myprosperity

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.

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.

Register now

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**

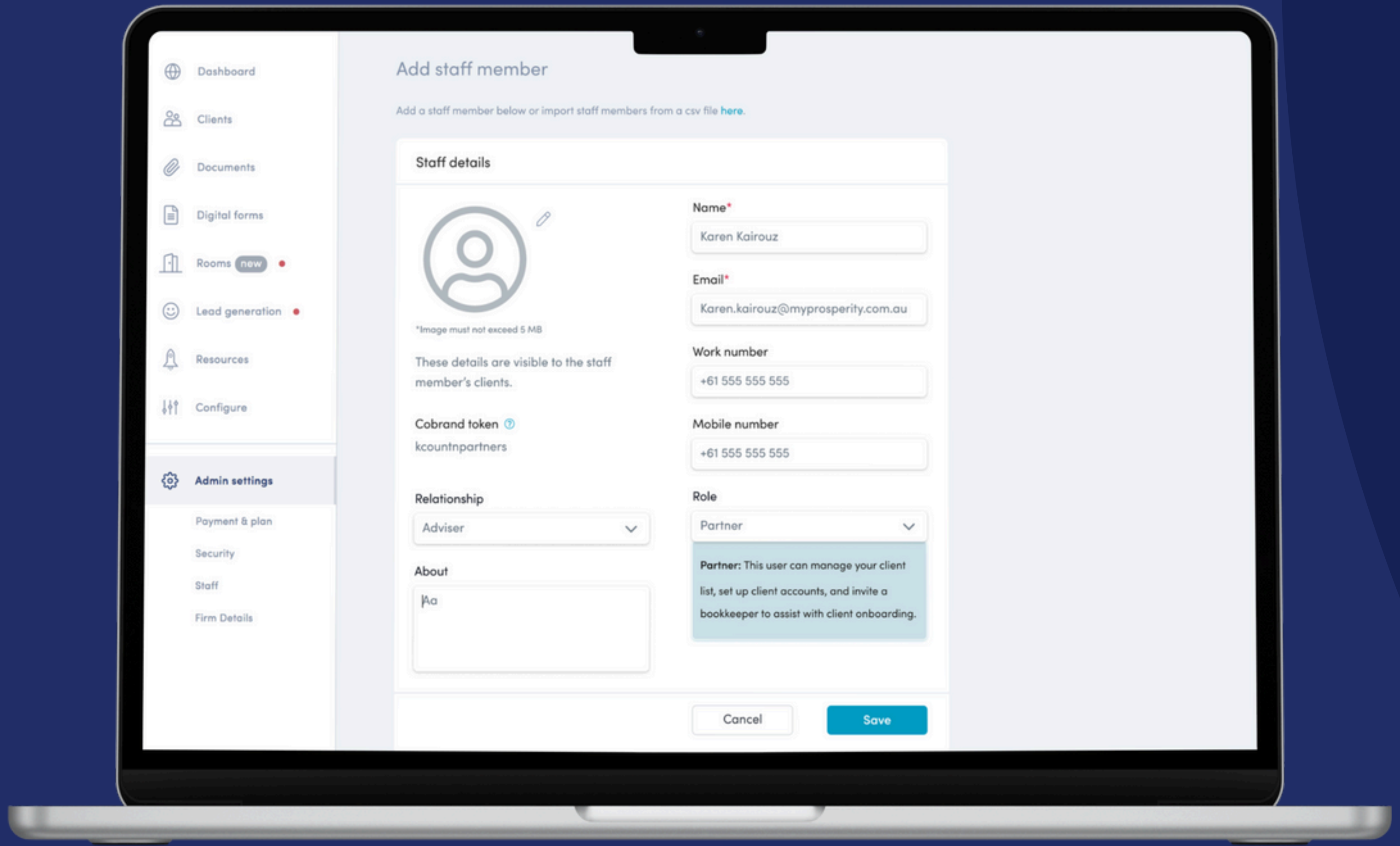
Admin settings

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

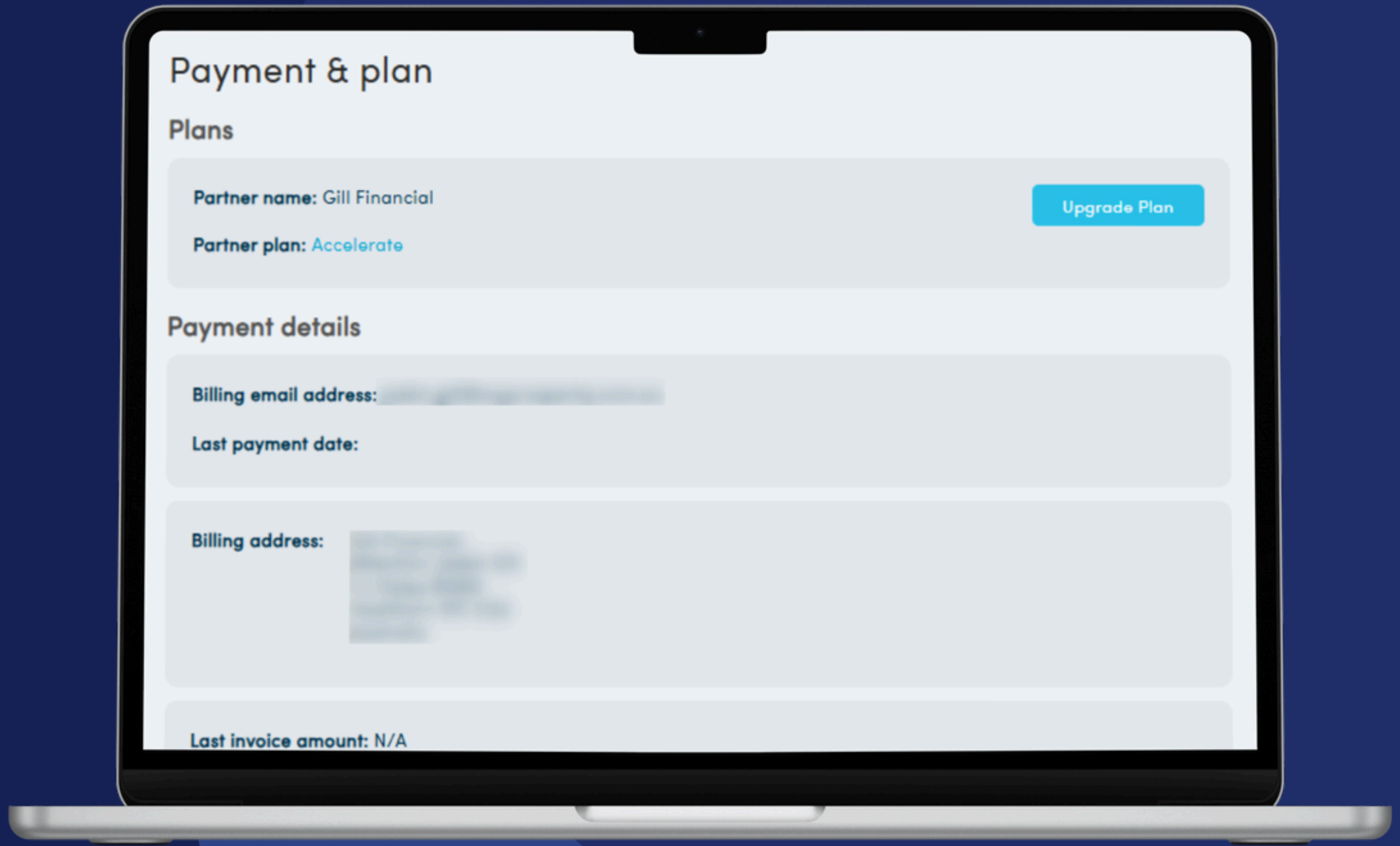


Billing, payments & firm details

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



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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

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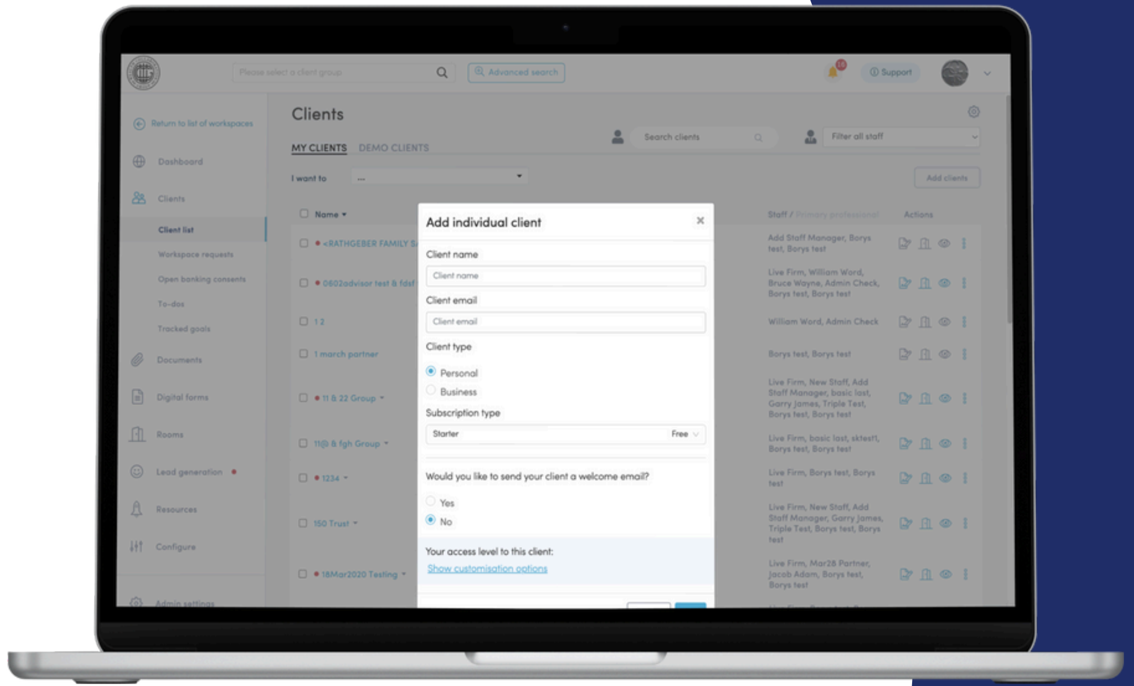
Adding clients

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.

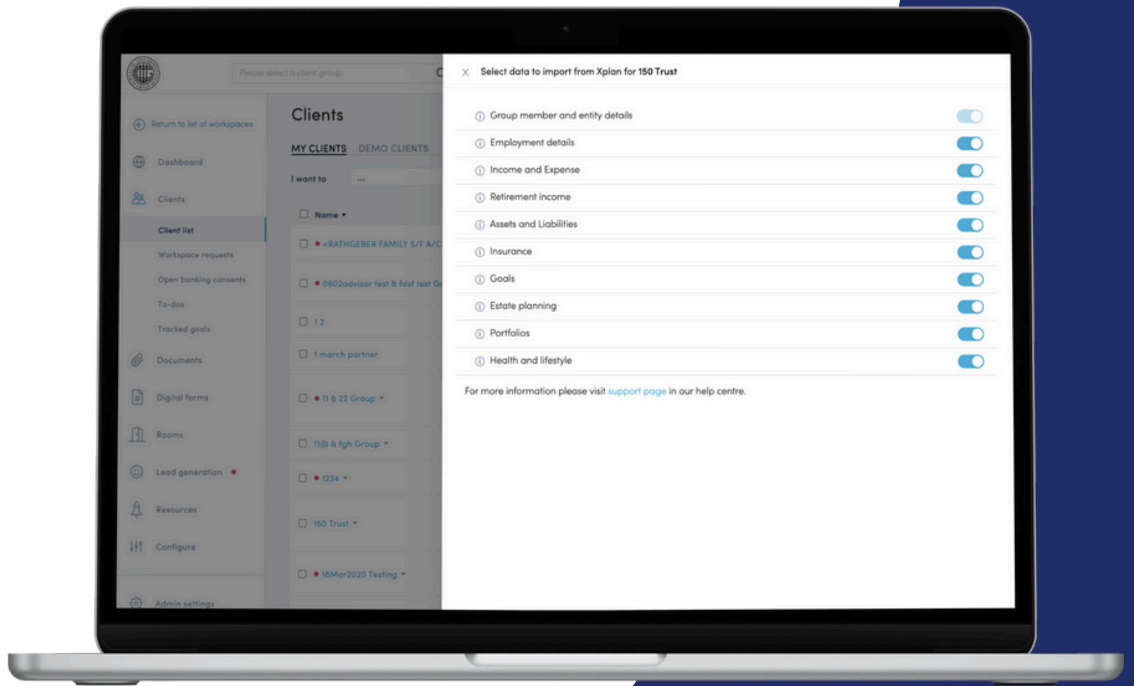
View guide | Watch video



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



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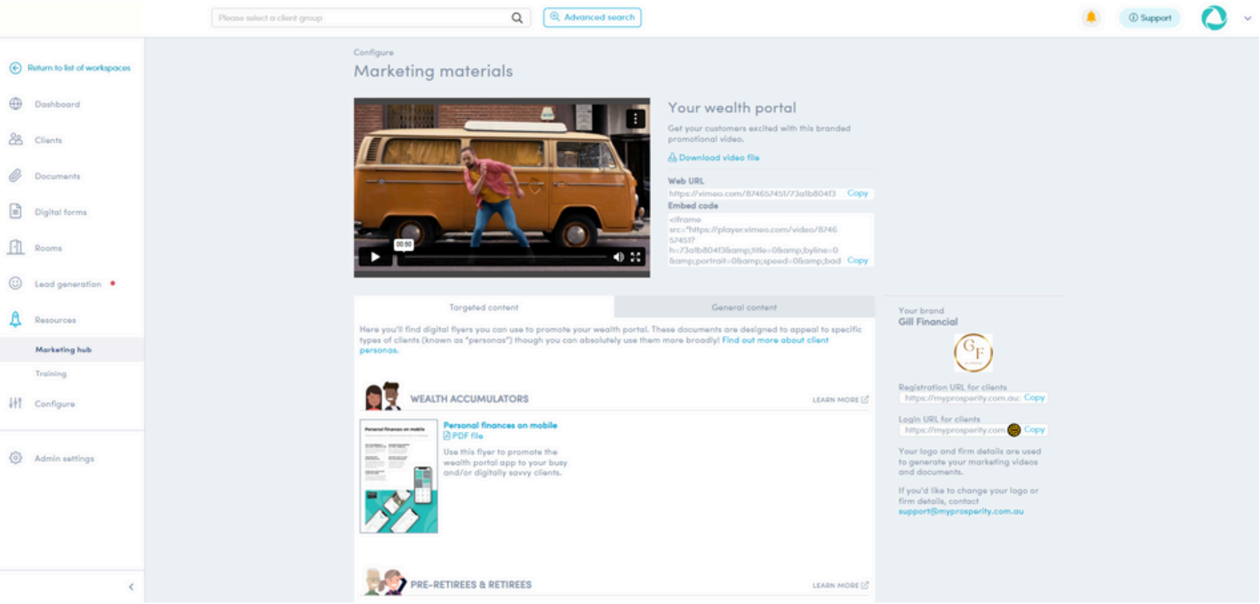
Resources for change management

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.

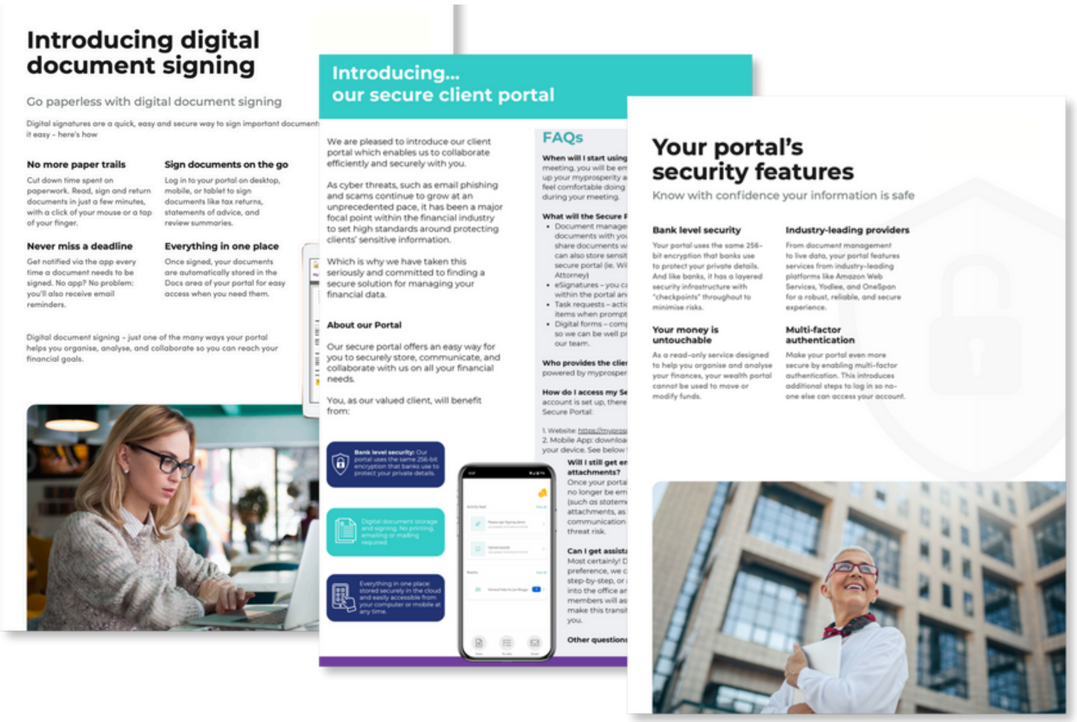


View guide

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.



View resources

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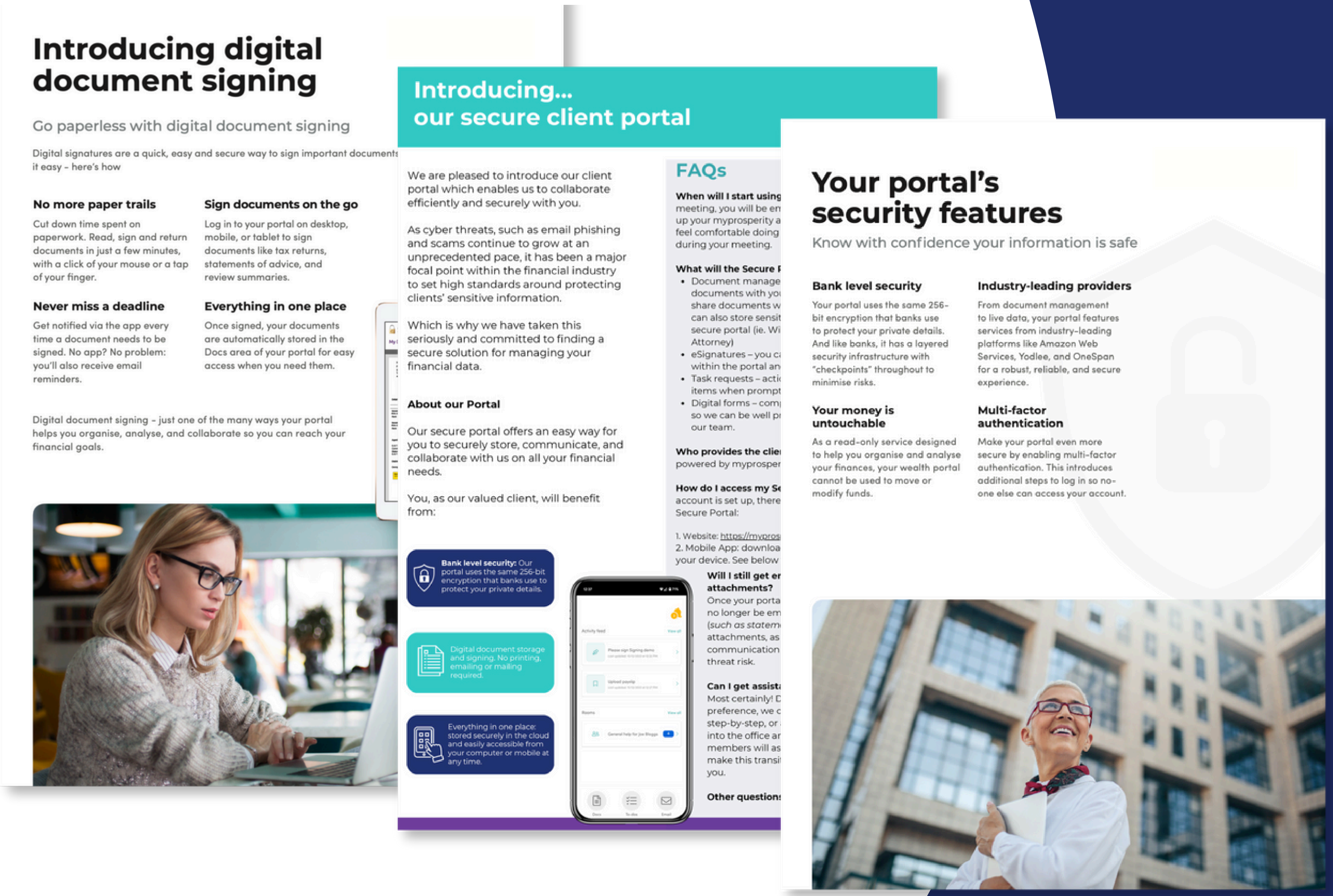

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Next steps

- 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