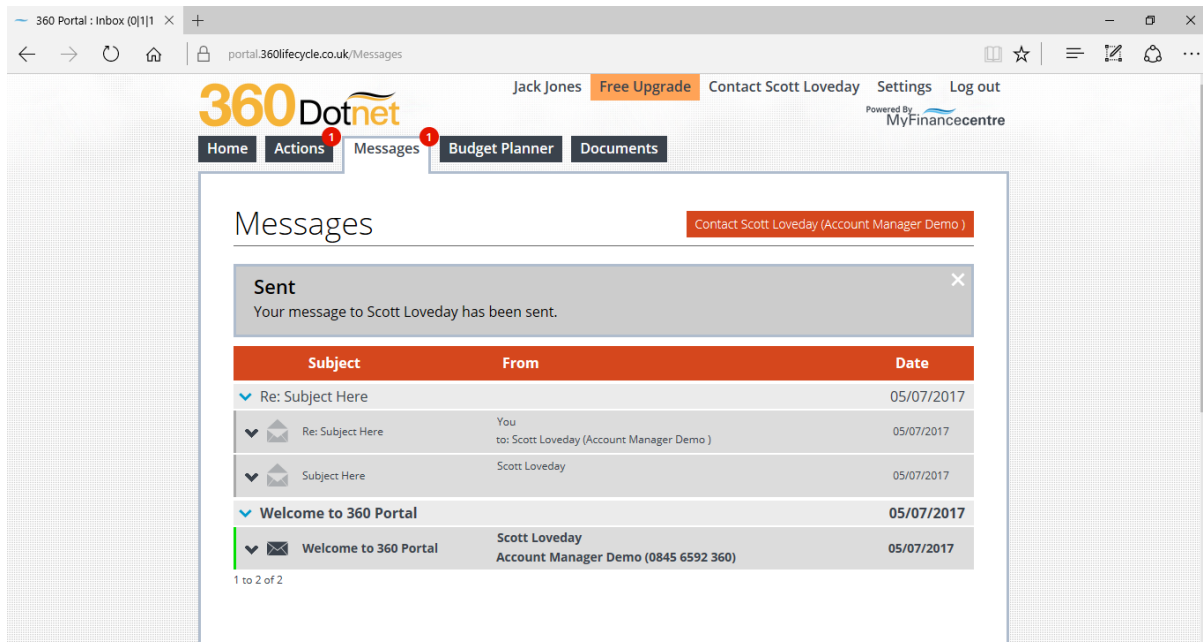


The screenshot shows the 360 Portal interface with the 'Messages' tab selected. The page displays a list of messages with columns for Subject, From, and Date. The messages are from Scott Loveday, Account Manager Demo, dated 05/07/2017. The messages are: 'Subject Here' and 'Welcome to 360 Portal'.

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

1 to 2 of 2

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



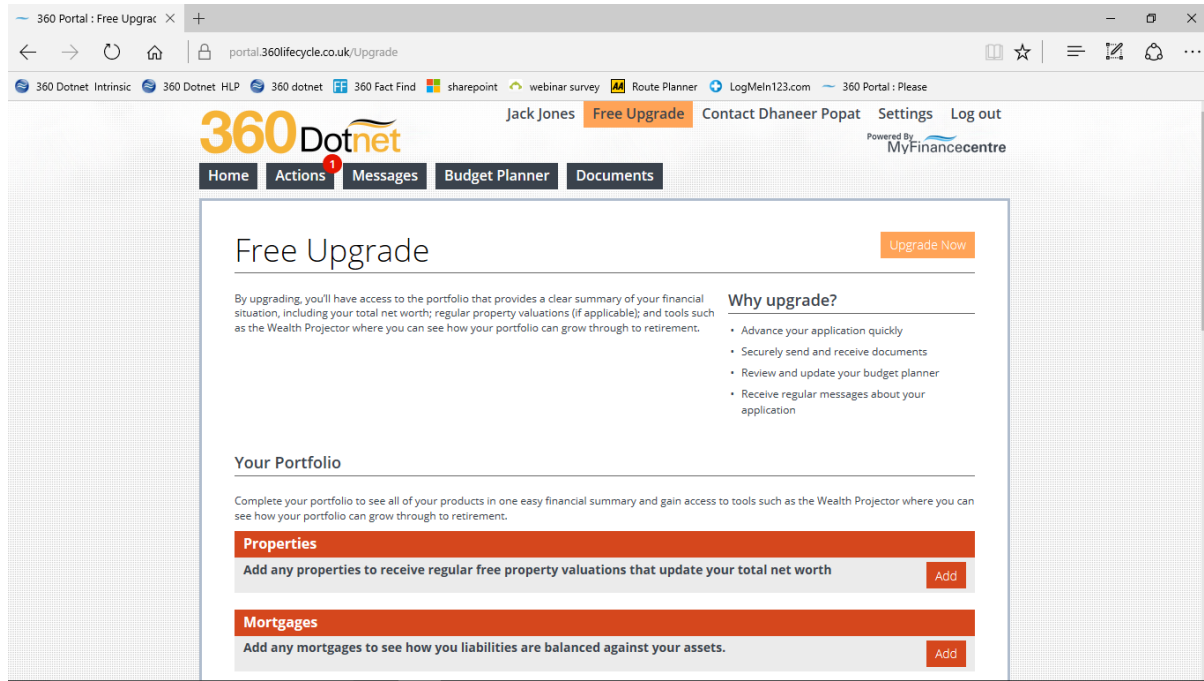
The screenshot shows the 360 Portal interface with the 'Messages' tab selected. A 'Sent' confirmation message is displayed at the top: 'Your message to Scott Loveday has been sent.' Below this, the list of messages is updated to include a new message: 'Re: Subject Here' from 'You to: Scott Loveday (Account Manager Demo)' dated 05/07/2017. The messages are: 'Re: Subject Here', 'Subject Here', and 'Welcome to 360 Portal'.

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

1 to 2 of 2

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).