



abrdn platforms

Getting started with the portal

abrdn.com

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Introduction

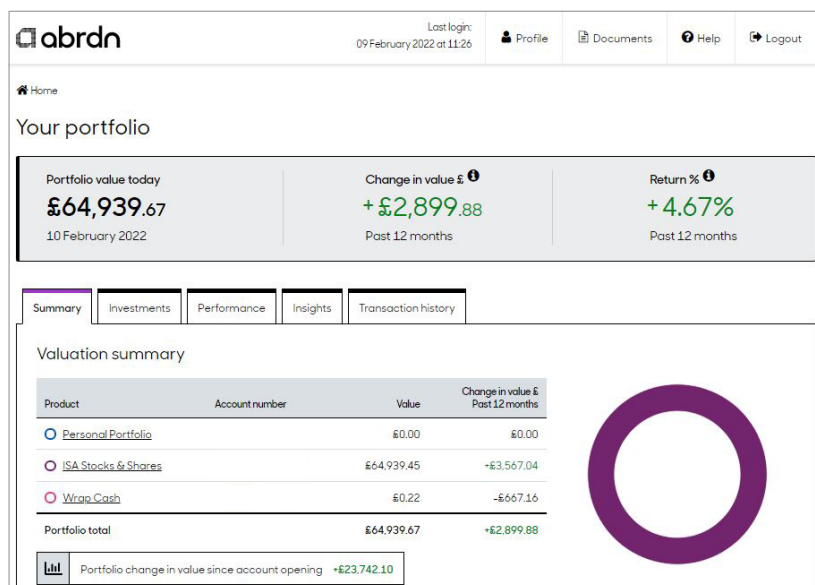
Welcome to the online portal for your abrdn account. This guide will take you through how to register for the first time and login, using our security partner Okta. Security is important to us and Okta are a market leader in managing secure online access.

Once registered, you'll be able to log in and view your account whenever it suits you. You can quickly get hold of the information you need to keep track of your investments.

The value of your investments can go down as well as up, and you could get back less than you paid in.

With the portal you can:

- see a quick summary view of your portfolio
- view up-to-date valuations, product details and documents
- access on your desktop, tablet or mobile
- reset the password and unlock account if needed



This example is for illustrative purposes only. No assumptions regarding future performance should be made.

"You can quickly get hold of the information you need to keep track of your investments"

Registering for the portal

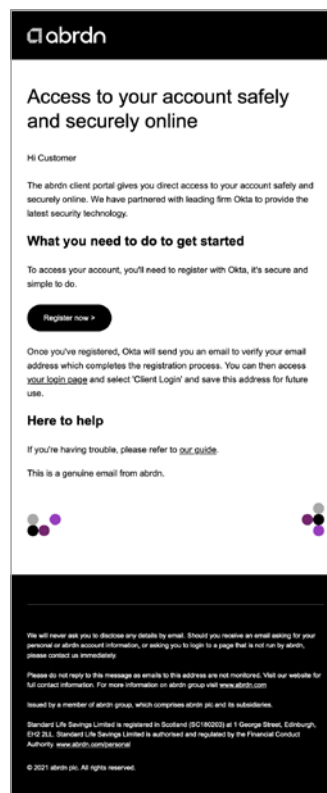
Portal access email

Before logging in for the first time, you will need to register first.

We'll send you an email confirming your access to the portal and explain how to get started.

Once you've received this email, you can register by clicking the link through to our security partner, Okta. This will take you to the Okta website to complete the registration process.

Please note, the registration link is only available for 72 hours after the email is sent. You can request another email if the registration link has expired.



How do I register?

After clicking "Register with Okta" from the Portal Access Email, you will see the registration step.

The email address will pre-populate with the one we already have registered for you and will be part of your login.

Please note, this email has to match the one we hold for security reasons. Your email address can be changed later if required.

Your password must be at least 12 characters long. There are no restrictions on the characters you choose, but we have checks in place to make sure your password is strong. Your password won't expire and can be changed at any time. Page 9 of this guide explains how to do this.

The image shows a screenshot of the Okta 'Create Account' registration form. The header is white with the 'okta' logo in blue. The main text is on a white background. It says 'Create Account'. Below that, there is a grey box with the text 'Your Platform email address will be pre-populated here'. There are three input fields: a password field with a lock icon, a 'First name *' field, and a 'Last name *' field. Below the fields, it says '* indicates required field'. There is a blue button with 'Register' in white text. At the bottom, there is a link 'Back to Sign In'.

Logging in to the portal

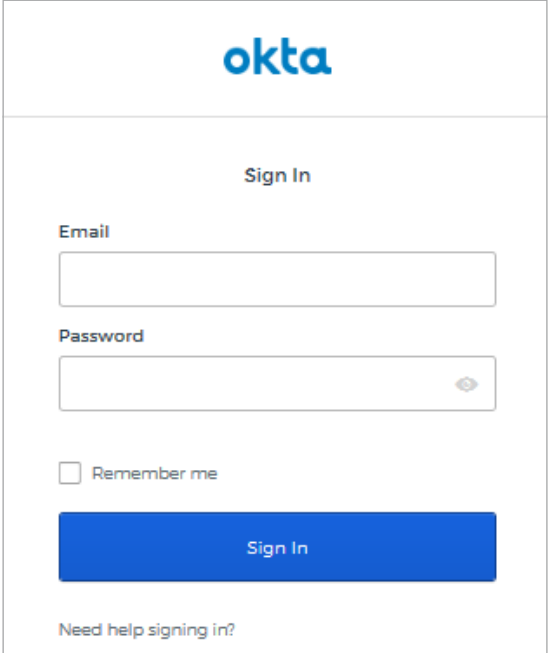
How do I login?

Once you've registered you will receive a verification email. You should click on the link to take you to the next step. This verifies your identity.

Enter your email address and password to enter the portal.

There is a link to get help on this screen if you have forgotten your password.

There is also a facility to unlock your account if you make more than five unsuccessful attempts. You'll receive an email giving you the steps to follow.

A screenshot of the Okta Sign In page. At the top is the Okta logo. Below it is the text "Sign In". There are two input fields: "Email" and "Password". The "Password" field has a toggle icon on the right. Below the fields is a checkbox labeled "Remember me". At the bottom is a blue "Sign In" button. Below the button is a link that says "Need help signing in?".

okta

Sign In

Email

Password

☐ Remember me

Sign In

[Need help signing in?](#)

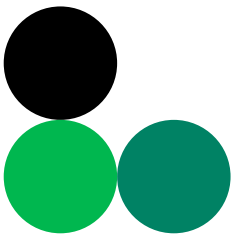
Email addresses

Are there any restrictions on email addresses?

Please enter the email we hold on record for you when you first register for the portal. This is the email address that we sent your registration email to. You can update your email address later, once you've logged into the portal.

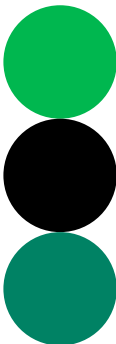
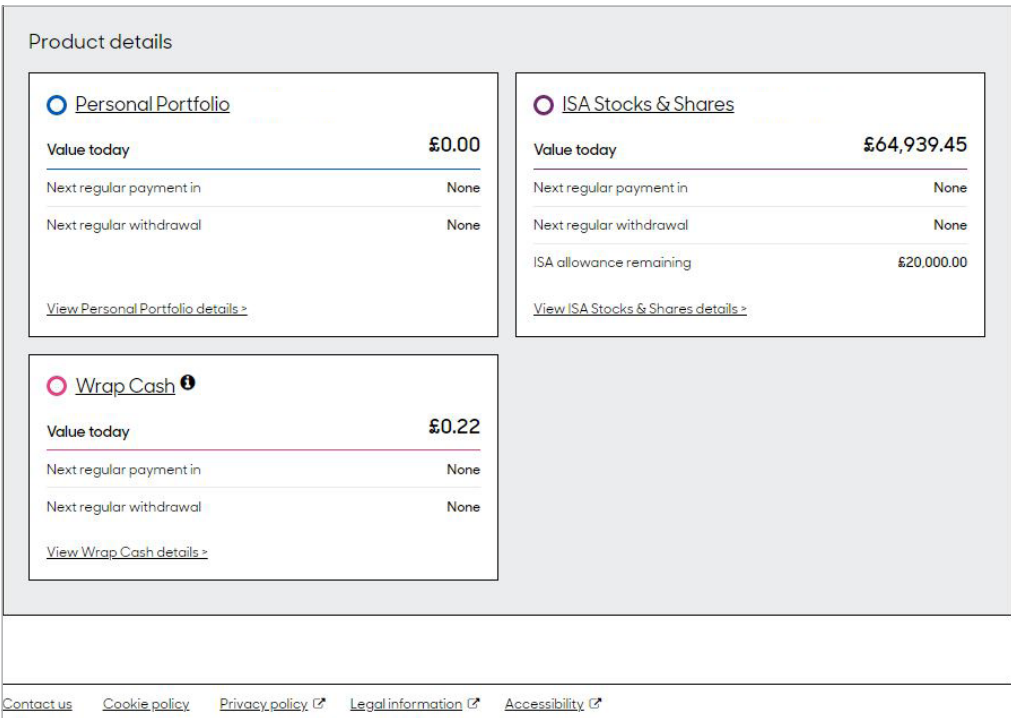
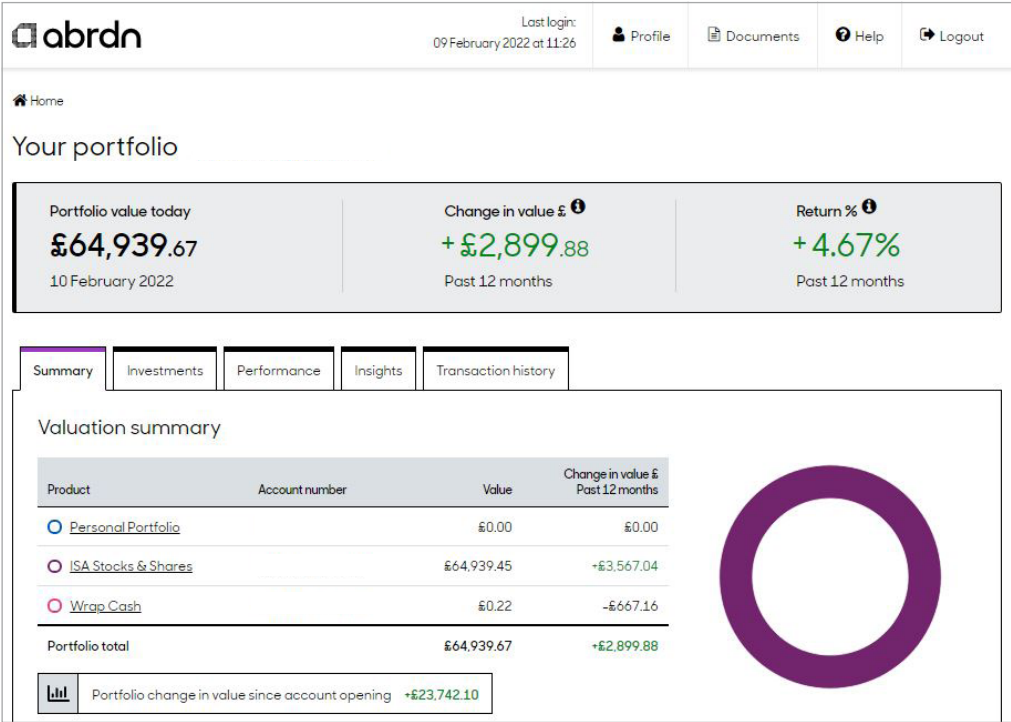


Summary page



What will I see first?

The first screen you will see is a summary view of your portfolio. This shows your total portfolio valuation at today, the change in value (monetary and percentage) over a 12 month period (or from when you first opened the account if earlier) and a breakdown of the products you hold.



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Documents



Can I see my documents on the portal?

There is a document library on the portal which will store copies of your important account documents. Just click on 'Documents' at the top of the page.

Last login:
09 February 2022 at 11:26

Profile

Documents

Help

Logout

Home > Documents

Your documents

Literature & guides
View the [latest terms & conditions, key features and guides here](#).

Document type
Select document types to view

Date
Past year

From 11 February 2021 until 10 February 2022

Date	Type	Document	Download
10/02/2022	Document	Cost and Charges Disclosure	
15/11/2021	Orders and trades	Contract Note Consolidated	
26/09/2021	Reports	SL Annual Statement	
15/09/2021	Orders and trades	Contract Note Consolidated	
14/07/2021	Orders and trades	Contract Note Consolidated	
20/06/2021	Reports	SL Annual Statement	

Security details

How do I update my password?

In the Profile area of the portal, there is an option to update your security details.

Last login:
09 February 2022 at 11:26

Profile

Documents

Help

Logout

Home > Profile

Your profile

Personal details

Account details

Security details

Security details

You can change your password online through our secure services with Okta.

Change password

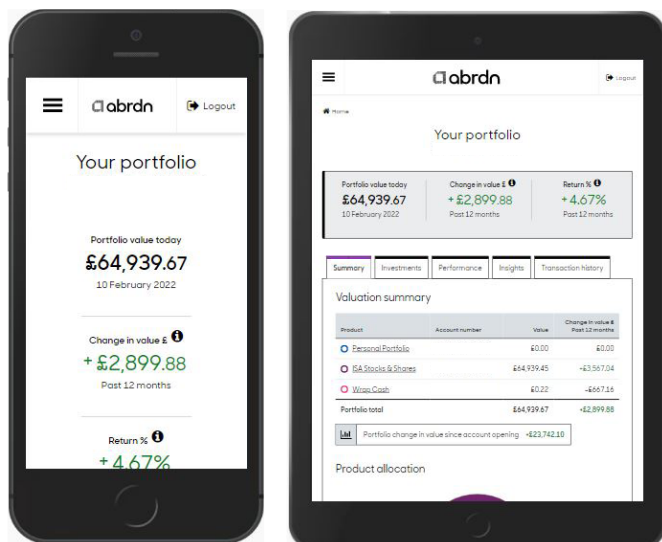
[Contact us](#) [Cookie policy](#) [Privacy policy](#) [Legal information](#) [Accessibility](#)

Platform and product provider details

Mobile view

Can I view the portal on my mobile device or tablet?

The portal is fully mobile responsive. You can login using the internet browser on your device.



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Compatible browsers

The platform will work best on latest versions of modern browsers e.g. Edge, Chrome, Safari, Firefox. With these browsers, latest version covers the most recent stable version and the one before that. If you use an older browser, your user experience may not be optimal.

Can I add the portal to my mobile device home screen?

Yes, devices have the option to save the Welcome/login page URL as an icon to provide quick access to the mobile site.

You will be responsible for entering a username and password. It's the device that makes this login easy and allows username/password to be saved on the device and then re-used when the portal requests it. These are normally validated by using the security on the device (e.g. face ID or touch ID).

Further support

If you have any questions or need further support, please contact your adviser firm.

For more information visit abrdn.com/adviser

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