



Your quick resource guide to...

Getting Connected

Setting up your partner
portal for success



Getting Connected

Your quick reference guide

Thank you for attending the **Getting Connected** 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 setup your Partner Portal. Click the topic below or continue through to find what you need.

- ▶ Admin settings
- ▶ Configuring your portal
- ▶ Viewing and adding clients
- ▶ Support and resources
- ▶ Next steps



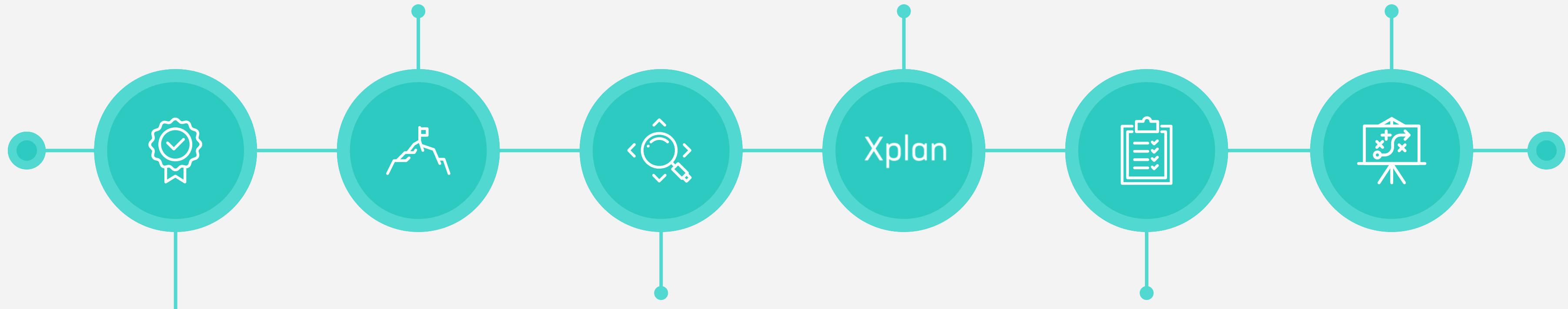
Watch the full webinar

myprosperity onboarding training

Getting Started

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

Register now



Getting Connected

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

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

Ongoing Support

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

Q&A

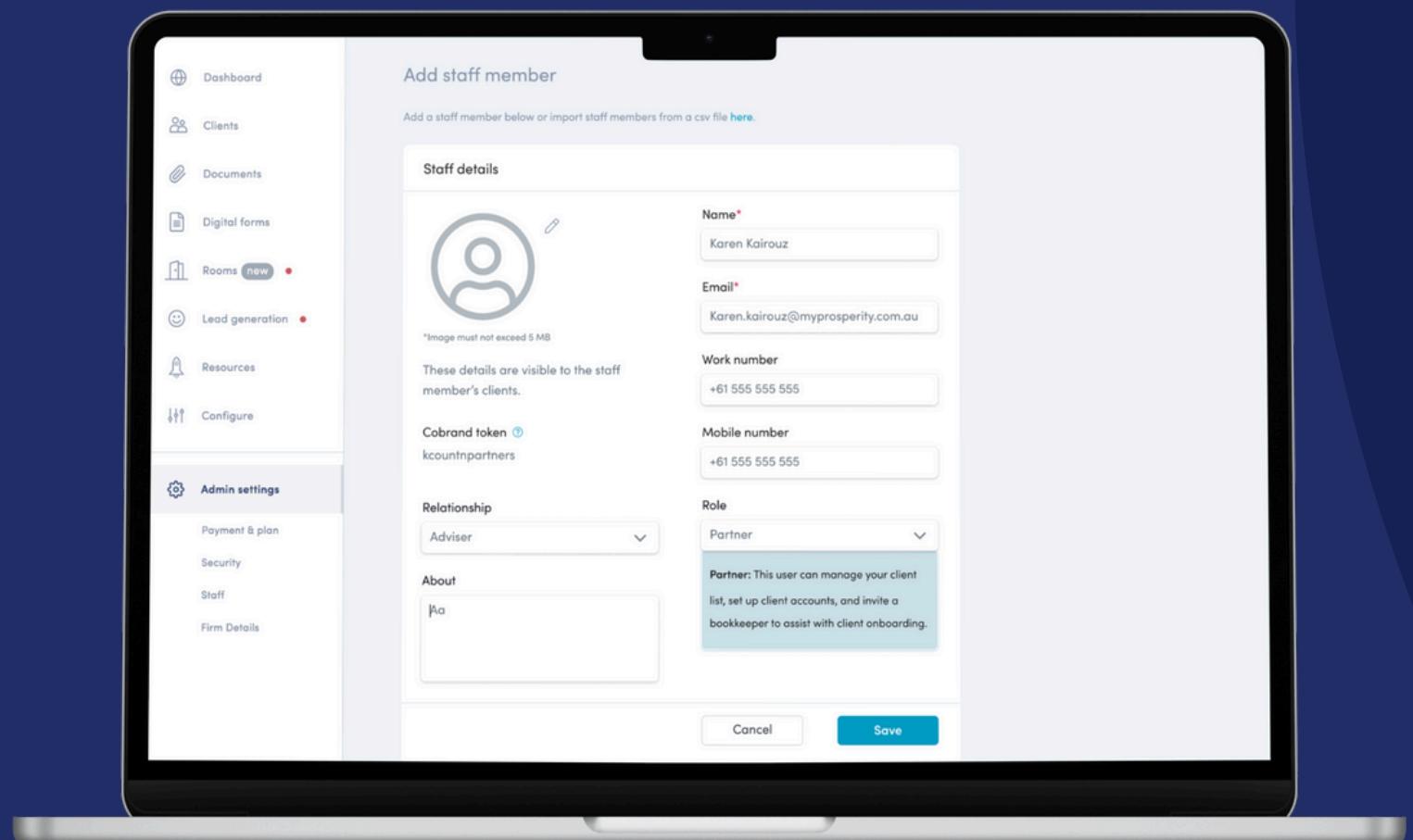
Once you've completed the 3 onboarding webinars, you'll be invited to sign up to a live Q&A session.

Admin settings



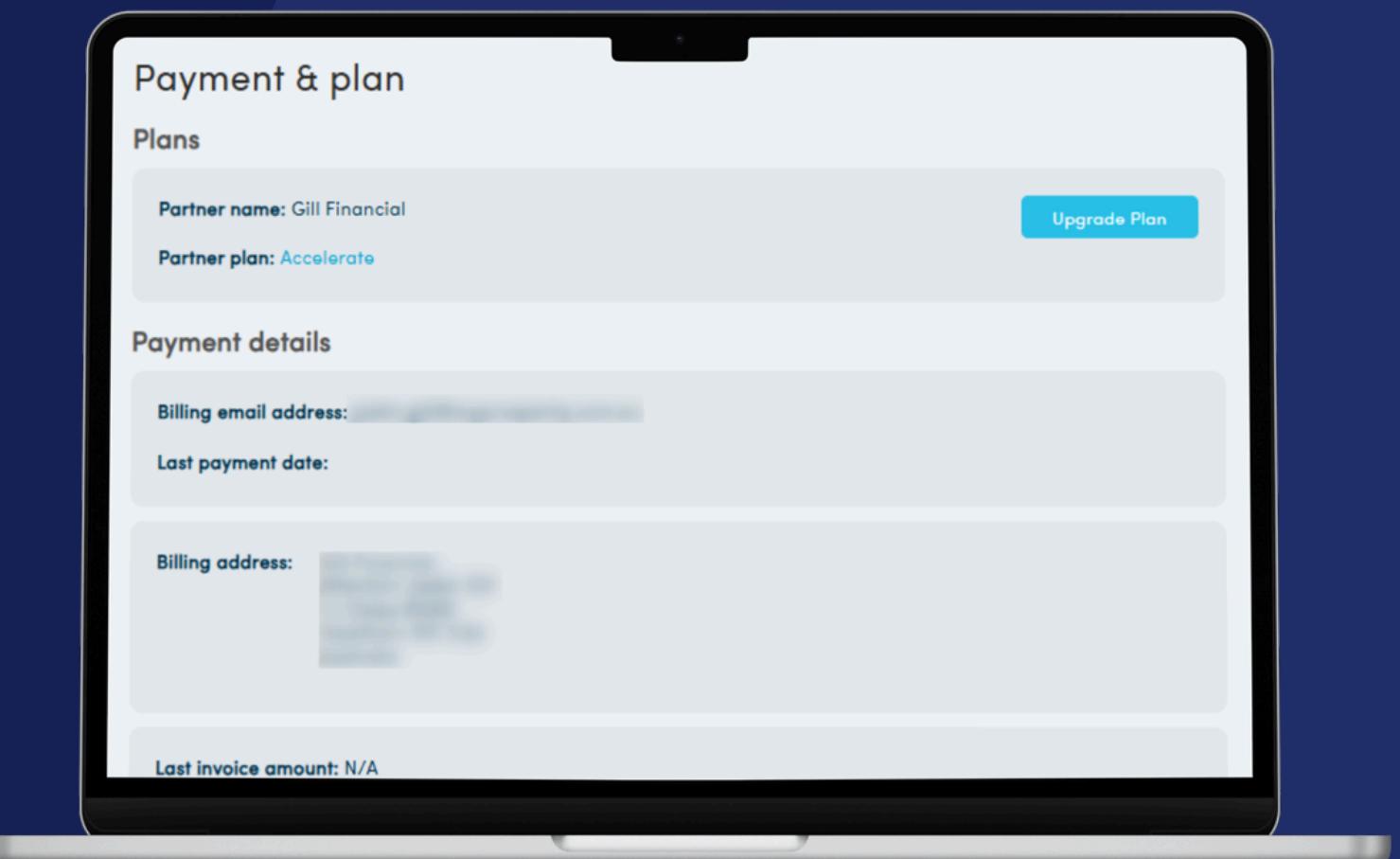
Staff roles

Learn how to add staff, assign roles and permissions, and manage access to client files through the video or guide below.

[Watch video](#)[View guides](#)

Billing, payments & firm details

Discover where to view invoices, update billing details, and manage your firm's contact information with the video and guide below.

[Watch video](#)[View guides](#)

Configuring



Services

Set up and customise the list of services your firm offers to improve visibility for clients and generate new enquiries through the portal.

[Watch video](#)[View guide](#)

Mobile app setup

Configure client portal views and customise widgets to tailor the mobile app experience to different client needs.

[Watch video](#)[View guide](#)

Integrations

Learn how to connect third-party tools like Xplan, FYI, SharePoint, and e-signature platforms for a more seamless workflow.

[Watch video](#)[View guides](#)

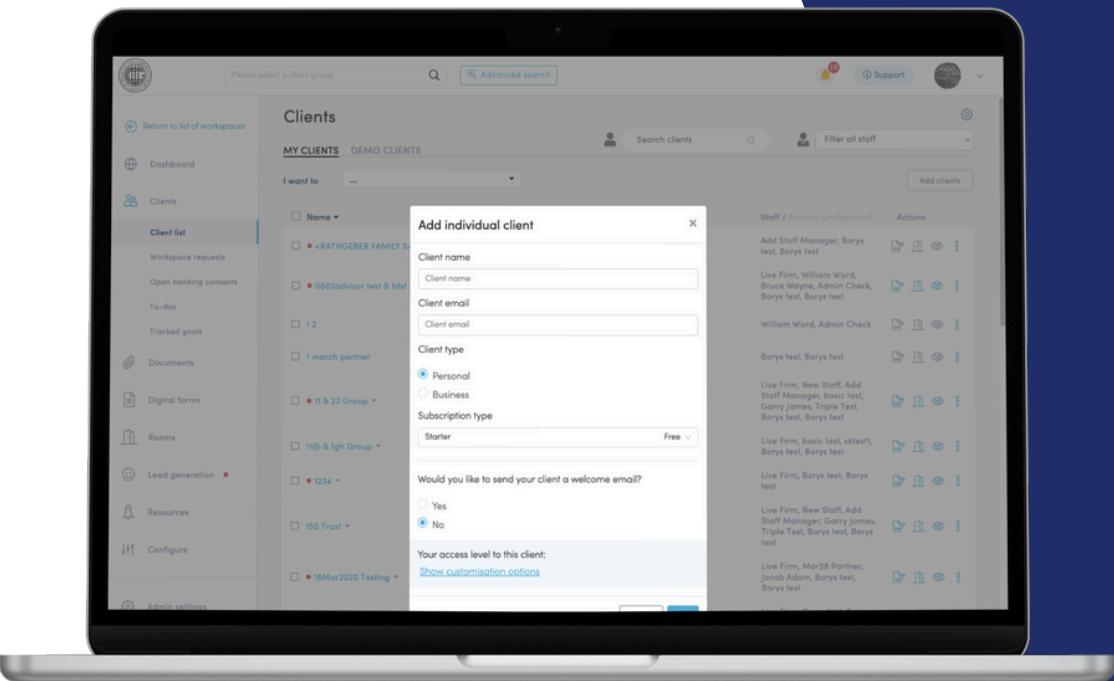
Adding clients

Via integrations, individually or in bulk



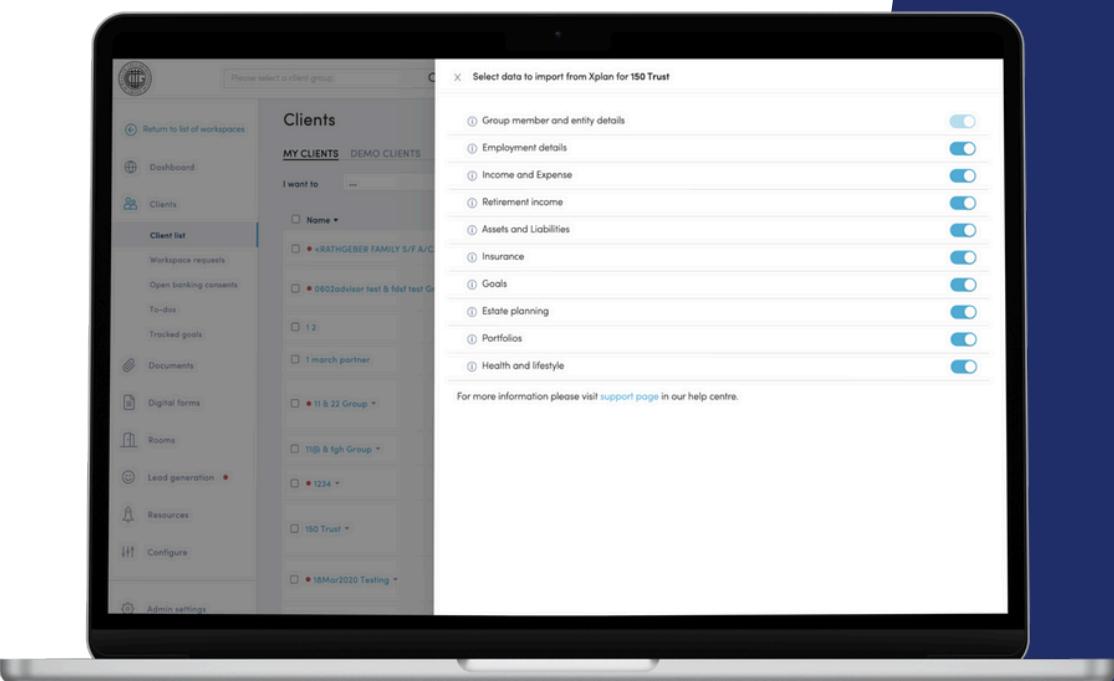
Adding a new client (manual)

Manually create individual, group, or entity client profiles, choose account type, and send invitations or digital forms during setup.

[View guide](#)[Watch video](#)

Adding clients via integration

Import multiple clients at once from connected platforms like Xplan, APS, or FYI, streamlining onboarding while maintaining control over invitations.

[View guide](#)[Watch video](#)

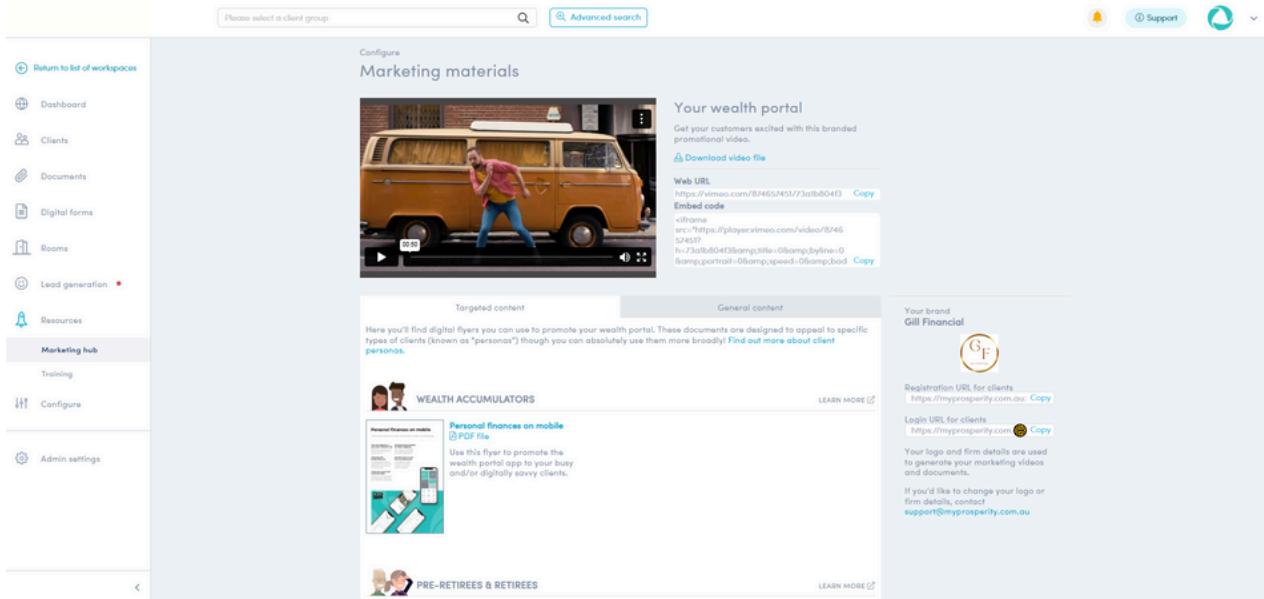
Resources for change management

Effective change management helps clients understand the benefits of myprosperity. We've developed a range of flyers and email templates for you to use with your clients.

Branded resources

In the **Marketing Hub** you'll find resources to share with your clients in your own business branding.

Watch the video or view the guide below to see where you can find these resources.



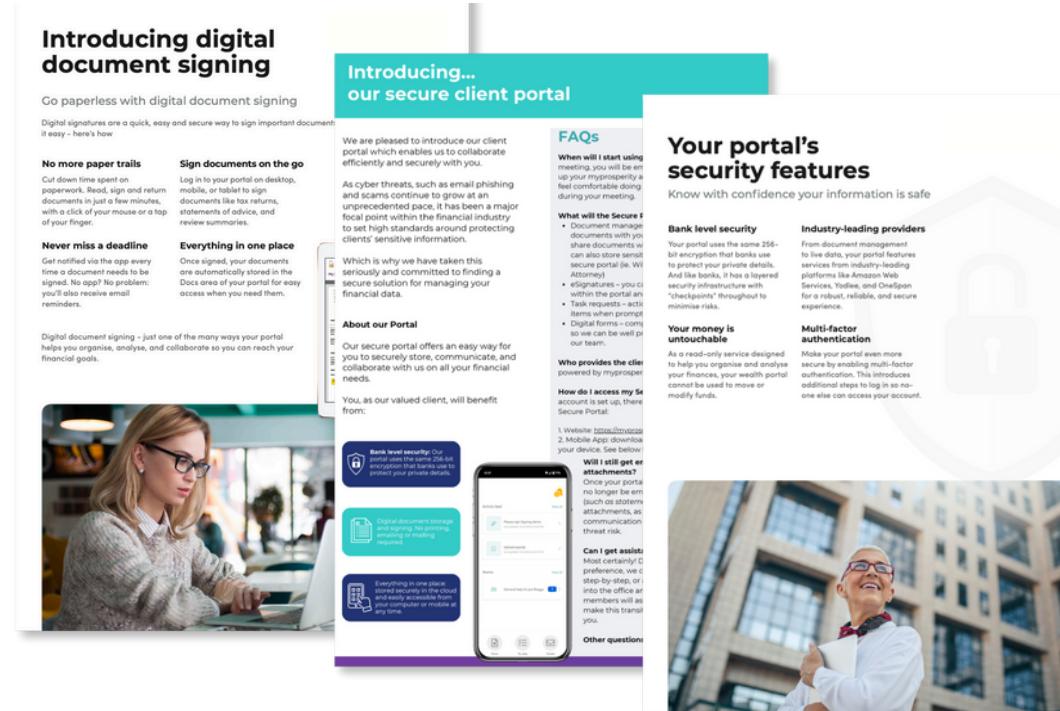
The screenshot shows the Marketing Hub interface with a sidebar containing 'Marketing hub' and 'Configure Marketing materials'. The main content area displays a 'Your wealth portal' section with a video player showing a man in a van, download links for a video file and embed code, and sections for 'Targeted content' and 'General content'. It also shows 'Your brand' with a logo for 'Gill Financial' and links for 'WEALTH ACCUMULATORS' and 'PRE-RETIREES & RETIREES'.

[View guide](#)

[Watch video](#)

Other resources

Through our **Partner help centre** you'll find a range of content including the key change management flyers and templates below.



The first screenshot, 'Introducing digital document signing', shows a landing page with sections for 'Sign documents on the go', 'Never miss a deadline', and 'Everything in one place'. It includes a video player showing a woman at a desk, a 'FAQs' section, and a 'Bank level security' section. The second screenshot, 'Introducing... our secure client portal', shows a landing page with sections for 'Your portal's security features', 'Bank level security', 'Industry-leading providers', 'Your money is untouchable', and 'Multi-factor authentication'. It includes a video player showing a man in a white coat outdoors and a 'Bank level security' section.

[View resources](#)

Resources for change management

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View resources

Introducing digital document signing

Go paperless with digital document signing

Digital signatures are a quick, easy and secure way to sign important documents it easy – here's how

No more paper trails

Cut down time spent on paperwork. Read, sign and return documents in just a few minutes, with a click of your mouse or a tap of your finger.

Never miss a deadline

Get notified via the app every time a document needs to be signed. No app? No problem: you'll also receive email reminders.

Digital document signing – just one of the many ways your portal helps you organise, analyse, and collaborate so you can reach your financial goals.

Sign documents on the go

Log in to your portal on desktop, mobile, or tablet to sign documents like tax returns, statements of advice, and review summaries.

Everything in one place

Once signed, your documents are automatically stored in the Docs area of your portal for easy access when you need them.

Our secure portal offers an easy way for you to securely store, communicate, and collaborate with us on all your financial needs.

You, as our valued client, will benefit from:

Introducing... our secure client portal

FAQs

When will I start using meeting, you will be en up your myprosperity a feel comfortable doing during your meeting.

What will the Secure F

- Document management: documents with you share documents with can also store sensitive portal (i.e. WI Attorney)
- eSignatures: you can within the portal and Task requests – active items when prompt
- Digital forms – com so we can be well prepared for our team.

Who provides the client

powered by myprosper Your portal is set up, there Secure Portal:

1. Website: <https://mypros>
2. Mobile App: download your device. See below

Will I still get email attachments?

Once your portal no longer be email attachments, as communication threat risk.

Can I get assistance?

Most certainly! Our preference, we can step-by-step, or into the office and members will assist you.

Other questions?

Your portal's security features

Know with confidence your information is safe

Bank level security

Your portal uses the same 256-bit encryption that banks use to protect your private details. And like banks, it has a layered security infrastructure with "checkpoints" throughout to minimise risks.

Your money is untouched

As a read-only service designed to help you organise and analyse your finances, your wealth portal cannot be used to move or modify funds.

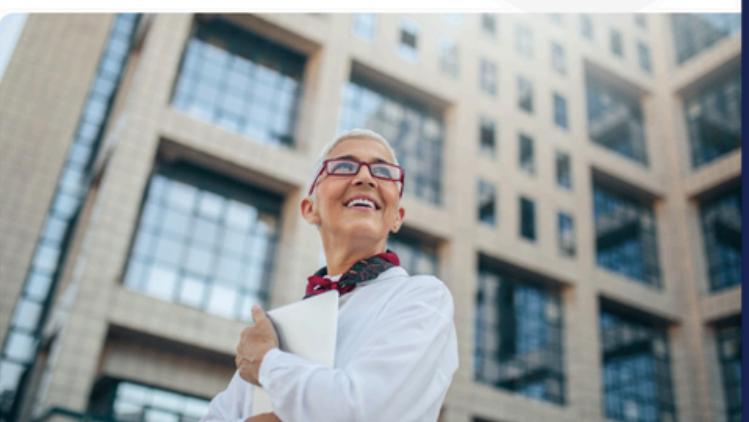
Industry-leading providers

From document management to live data, your portal features services from industry-leading

platforms like Amazon Web Services, Yodlee, and OneSpan for a robust, reliable, and secure experience.

Multi-factor authentication

Make your portal even more secure by enabling multi-factor authentication. This introduces additional steps to log in so no one else can access your account.



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**](mailto:support@myprosperity.com).

[**Partner help centre**](#)

[**Email support**](#)