

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**

The screenshot shows the 'Investments' section for 'Bec Test - Accumulation'. The left sidebar has 'Reports & Documents' highlighted. The main area has tabs for 'Summary', 'Holdings', 'Asset Allocation', 'Performance', and 'Investment Transactions'. Under 'Summary', there is a date filter (02-Oct-2023) and an 'Include External Assets?' toggle. Below this are three panels: 'Portfolio Value' showing \$0.00, 'Performance Since Inception' with a message 'There is no performance data to display.', and 'Asset Distribution' with a message 'There is no asset distribution data to display.'.

2. Click on **Submit Superannuation Documents**

The screenshot shows the 'Request Reports' section. The 'Submit Superannuation Documents' button is highlighted in a purple box. Below the 'Date Range' filter, there is a table 'Select Reports to Generate' with columns for 'REPORT', 'PDF', 'EXCEL', and 'CUSTOMISATION (OPTIONAL)'. The table lists reports such as 'Portfolio Valuation', 'Portfolio Performance', 'Transaction Listing', 'Account Summary', 'Realised Capital Gains', and 'Unrealised Capital Gains'. The 'Generate Report' button is highlighted in a dark blue box at the bottom right.

- 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
- Click **Submit**

Bec Test - Accumulation PP6001433 - MEMBER

Quick Links: [Holdings](#) [Contribute](#) [Create Orders](#) [Go to the Client Portal](#)

Request Reports | Library | **Submit Superannuation Documents**

Submit Superannuation Documents For Processing

Type:

Add File:
Super Accumulation & Pension (1).pdf

Document Name:

FILE NAME	STATUS	ACTION
Super Accumulation & Pension (1).pdf	✓ Successfully uploaded	<input type="button" value="X"/> <input type="button" value="Q"/>

Detail:

- 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.
- Click **Administration**

Reports & Documents

Search:

Bec Test - Accumulation PP6001433 - MEMBER

Quick Links: [Holdings](#) [Contribute](#) [Create Orders](#) [Go to the Client Portal](#)

Request Reports | Library | **Submit Superannuation Documents**

Issue log with ID 2128 has been successfully created

Submit Superannuation Documents For Processing

Type:

Add File:
No file chosen

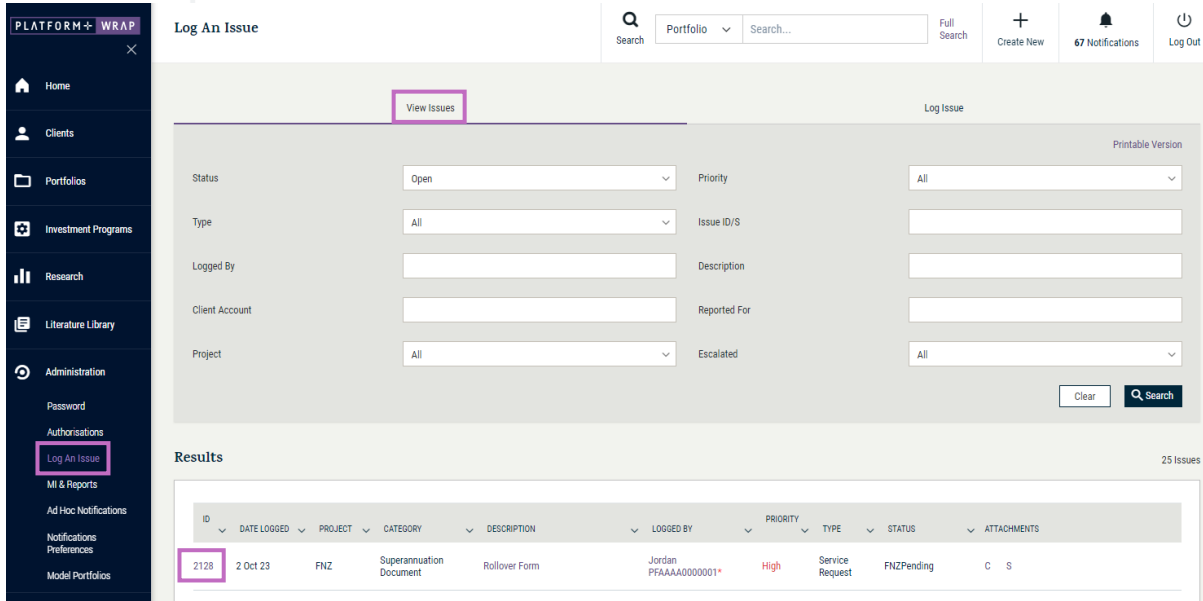
Document Name:

FILE NAME	STATUS	ACTION
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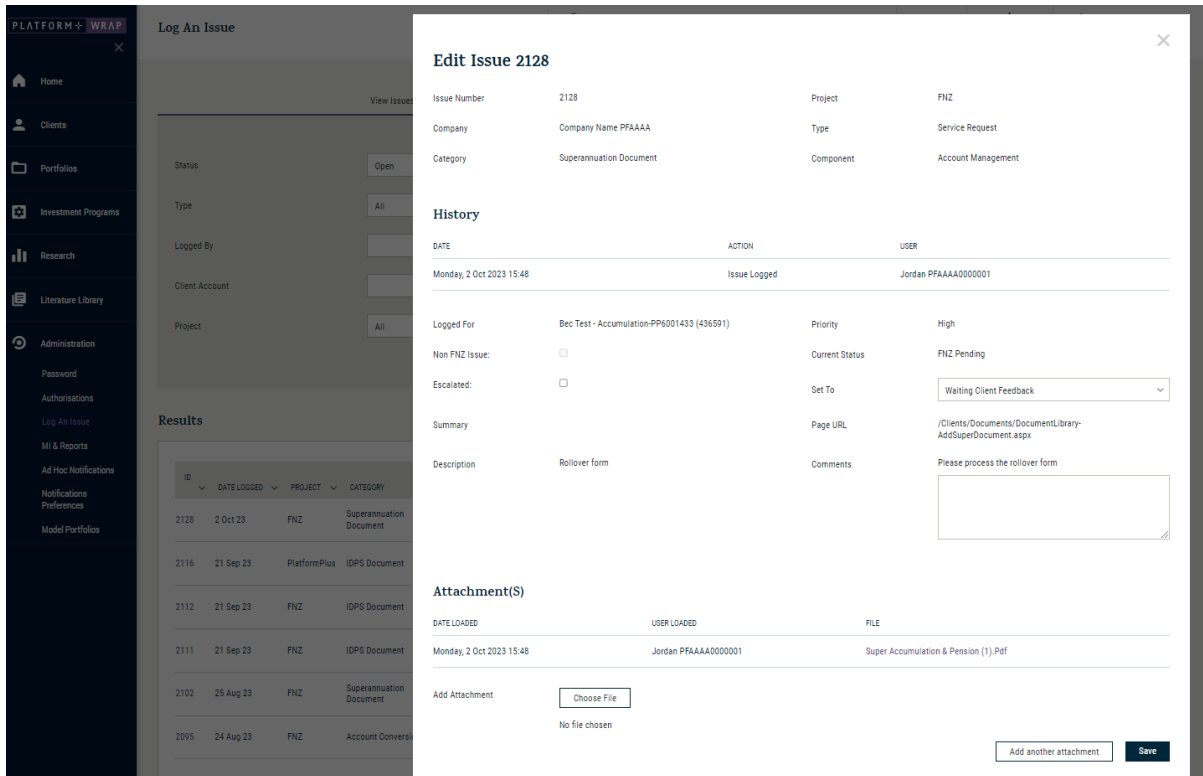
Detail:

Administration

7. Click [Log An Issue](#), [View Issues](#). To open the Service Request, click on the ID number



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



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.