

Portal user guide for advisers

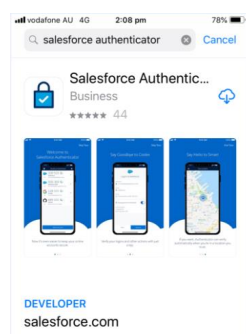
Registering for access to the AE adviser portal

To register you'll need your **Welcome Email** and a **mobile device** to authenticate your identity during registration.

Once we receive and approve your TPA, we'll send you the **Welcome Email** with your username. (This will be your registered email address with **.ae** added to the end).

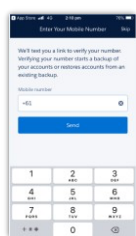
Step 1

Download the **Salesforce Authenticator App** from the App Store (IOS or Android) onto your mobile device.

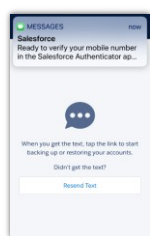


Step 2

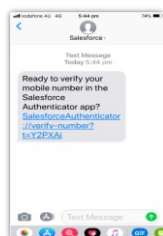
Open the **Salesforce Authenticator App** and follow the prompts to add an account:



Enter mobile



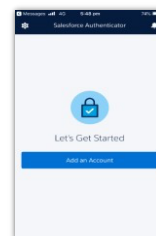
Await SMS



Click on link



Create PIN

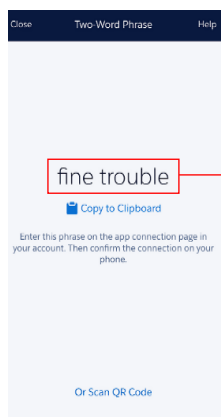


Add account

Step 3

Keep a note of the **unique two-word phrase** generated by the app.

You will need this when you log in to the portal for the first time.



Example of a two-word phrase

Logging in to the portal for the first time

Step 1

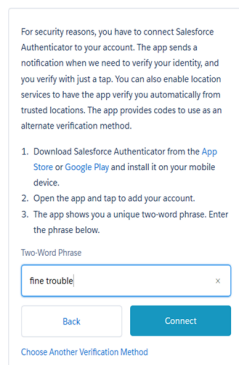
In the **Welcome Email** click on the **Complete your registration** link and read and accept the **Terms & Conditions**.

The **Connect Salesforce Authenticator** screen will appear.

Enter the two-word phrase (see above) into the field displayed on your browser screen and click **Connect**.

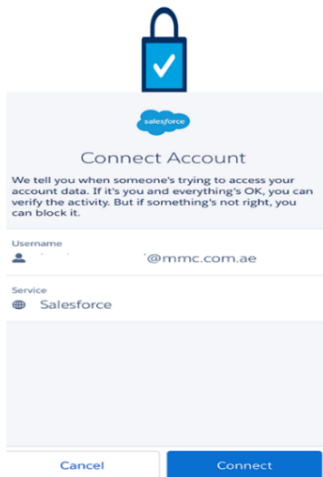


Connect Salesforce Authenticator



Step 2

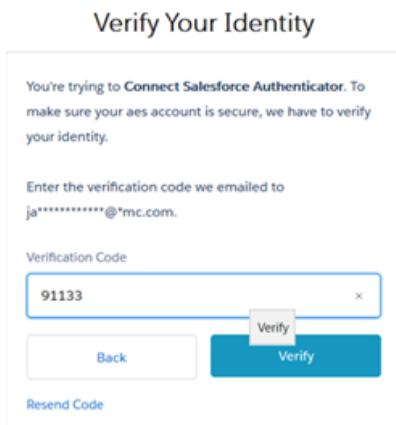
The mobile app will show the **Connect Account** screen with your username. Click **Connect**.



Step 3

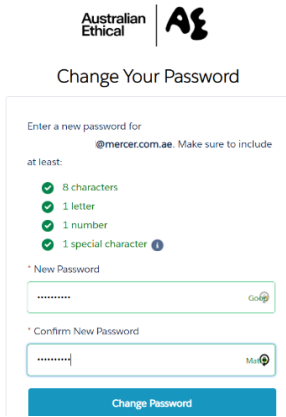
Check your email address for an email from **noreply@salesforce.com**. (Check Junk Folder if not in Inbox).

Enter the **five-digit verification code** from the email into the app screen and click **Verify**.



Step 4

You'll then be prompted to create a new password. You'll now be able to log in to the portal.



Australian Ethical | AE

Change Your Password

Enter a new password for
@mercator.com.au. Make sure to include
at least:

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

* New Password

* Confirm New Password

Change Password

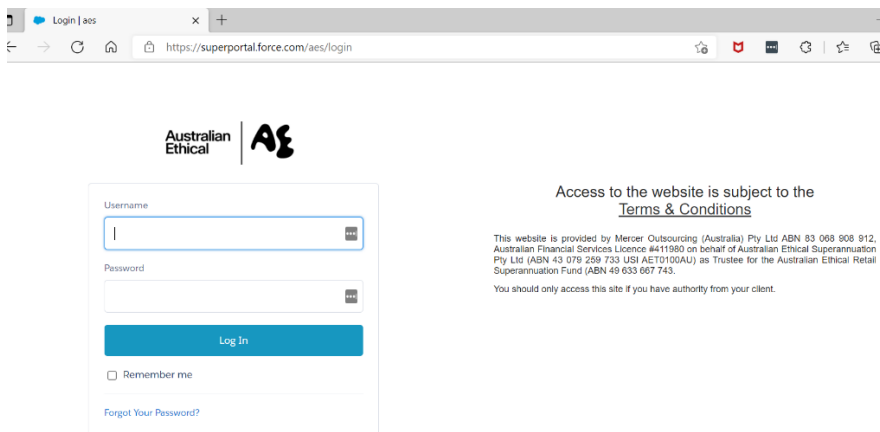
Having problems logging in?

Call us on **1800 021 227** between 08:30am and 5:30pm (AEST) Monday to Friday or email us at advisers@australianethical.com.au

Logging in – ongoing

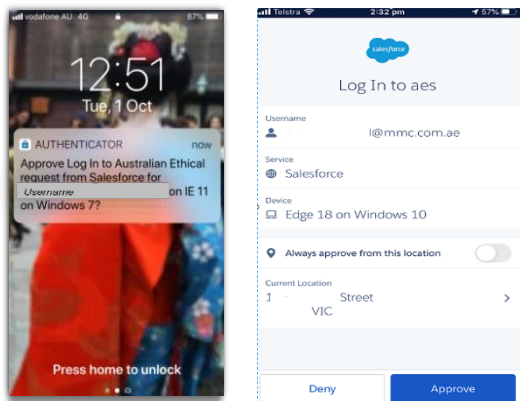
Step 1

Go to 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 be logged into the portal and will see this symbol.



Frequently asked questions

What if I have problems logging in?

Call us on **1800 021 227** between 8:30am and 5:30pm (AEST) Monday to Friday or email us at advisers@australianethical.com.au

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 call us on **1800 021 227**.

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 or your client, or
- if we identify invalid TPA details (for example, due to differences in records that are held in our system).
If this happens, we'll notify both you and your client/s.

Why can't I transact in the portal?

The portal provides advisers with a view of their clients' information but doesn't allow any transactions or editing of clients' details.

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 contact us on **1800 021 227**.

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.

Can I use Salesforce Authenticator on any mobile device?

Salesforce Authenticator is supported on both iOS and Android devices.

Can I set Salesforce Authenticator up on multiple devices?

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

What happens if I lose/break my device?

Call us on **1800 021 227** and will be able to reset your access. You'll receive a new welcome email (which may take a few days) in the meantime we can assist you with your clients' details over the phone.