CONCERT HUB

Portal
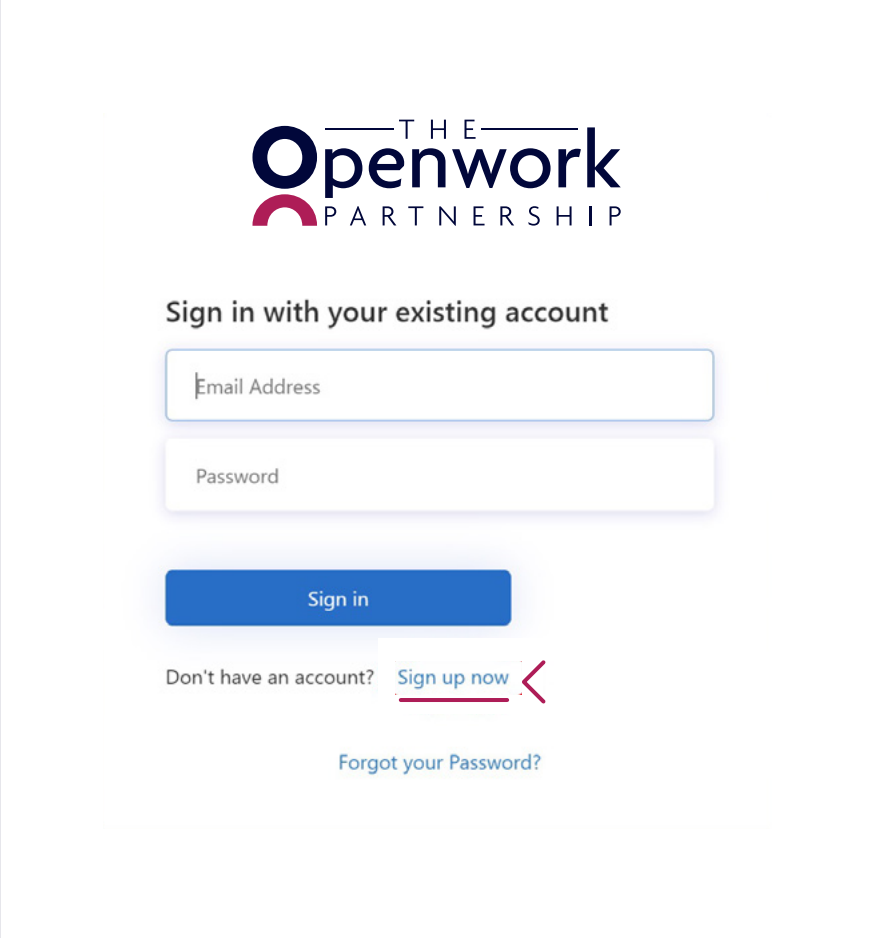# Access Guide

THE Openwork PARTNERSHIP

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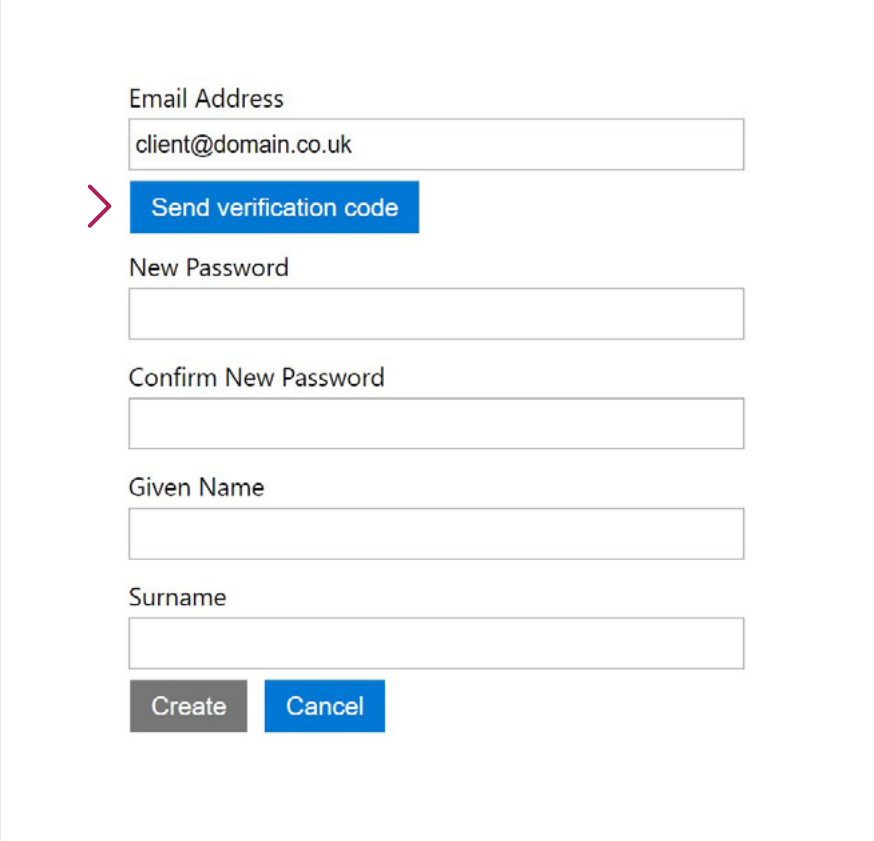
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How to sign-up and create your Openwork Client Portal Account

1. Click the Openwork Client Portal link in the email or type the following URL into your browser:
   www.myadvicehub.com

2. You will be taken to a web page that gives you the option to sign-in or sign-up now. Click the **"Sign-up now"** link – as highlighted in the image opposite.

**How to sign-up and create your
Openwork Client Portal Account**

3. You will be taken to a screen that asks you to input your email address. This should be your original portal invite recipient email address. If you wish to use a different email address, please contact your Adviser.

4. When you have input your email address, please click the **"Send verification code"** button – as highlighted by the red arrow in the image opposite.

5. You will be sent an email containing a 6-digit verification code.

Email Address

client@domain.co.uk

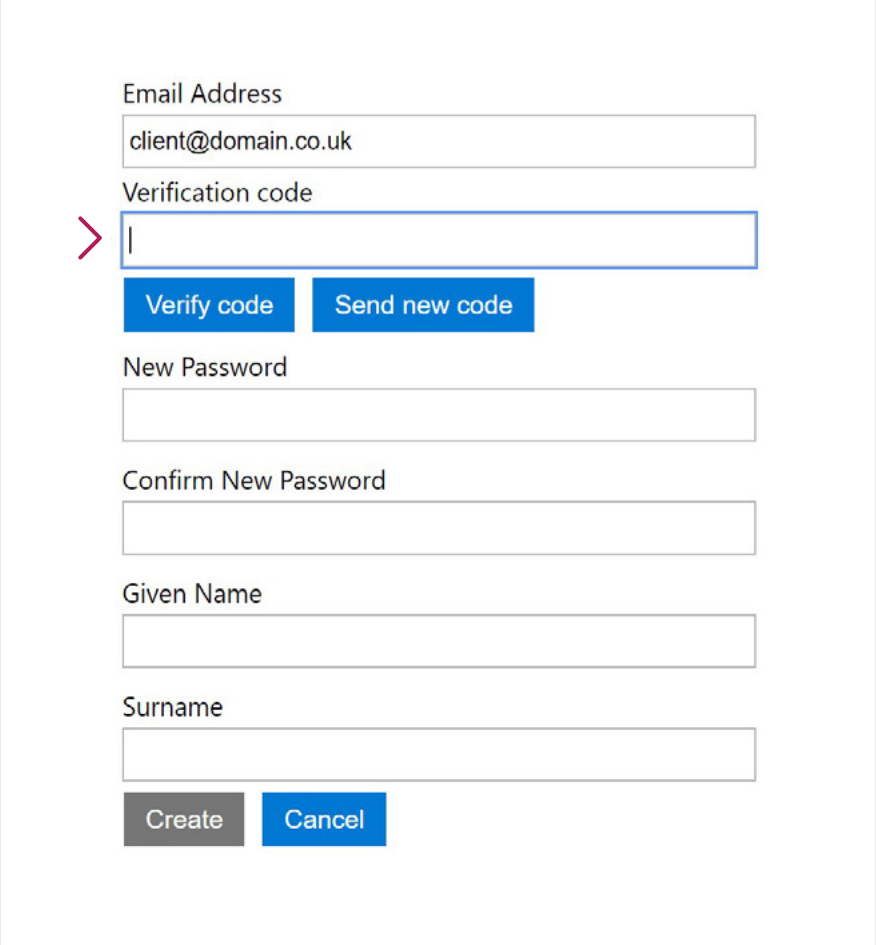Send verification code

New Password

Confirm New Password

Given Name

Surname

Create   Cancel

**How to sign-up and create your
Openwork Client Portal Account**

6. If you fail to receive a verification code email, please check that you have input your email address correctly and then click the **"Send new code"** button.

7. Please input the 6-digit code in the **"Verification code"** field – as highlighted by the red arrow in the image opposite.

8. Click the **"Verify code"** button.

9. You will then be prompted to create and confirm a password. Your password must consist of at least 8 characters and meet at least 3 of the following rules:
   • Have at least one uppercase letter
   • Have at least one lowercase letter
   • Have at least one number
   • Have at least one symbol

10. Complete the **"Given Name"** and **"Surname"** fields and click the **"Create"** button.

Email Address

client@domain.co.uk

Verification code

Verify code   Send new code

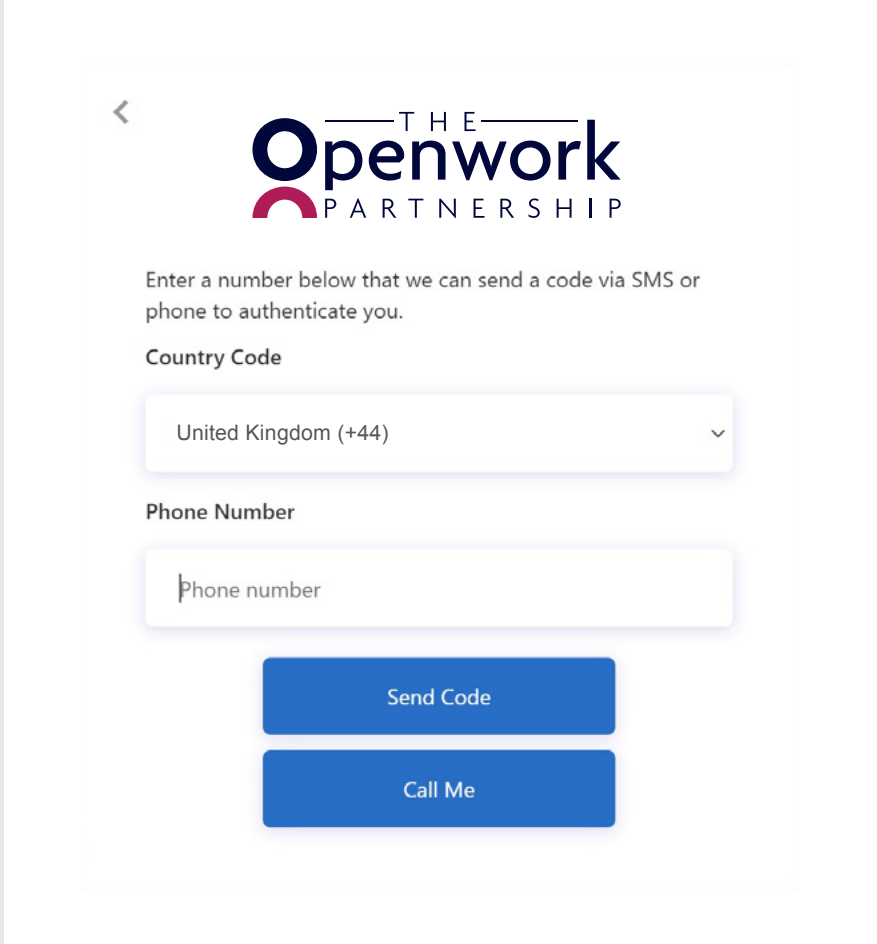New Password

Confirm New Password

Given Name

Surname

Create   Cancel

How to sign-up and create your
Openwork Client Portal Account

11. For your added security, the Openwork Client Portal uses two-factor authentication. This means that you must verify your access via a mobile device. You will be taken to a screen where you can add your mobile phone details. Please ensure that the country code and your phone number are input correctly.

12. If you wish to be sent a verification code via text message, click the **"Send Code"** button. Go to step 14.

13. If you would prefer a verification call, click the **"Call Me"** button and you will receive an automated call. You will be prompted to press the pound key, which is the # key on your handset. The call will then end. Go to step 17.

How to sign-up and create your Openwork Client Portal Account

14. If you have clicked the **"Send Code"** button, you will be taken to a screen where you can input the verification code that will be sent via text message to your mobile phone.

15. If you fail to receive a verification code text message, please click the **"Send new code"** link.

16. Input the verification code as it appears in the text message.

17. You will then be automatically redirected to the sign-in page where you can use the credentials that you have set-up to sign-in. If you require guidance as to how to sign-in, please refer to the **"How to sign-in to your Openwork Client Portal Account"** guide on the next page.

Enter a number below that we can send a code via SMS or phone to authenticate you.

+4407 ⁻6762 .-2

Enter your verification code below, or send a new code

Sign in with your existing account

Email Address

Password

Sign in

Don't have an account?   Sign up now

Forgot your Password?

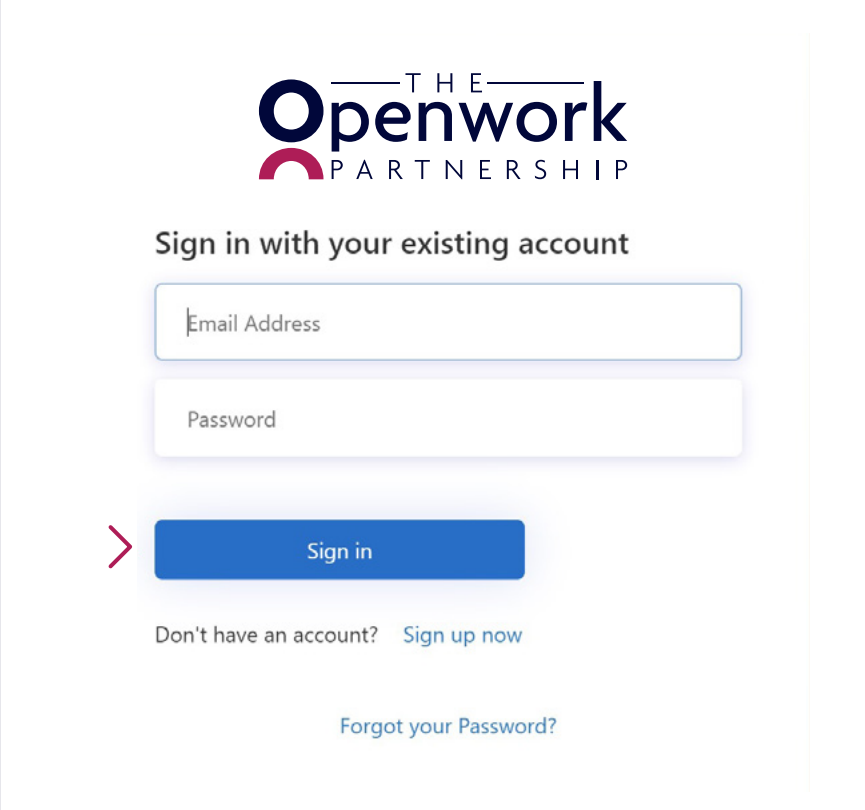# How to sign-in to your Openwork Client Portal Account

Other steps

- How to sign-up and create your Openwork Client Portal Account >

- What to do if you have forgotten your password >

How to sign-in to your Openwork Client Portal Account

1. Click the Openwork Client Portal link in the email or type the following URL into your browser: www.myadvicehub.com.

2. You will be taken to a web page that gives you the option to sign-in with your existing account.

3. Input your email address and password and click the **"Sign-in"** button – as highlighted by the red arrow in the image opposite.

   Note: If you have forgotten your password, see the "What to do if you have forgotten your password" guide on the next page.

4. For your added security, the Openwork Client Portal uses two-factor authentication. This means that you must verify your access via the mobile device that you registered when you created your account.

How to sign-in to your Openwork Client Portal Account

5. You will be taken to a screen where you can choose how to complete the second authentication phase on your mobile device.

6. If you wish to be sent a verification code via text message, click the **"Send Code"** button. Go to step 8.

7. If you would prefer a verification call, click the **"Call Me"** button and you will receive an automated call. You will be prompted to press the pound key, which is the # key on your handset. The call will end and you will then be redirected to the Welcome page of your Client Portal.
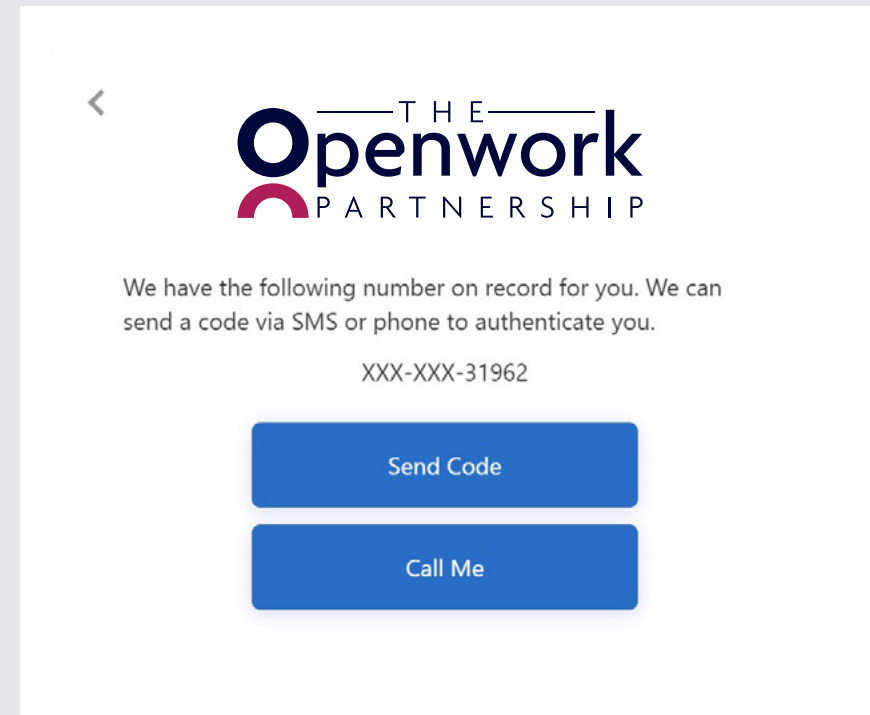
How to sign-in to your Openwork Client Portal Account

8. If you have clicked the **"Send Code"** button, you will be taken to a screen where you can input the verification code that will be sent via text message to your mobile phone.

9. If you fail to receive a verification code text message, please click the **"Send new code"** link.

10. Input the verification code as it appears in the text message in the verification code field – as highlighted by the red arrow in the image opposite.

11. You will then be automatically redirected to the Welcome page of your Client Portal.

We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

XXX-XXX-31962

Enter your verification code below, or send a new code

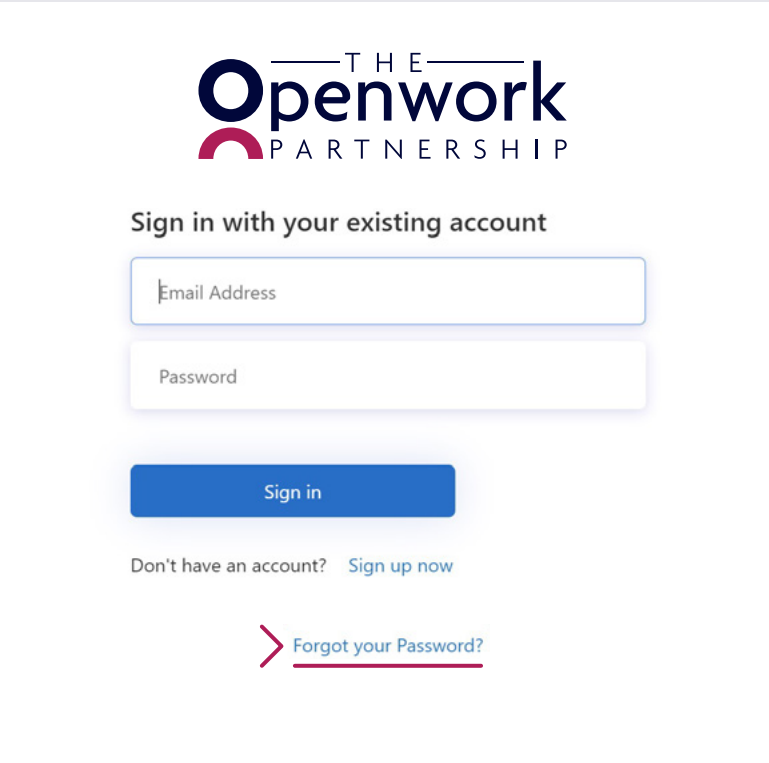# What to do if you have forgotten your password

Other steps

• How to sign-up and create your Openwork Client Portal Account ❯

• How to sign-in to your Openwork Client Portal Account ❯

What to do if you have forgotten your password

1. Click the Openwork Client Portal link in the email or type the following URL into your browser: www.myadvicehub.com.

2. You will be taken to a web page that gives you the option to sign-in with your existing account.

3. Click the **"Forgot your Password?"** link – as highlighted in the image opposite.

4. You will be taken to a screen that asks you to input your email address. Please use the same email address that was used when you created your account.

What to do if you have forgotten your password

5. When you have input your email address, please click the **"Send verification code"** button – as highlighted by the red arrow in the image opposite (top).

6. You will be sent an email containing a 6-digit verification code.

7. If you fail to receive a verification code email, please check that you have input your email address correctly and then click the **"Send new code"** button.

8. Please input the 6-digit code in the **"Verification code"** the field – as highlighted by the red arrow in this image opposite (bottom).

9. Click the **"Verify code"** button.

Verification is necessary. Please click Send button.
Email Address

Send verification code

Continue   Cancel

Verification code has been sent to your inbox. Please copy it to the input box below.
Email Address

client@domain.co.uk

Verification code

Verify code   Send new code

Continue   Cancel

What to do if you have forgotten your password

10. The screen will update. Click the **"Continue"** button.

11. For your added security, the Openwork Client Portal uses two-factor authentication. That means you must verify that it is you via the mobile device that you registered with when you created your account.

12. If you wish to be sent a verification code via text message, click the **"Send Code"** button. Go to step 14.

13. If you would prefer a verification call, click the **"Call Me"** button and you will receive an automated call. You will be prompted to press the pound key, which is the # key on your handset. The call will then end. Go to step 17.

E-mail address verified. You can now continue.
Email Address

client@domain.co.uk

Change e-mail

Continue   Cancel

We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

Phone Number - **XXX-XXX-31962**

Send Code   Call Me   Cancel

What to do if you have forgotten your password

14. If you clicked the **"Send Code"** button, you will be taken to a screen where you can input the verification code that will be sent via text message to your mobile phone.

15. If you fail to receive a verification code text message, please click the **"Send new code"** link.

16. Input the verification code as it appears in the text message.

17. You will then be prompted to create and confirm a password. Your password must consist of at least 8 characters and meet at least 3 of the following rules:
    - Have at least one uppercase letter
    - Have at least one lowercase letter
    - Have at least one number
    - Have at least one symbol

18. Click the **"Continue"** button and you will be re-directed to the sign-in page where you can use your new password to sign-in.

We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

Phone Number - **XXX-XXX-31962**

Enter your verification code below, or send a new code

Cancel

New Password

Confirm New Password

Continue   Cancel