

smartMonday Adviser Portal

Adviser delegated access guide

About this guide

Section 1 of this guide provides instructions for *how an adviser can nominate authorised staff* to have access to their Adviser Portal instance and manage this access going forward. Delegated access provides an authorised staff member with the ability to view and act on behalf of the adviser.

To help safeguard your clients and your business, make sure that you *remove portal access for any authorised staff member who leaves your practice*, or moves into a role where access is no longer appropriate. See Step 5 of this guide for how to remove or cancel access.

Section 2 of this guide provides instructions for *how an individual with delegated authority can register for portal access* and accept an invitation to have delegated access for an adviser.

Let's get started

Section 1: Nominating and managing delegated access

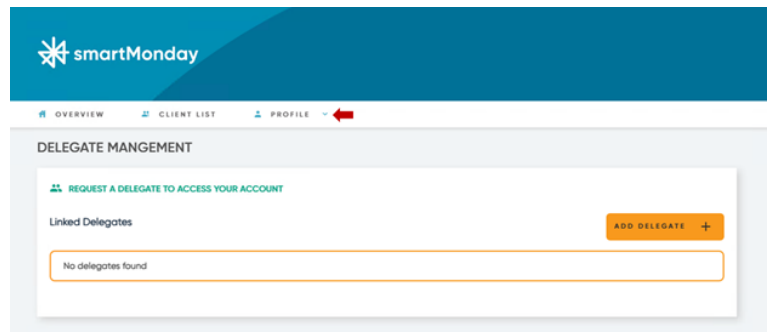
Step 1

Visit <https://adviser.smartmonday.com.au/> and log into your account.

For login help visit <https://www.smartmonday.com.au/advisers/adviser-login>

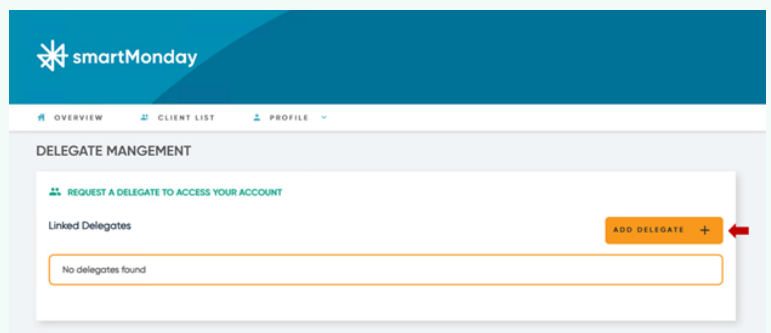
Step 2

Go to Profile > Delegate management.



Step 3

Select the **Add Delegate** button



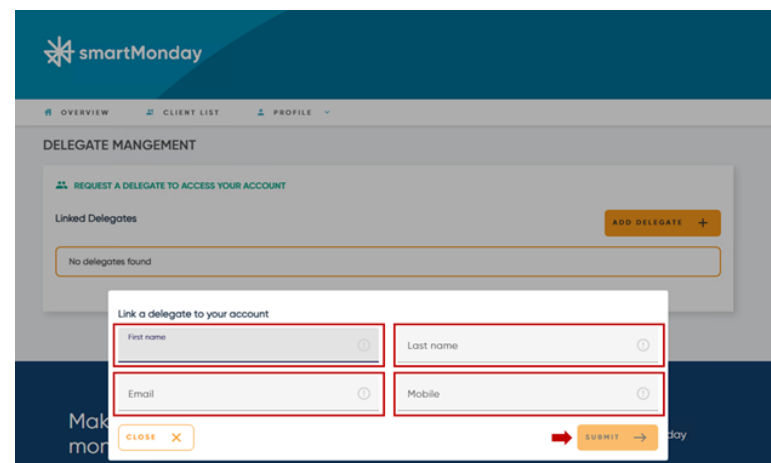
Step 4

Complete all fields (first name, last name, email and mobile) for the delegate.

Use the delegate's work email address to ensure access is linked to their company email address.

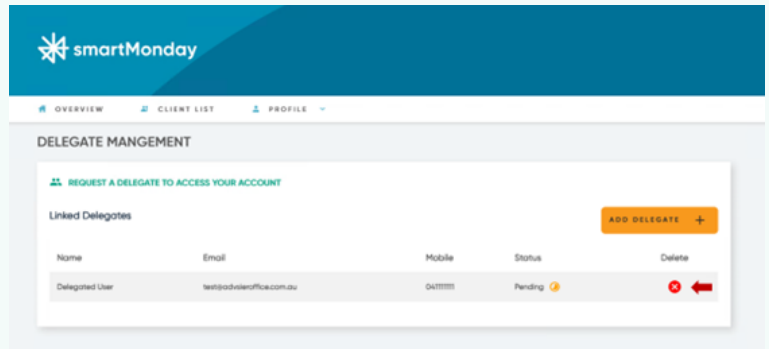
Select **Submit** to send the invitation

See Step 5 below to cancel an invitation.



Step 5

To manage delegate access (cancel an invitation or remove access) go to Profile > Delegate management.



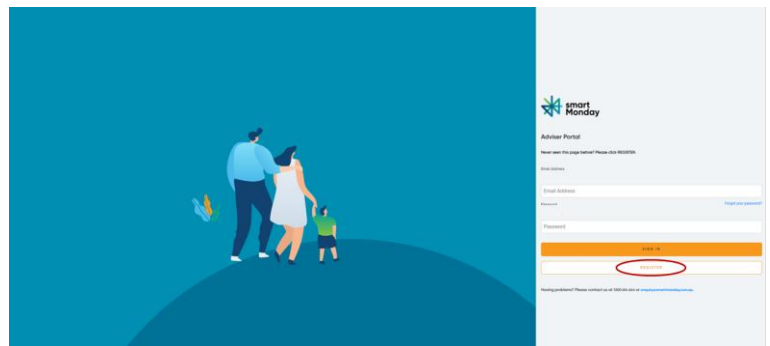
Section 2: Adviser delegate site registration and invitation acceptance

Step 1

Visit <https://adviser.smartmonday.com.au>

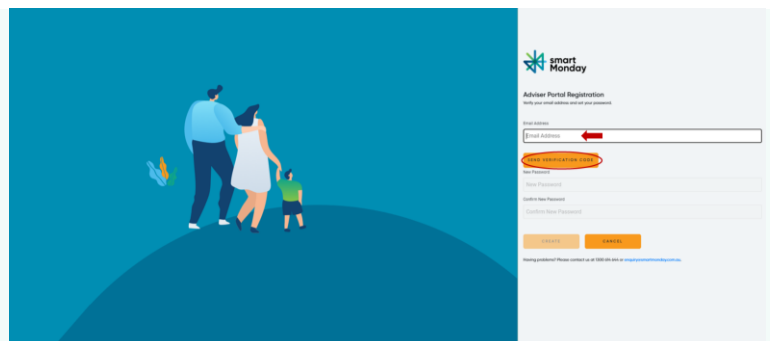
Step 2

Select the **REGISTER** button located under the block orange Sign-In button.



Step 3

Add your email address (the one registered against your adviser record) and select **SEND VERIFICATION CODE**.



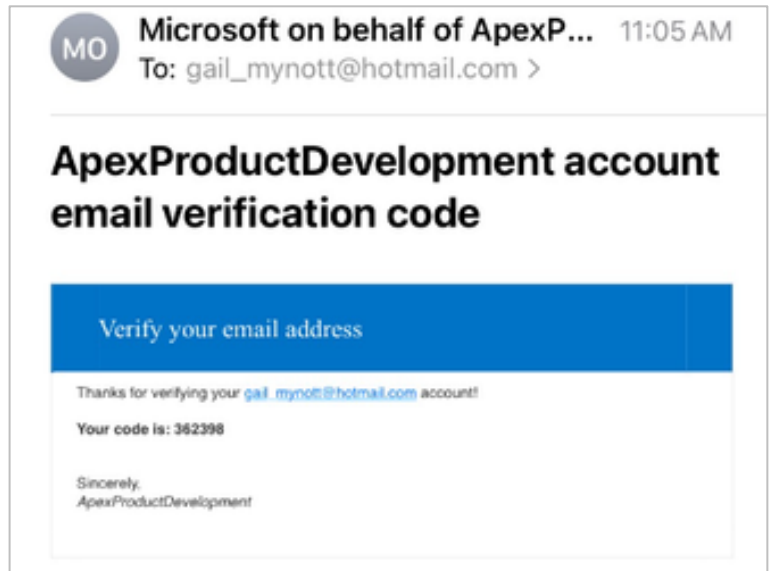
Step 4

Check your email. We've sent you a verification code.

The email will come from noreply@smartmonday.com.au, it should arrive almost immediately. If the email doesn't arrive, please check your junk folders.

If you still haven't received the verification code, select **SEND NEW CODE** to request a new code.

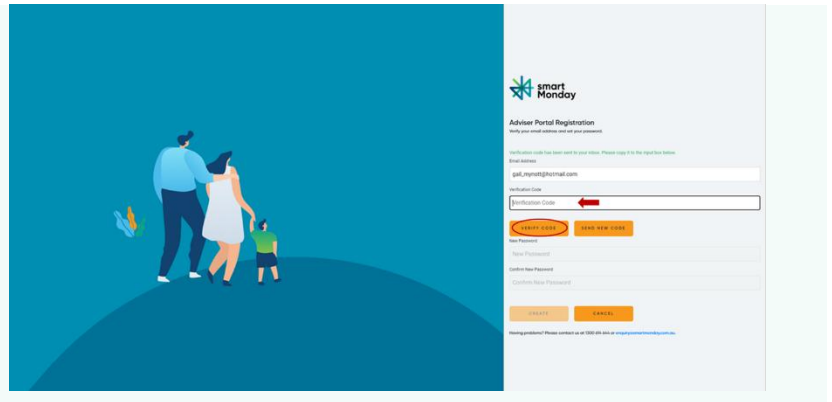
You can also call the smartMonday contact centre on 1300 614 644 from 8.30am to 5.00pm (AEST/AEDT), Monday to Friday or email adviser@smartmonday.com.au for further assistance.



Step 5

Add the verification code to the field provided and click the **VERIFY CODE** button.

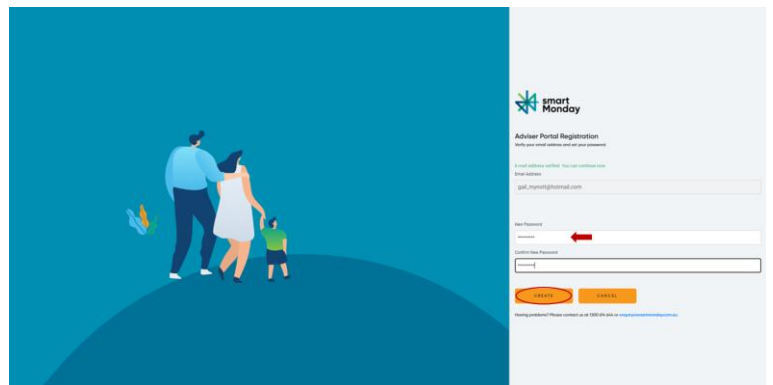
If the code expires before you enter it click the **SEND NEW CODE** button to request a new code.



Step 6

Once the code has been verified, the password section of the screen will become available. You can now set your password and select the **CREATE** button.

Please note, your password should consist of between 8 and 64 characters and should include at least 3 of the following elements: uppercase letters, lowercase letters, numbers and symbols (special characters).

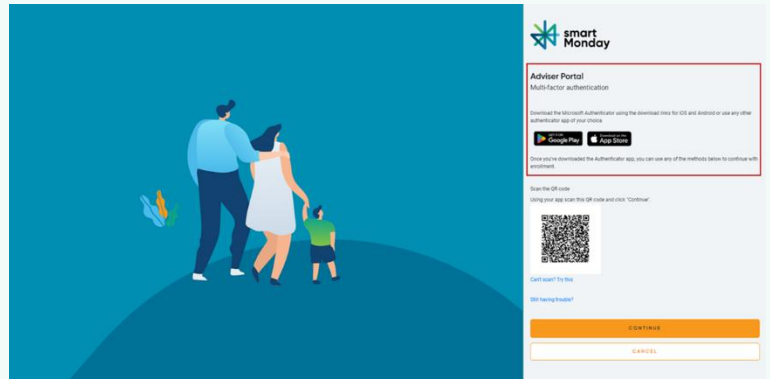


Step 7

Once your password has been set, you will need to download the Authenticator App onto your mobile phone (you can skip this step and progress to Step 8 below if you already have the App on your phone). The following screen will be displayed.

Do not scan the QR code yet.

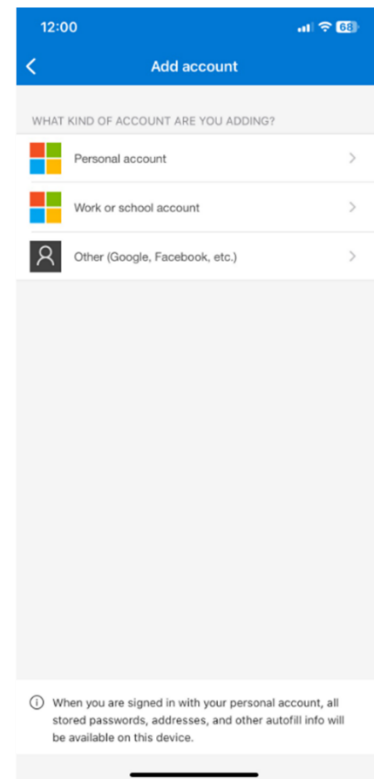
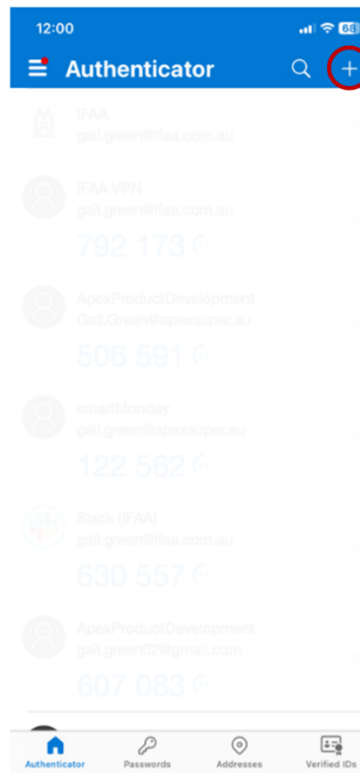
Instead, follow the instructions at the top of the screen to download the Microsoft Authenticator App onto your phone.



Step 8

Once you have downloaded the App, select the '+' symbol at the top of the screen.

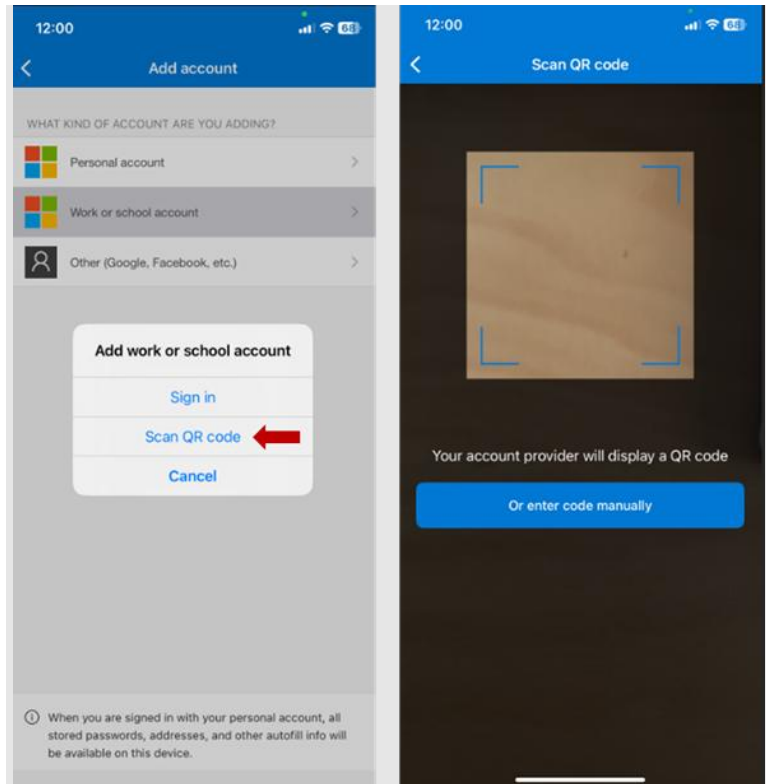
You will then be taken to a second screen which allows you to select what type of account you want to add. You should select the account type that is best for you.



Once you have selected one of the options, you will see a prompt that asks how you would like to add the account, select **SCAN QR CODE**.

The App may ask for access to your camera, which you should accept. Then scan the QR code on the Adviser Portal registration screen using your phone's camera.

Once the QR code has been scanned, the Adviser Portal will become an entry on the Authenticator App, and a new code will be provided every 60 seconds.



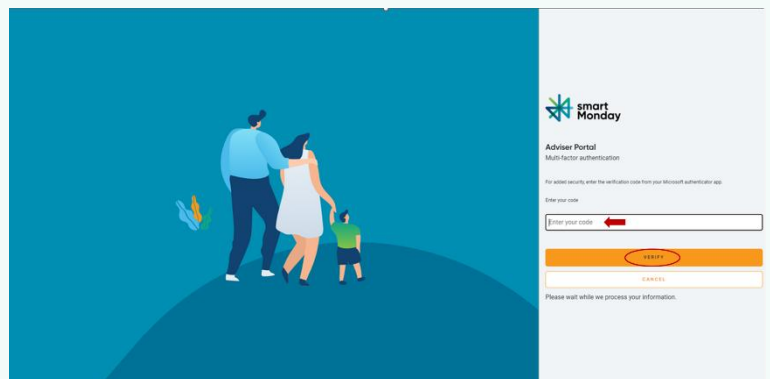
Step 9

Back on the Adviser Portal you should now select **CONTINUE**.

The screen will change to the adjacent where you will need to add the code currently being displayed on the Authenticator App and select **VERIFY**.

You should now be redirected to the Adviser Delegate Overview page.

In the future, to log in, you will only need to enter your registered email address, the password you created while registering and the verification code from your Authenticator App.



Step 10

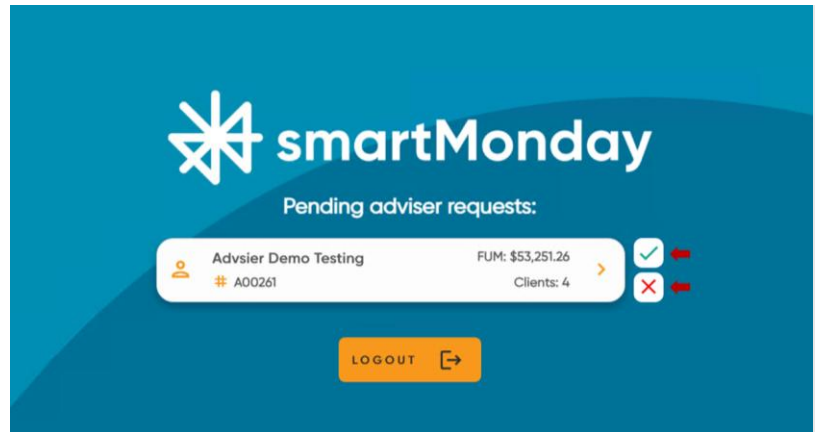
The invitation can be accepted or declined from this screen.

- To accept: select the green tick
- To declined: select the red cross

Once the invitation has been accepted, the next time the Adviser Delegate logs in they will see the linked Adviser record here.

Adviser Delegates can be linked to multiple advisers. Once invitations have been accepted the Advisers will be listed here each time the Adviser Delegate logs in.

Selecting the Adviser's tile will take the Adviser Delegate to the Adviser's account where they will be able to view and act on behalf of the adviser.



For more information about how to use the smartMonday Adviser Portal please refer to the [user guides available on our website](#).

Got questions?

For **questions about the Adviser Portal and member accounts**, please call the smartMonday contact centre on 1300 614 644 from 8.30am to 5.00pm (AEST/AEDT), Monday to Friday or email adviser@smartmonday.com.au.