



Your quick resource guide to...

Collect & Collaborate

Unlocking the power of digital forms and rooms



Collect & Collaborate

Your quick reference guide

Thank you for attending the **Collect & Collaborate** 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 use your myprosperity Partner Portal's digital forms and Room features. Click the topic below or continue through to find what you need.

- Digital forms
- Rooms (setup)
- Rooms (features)



Watch the full webinar

myprosperity onboarding training

Getting Started

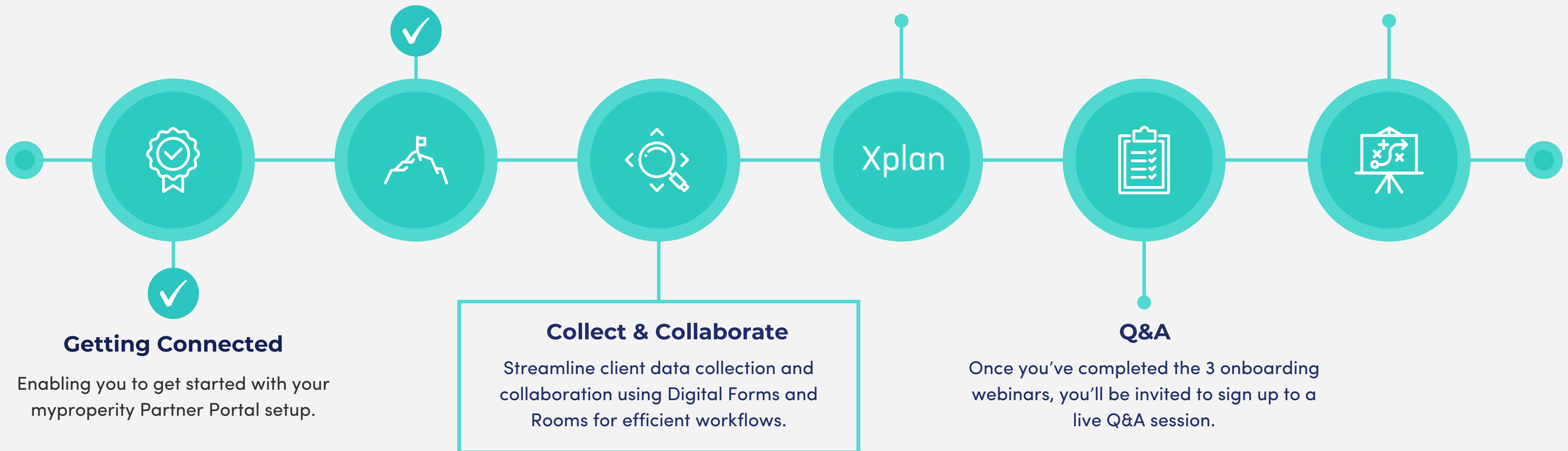
Learn the essentials of adding clients, managing tasks, sharing documents, and requesting eSignatures in myprosperity.

Xplan

How to utilise myprosperity's integration with Xplan

Ongoing Support

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



Digital forms

Whether you are collecting data from a new or an existing client, digital forms offer a quick and seamless experience for you and your clients. Below is what we covered during the Collect & Collaborate webinar, as well as links to videos and guides you can access at any time.



Sending forms to clients



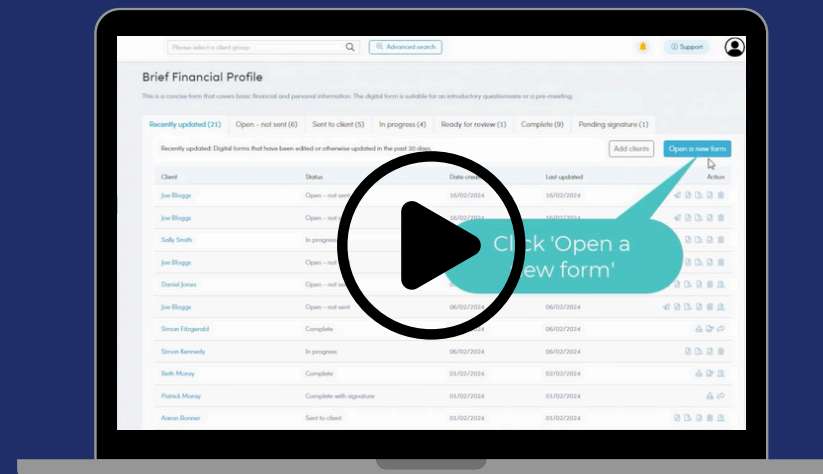
Your client's experience



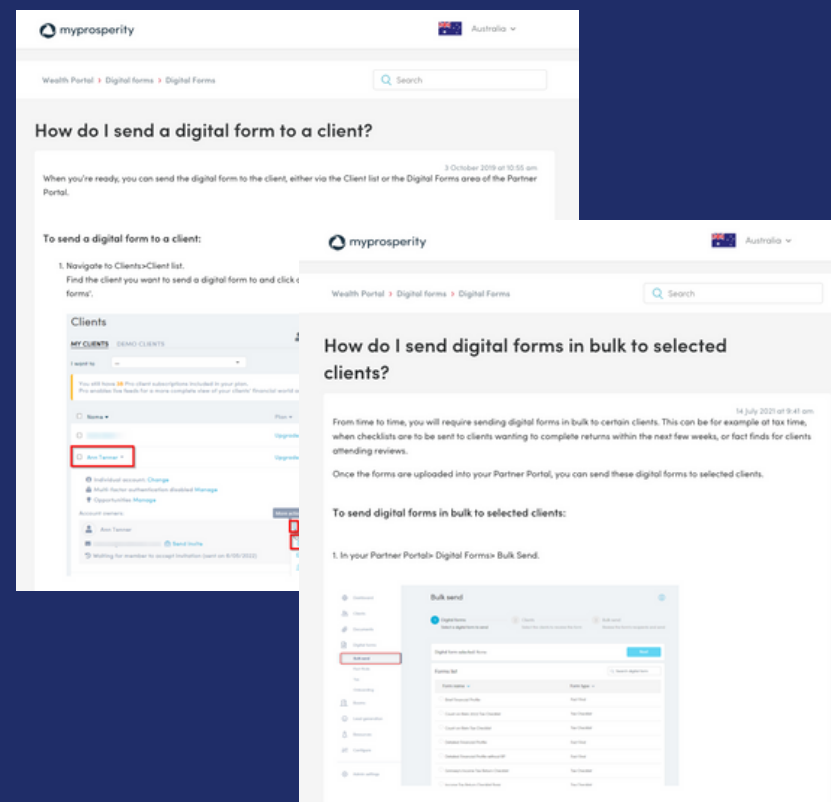
Checking a form's status



Requesting an eSignature



Watch videos



View guides

Rooms (setup)

Rooms are digital collaboration spaces on your Partner Portal. They allow you to work with your client and other external professional parties towards a shared goal.

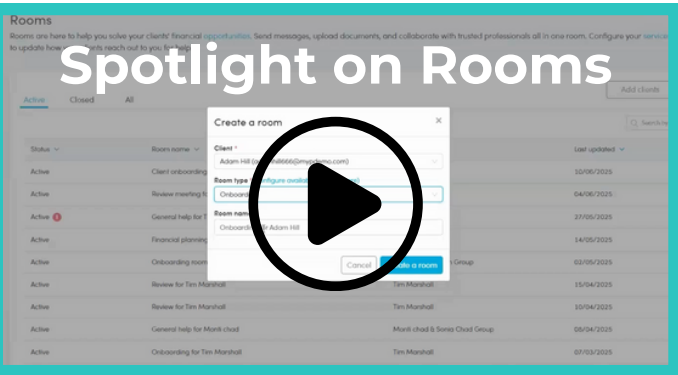


Room use cases

Some of the common use cases for rooms include:

- ▶ Client onboarding
- ▶ Financial reviews
- ▶ Tax preparation
- ▶ Mortgage & loan establishment
- ▶ SMSF audits
- ▶ Estate planning

If you're looking for a deep-dive into Rooms, watch the below webinar.

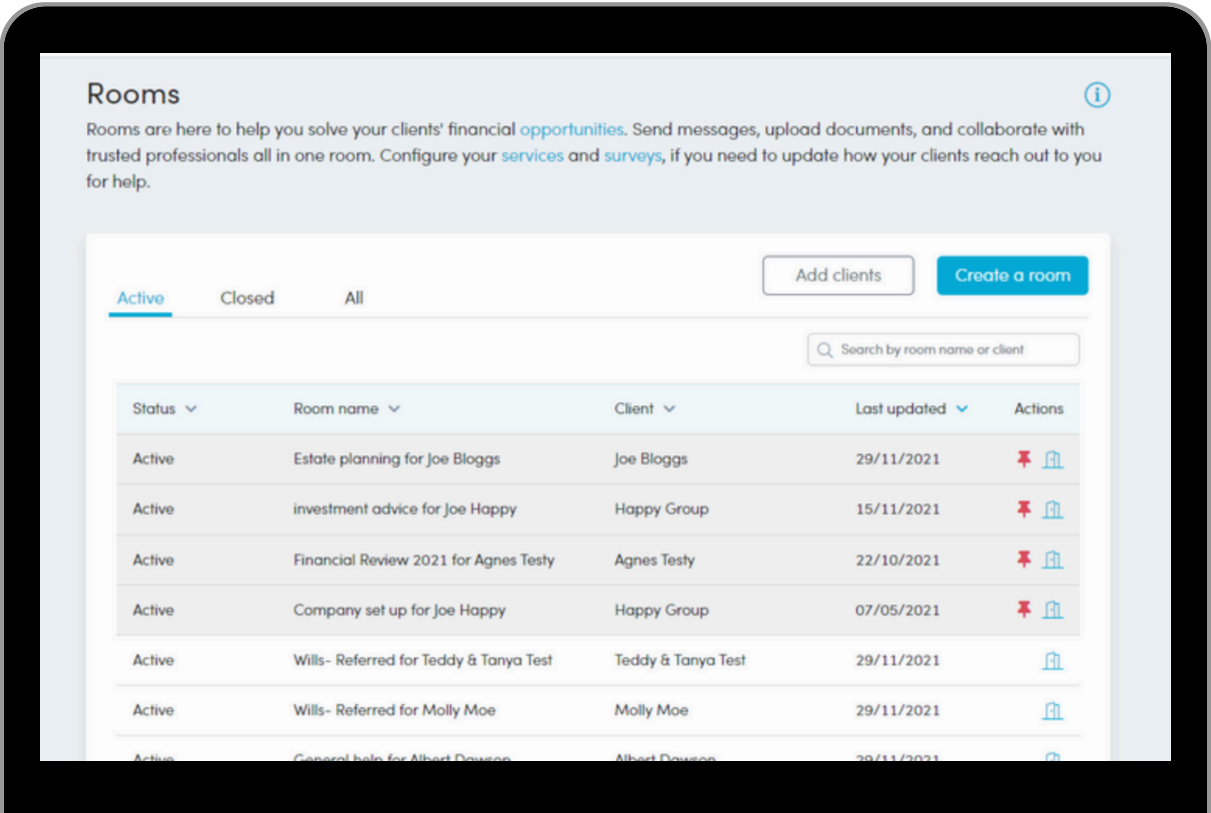


Setting up a Room

How to set up a new Room and add collaborators, including clients, staff and third parties.

Watch video

View guide



Rooms (features)



Room inclusions

By opening up a room, you're creating a collaboration space that includes:

- ▶ Activity logs
- ▶ Chat
- ▶ Document uploading
- ▶ Shared tasks
- ▶ Push and email notifications

[View guides](#)

[Watch videos](#)



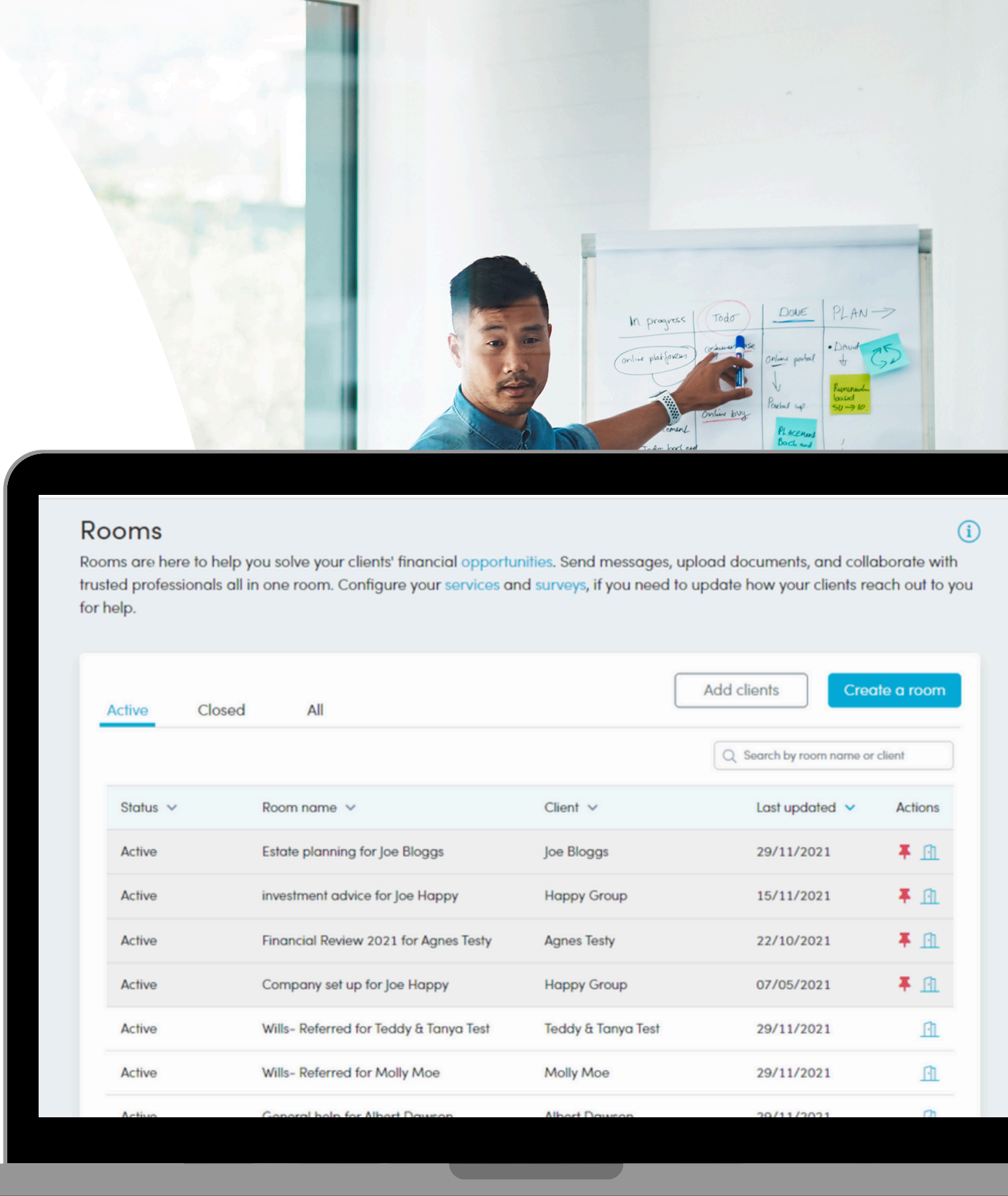
Export & close a Room

After the task is complete, you can export and close your room to keep a record of the activity, chat and documents shared in the room.

Learn how to export and close a Room when you're done.

[View guide](#)

[Watch video](#)



Next steps



Getting your staff trained

[Book Training](#)



Think about your client approach



Incorporating myprosperity into your business



Start your rollout



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

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