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Website Guide /

My Portal

Learn how to update your account & product information

My Portal

'My Portal' is your central hub where all of your account & product information is managed.

You can update things such as your business contact, regulation and employee details. Furthermore, this is where you manage all of the products for your website.

'My Portal' is split into several sub-sections; User Information, Products, Business Information, Office Locations, People, Regulation and API.

To manage your 'My Portal', log in to our site http://www.adviserportals.co.uk with the 'My Portal' details received in your 'Welcome Email'.

My Portal / **Account**

Any changes saved in your 'My Portal' will automatically update on your website in real time.

User Information

The User Information section allows you to manage your profile. You can change your email address, password and privacy settings.

Business Information

The Business Information section is where you manage all of the details of your business, for example; your address, contact details and legal status.

Office Locations

If you have multiple business locations then you can use this section to add an additional 3 office addresses.

People

The People section is where you add all of your employee information. You can add as many people as you like and decide whether to display them in the contacts section, the biographies section or both. You can also upload an image for each.

Regulation

The Regulation section allows you to manage your website disclosures such as your mortgage fee and exit site statements. This is also where your network is selected along with your FCA number.

API

The API section is only required when a third party is building your website. ***If Adviser Portals is building your site then you do not need to access this page.***

Top Tip: All of the above sections are updated using simple forms. Simply update the relevant input fields in the required section and then click 'Save'. Any changes made in your 'My Portal' will automatically update on your website in real time.

My Portal / **Products**

Your Adviser Portals website comes packed with compliant financial information and tools.

Articles

Library of compliant topical financial information to help you inform your client base.

Calculators

Suite of industry leading financial calculators.

Contact Forms

Structured contact forms to help qualify your leads.

Market Data

Stock & currency market data updated every hour.

News Feeds

Live news from around the world.

Newsletters

Quarterly topical newsletter with your businesses contact details.

Plugins

Earn commission when a user transacts online.

Research Links

Links off to useful resources to assist you when researching financial products.

Videos

Regular videos from fund managers.

Wraps

Links to popular third party investment platforms.

Top Tip: All of the above sections are updated using a 'drag & drop' interface. This allows you to add, remove and re-order each item. To enable an item simply drag from the 'Available' section in to the 'Selected' section - reverse the process to remove. Re-ordering is achieved by dragging and dropping each item in your desired order within the 'Selected' section.

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