

Adviser Portal User Guide

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Overview



Register



First Log in



Ongoing Log in



FAQ



Interactive menu
(click the item you want)

1. Background and overview



In November 2019, Australian Ethical Investment (AEI) launched the Adviser Portal for financial advisers to gain access to their clients' superannuation account details.

This allows all approved financial advisers with valid third party authorities (TPA) to view their clients' account details online. We understand the value and benefit of advisers to be able to access their clients' information in an accurate and timely manner that brings efficiencies to their business.

This is a non-transactional portal, meaning all the information is *read-only* and unable to be edited or transacted on.

The portal is not available to non-adviser roles, such as accountants, solicitors and powers of attorney.

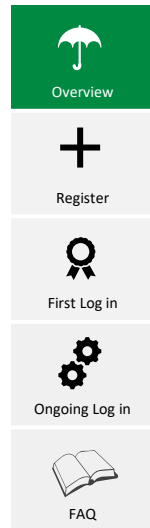
Advisers will only need to register for the portal once and then follow the authentication process each time they log in. Our security features include two-factor authentication (2FA), which is becoming the world wide norm due to privacy and data breach concerns.

For all new advisers:

When you submit a valid TPA, you'll be asked to register for the portal. Once complete, you'll be able to view your clients details.

For all existing advisers:

- if you have existing clients with a valid TPA, this will be pre-loaded onto the portal. You'll still be required to register for portal access
- for new client TPAs – these must be submitted to us and validated before being loaded onto the portal
- if your details change (eg. move to another company or change dealer groups) you'll need to send through an up to date TPA.



2. Registering for access

Step 1

- Submit a TPA form and send it to advisers@australianethical.com.au
- This form must include:
 - your name
 - company and dealer group (licensee)
 - your email (must be personalised, not generic)
 - mobile number
 - member name
 - member DOB
 - member address
 - signed and dated by you and the member

Step 2

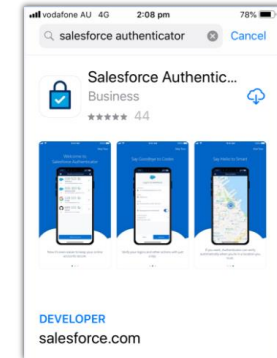
Once we receive your TPA, we'll do a thorough check and if approved, you'll receive a welcome email.

Step 3

Once you receive the welcome email, click on the link. This will take you to the portal log in page. You'll need to download the Salesforce Authenticator App from your phone to continue with the next step.

Step 4

From your phone, go to your App store and download the Salesforce Authenticator. Salesforce Authenticator App support is available online and is a standard Salesforce product.



Step 4



Overview



Register



First Log in



Ongoing Log in



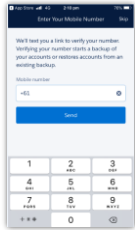
FAQ

2. Registering for access (cont)

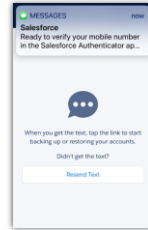


Step 5

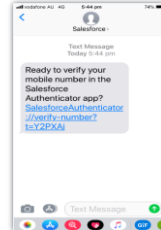
Follow the prompts and fill out the details on the Salesforce Authenticator app:



Enter mobile



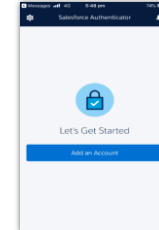
Await SMS



Click on link



Create PIN

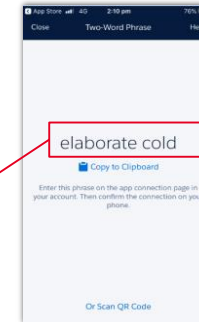


Add Account

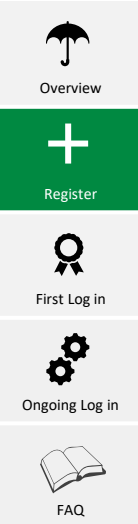
Step 6

Record the **unique two word code**, because you'll need this later when you log in to the portal for the first time.

This is your two word code (example only)



Step 6



3. Logging in for the first time



Step 1

Before you use the portal, make sure you read and accept the Terms and Conditions from your welcome email before continuing. We recommend reviewing the Terms and Conditions on a regular basis.

Step 2

Using the two word code you previously wrote down, enter it into the field displayed on your screen.

Step 3

Check your mobile and approve the request to log in (a prompt should appear).

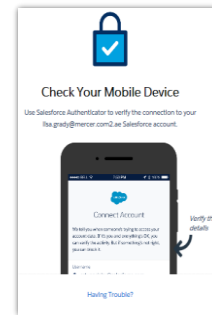
Step 4

Populate the fields with your username or ensure this is correct if pre-populated. The format for your username is your email address, appended by .ae, for example, john.smith@emailaddress.com.au

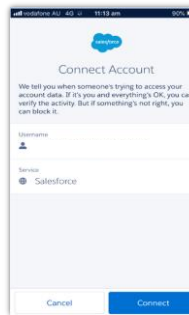
Your username should also be on your welcome email.



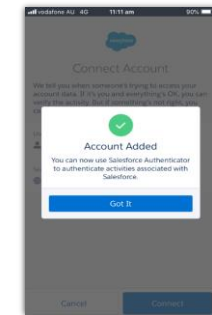
Step 1 & 2



Step 3



Step 4



Step 4

- Overview
- Register
- First Login**
- Ongoing Login
- FAQ

3. Logging in for the first time (cont)



Step 5

Note: You should receive an email acknowledging the account:

The following identity verification method was recently added to your (portal Username) account. Approve notifications from Salesforce Authenticator. If you didn't add this verification method, contact your Australian Ethical admin immediately to prevent unauthorized access to your account.

No action is required in this step

Step 6

You'll be prompted to create a new password using the rules provided.

You'll now be able to log in to the portal.

ae australianeethical
super

Change Your Password

Enter a new password for Make sure to include all

least:

- 8 characters
- 1 letter
- 1 number
- 1 special character

* New Password

* Confirm New Password

Password was last changed on 1/10/2019 11:00 AM.

Step 6

- Overview
- Register
- First Login**
- Ongoing Login
- FAQ

4. Logging in (ongoing)



Step 1

Go to <https://superportal.force.com/aes/login> and enter your username and password.

Step 2

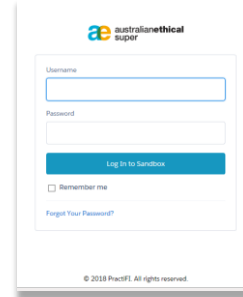
You'll receive a prompt on your phone to authorise. If you prefer to not authenticate every time, the Salesforce Authenticator app will prompt you to set a trusted location (same service, from the same user, from the same terminal, from the same trusted location, defined by mobile device).

Step 3

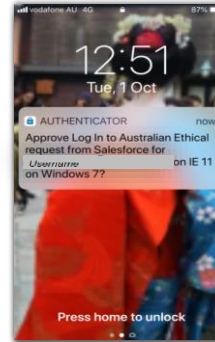
Once you've authenticated from your phone, you'll now be logged into the portal.



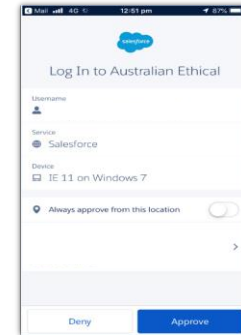
When you see this symbol, the authentication has been successful, and you will be logged into the portal



Step 1



Step 2



Step 2

- Overview
- Register
- First Log In
- Ongoing Log in
- FAQ

5. Frequently asked questions (FAQ)

1. What if I have problems logging in?

Call us on **1300 134 337** between 8:00am and 8:00pm (AEST) Monday to Friday or email us at advisers@australianethical.com.au

2. How long does it take from submitting my TPA to seeing my client on the portal?

This may take anywhere from 3 to 5 working days. If you need information sooner, you can call the Helpline on **1300 134 337**.

3. When does a TPA get revoked and removed from the client portal?

A TPA is revoked when:

- we receive an instruction from you, your licensee, Australian Ethical or your client
- we identify invalid TPA details (e.g. due to differences in records that are held in our system).

When this happens, we'll notify you and your client.

4. Why can't I transact in the portal?

As a preventative measure against inadvertent activity, the initial release of the portal deliberately doesn't allow any transactions or editing of your clients details. This functionality may be considered at a later time.



Overview



Register



First Login



Ongoing Login



FAQ

5. Frequently asked questions (FAQ)

5. How do I reset my password?

On the portal log in screen, there is an option for you to reset your password. Click on the Forgot Your Password link. If you think someone else has used your log in details to access the portal, please let us know immediately.

6. Where does the information in the portal come from?

The details you can view in the adviser portal are identical to the information your clients can see in their secure member portal. This enables you to “be on the same page” as your clients when discussing their account details.

7. Can I use Salesforce Authenticator on any mobile device?

Salesforce Authenticator is supported on both iOS and Android devices.

8. Can I set Salesforce Authenticator up on multiple devices?

It’s best to only register one device. You can register Salesforce Authenticator on multiple devices, however the notification feature will only work on one device at a time.

9. What happens if I lose/break my device?

Helpline will be able to reset your access as a result of a lost or stolen device. You’ll receive a new welcome email as soon as the process has been completed (it may take up to a few days). Helpline can assist you with your client details over the phone during the *reset* process.



Overview



Register



First Login



Ongoing Log in



FAQ

Version



Version	Date Released
Version 1	November 2019