

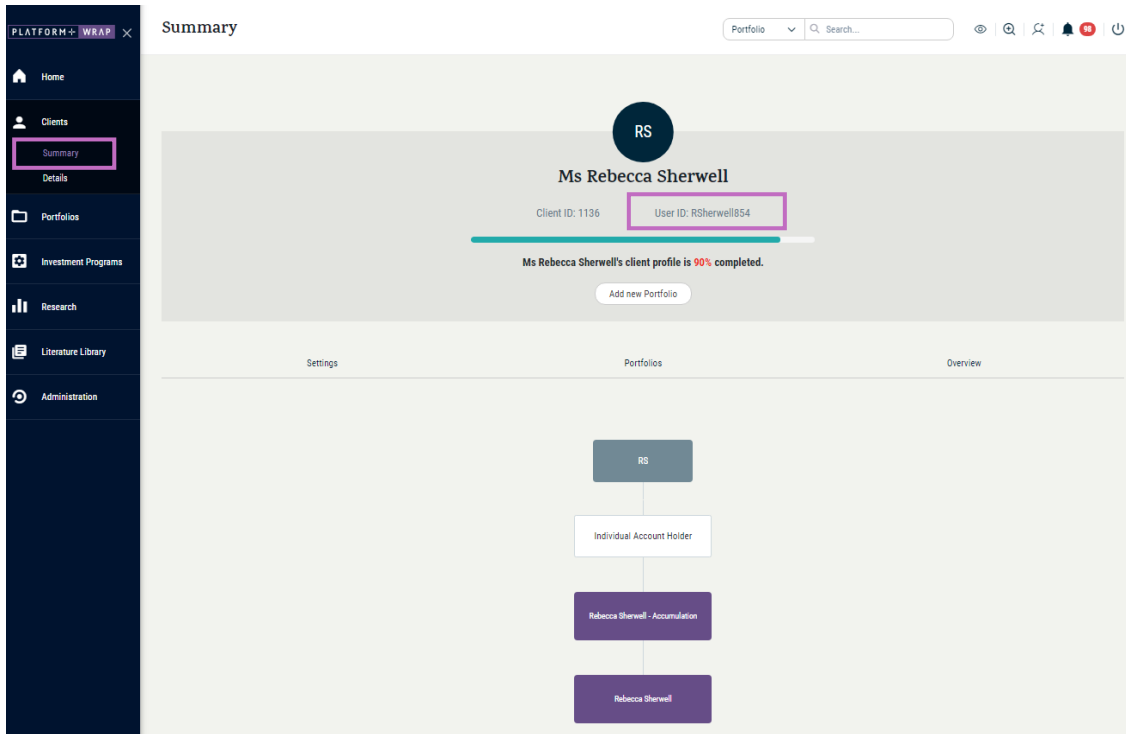
Client User ID and Password Reset

Adviser guide only.

This guide provides instructions on how to view your client’s user ID and request a password re set email.

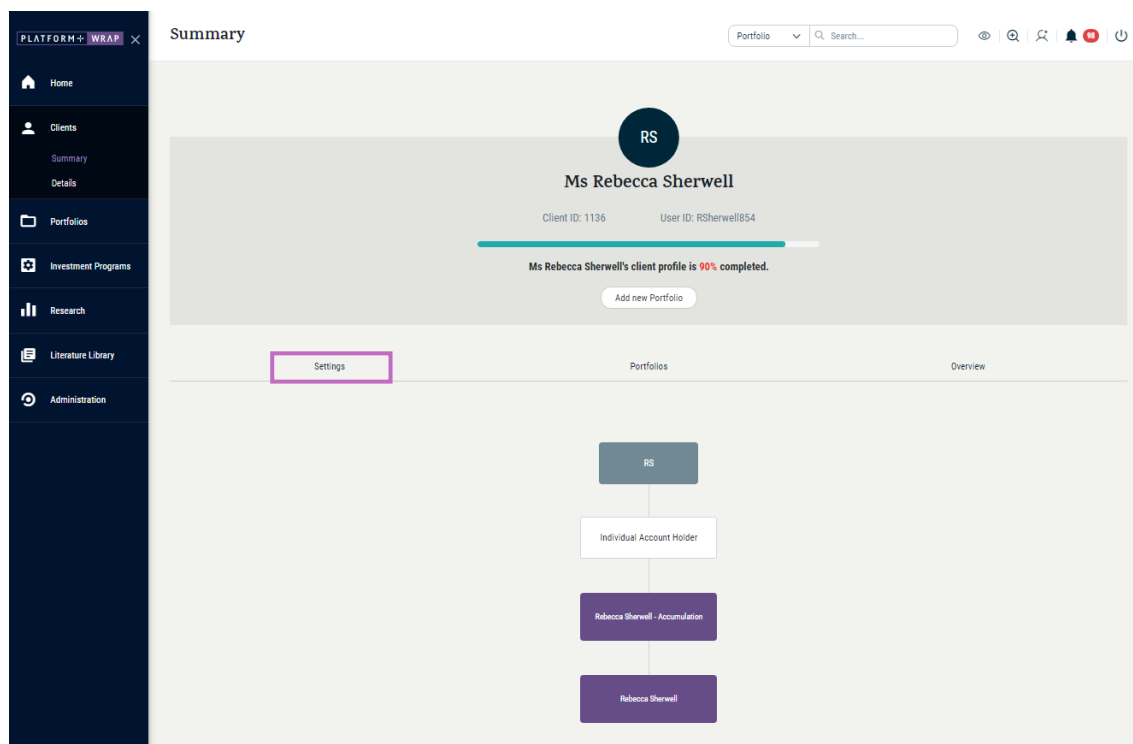
Locating your client’s User ID.

Once you have selected the client you will locate their User ID under the client **Summary**, you will see your client’s User ID as indicated below.



Resetting your client’s password.

1. To reset your client’s password, click on **Settings**



2. Click Password Status **“Reset”**

The screenshot shows the 'Summary' page for a client named Ms Rebecca Sherwell. The client's profile is 90% completed. A table lists various tasks and their progress:

Task	Progress	Action
Personal Details Add client personal details	100% Complete	View/Edit
Add Account(S) Create new accounts	2 Added	Add
Regulatory Checks Complete regulatory checks against your client	66% Complete	View/Edit
Investment Program Investment Programs	0 Added	
Password Status Unlocked		Reset

3. Click on **OK** in the pop-up box to confirm a password trigger is required

The pop-up box contains the following text:

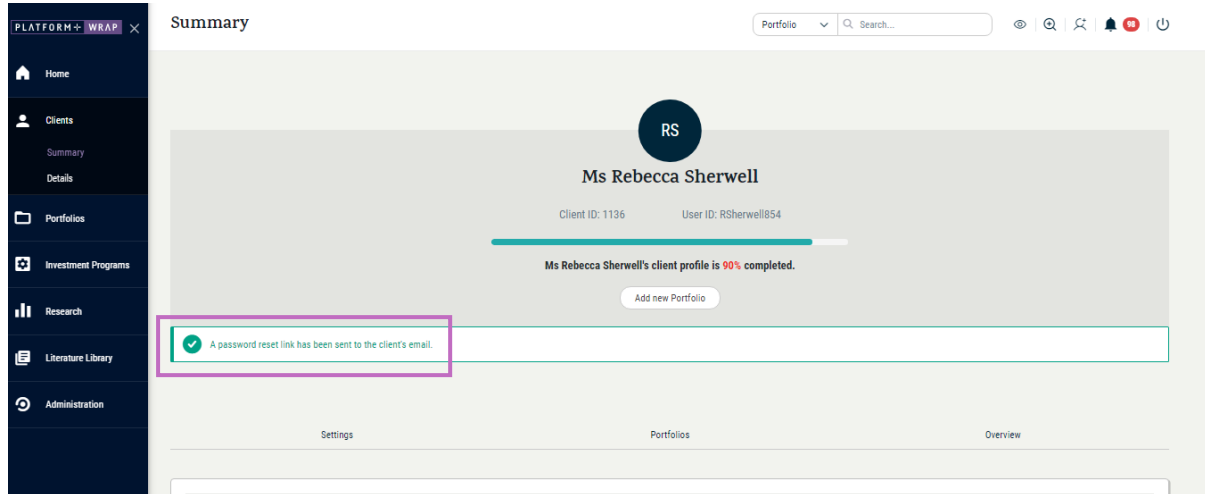
adviser.platformpluswrap.com.au says

Clicking OK will reset this client's password and trigger an email to the registered email address on their profile.

Are you sure you want to proceed?

Buttons: **OK** (blue), Cancel (white with blue border)

4. Once successfully submitted the following confirmation will show



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@platformpluswrap.com.au.