myprosperity

Your quick resource guide to...

Getting Started

Starting the journey of knowledge

Getting Started

Your quick reference guide

Thank you for attending the **Getting Started** webinar.
A full version of the webinar is available below for you to rewatch at anytime.

In addition to the full video, this post-webinar pack is filled with short videos and guides for all relevant topics, to enable you to add and engage with your clients. Click the topic below or continue through to find what you need.

- Adding & managing clients
- Setting up to-do tasks
- Uploading documents
- Requesting eSignatures

Watch the full webinar

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myprosperity onboarding training

Getting Connected

Enabling you to get started with your myproperity Partner Portal setup.

Getting Started

Learn the essentials of adding clients, managing tasks, sharing documents, and requesting eSignatures in myprosperity.

Collect & Collaborate

Streamline client data collection and collaboration using Digital Forms and Rooms for efficient workflows.

Register now

Xplan

How to utilise myprosperity's integration with Xplan

Q&A

Once you've completed the 3 onboarding webinars, you'll be invited to sign up to a live Q&A session.

Ongoing Support

Visit **myprosperity.com.au/resources** or email **support@myprosperity.com.au**

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Managing clients

From adding and onboarding your clients to editing and sending them forms, with myprosperity you can manage your clients all from the one portal. Read the guides linked below to show you how.

Client setup

Learn how to add clients as individuals, groups or entities, add family members who share an email address and search for clients via your integrations (e.g. Xplan).

Watch video

View guides

Client onboarding

Access an onboarding checklist and a series of client onboarding guides including how to send a welcome email and questionnaire.

View guides

Client list

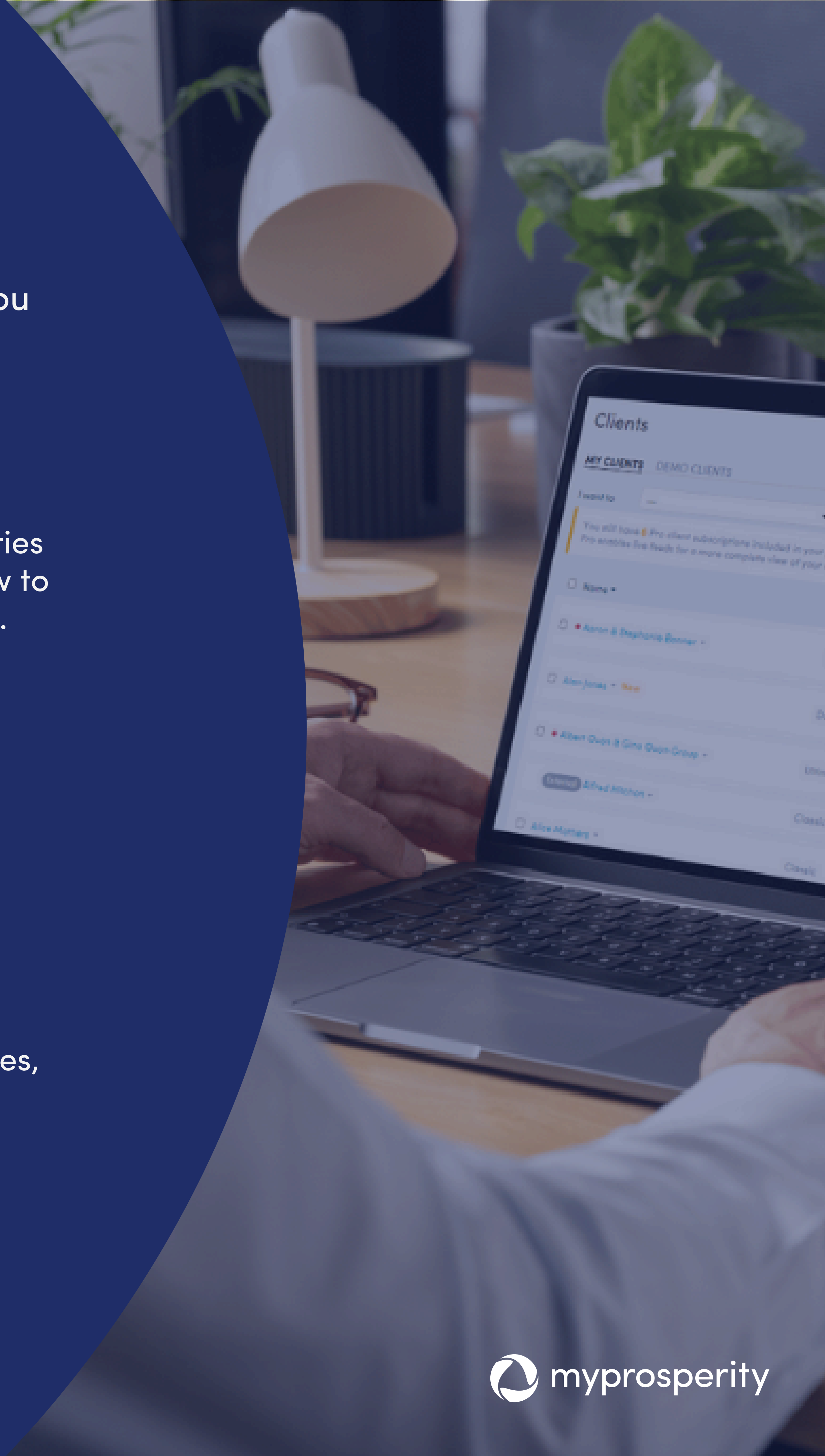
Guides covering assigning staff access to clients, editing your client's portal view, bulk actions and more.

View guides

Client portal tips

Understand the different subscription types, amend your client's details and export transaction lists. These and more are covered within our client portal tips.

View guides



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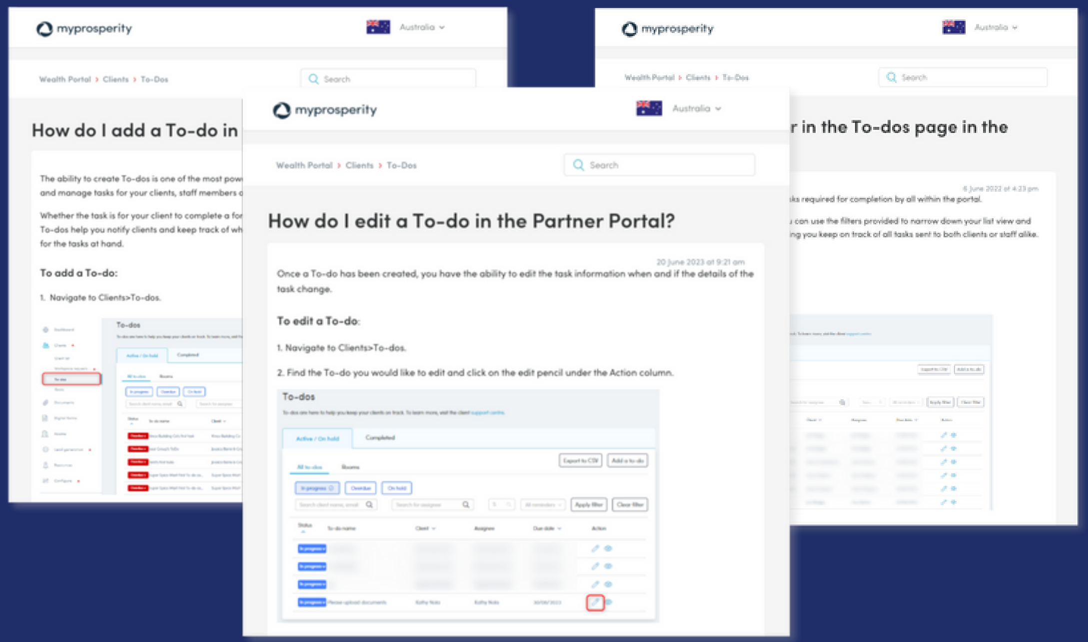
Setting up to-do tasks

To-do tasks are one of the most powerful features in your partner portal. Create and manage tasks for clients, staff, and yourself, with automated reminders to keep everyone on track.
Learn more about how to add, edit and search to-do tasks through the guides and videos linked below.

To-Do guides

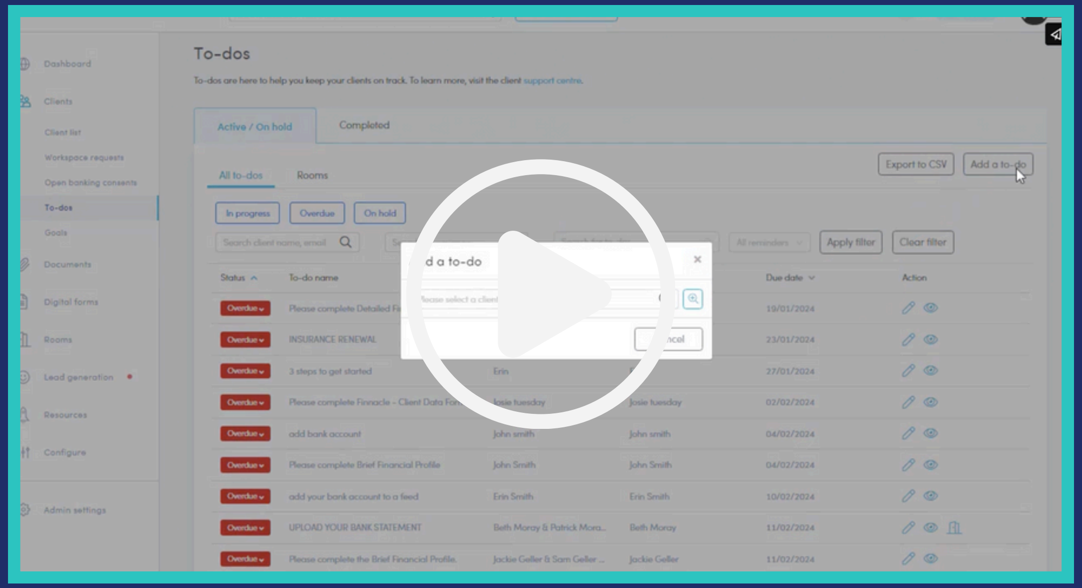
Access our guides to help you set up, edit and search for to-do tasks.



View guides

To-Do videos

Watch this short video to learn how to add, edit and complete a to-do task.



Watch video

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Uploading documents

Upload, send and find documents

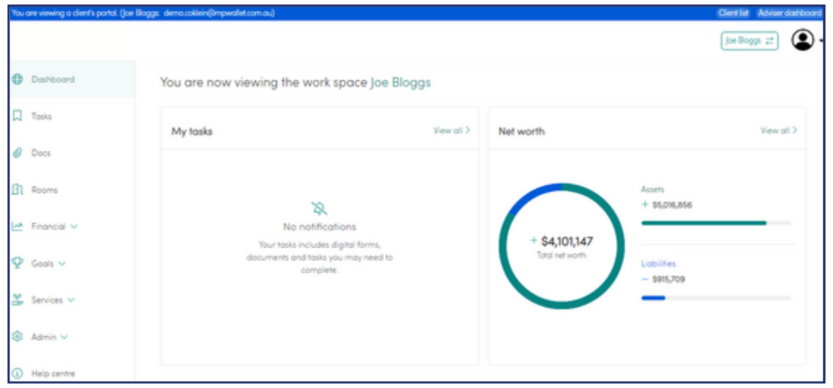
View resources to help you to upload and send documents to your clients via the portal as well as creating folders and finding documents.

View guides

Watch videos

Client experience

Where to view the documents in the client portal as your client will see them.



View client portal

Syncing via integrations

Add uploaded documents to your integrated document management platform. Find the guide for your platform below.

iress Xplan

OneDrive

Google Drive

SharePoint

Requesting eSignatures

eSignature provider integration

Learn how to integrate your eSignature platform of choice.
Click the relevant logo below to get started.

docusign Annature
FuseSign

Request an eSignature with OneSpan

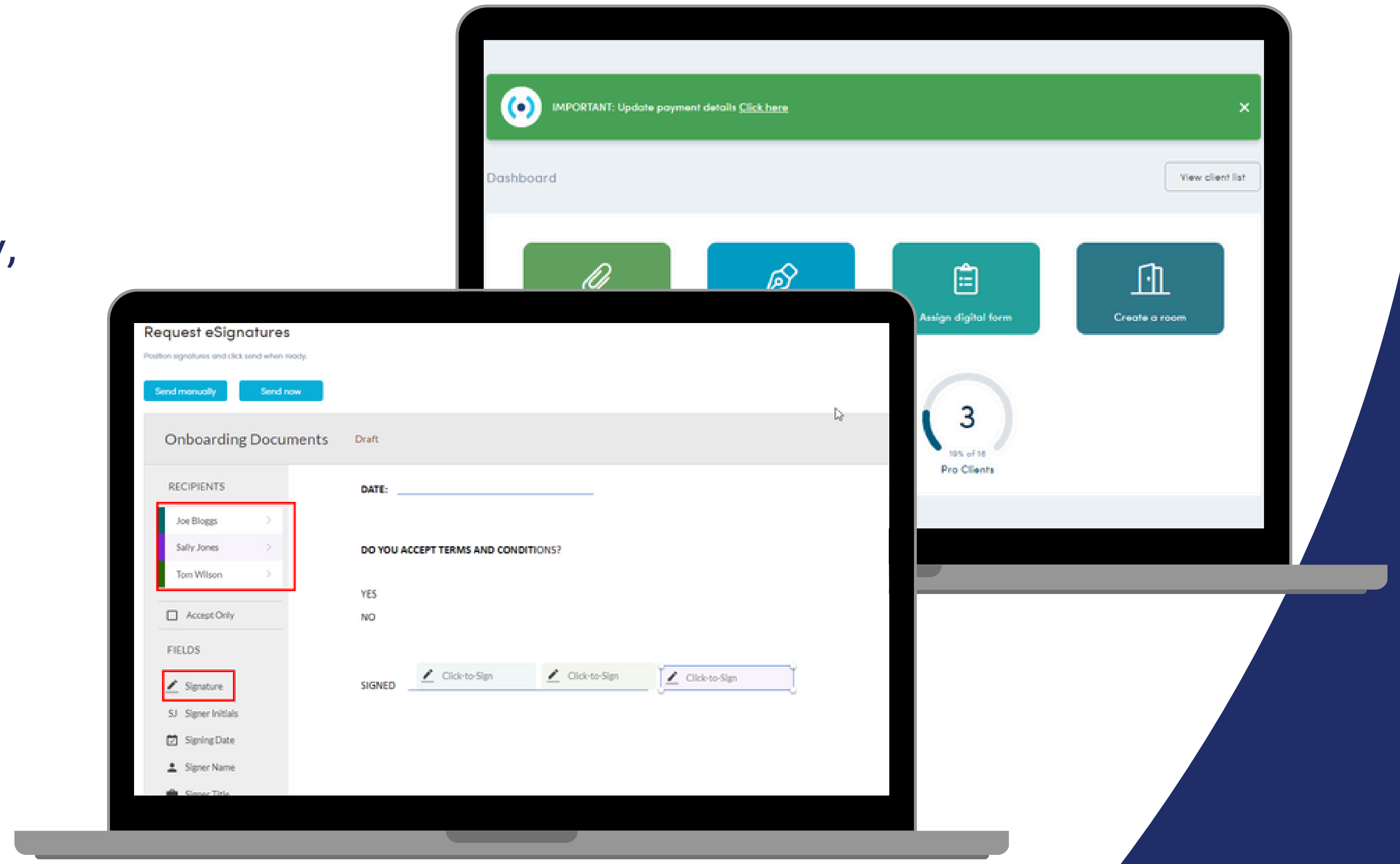
Send a document for signing using the Partner Portal’s default signing provider, OneSpan. Click the logo below to learn how.

OneSpan

Other eSignature resources

View outstanding eSignatures, download the evidence summary, troubleshoot and more. Use these guides and videos to find everything you need to know about eSignatures.

Watch videos **View guides**



Next steps

- Getting your staff trained **Book Training**
- Think about your client approach
- Incorporating myprosperity into your business
- Start your rollout

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Further support

You'll find the resources referenced throughout this guide and many more by visiting our **Partner help centre**.

For any other questions, contact our expert support team **support@myprosperity.com.**

Partner help centre

Email support