

CLIENT PORTAL

During this two part webinar session we will equip you with the skills and knowledge to get started on the FinCalc Client Portal. This session will provide an overview of the FinCalc Client Portal set-up, the process of inviting your clients to the portal, sending documents, messages and links, and reviewing the submitted information. We will also cover the clients view of the Portal.

CLIENT PORTAL SET UP

- How to enable the Portal.
- How to create Fact Find Questions.
- Designing your own Fact Find Template.
- How to set up Message Templates and external Links.
- Configuring the system for Self Registration.
- Setting up Teams for your advisers.
- Adding bespoke Adviser Details such as avatars and contact information.

INVITING CLIENTS TO THE PORTAL

- How Self Registration works within FinCalc.
- Setting up your clients in FinCalc.
- How to invite a client to the portal.
- How to send welcome emails to your client and include the spouse if necessary.
- Portal notification settings.
- Limiting access to the portal.

INTRODUCING THE PORTAL

- We will look at how your clients log on to the system.
- Communication through the portal.
- Sending messages, documents and links.
- Viewing communications.
- Activating a fact find.
- Clients view of the fact find.

REVIEWING THE DATA

- We will look at the email you receive to confirm the clients have submitted their data.
- Reviewing the non financial information and responses.
- Reviewing the financial information within the Cashflow Modeller and merging this into your Cashflow and back office software.

SESSION DURATION

This session is made up of two 30-minute sessions, with a 10 minute break inbetween and the opportunity for questions at the end of the session.

