

IDPS and Superannuation Document Upload

Adviser guide only.

This guide provides instructions on how to upload documents in a secure manner and track the progress of the request via the PlatformplusWRAP portal.

1. Once in the client portfolio, click on Reports & Documents

PLATFORM+ WRAP		Investments	Q Search Portfolio ~ Search	Full Search Create New 67 Notifications Log Out
•	Home Clients Portfolios Investments	Bec Test - Accumulation PP6001433 - MEMBER Summary Holding Date Include External Assets? 02-00t2023 P 60 Yes No	Quick Links	Holdings Contribute Create Orders Go to the Client Portal Performance Investment Transactions
	Cash & Payments Orders Unders Strategy Add Account Transfers Corporate Actions Superannuation Tax Fees & Interest Portfolio Settings Notifications Reports & Documents	Portfolio Value \$0.00 ACCOUNT MAME VALUE Superannuation Account \$0.00 View Details	Performance Since Inception There is no performance data to display.	Asset Distribution There is no asset distribution data to display.

2. Click on Submit Superannuation Documents

ie .	Bec Test - Accumulation 🙏			
	PP6001433 - MEMBER		QUICK LINKS Holdings	Create Orders Go to the Client F
	Request Reports		Library	Submit Superannuation Documents
olios				
ments	Date Kange			
Payments	08-Sep-2023 12 months Ti	ax YTD Since Inception	02-Oct-2023	
			La	
ment Programs & gy				
count	Select Reports to Generate			
ers	REPORT	PDF EX	CEL CUSTOMISATION (OPTIONAL)	
rate Actions	Portfolio Valuation			
annuation				
	Portfolio Performance		IRR TWR After Fees Before Fees	
Interest				
io Settings	Transaction Listing		Detailed Simple Full Report ~	
ts & Documents	Account Summary			
ment Programs	Realised Capital Gains			
rch	Unrealised Capital Gains			



INVESTMENT AND SUPER

3. Fill in each section of the form:

 Type
 – select the type of document

 Add File
 – click to upload your document

 Document Name
 – enter the name of your document and click Save

 Details
 – provide instructional detail

4. Click Submit

Bec Test - Accumulation 🔥	(Quick Links Holdings	Contribute Create Orders Go to the Client Portal
Request Reports	Library		Submit Superannuation Documents
Submit Superannuation Documents For Processing			
Туре	Rollover form		
Add File	Choose file Super Accumulation & Pension (1).pdf		
Document Name	Rollover Form - Bec Test		
		Add another document	ave
	FILE NAME STATUS		ACTION
File	Super Accumulation & Pensio v Successfully uple (1).pdf	paded	Xq
Detail	Please process the rollover form		Submit
			Submit

- 5. Once successfully submitted, you will see the following message with an ID number. This ID number relates to a service request which can locate the service request under the administration menu.
- 6. Click Administration

PLATFORM+ WRAP		Reports & Documents		Q Search Portfolio	✓ Search	Full Search	+ Create New	67 Notifications	U Log Out
A	Home	Bec Test - Accumulation 🔥			Quick Links Holdings	Contribute	Create Orders	Go to the Client	Portal
÷	Clients	Request Reports		Library		Subn	nit Superannuation D	ocuments	
D	Portfolios	Issue log with ID 2128 has been successfully created							
	Investments								
	Cash & Payments	Submit Superannuation Documents For Processing							
	Orders								
	Investment Programs & Strategy	Туре				~			
	Add Account		Choose file						
	Transfers	Add File	No file chosen						
	Corporate Actions								
	Superannuation	Document Name							
	Тах								
	Fees & Interest				Add another document	Save			
	Portfolio Settings		FILE NAME	STATUS		ACTION			
	Notifications	File							
۵	Investment Programs	Detail							
dt	Research					le		Sub	mit
٩	Literature Library								
9	Administration								
2	V1 (October 2023							



7. Click Log An Issue, View Issues. To open the Service Request, click on the ID number

PLATFORM+ WRAP		Log An Issue		Q Search Portfolio ~ Search	Full + A Search Create New 67 Notifications L	し .og Out
٨	Home		View Issue			
•	Clients		THE NUME		Printable Versiv	on
Þ	Portfolios	Status	Open	 Priority 	All	-
۵	Investment Programs	Туре	All	✓ Issue ID/S		
ılı	Research	Logged By		Description		
٥	Literature Library	Client Account		Reported For		
9	Administration	Project	All	✓ Escalated	All	~
	Password				Clear Q Search	
	Authorisations					
	Log An Issue	Results			25	Issues
	MI & Reports					
	Ad Hoc Notifications	ID DATE LOGGED V PROJECT V	CATEGORY V DESCRIPTION	PRIORITY LOGGED BY TYPE SI	atus 🗸 attachments	
	Notifications Preferences		uperannuation	Iordan Service		
	Model Portfolios	2128 2 Oct 23 FNZ	ocument Rollover Form	PFAAAA0000001* High Request FN	ZPending C S	

8. In this screen, you have the ability to track the progress of your request, submit any necessary supporting documents and provide comments as required

PLA	TFORM+ WRAP	Log	g An l	Issue									×
							Edit Issue 2128						
-	Home					View Issues	Issue Number	2128		Projec	t	FNZ	
•	Clients						Company	Company Name PFAAA	A	Туре		Service Request	
Þ	Portfolios		Status			Open	Category	Superannuation Docum	ent	Comp	onent	Account Management	
	Investment Programs		Туре			All	History						
di.	Research		Logged E	Ву			DATE		ACTIC	л	USER		
ē	Literatura Libracu	Client Account			Monday, 2 Oct 2023 15:48		Issue	e Logged	Jordan	PFAAAA0000001			
		Project		Project All Logged For Bec Test - Accumulation PP Non FI/2 Issue:		n-PP6001433 (436591)	Priorit	y .	High				
۹	Administration					Non FNZ Issue:			Curren	t Status	FNZ Pending		
	Password						Escalated:			Set To		Waiting Client Feedback	~
	Log An Issue	Re	sults				Summary			Page L	JRL	/Clients/Documents/DocumentLibrary-	
	MI & Reports							Dellaure form				AddSuperDocument.aspx	
	Ad Hoc Notifications		ю. ,	DATE LOGGED	V PROJECT V	CATEGORY	Description	Ronovertorm		Comm	ents	Please process the follower form	
	Preferences Model Portfolios		2128	2 Oct 23	FNZ	Superannuation Document							/
			2116	21 Sep 23	PlatformPlus	IDPS Document							
				21 Sep 23	FNZ	IDPS Document	Attachment(S)						
							DATE LOADED		USER LOADED		FILE		
				21 Sep 23	FNZ	IDPS Document	Monday, 2 Oct 2023 15:48		Jordan PFAAAA0000001		Super Accumula	tion & Pension (1).Pdf	
				25 Aug 23	FNZ	Superannuation Document	Add Attachment	Choose File					
				24 Aug 23	FNZ	Account Conversion		No file chosen				Add another attachment	Save
												L	

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.