VieFUND CORPORATION

Web Client Access Guide

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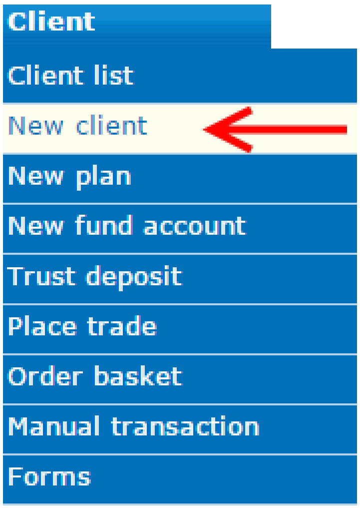
Advisors set up Web Access for new clients

Non-existing clients cannot register for Web Client Access by themselves from MyPortfolio. Representatives need to help their clients registering for one while adding new client into the database.

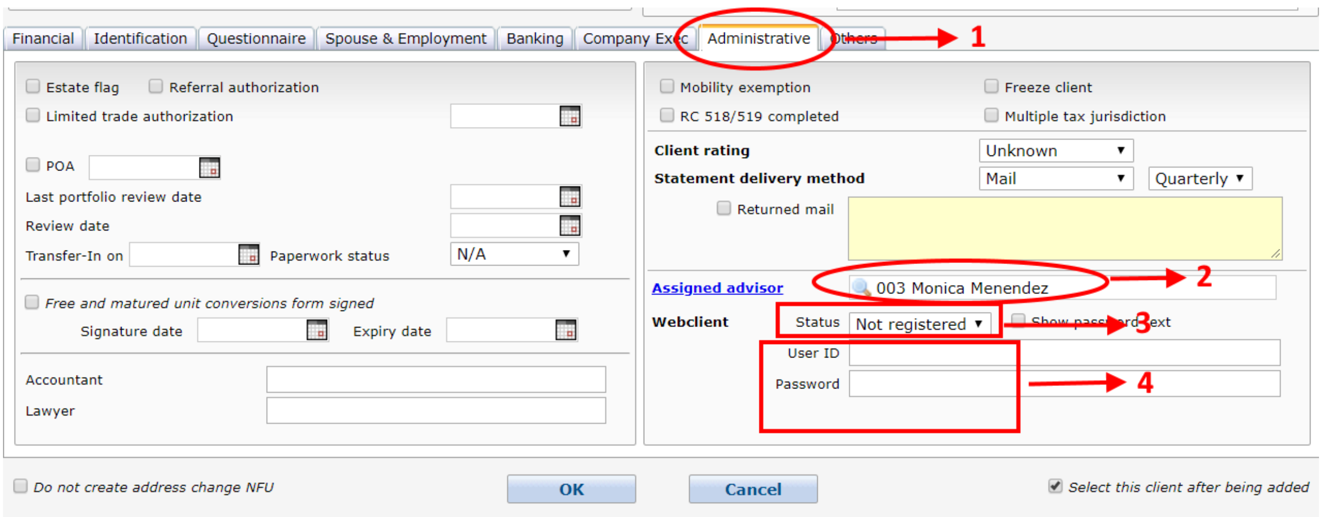
For the path, start with the “Client” tab:

Click on “Client”

Click on “New Client”



In the new pop-up windows:



1. Click on “Administrative” tab

2. Select Assigned advisor by clicking on the field on the right
3. Change WebClient status to “Registered”
4. Type in User ID and Password for the client’s MyPortfolio account

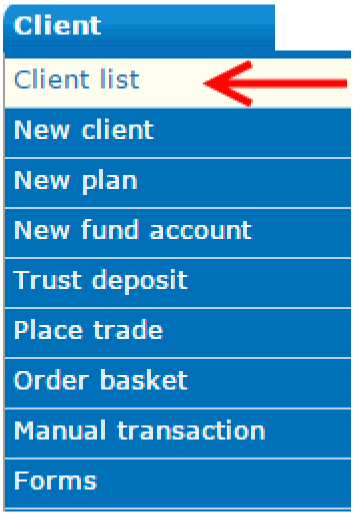
Advisors set up Web Access for existing clients

Existing clients without Web Access can ask their representatives to create one for them.

For the path, start with “Client” tab:

Go to “Client” tab

Click on “Client list”

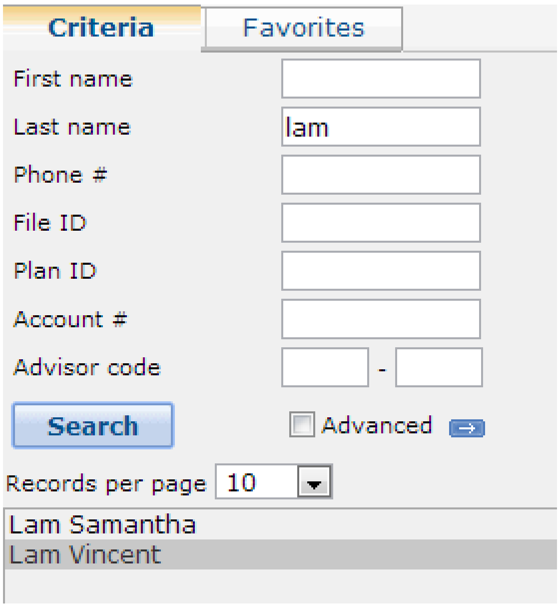


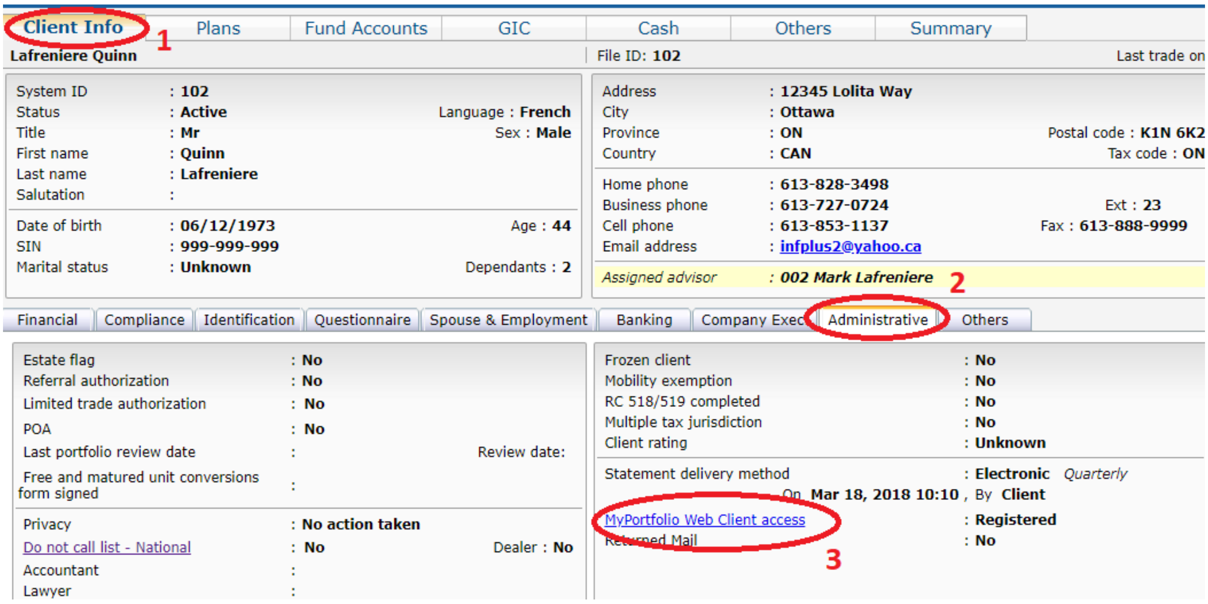
On the right box:

Search for an existing client by First Name, Last Name, Phone Number, etc.

Click on the client’s name to select the client from search results

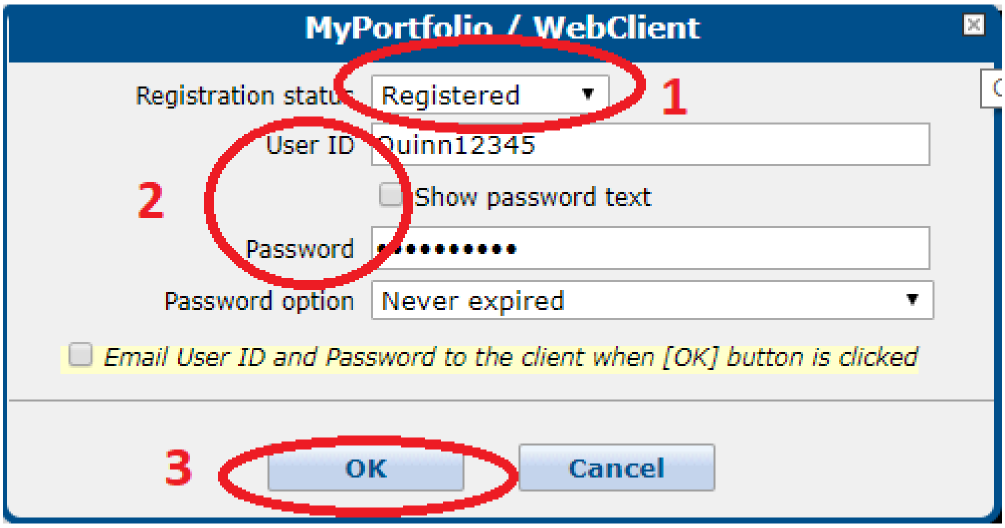
On the left box:





1. Click on “Client Info” tab
2. Click on “Administrative” sub-tab
3. Click on “MyPortfolio Web Client access” link

In the new pop-up window:



1. Change the Registration status to “Registered”
2. Type in User ID and Password for the client’s MyPortfolio
3. Click on “OK”

Existing clients register for Web Access

Existing clients without Web Access can register for one on MyPortfolio web page. MyPortfolio web page can be accessed by entering "/myportfolio" at the end of the dealership's VieFund URL (For example: http://67.55.26.45/myportfolio/).

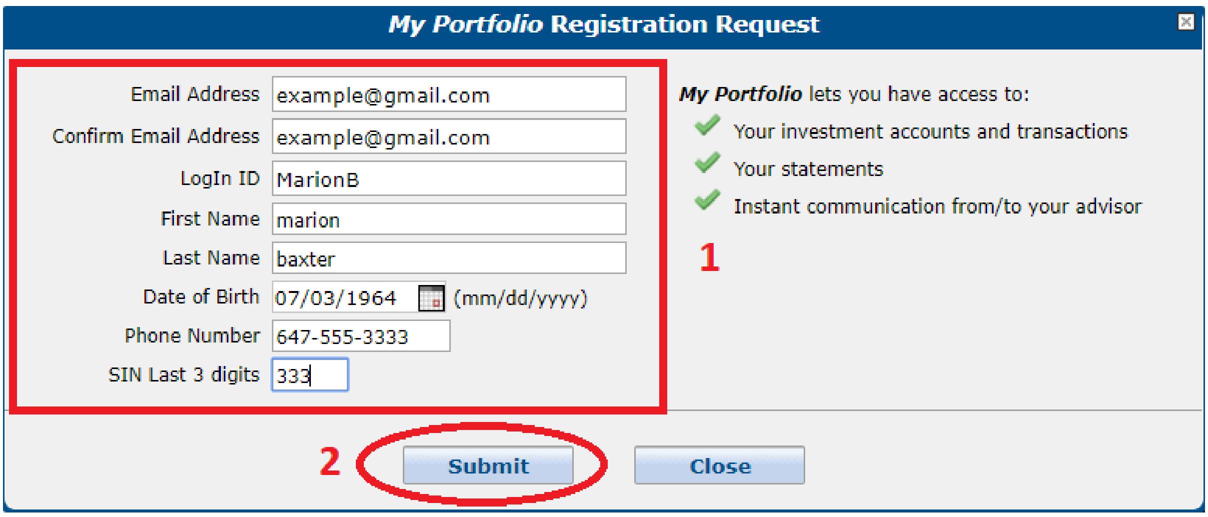
There are a few steps:

Step 1 - For clients

First, the client needs to go through registration process on MyPortfolio

Click on "Register Now" (or "Enregistrer Maintenant")

In the new pop-up window,



1. Fill in personal information: Login ID, Email address, First and Last name, etc.
   ***Note**: for Phone number, the clients should enter their home phone numbers.
2. Click on "Submit"
   ***Note**: the registration request will only be submitted if this information is the same with the information stored in the dealership's database.

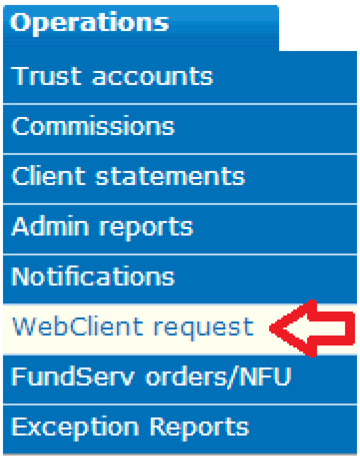
Step 2 - For advisors

After the clients submit the registration, a Web Client request is sent to the system. Then, representatives need to process it.

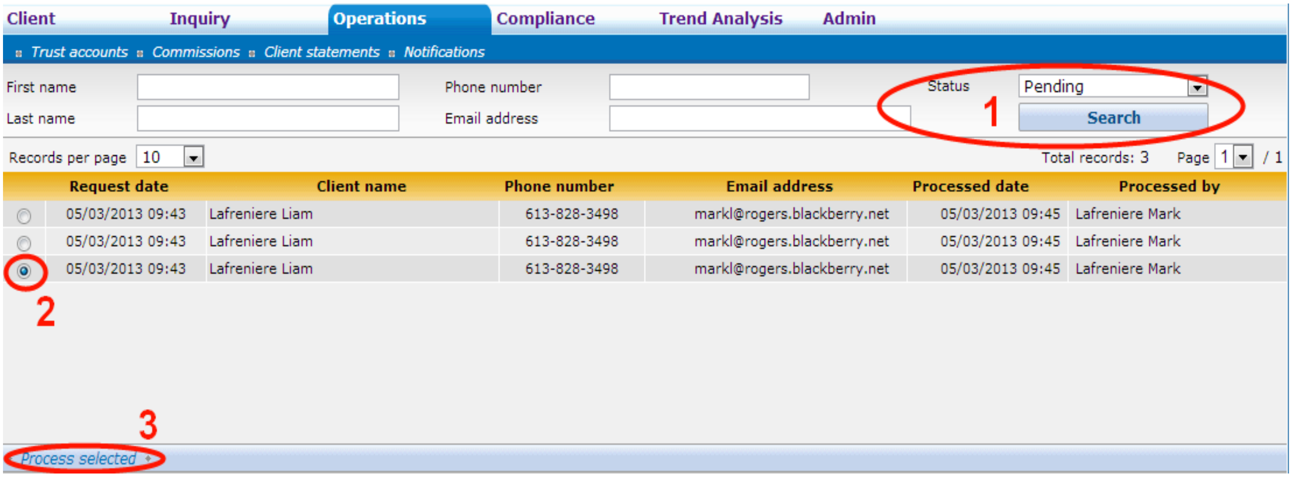
For the path, start with "Operation" tab:

Click on "Operations"

Click on "WebClient request"



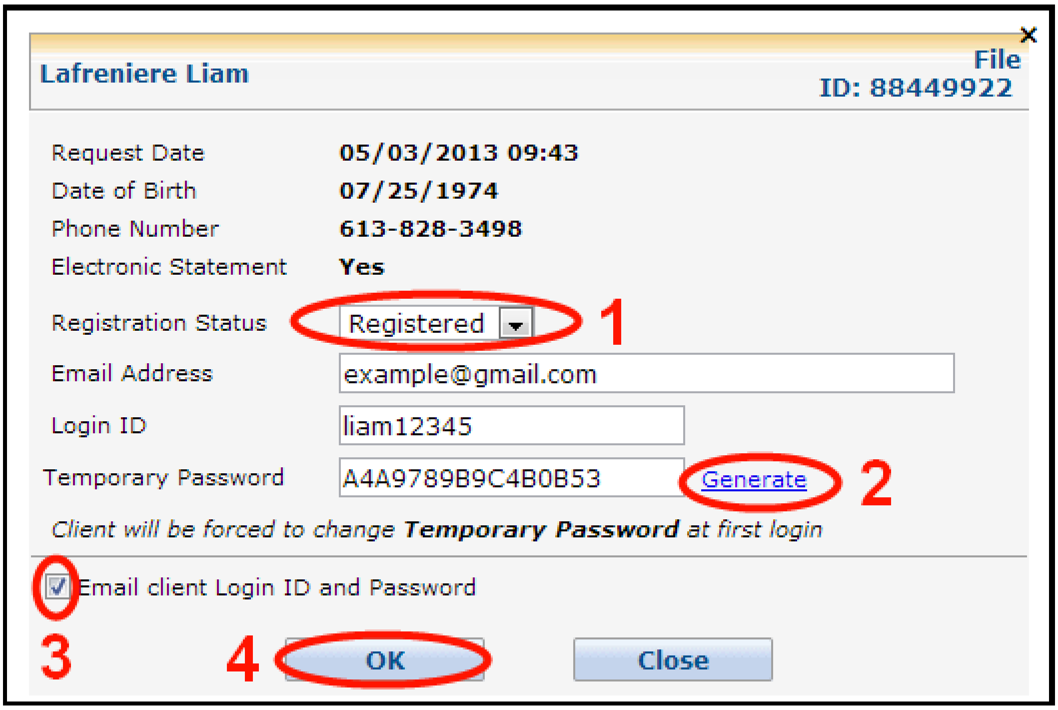
Once clicked on "WebClient request",



1. Search for pending request by clicking on Status drop box and select “Pending”. Then, click on “Search”.
2. Select a request by clicking on the radio button on the left of it
3. Click on “Process selected”

***Note**: The number of Webclient request always matches with the number of rep codes associated with the particular client. When one of the requests is approved, every other request for the same client will be automatically approved, as well.

Once clicked on “Process selected”, In the new pop-up window:

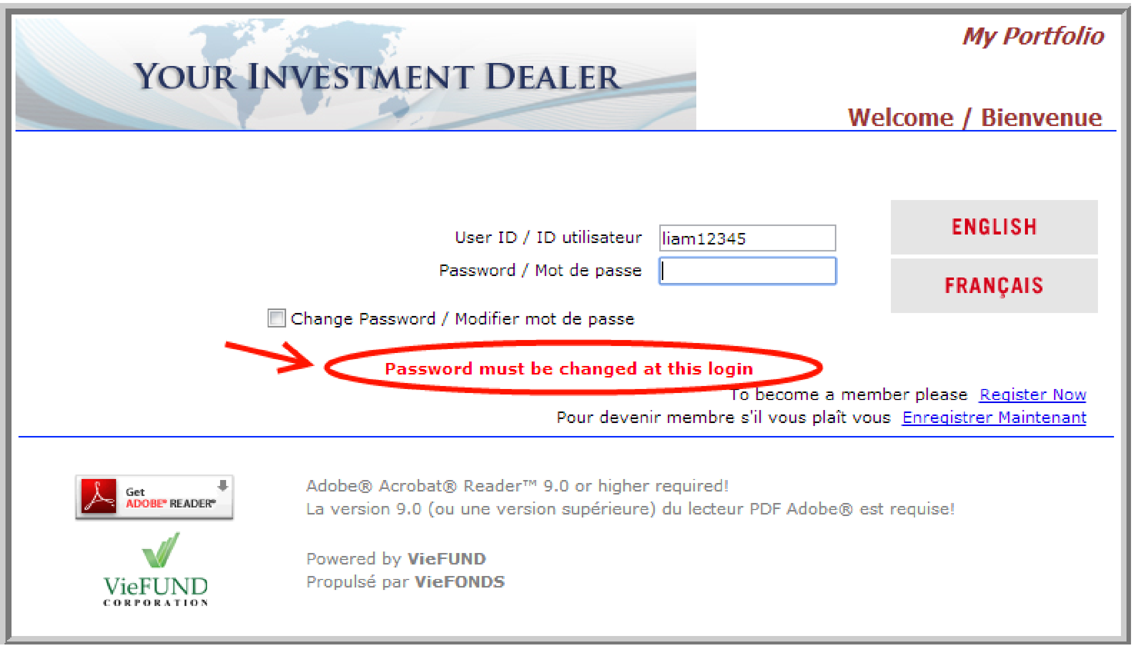


1. Click on Registration Status and select “Registered”
2. Click on “Generate” to create a temporary password or type in a password manually (The client will need to change this password at first login)
3. Select the option to email the client Login ID and password by clicking on the square box on the left of it
4. Click on “OK”

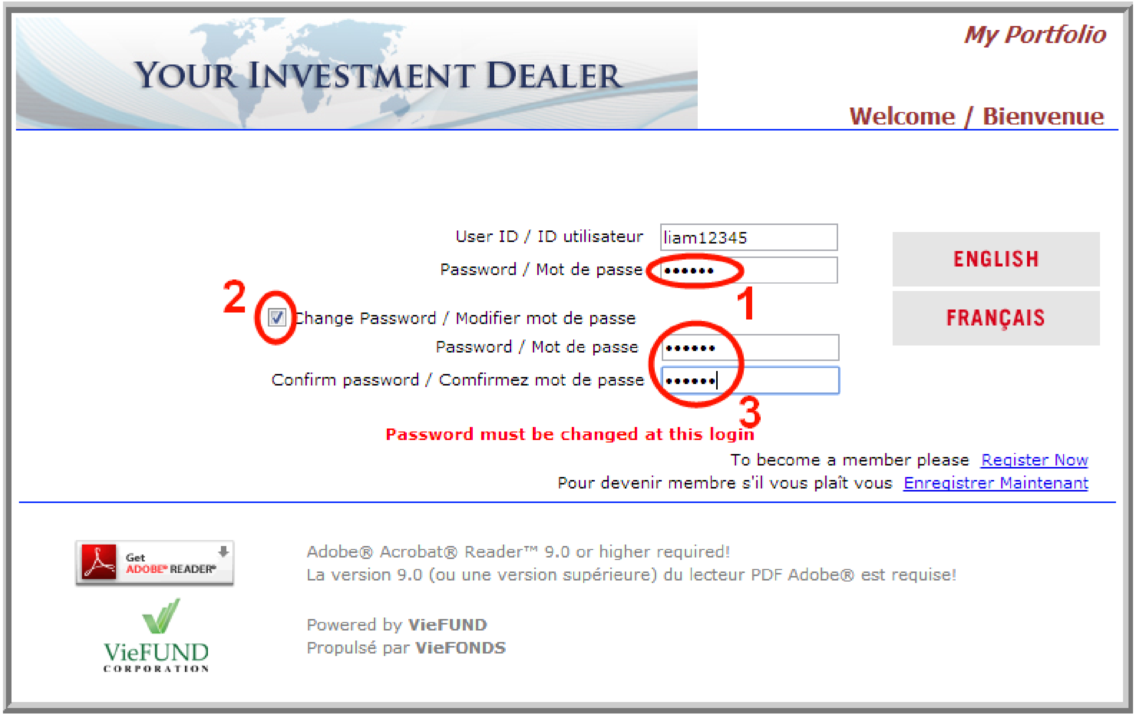
An email will be sent to the client, enclosing Login ID and temporary password.

Step 3 - For clients

After receiving the temporary password from representatives, the clients can now try to log in. If the clients type in the temporary password without checking “Change password” option, a warning message will appear:



A few procedures need to be done by the clients:



1. Type in the temporary password
2. Select “Change password” option by clicking on the square box on the left of it
3. Type in new password into the second last field

   Type in new password again into the last field to confirm

Web Access for new users from other platforms

If the clients come from other platforms, their old accounts are imported with some changes to comply with Viefund security standards:

- The Login ID needs to be at least 4 characters.
- The password needs to be 6 characters.

If these conditions above are not met, the system will automatically put 123..... at the end of Login ID and password. For example: if the old password is “abc”, the new password would be “abc123”.

Troubleshooting

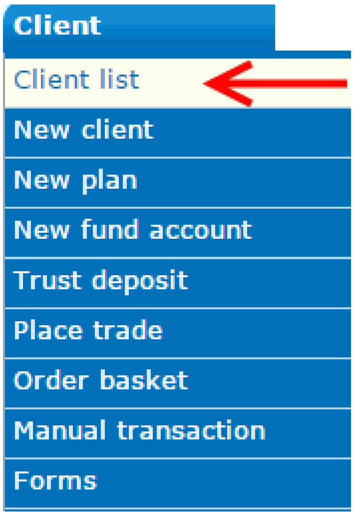
Maximum login trial exceeded

When a client fails to put in correct Login ID and password too many times in a short period, the system will display “Maximum login trial exceeded” message.

To fix this, the representative needs to reset the client’s Web Client account.

For the path, go to “Client List” tab,

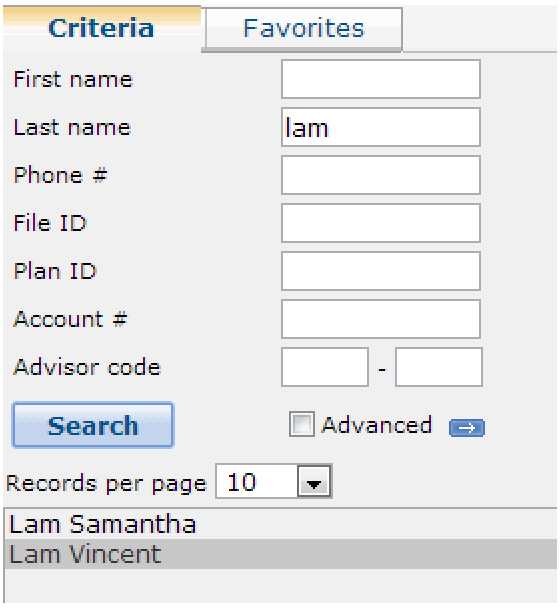
Click on “Client List”



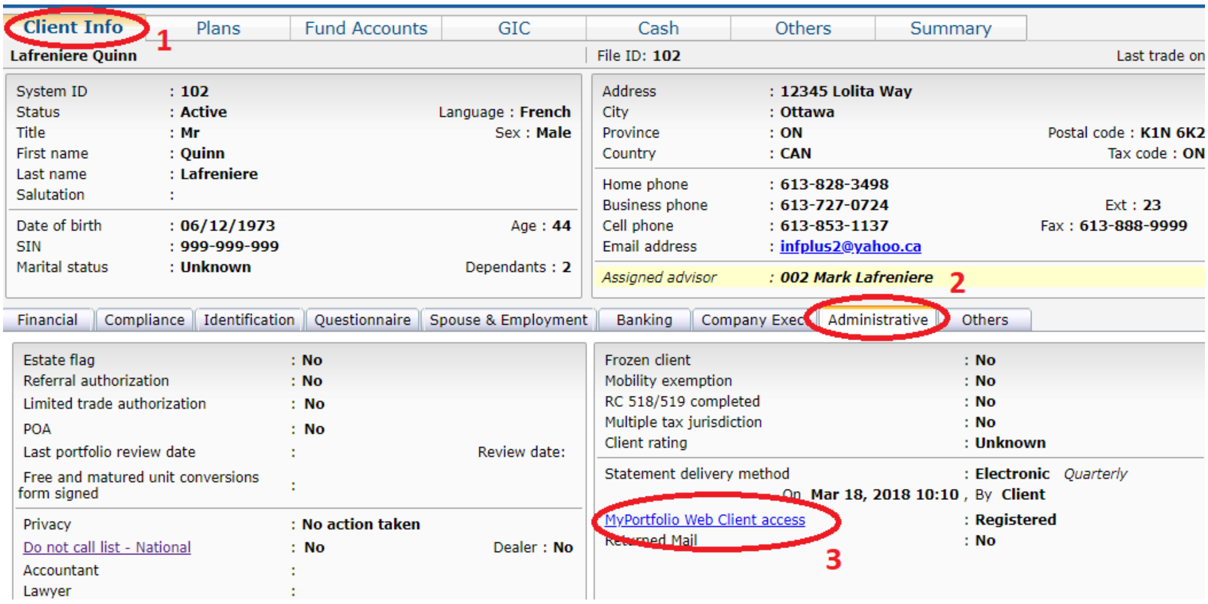
On the right box:

Search for an existing client by First Name, Last Name, Phone Number, etc.

Click on the client's name to select the client from search results



On the left box:



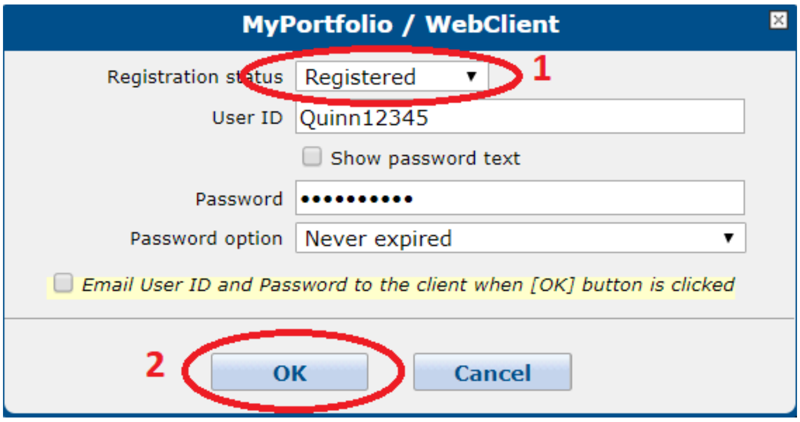
1. Click on "Client Info" tab
2. Click on "Administrative" tab
3. Click on "MyPortfolio Web Client access" link

In the new pop-up window,

1. Change registration status to “Suspended”

   ***Note**: Changing this status to “Pending”, “Declined”, or “Not Registered” could work as well. However, choosing “Not Registered” option will erase previous User ID and password. In this case, representatives will need to retype the User ID and password.
2. Click on “OK”

Repeat the same process and click on “MyPortfolio Web Client access” link again:



1. This time, change the registration status to “Registered”
2. Click on “OK”

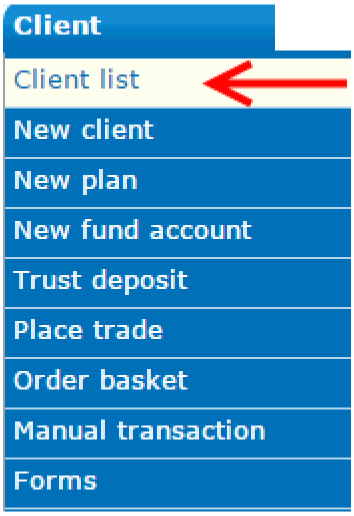
The request is processed but still can’t access Web Client

Representatives should check their clients' Web Client status.

For the path, go to "Client" tab:

Click on "Client" tab

Click on "Client list"



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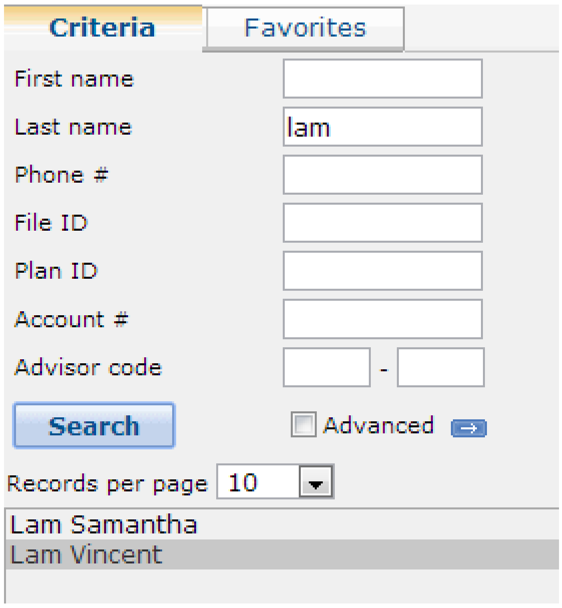
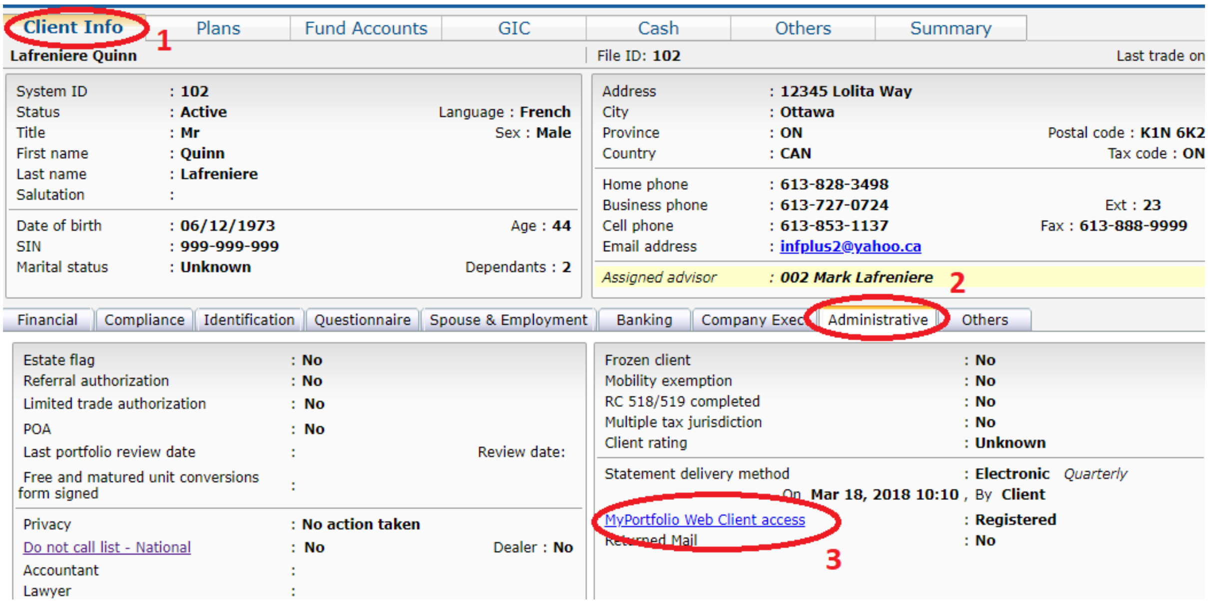
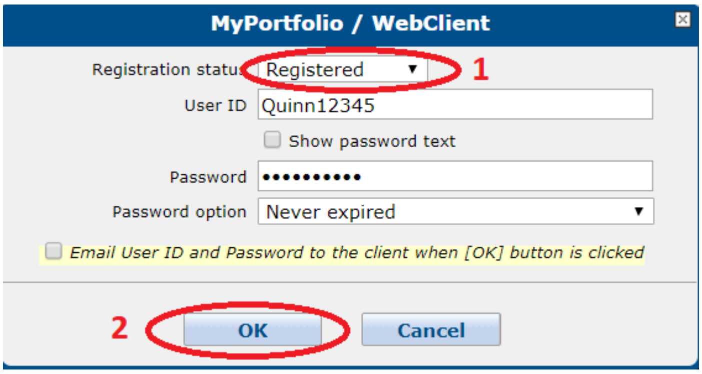


On the left box:



1. Click on “Client Info” tab
2. Click on “Administrative” tab
3. Click on “MyPortfolio Web Client access” link

In the new pop-up window,



1. Make sure that the registration status is “Registered”:
2. Click on “OK”

Client’s registration doesn’t go through

It is important for the client to fill in the personal information identically to those previously entered into the system. Some notable points:

- The client can choose their Login IDs. Pay close attention to capital letters

- First and Last name: it doesn’t matter if they are in capital letters or not
- Email address: pay attention to domain part. E.g. @hotmail.com vs. @hotmail.ca
- Phone number: the number format will be changed automatically to 999-999-9999, doesn’t matter how the client enters it.
- In case the client’s home phone, business phone, and cell phone have been saved in the database, the client needs to use home phone number for registration in MyPortfolio.