CONCERT HUB

Portal Access Guide

THE Openwork PARTNERSHIP

Contents

Introduction

The Client Portal is an interactive, web-based support tool to help with communication and provide a secure way of sharing information and documentation between Advisers and Clients.

This guide is designed to provide step-by-step instructions for Clients on how to use the ConcertHub Client Portal. The Client Portal has been designed to be intuitive; however, some Clients may prefer to work their way through this guide when familiarising themselves with the system.

How to register, create and validate an account

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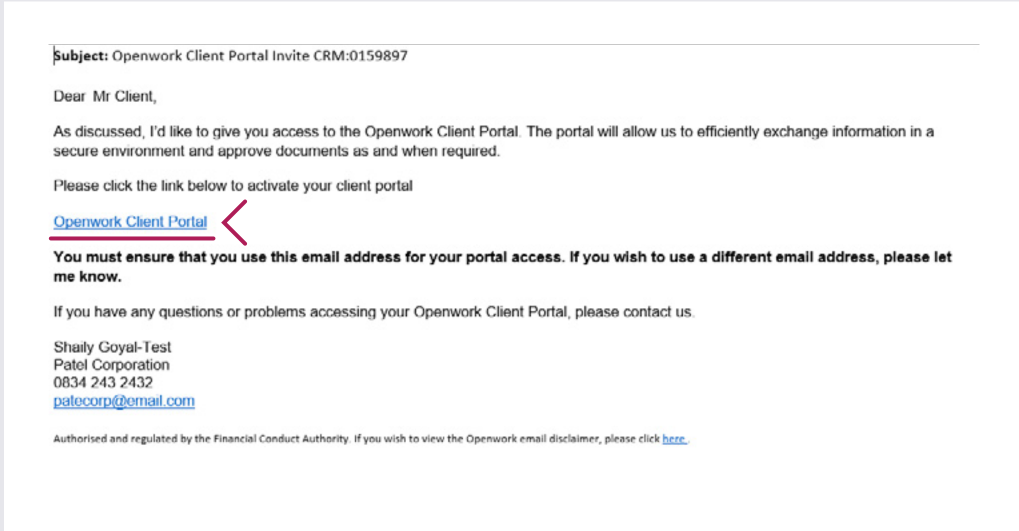
How to register, create and validate an account

Before you can use the portal, you will need to register and create an account. You will receive an email to the address that you provided to your Adviser. The email response that you receive will be dependent on initial or previous registration to the portal. To access the portal, click on the link in the email to take you directly to the sign-in page.

If you are being given access for the first time you will receive the following email;

If you already have portal access given to you by another Adviser, you will receive the following email;

Please note, for the best functionality, please use either an IPAD, tablet, laptop or desktop computer to access, rather than a mobile phone.



Subject: Openwork Client Portal Invite CRM:0159897

Dear Mr Client,

As discussed, I'd like to give you access to the Openwork Client Portal. The portal will allow us to efficiently exchange information in a secure environment and approve documents as and when required.

Please click the link below to activate your client portal

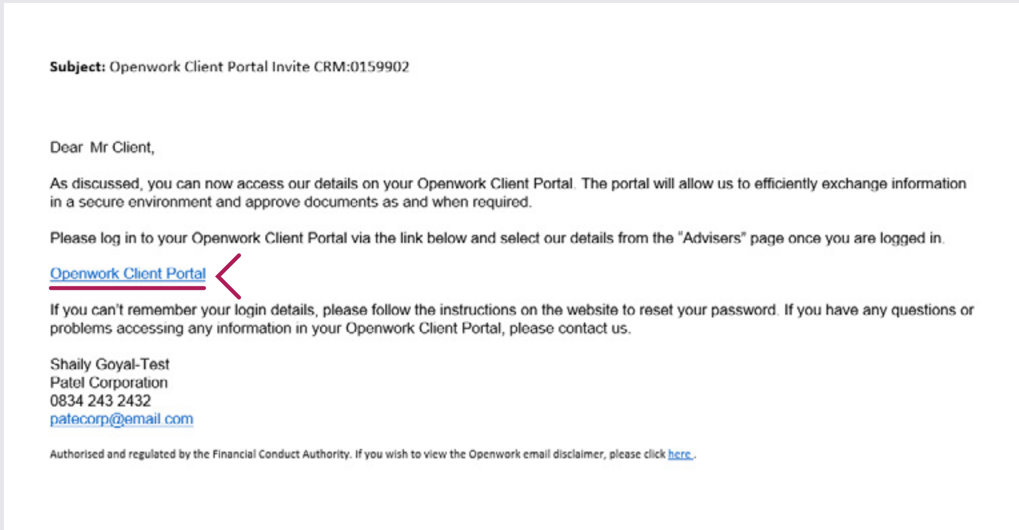
Openwork Client Portal

You must ensure that you use this email address for your portal access. If you wish to use a different email address, please let me know.

If you have any questions or problems accessing your Openwork Client Portal, please contact us.

Shaily Goyal-Test
Patel Corporation
0834 243 2432
patecorp@email.com

Authorised and regulated by the Financial Conduct Authority. If you wish to view the Openwork email disclaimer, please click here.



Subject: Openwork Client Portal Invite CRM:0159902

Dear Mr Client,

As discussed, you can now access our details on your Openwork Client Portal. The portal will allow us to efficiently exchange information in a secure environment and approve documents as and when required.

Please log in to your Openwork Client Portal via the link below and select our details from the "Advisers" page once you are logged in.

Openwork Client Portal

If you can't remember your login details, please follow the instructions on the website to reset your password. If you have any questions or problems accessing any information in your Openwork Client Portal, please contact us.

Shaily Goyal-Test
Patel Corporation
0834 243 2432
patecorp@email.com

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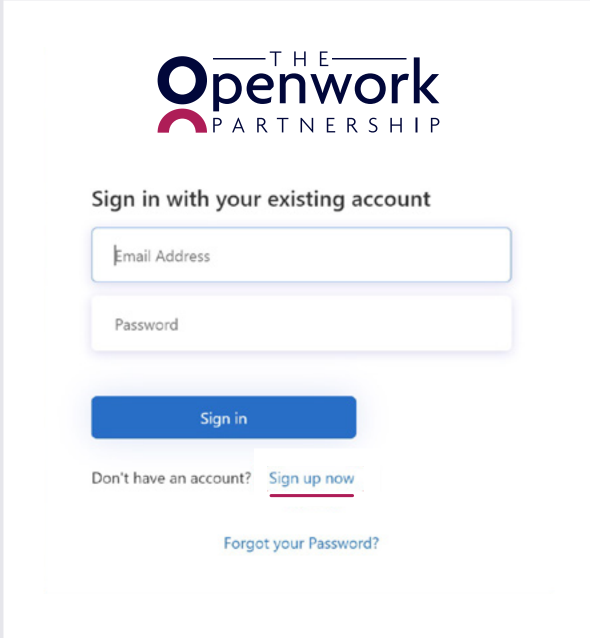
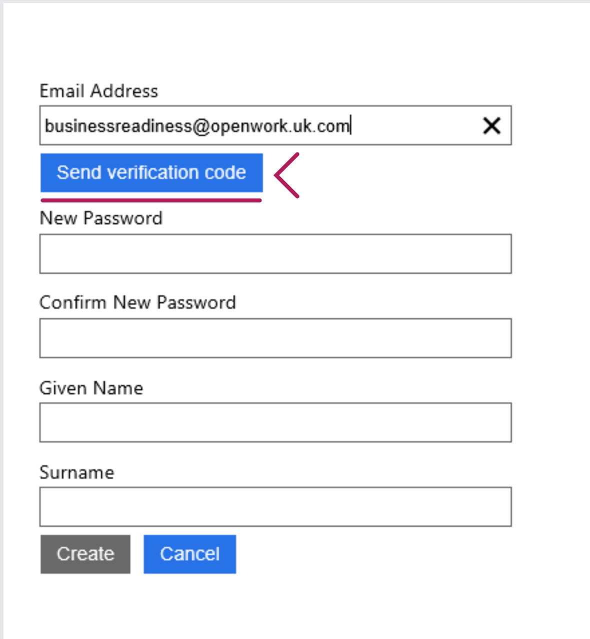
How to register, create and validate an account

1. To register, click on **'Sign up now'**.

2. Enter your email address and click on **'Send verification code'**.





How to register, create and validate an account

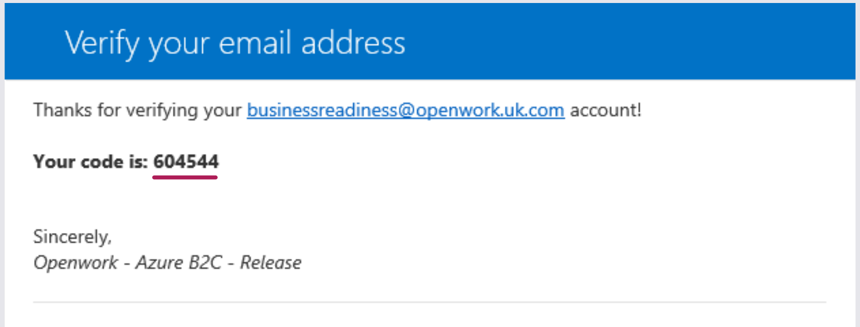
3. You will then receive a 6-digit verification code sent to your email address.

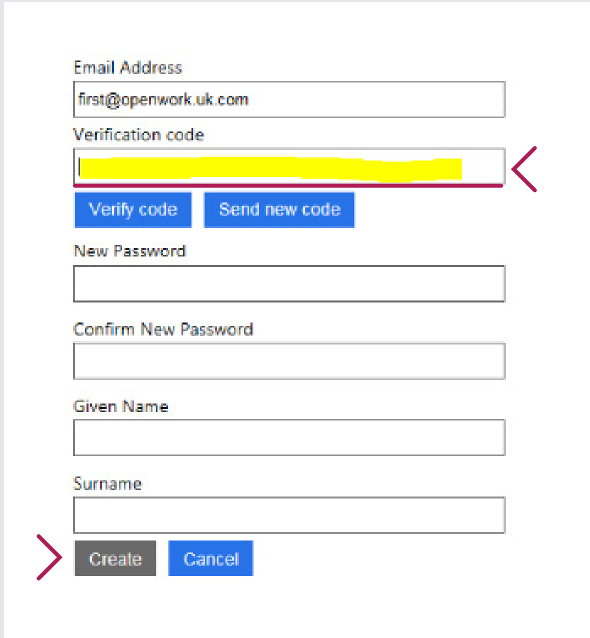
4. Enter the 6-digit code in the verification code box on the portal, then click **'Verify code'**. The verification box will then disappear, and you will need to create a password which conforms to the following format;

   The password must be between 8 and 64 characters. The password must have at least 3 of the following:

   - a lowercase letter
   - an uppercase letter
   - a digit
   - a symbol

   Once you have entered and confirmed your new password, complete your name fields then click **'Create'**.



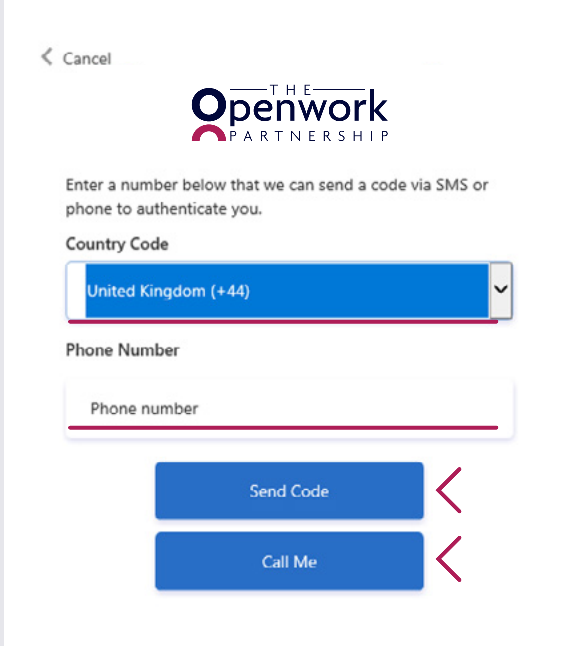


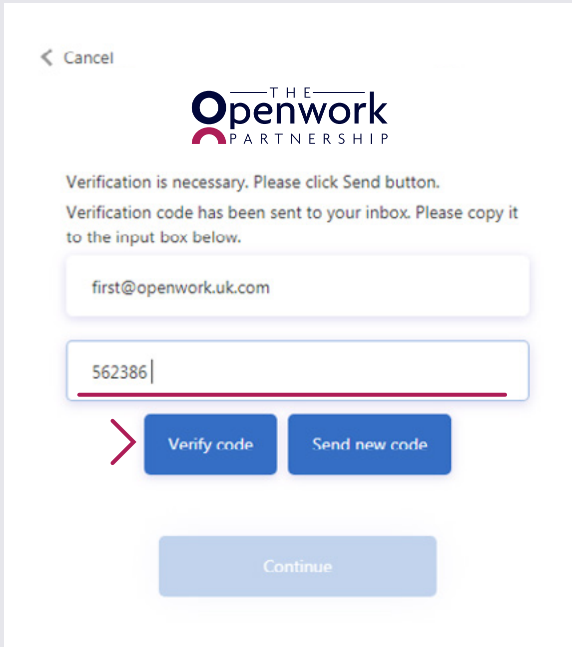
How to register, create and validate an account

5. Once you have created your account, you will need to complete further details to receive a verification code to a mobile number. Select your Country Code from the drop-down menu and enter your preferred mobile number.

6. If you click **'Send Code'** you will receive a text message from SMSVerify with a 6-digit code. Enter the code in the free box in the new window which has opened, then click 'Verify code'

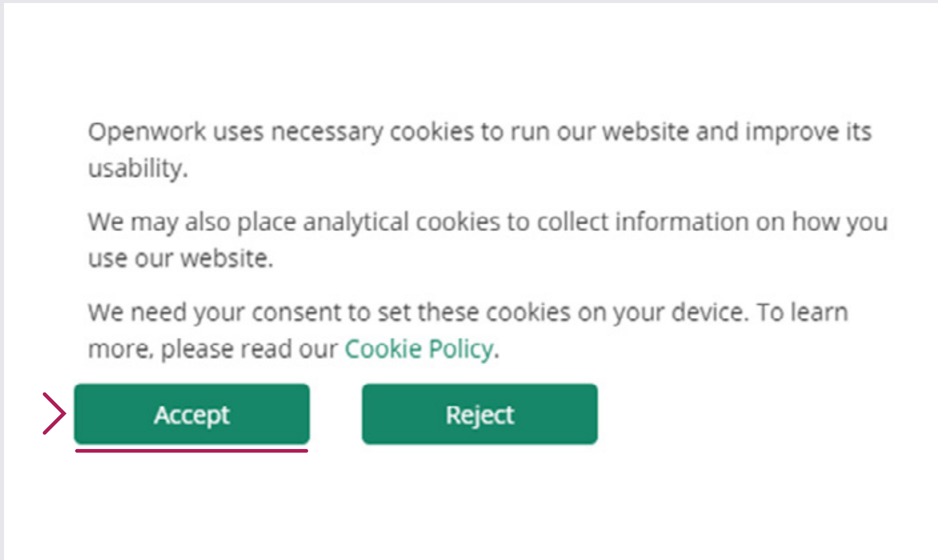
   If you select **'Call Me'**, you will receive a call from +1 (855) 330-8653 and an automated voice with an American accent. Select option (2) on your handset and press pound key (which is the # key) – the voice will confirm that your sign-in was successfully verified, the call ends and you will be redirected to the main sign-in page for email and password.





7. When you select ‘Sign-in’ for the first time you may see a pop-up message asking you to accept or reject cookies. Please click **‘Accept’** to proceed.

8. You will then successfully be logged in to the Client Portal where you will be presented with the home page and you will see all the Advisers with whom you have a connection.



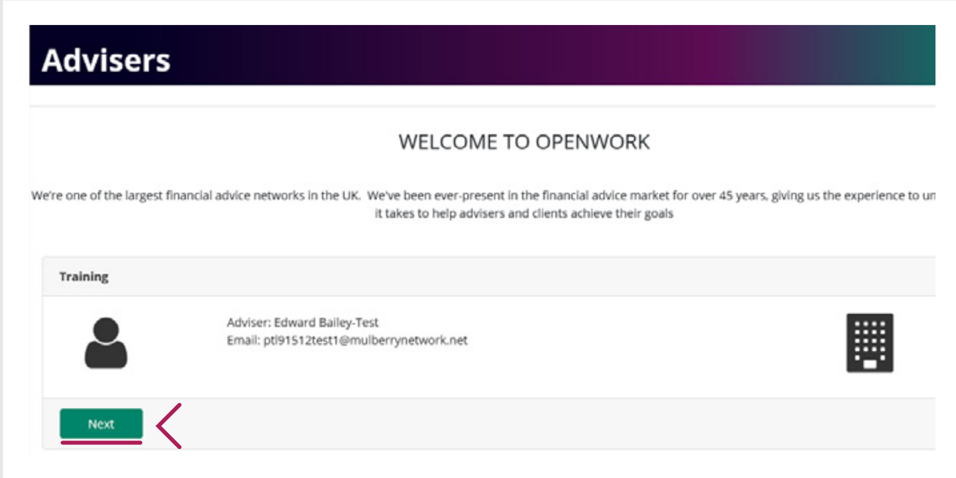
How to navigate portal content

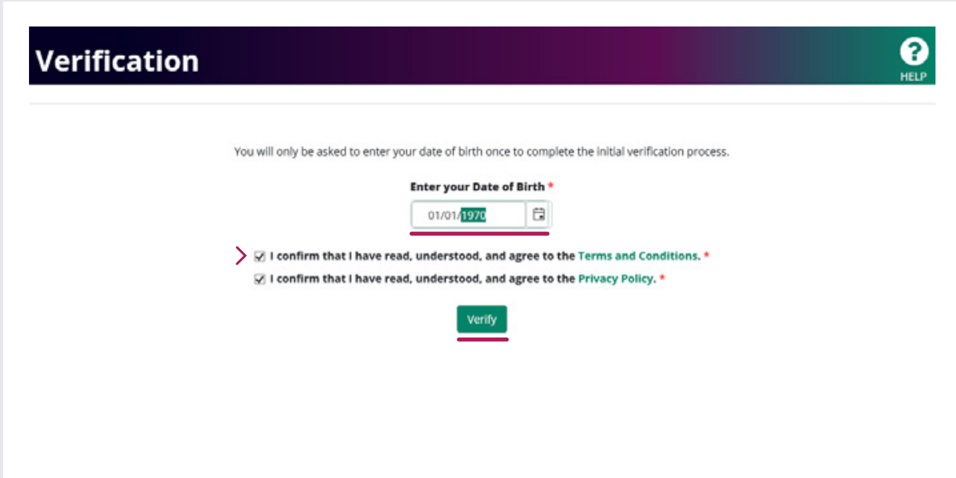
Other steps

How to navigate portal content

1. Once you have logged onto the portal you will see the following screen. Click on **'Next'** underneath the Adviser that you wish to view.

2. The first time that you carry out this procedure you will be asked to verify your identity by entering your date of birth. You will also need to tick the boxes to say that you have read the Terms and Conditions and Privacy Policy. Once you have done this click **'Verify'**.





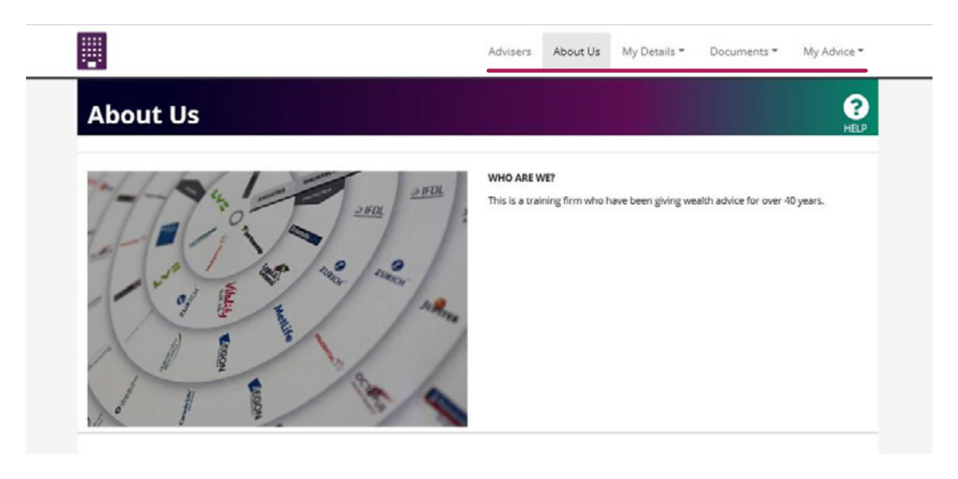
How to navigate portal content

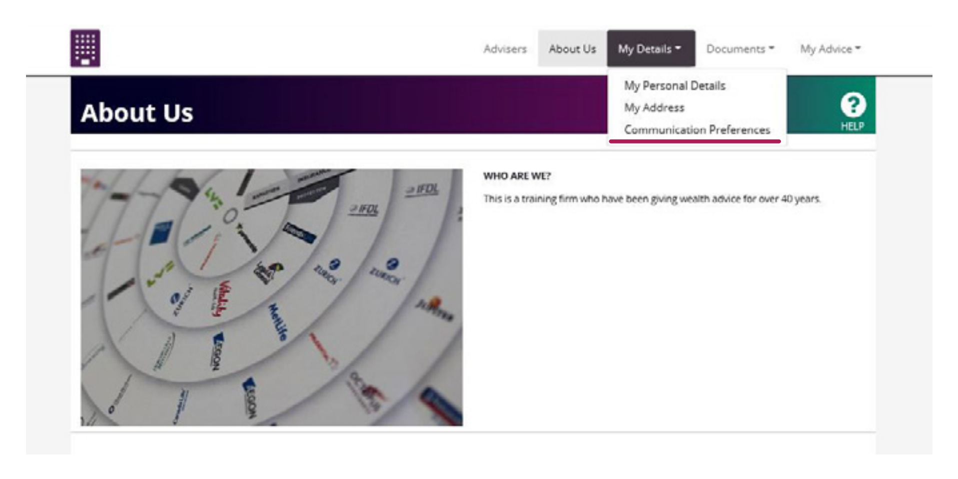
3. You will now be directed to your 'About Us' portal page where you will be able to select further pages to enable you to perform certain functions such as approve documents, complete questionnaires, and amend your personal details etc.

4. Clicking **'Advisers'** will take you back to the first page where you can choose your Adviser see step 8 above.

   Clicking **'About Us'** will reload the page that you are currently on.

   Clicking **'My Details'** will open a menu where you can choose to update your 'Personal Details', 'Address Details' and 'Communication Preferences'.





How to update your details in the Client Portal

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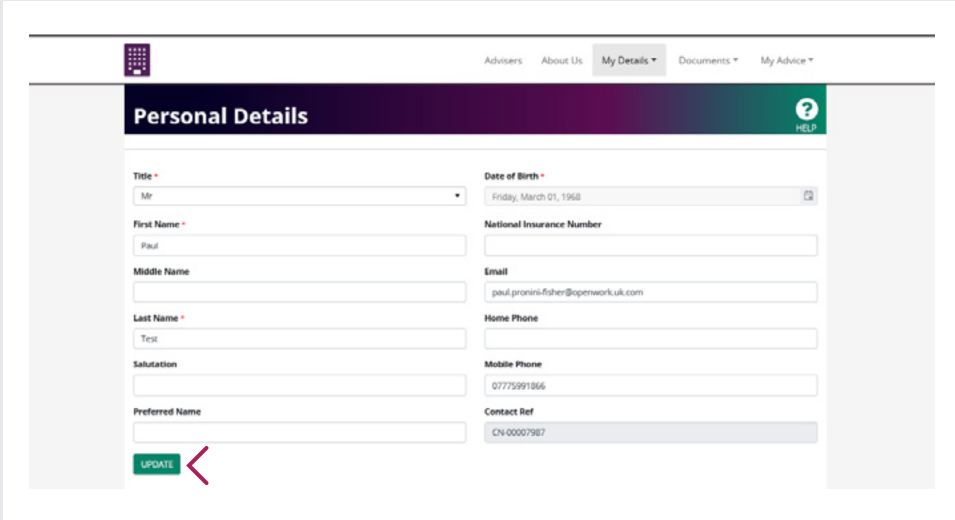
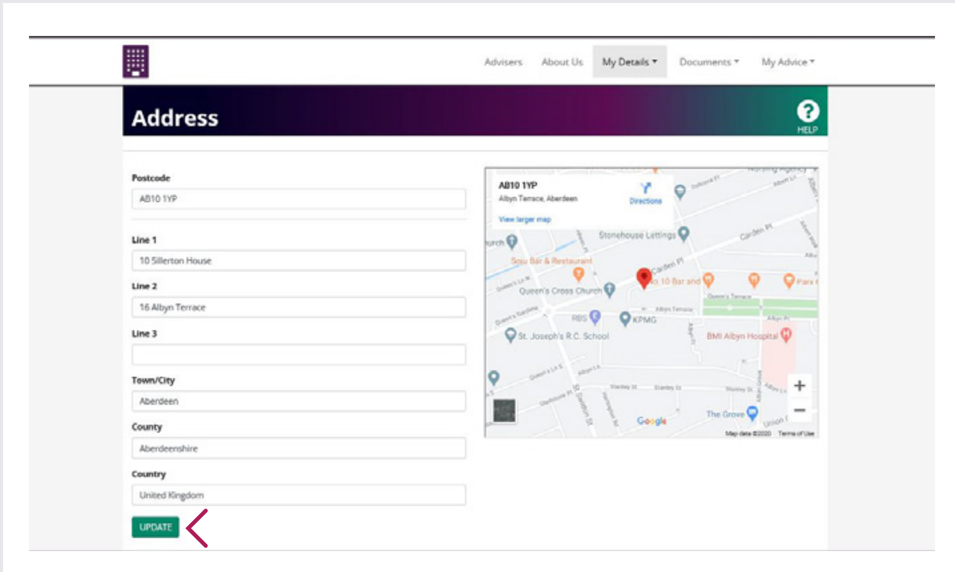
How to update your details in the Client Portal

1. Use the **'Personal Details'** page to update any changes to your name, telephone and email address details. Once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.

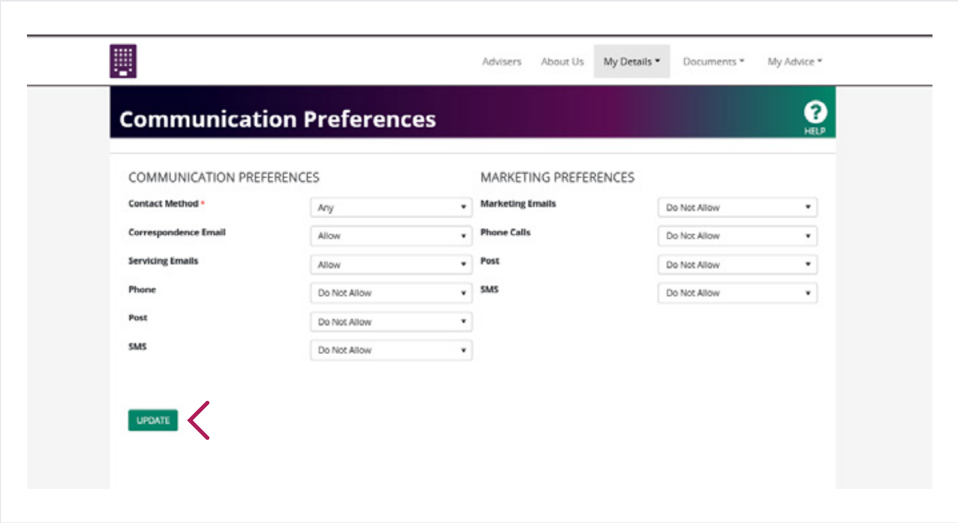
2. Use the **'Address'** page to update any changes to your address. As before, once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.





How to update your details in the Client Portal

3. Use the **'Communication Preferences'** page to update any changes to how you are contacted and what marketing you are happy to receive. As before, once details have been entered you will need to click **'UPDATE'** to effect the changes. Your changes will be updated immediately, and your Adviser will be notified.



How to view and upload documents

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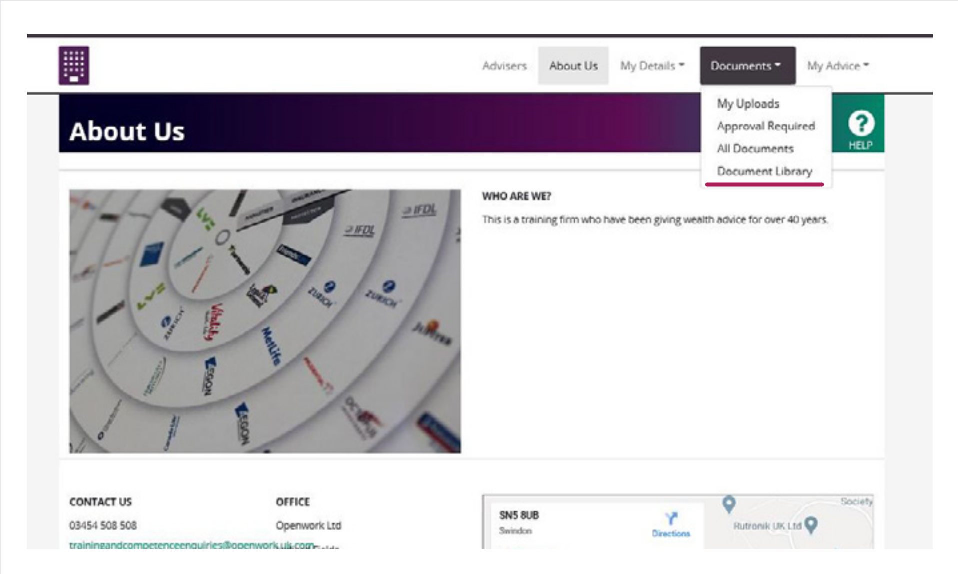
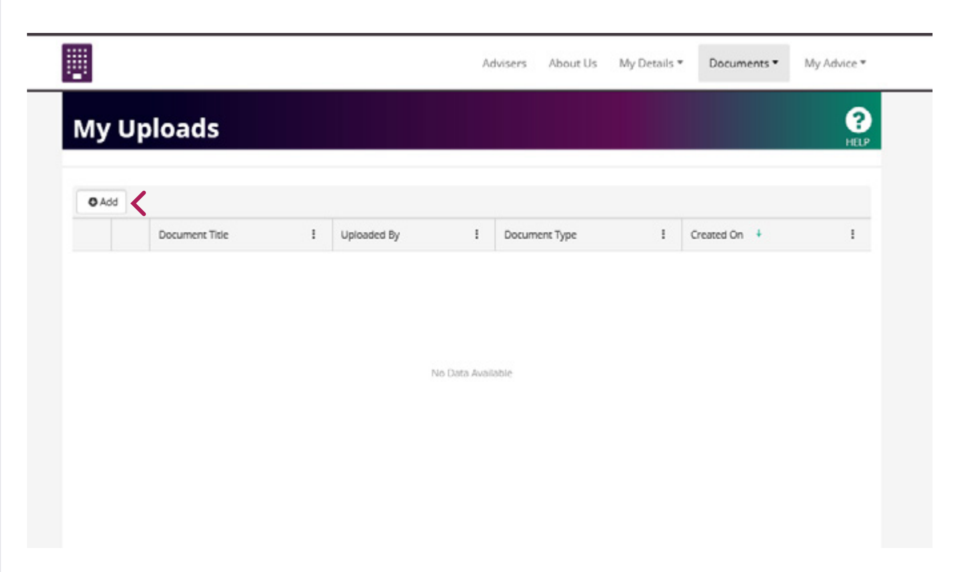
How to view and upload documents

1. Clicking on **'Documents'** will open a menu where you can choose to view documents that you have uploaded, those which need your approval, all documents loaded to your portal plus documents within your **'Document Library'**.

2. **'My Uploads'** lists out the documents that you have shared with your Adviser via the portal. This is also where you can upload any new documents. To upload a new document, click **'Add'**.

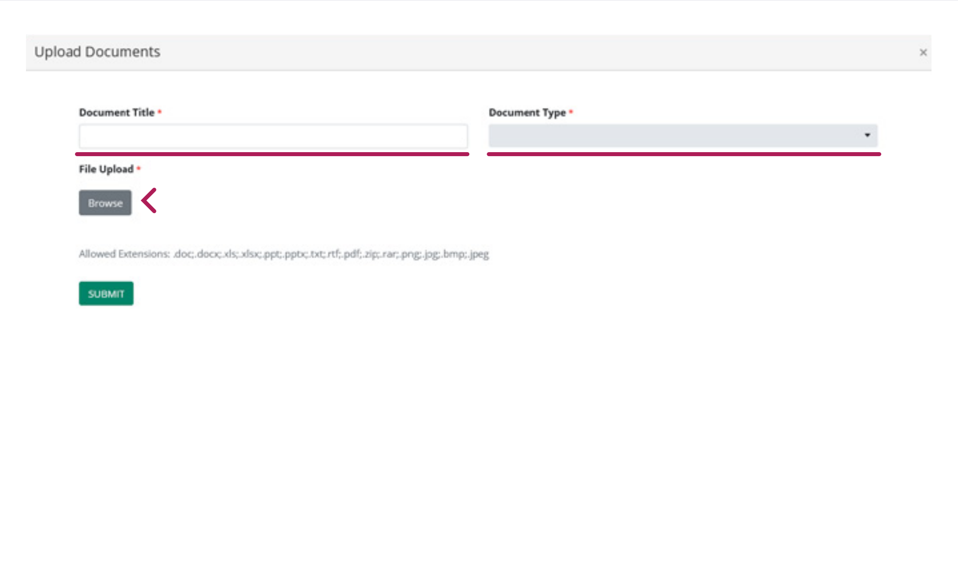


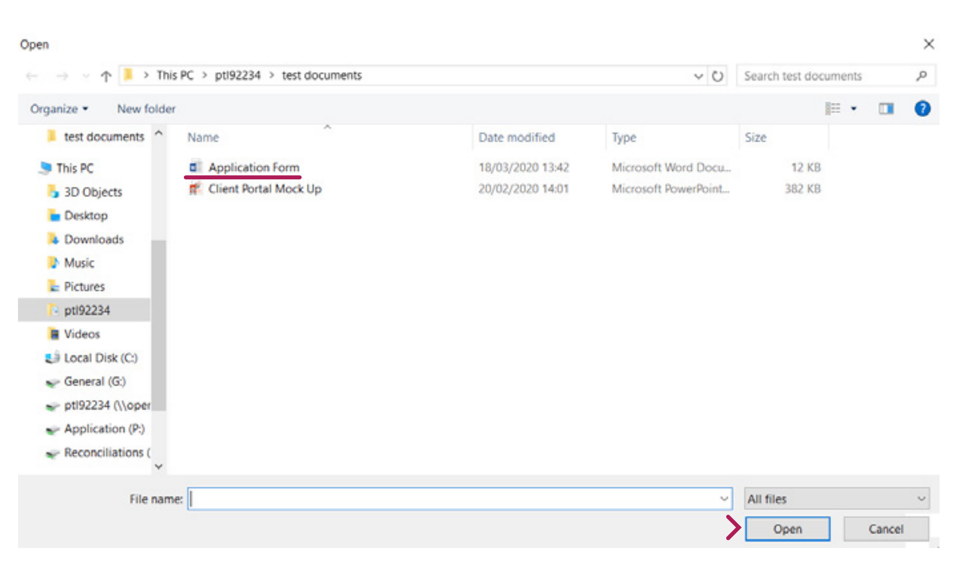


How to view and upload documents

3. Enter the name of the document in the **'Document Title'**, select the **'Document Type'** from the drop-down options, then click **'Browse'** to select the document from your computer.

4. When diverted to your computer files select the document that you want to upload and click **'Open'**.

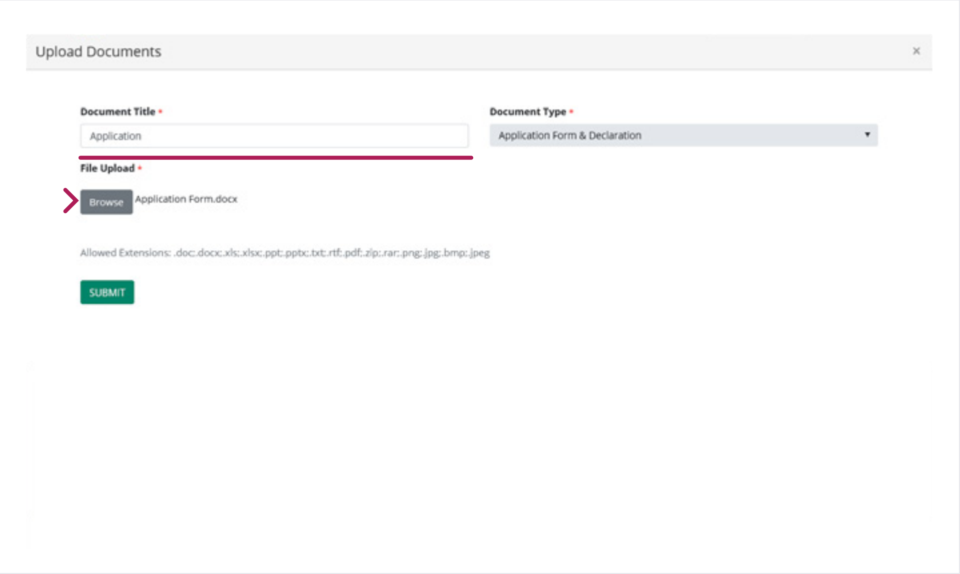


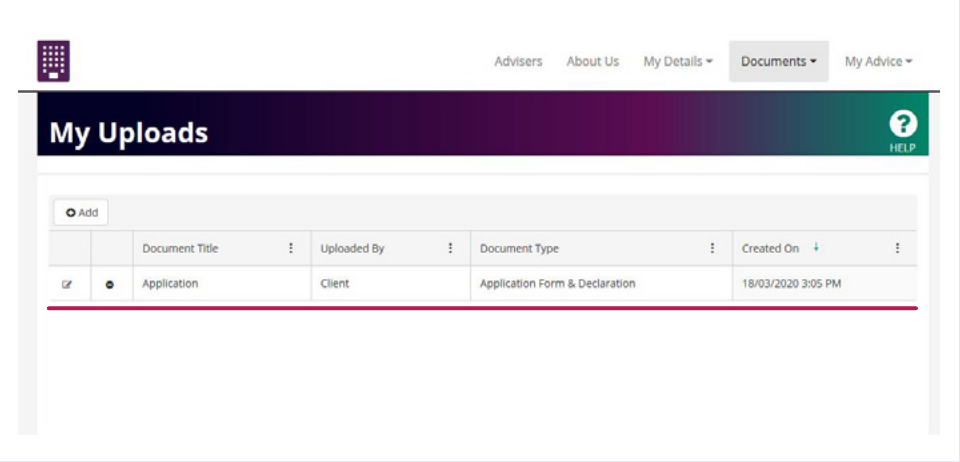


How to view and upload documents

5. Make sure that the correct document name is showing next to **'Browse'** and if this is correct, click **'Submit'**.

6. The document will now be added to the portal and available on the **'My Uploads'** page.





How to approve documents

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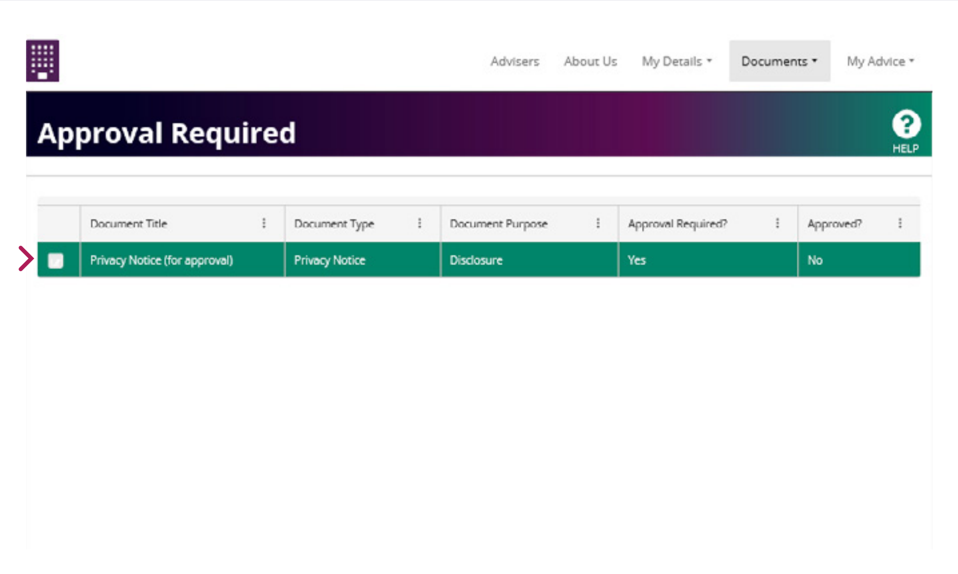
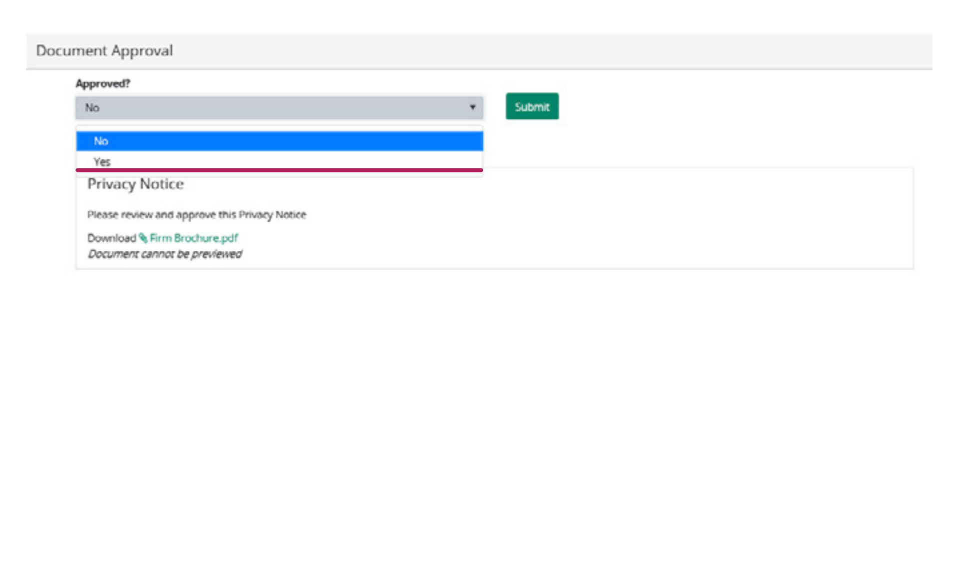
How to approve documents

1. On the **'Approvals Required'** page you will find any documents that your Adviser needs you to approve. To approve a document, click on the tick box to the left of the document.

2. Choose **'Yes'** from the drop-down menu under **'Approved?'** and click **'Submit'**.

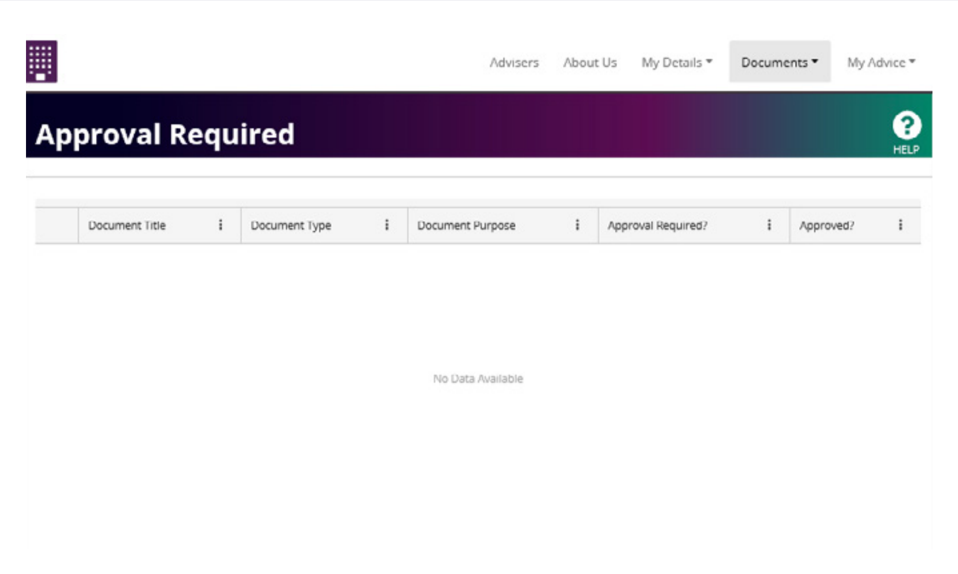


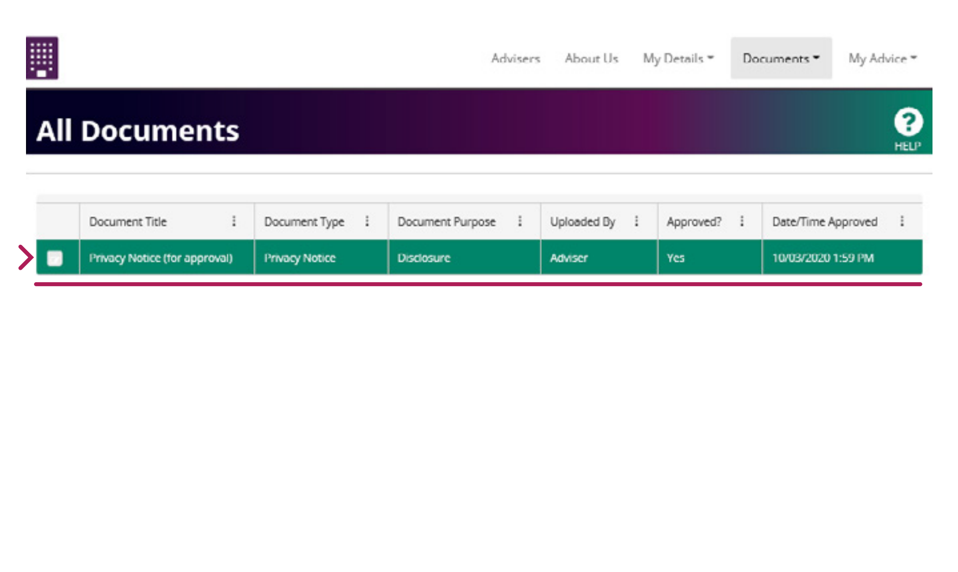


How to approve documents

3. The document will then disappear from the list.

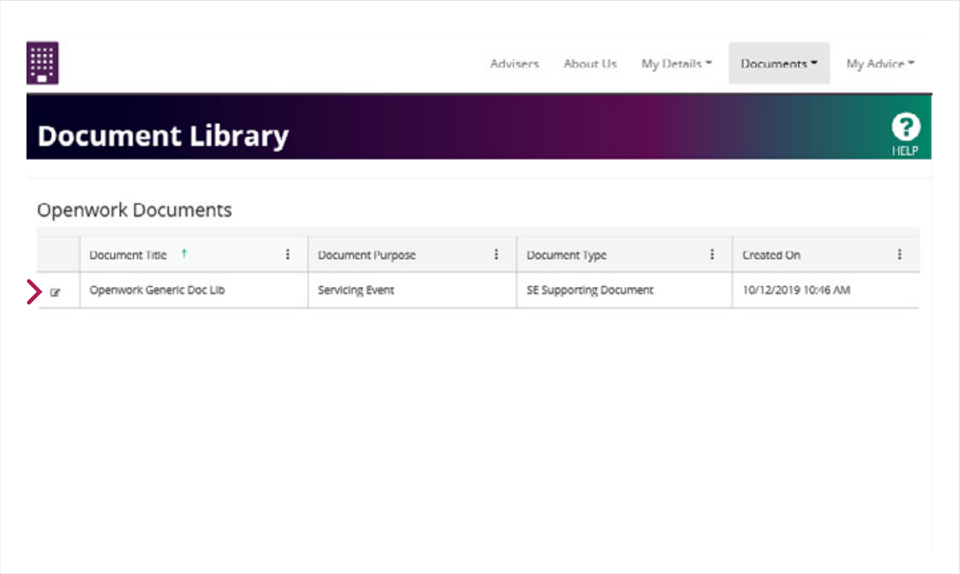
4. The document will now appear in the list of **'All Documents'**, each document can be viewed by checking the tick box to the left.





How to approve documents

5. **'Document Library'** displays a list of all the documents which have been shared by your Adviser on the portal. To view any of the documents click the tick box adjacent to it.



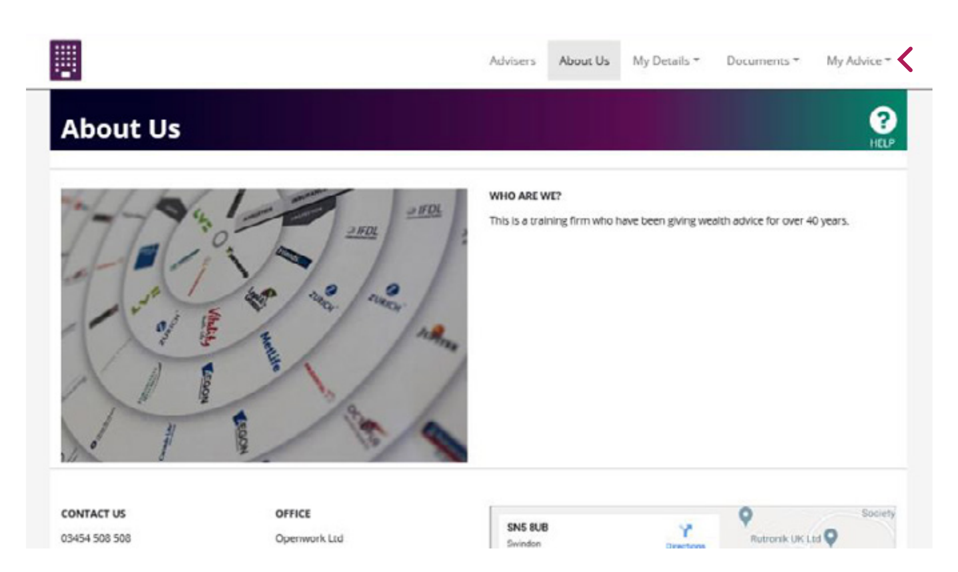
How to complete the Attitude to Risk questionnaire

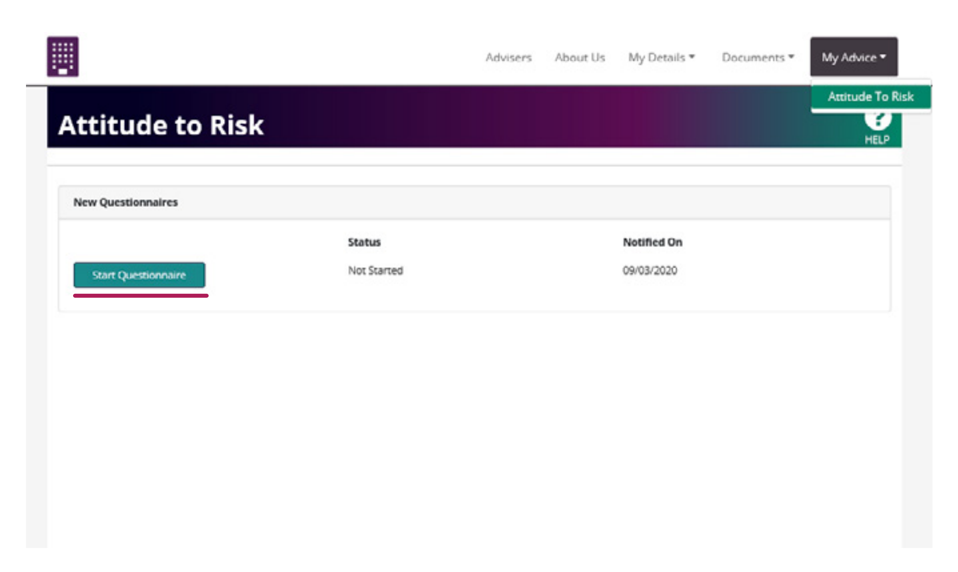
Other steps

How to complete the Attitude to Risk questionnaire

1. From the **'About Us'** portal page select **'My Advice'** then **'Attitude to Risk'**

2. The **'My Advice'** tab displays advice-related tasks and documents that require completion including the **'Attitude to Risk'** questionnaire for you to complete. To complete the questionnaire click on **'Start Questionnaire'**.

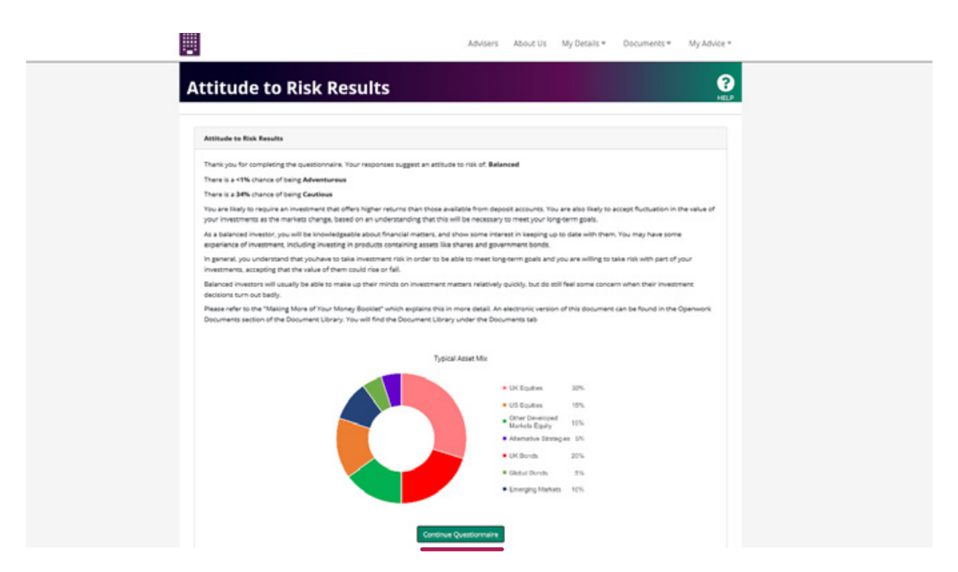


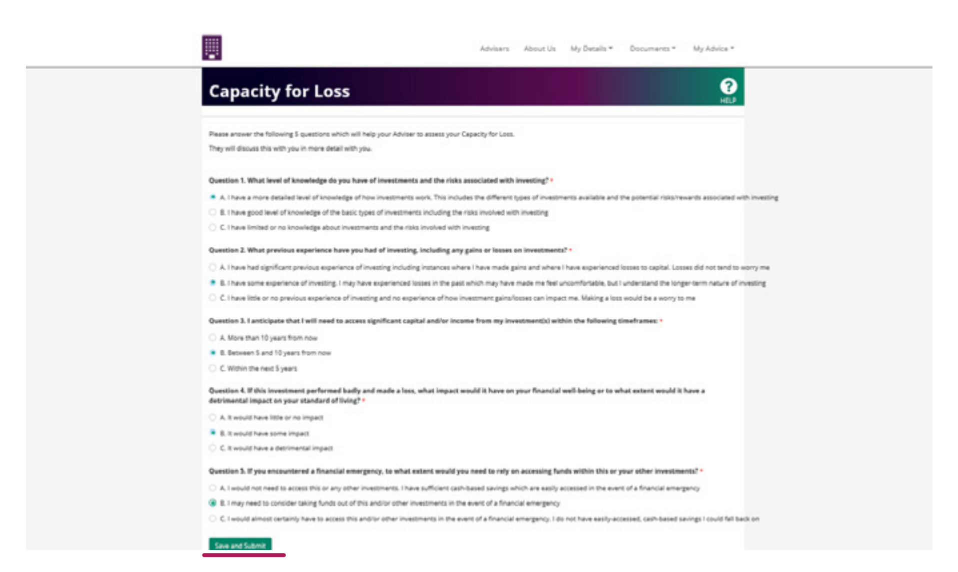


How to complete the Attitude to Risk questionnaire

3. Answer the questions then submit the questionnaire, you will then receive your initial **'Attitude to Risk Results'**. Click on **'Continue Questionnaire'** to be directed to an additional five questions regarding your **'Capacity for Loss'**.

2. Answer these five questions and click **'Save and Submit'**.

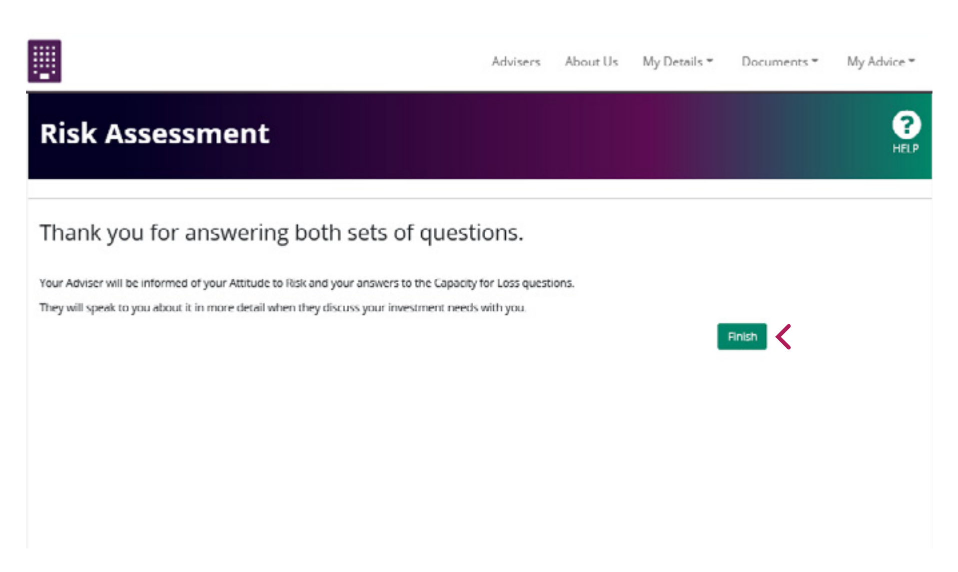


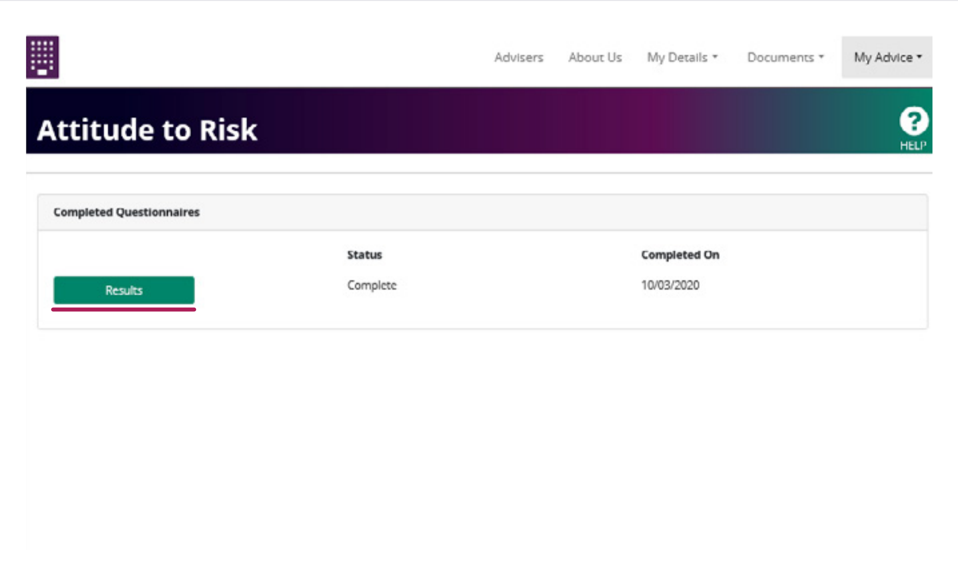


How to complete the Attitude to Risk questionnaire

5. You will be directed to the following **'Risk Assessment'** page where you should click on **'Finish'.**

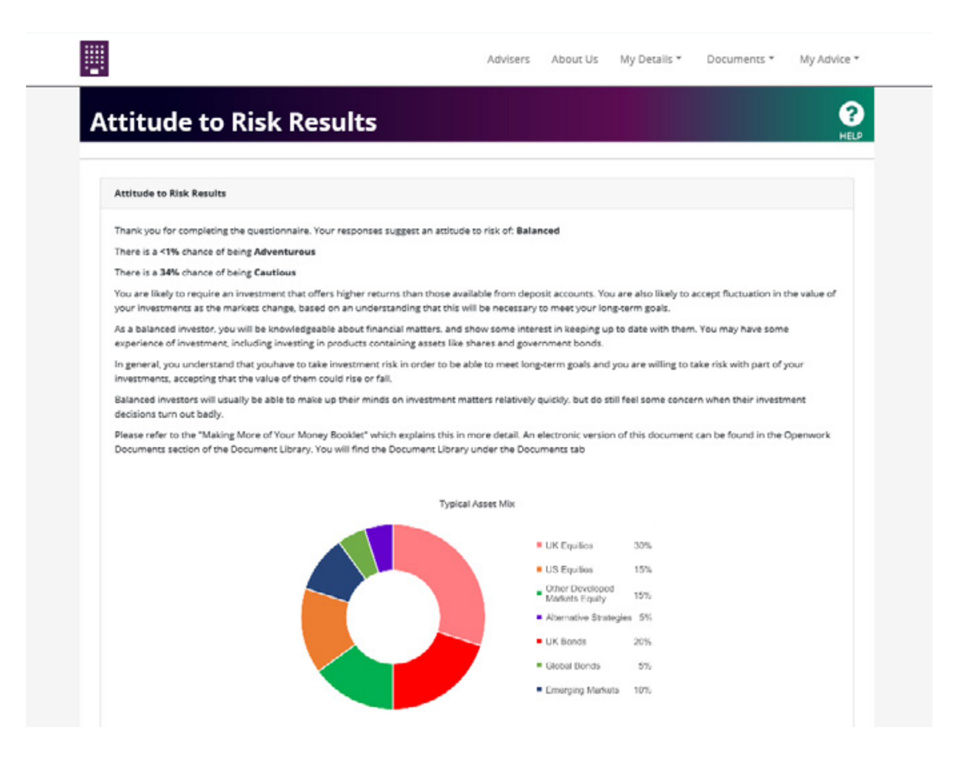
6. Your **'Attitude to Risk'** result is available by clicking on **'Results'**.





How to complete the Attitude to Risk questionnaire

7. Here is your report.



How to sign into the portal once you've registered an account

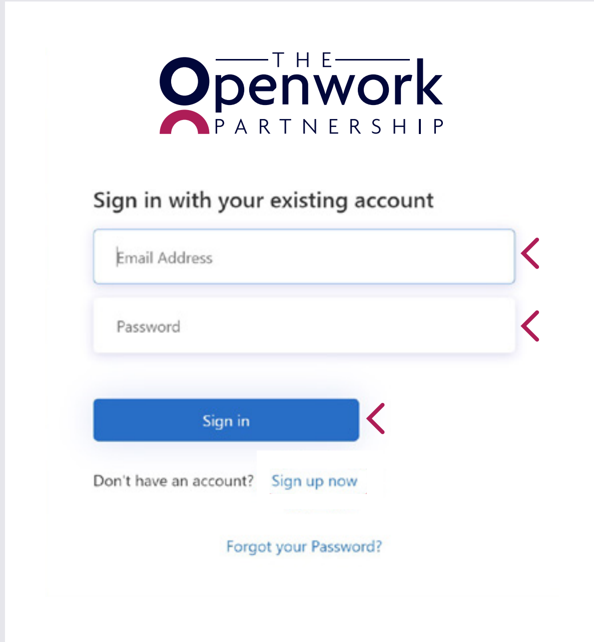
Other steps

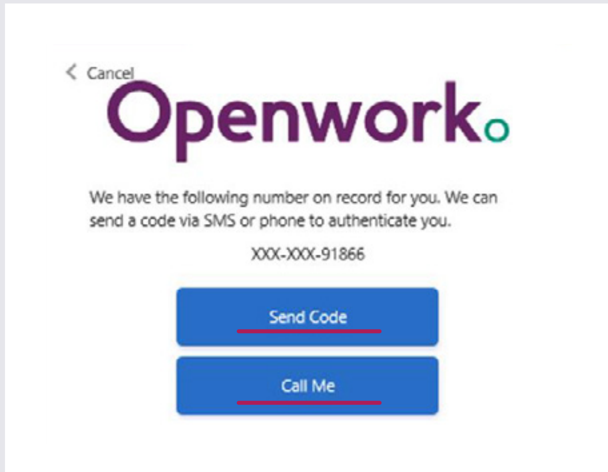
How to sign into the portal once you've registered an account

1. Open the Openwork Client Portal sign-in page by clicking the link or typing it into your browser **www.myadvicehub.com**/ then bookmark the page / save it as a favourite.

2. Enter your email address and the password that you have already created, then click **'Sign in'**.

3. You will be redirected to the following screen where you will need to carry out a second-stage verification, either by requesting a code is sent to your mobile by clicking **'Send Code'** or by requesting a call back by clicking on **'Call Me'**.

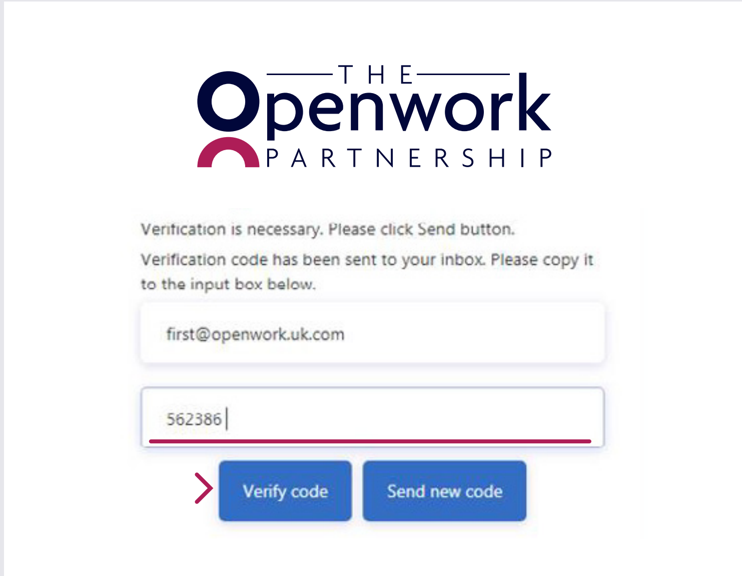


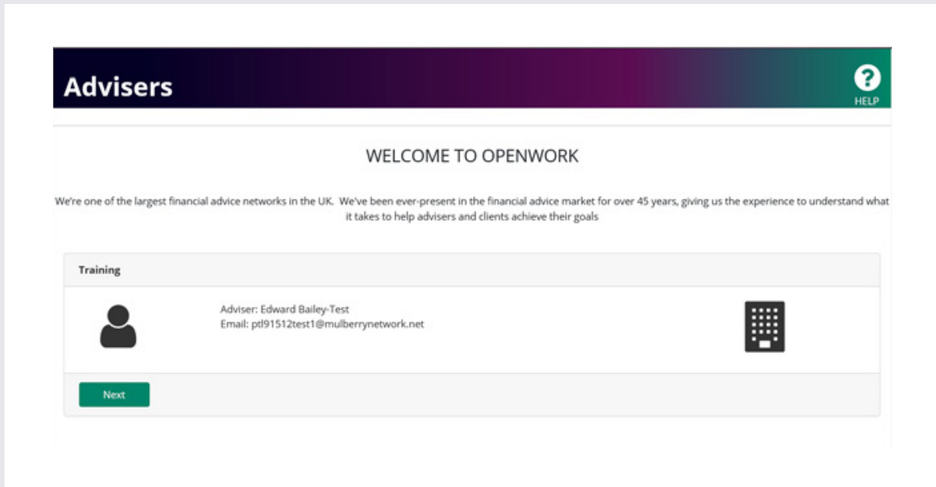


How to sign into the portal once you've registered an account

4. If you click **'Send Code'** you will receive a text message from SMSVerify with a 6-digit code. Enter the code in the free box in the new window which has opened, then click **'Verify code'**.

   If you select **'Call Me'**, you will receive a call from +1 (855) 330-8653 and an automated voice with an American accent asking you to press the pound key (which is the # key). Do this and you will be told your sign-in was successfully verified, the call ends and you will be redirected to the Welcome page of the portal.





What to do if you forget your password

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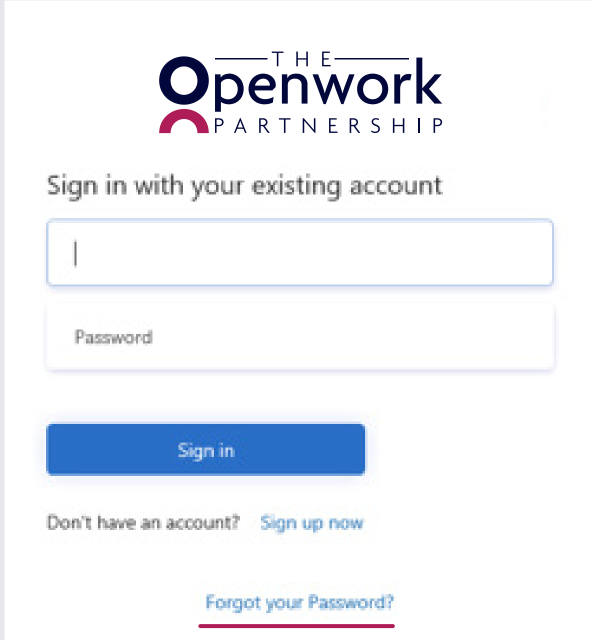
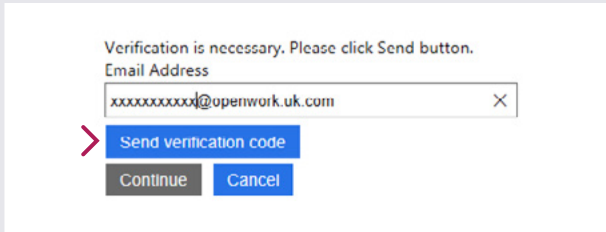
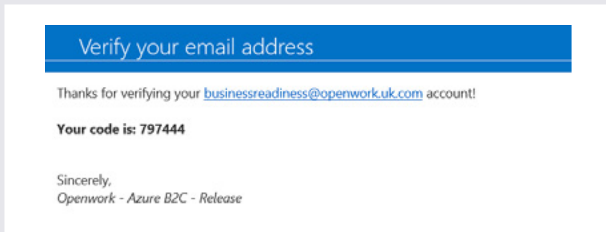
What to do if you forget your password

1. Select **‘forgotten your password’**.
2. Fill in the email address which you registered with at the start and click **‘send verification code’**.
3. You will receive an email with the code.



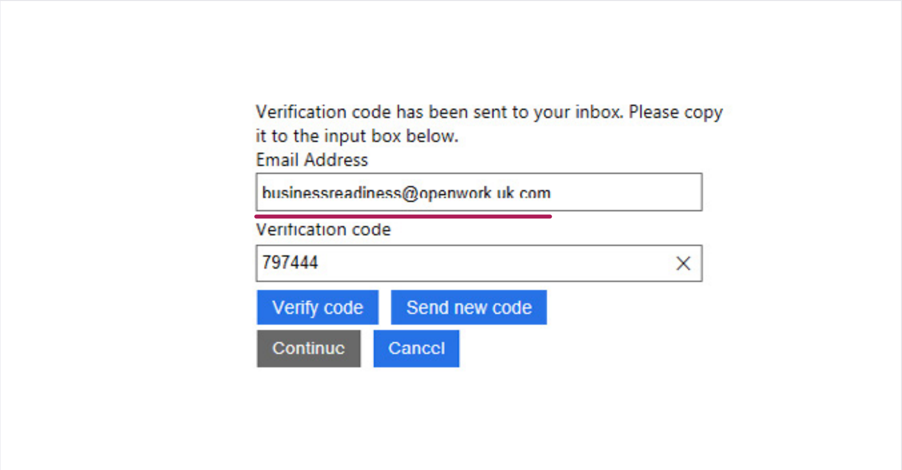


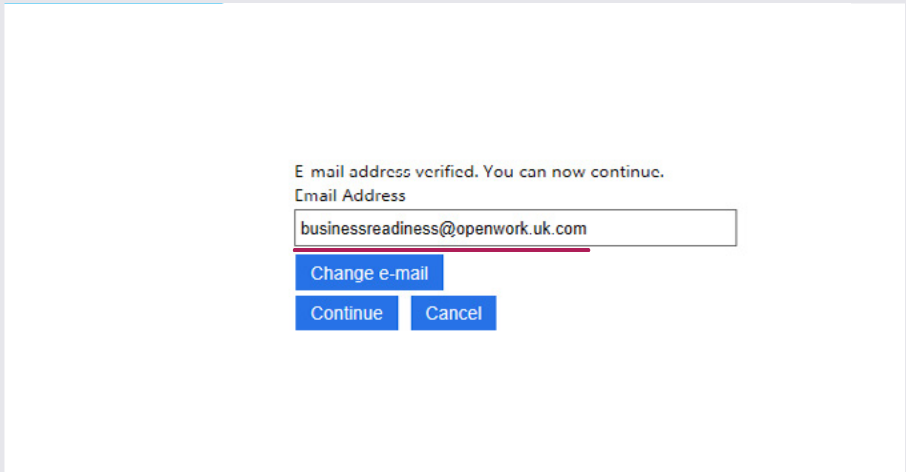


What to do if you forget your password

4. Enter the verification code that was sent to your email address and click verify code. If the code has expired, you will need to click **'Send new code'**.

5. Once you have entered the verification key it will ask if you want to change your email address on the account or continue to proceed to changing the password.

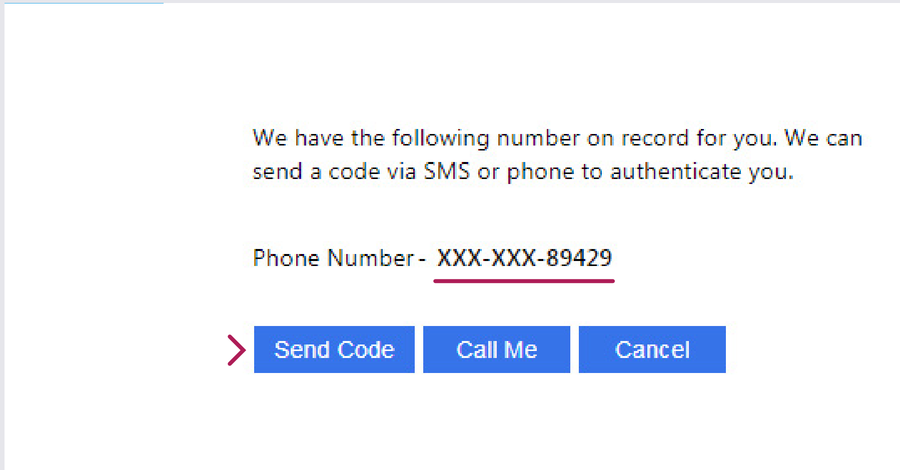




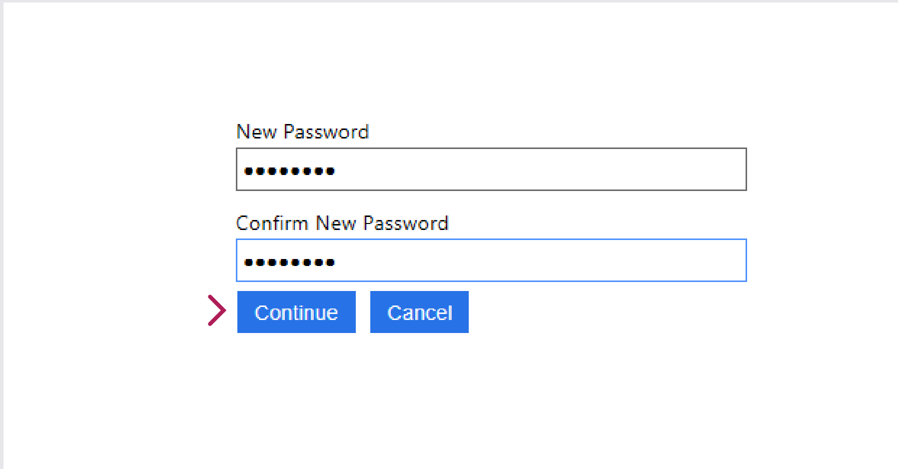
What to do if you forget your password

6. You will then be sent a verification code to your preferred contact number.

   Ensure your preferred mobile number is shown and click **'Send Code'**, you will then receive a text message with a 6-digit code, from SMSVerify. If you select **'Call me'**, you'll receive a call from +1 (855) 330-8653 (2) You will then have to press the pound key (which is the #) – You will then be told your sign-in was successfully verified and the call will end.



7. It will then ask you to input the new password and then confirm the new password again, once you have done so click continue.



What to do if you forget your password

8. Once you’ve pressed continue you will be redirected to the sign-in screen where you will use the email address you registered with and the NEW password.

9. You will then be successfully logged in.