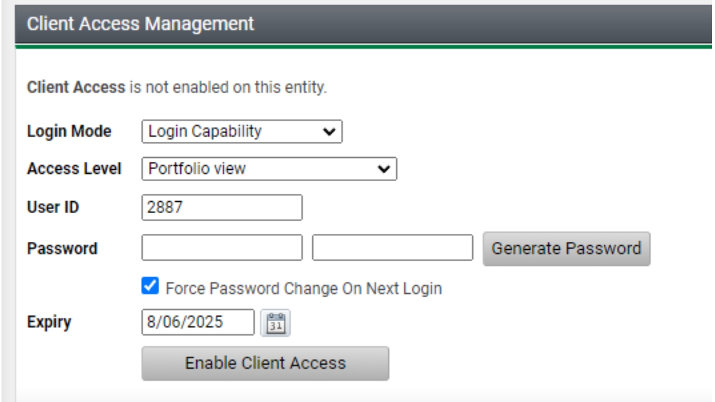
1. **Creating the Client Portal login for your client**
    a. Iress resource: https://community.iress.com/t5/Help-Guide-Client-Portal/Enabling-Client-Access/ta-p/22299
    b. In the Xplan client profile > Service and Administration > Client Access > Access
        i. Complete all details on the page and click ‘Enable Client Access’
            1. 

    c. Access levels to choose for your client.
        i. <u>Messages and Documents Only</u>: Provides access to secure messaging within the portal via client document notes
        ii. <u>Assets View:</u> Provides access to secure messaging and visibility of client assets (non-portfolio)
        iii. <u>Portfolio View</u>: Provides secure messaging, assets and portfolio visibility
    d. Best practice is allowing Xplan generate the temporary password by clicking the 'Generate password' button
    e. Once the access level is set against the client and the 'Enable Client Access' button is clicked, an automated email is immediately sent to the client with their login details (and temporary password)

2. **Tips**
    a. Controlling whose data the client can see (related entities in Xplan):
        i. Each client may have different views on whose data they want to see via the Client Portal. For example, a couple may not want access to each other’s information, apart from the information they share jointly. In addition, you may have linked the client to a trust they are a settlor of, or a company they’re a director of.
        ii. Iress resource: https://community.iress.com/t5/Help-Guide-Client-Portal/Viewing-data-for-a-group-of-related-clients-entities-under-one/ta-p/18318
    b. Providing your client with access to the Fact Find tool:
        i. In client access > access set 'Factfind Status' = 'In Progress' and 'Factfind Type' = 'Detailed' > click Save.
        ii. Client will be prompted to complete the fact find upon login
    c. To send a secure message to your client via the Client Portal and document notes:
        i. Iress resource: https://community.iress.com/t5/Help-Guide-Client-Portal/Sharing-documents-and-messages-with-the-client/ta-p/22294
    d. Adviser view screens (via your Xplan login credentials):
        i. Iress resource: https://community.iress.com/t5/Help-Guide-Client-Portal/Accessing-the-Client-Portal-as-an-Xplan-User/ta-p/10952
    e. Please test all functionality with a test client in Xplan (that has a valid email address) first, to ensure you are familiar with how the portal works, and are comfortable with the data the client will be able to view:
        i. Iress resource: https://community.iress.com/t5/Help-Guide-Client-Portal/Checking-client-data-before-inviting-them-to-the-Client-Portal/ta-p/21494