Client portal access

WRAP Quick Guide

For adviser use only.

Providing client access

Ensure client portal access is set to Yes either at new business set up or, on an active account go to **Roles>View account information.**

Add new user

For an Individual Account go to Activity and Create User and save.

For a Joint Account search for the client you want to set up a profile for which can then be done via Activity and Create User.

Once saved this will automatically issue the welcome e-mail to the client prompting them to register with Okta.

Adding additional accounts to an existing profile

Search for the account you wish them to have access to. Go to **Roles>Add interested party**. Tick the box next to the account holder name and then select Account access as the role. Select Existing and then enter the name of the user and click + add client. Ensure the details are correct and read only access is set to Yes and Submit.

Adding a new Interested Party for Access

Go to Roles and when adding an Interested Party select New which will prompt you to enter client details for this profile, you can then search for this client and within Activity you will be able to create the user profile by simply adding in the e-mail address and clicking save.

Removing accounts from an existing profile

On the Roles tab for the account that is to be removed from the users profile you can remove the access for the Interested Party within this section by clicking the remove icon.

Access oversight

You now have oversight of who has access to view accounts. To see who has access to view an account go to Roles where you can see the Interested Parties who have Online access. You have the ability to edit or remove the Interested Parties here.

What different access levels are available?

Access is set on an individual client basis, giving you flexibility to offer the right level of information to your client.

Client Basic

Valuation summary and documents

Client Standard

Valuation summary, documents, investments (including insights) and performance

Client Advanced

Valuation summary, documents, investments (including insights), performance and transaction history

Hints and tips

- If the client gets an error message saying 'access denied' please check they are going on through the correct website using the link provided in the Okta registration email issued to the client. They should not be going through abrdn but instead your dedicated adviser's portal.
- Your client can update their password in the Profile area of the Client Portal through our secure services with Okta.
- If your client has forgotten their password, there is a link to get help on the Okta login page. There is also a facility to unlock the account if there has been more than five unsuccessful password attempts. An email will be sent, giving guidance on these steps.
- Client Portal is fully mobile responsive. Your clients can login using the internet browser on any device
- When resending the registration email, if the initial registration email has not been received, check the email address entered is correct as well as client SPAM/Junk folders.
- The registration email can be re-issued by clicking the 'Re-send' button from within the client's user profile.
- You can check that a client has registered successfully by looking for the 'Remove Okta Identifier' function appearing in **Dynamic Menu > Users and access > User Management > Find user**.

For more information visit abrdn.com/adviser

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