

Setting up Invest Excess Cash - Active Portfolios

Adviser guide only.

This guide provides instructions on how to initiate automatic investment of cash on an active Portfolio.

1. Click on **Portfolios** in the main menu and click on the client **Portfolio Number** under **Portfolio Search**

The screenshot shows the 'Portfolio Search' results page. The left sidebar has 'Portfolios' highlighted. The main area shows a search bar and a table of portfolios. The first row is highlighted.

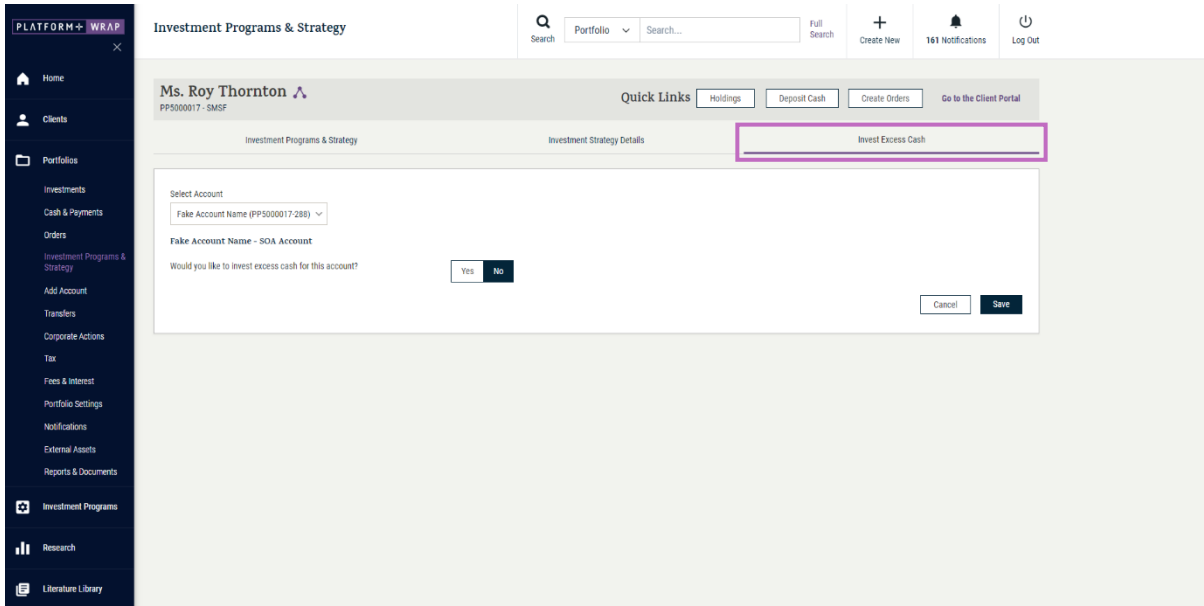
PORTFOLIO NUMBER	PORTFOLIO NAME	HOUSEHOLD NAME	HOUSEHOLD NUMBER	PORTFOLIO TYPE	ADVISER NAME	COMPANY	LAST VIEWED	STATUS	LAST UPDATE
PP5000001	Billie	Billie Mc Gee	PP9000002	SMSF	Billie PFAAAA0000001	Company Name PFAAAA	2022-12-07	Active	2021-0
PP3000003	Luis Barajas	Luis Barajas	PP9000004	Company	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2021-0
PP3000009	Luis Barajas	Luis Barajas	PP9000004	Company	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0
PP1000010	Billie Mc Gee	Billie Mc Gee	PP9000002	Individual	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0
PP4000012	Billie Mc Gee	Billie Mc Gee	PP9000002	Super - Accumulation	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0
PP2000013	Mr Ashley Drake	Mr Ashley Drake	PP9000014	Joint	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0
PP4000015	Jay Woodward	Jay Woodward	PP9000016	Super - Pension	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0
PP5000017	Ms. Roy Thornton	Ms. Roy Thornton	PP9000018	SMSF	Billie PFAAAA0000001	Company Name PFAAAA	Never	Active	2022-0

2. Click on **Investment Programs & Strategy**

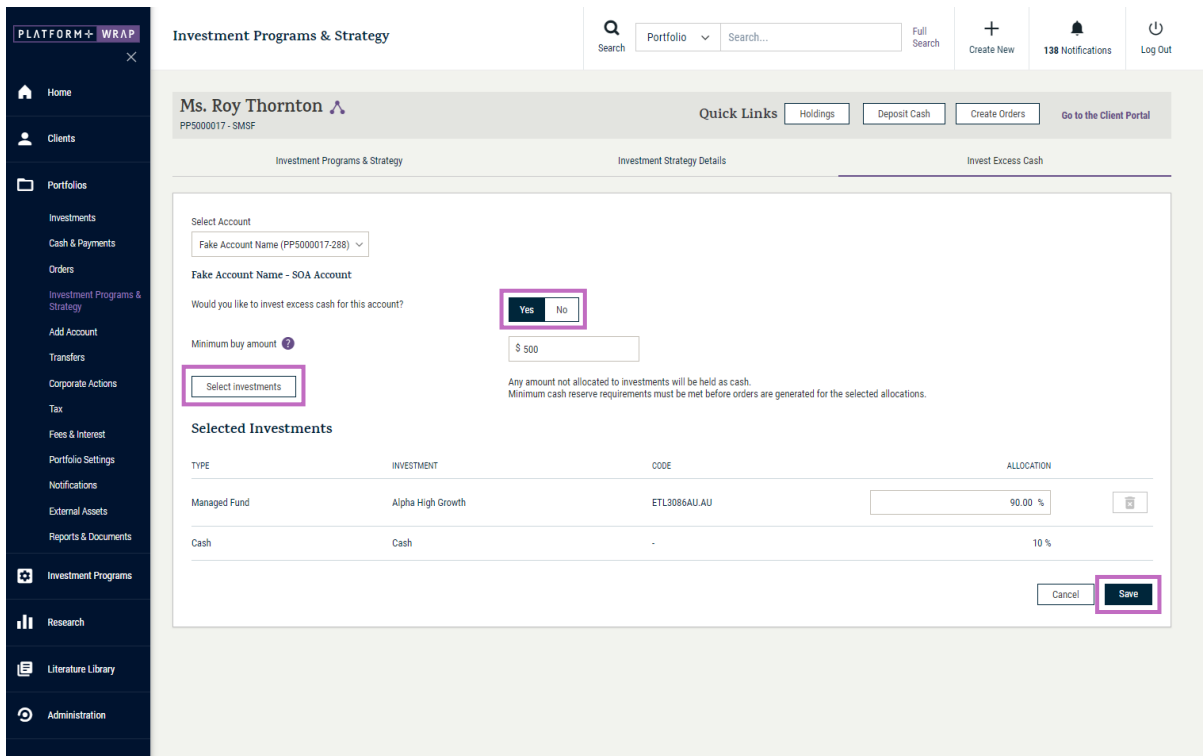
The screenshot shows the 'Investment Programs & Strategy' page for client Ms. Roy Thornton. The left sidebar has 'Investment Programs & Strategy' highlighted. The main area shows a table with account details.

ACCOUNT	ACCOUNT NAME	ACCOUNT TYPE	MENU SELECTION	STATUS	EXCESS CASH SETTING	MODEL NAME	LAST REBALANCED
PP5000017-288	Fake Account Name	Advised Accounts		Active	Hold as cash	None	-

3. Click on **Invest Excess Cash**



4. Move toggle to **Yes** and complete the required fields, including selecting the investment/s
5. Once completed, click **Save**



Should you have any questions or require any additional information in relation to this guide, please contact the PlatformplusWRAP Support Team on 1300 191 952 or support@platformplus.com.au.