Using the Client Web Portal

Morningstar Office Cloud
Contents

Overview ................................................................. 4

Logging on to the Client Web Portal .................................. 5
Overview ................................................................. 5
How do I log on to the CWP? ........................................... 5
What should I do if my client forgets their password? ............... 5

Using the Overview page .................................................. 6
Overview ................................................................. 6
What information do I find within the Overview page? ............... 6

Using the Investments page ............................................... 8
Overview ................................................................. 8
What information do I find within the Investments page? .......... 8

Using the Documents page ................................................ 11
Overview ................................................................. 11
How do I upload documents to you? .................................. 11

Setting up the Client Web Portal ......................................... 13
Overview ................................................................. 13
How do I access the Client Set Up Window? .......................... 13
What settings do I create within Portal Branding? .................... 14
What settings do I create within Portal Notifications? ............... 15

Managing CWP tasks in Office Cloud ................................... 17
Overview ................................................................. 17
How do I invite clients to the CWP? .................................. 17
How do I publish reports for a single client to the CWP? .......... 19
How do I publish multiple reports for multiple clients at once to the CWP? ......................................................... 20
How do I launch the CWP from inside Office Cloud? ............... 21
Using the Client Web Portal

The Client Web Portal (CWP) is a secure web site that your clients can log into using their email and a custom password. In addition to providing real-time visibility into your client’s accounts and portfolios, the CWP also acts as a two-way communication vehicle, allowing you to upload reports and receive documentation from your clients, securely. The following topics are covered:

► Logging on to the Client Web Portal (page 5)
► Using the Overview page (page 6)
► Using the Investments page (page 8)
► Using the Documents page (page 11)
► Setting up the Client Web Portal (page 13)
► Managing CWP tasks in Office Cloud (page 17)
Logging on to the Client Web Portal

The Client Web Portal is available using any device, using any browser. This section describes how to log on to the CWP.

To access the Advisor view of the CWP, log in using your Morningstar Office Cloud log in credentials. The first time your clients log in, they receive email instructions from you on how to create a custom password.

Note: Click here for instructions on how your clients can set a custom password.

After the initial log in, do the following to log in to the CWP:

1. In any browser, launch fp.morningstar.com. The Login screen opens.
2. In the Login screen, enter your email address and custom password.
3. Click Sign In.

If your client forgets their password, he or she will need to change it. To change a password, click the Forgot your password? link within the Login screen. From there, the system will prompt you on how to create a new password.
Using the Overview page

Now that you’ve logged in, review the different information and functionality available. This section describes what’s available on the Overview page.

After logging in, you are brought to the Overview page. This page acts as your dashboard, providing high-level information at a glance from other pages within the CWP. To view additional information, click the View More icon within the upper right corner of each component.
Begin by reviewing the total balance within the client’s portfolio. Underneath, you find three components containing the following information:

<table>
<thead>
<tr>
<th>This component …</th>
<th>Contains this information …</th>
</tr>
</thead>
</table>
| Your Annual Investment Performance | Investment information including the following:  
  ▶ Investment Gains  
  ▶ Returns  
  ▶ Additions  
  ▶ Withdrawals, and  
  ▶ Top five holding |

  Note: You must enable these data points within the Client Web Portal Set up window in order for them to appear. Review How do I access the Client Set Up Window? on page 13 to learn how to set up the Client Web Portal. |
| Your Investment Accounts | Account balances for each underlying account within your clients’ portfolio. |
| Files for you | Links to folders and documents most recently posted by you. |
Using the Investments page

This section describes what’s available in the Investments page.

The Investments page provides information related to the investments within your portfolio. The top half includes data points and graphs showing how your investments are performing. The bottom half includes limited details about the account constituting your portfolios.
From the Investments page, your clients have to ability to select their time frame for data. Choose from the following options:

- Since Inception
- 1-year
- 3-year
- 5-year
- 10-year, and
- YTD.

![Investments page screenshot]

Note: You will see only as much data as is available. For example, if you select the 10-year time frame, your account has been open for only 5 years, your will see 5-years worth of data.

Below the header, figures for Ending Balance, Total Investment Gains, and Net Investment are displayed at the portfolio level.

![Investments page screenshot]

The start date for these data points is controlled by the time frame you chose. The following table provides the end date and definition for each data point:

<table>
<thead>
<tr>
<th>This data point</th>
<th>Uses this end date</th>
<th>With this definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ending Balance</td>
<td>End of previous day</td>
<td>Ending balance of the entire portfolio as of close of business the previous day.</td>
</tr>
<tr>
<td>Total Investment Gain</td>
<td>Previous Month End</td>
<td>The overall increase or decrease in a portfolio's market value including or excluding management fees.</td>
</tr>
<tr>
<td>Net Investment</td>
<td>Previous Month End</td>
<td>The total of all additions minus withdrawals made to a portfolio between the start and end dates.</td>
</tr>
</tbody>
</table>
Last, review the charts and a table below. The following table describes each one:

<table>
<thead>
<tr>
<th>This component ...</th>
<th>Provides this information ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>How are my investments doing?</td>
<td>This line chart shows how the value of your portfolio has changed over the time period you have chosen. It also includes a cumulative contributions line. Click anywhere on the line to see an exact figure for a specific month.</td>
</tr>
<tr>
<td>How are my investments diversified?</td>
<td>This donut chart shows what percentage of your investments fit into each asset class.</td>
</tr>
<tr>
<td>How much have my investments grown?</td>
<td>This bar chart shows how your investments have performed.</td>
</tr>
<tr>
<td>Which accounts are included?</td>
<td>This table includes the accounts comprising your portfolio, along with limited details about each account. Click on the icon next to each account to open the Account Details page for transactional accounts only, Each Account Details page contains the same content as the Investments page, however a list of holdings replace the list of accounts at the bottom of the page. Click on any holding to launch the Morningstar page.</td>
</tr>
</tbody>
</table>
Using the Documents page

The Documents page offers access to paperless statements and documentation, and you can securely send documentation directly to me. The Documents page is broken into two sub-pages:

- Upload Files,
- View Files.

To access the documents page, type fp.morningstar.com into any browser, and log in using your email and custom password.

To see files sent from me to you, select the View Files page. The next section explains how you can upload files to me from the Upload Files page.

Uploading documents is easy and efficient. To upload a document, do the following:

1. From the CWP landing page, click Documents and remain on the Upload Files sub-page.
2. Click Upload. The document will appear first under Files You’ve Shared.

Note: The first time you upload a document, the Upload button appears in the center of the page.
3. Navigate to the document you want to upload, and double-click to select it.

4. Once uploaded, your document will immediately be available within the Upload files sub-page. The document will also be delivered to me.
Setting up the Client Web Portal

Now that you are familiar with the functionality available, the next step is enable the functionality you want your clients to see. This task is completed from the Client Web Portal Setup Window. Once launched, this window is broken into two sections:

- Portal Branding, which determines the look and feel of the CWP; and
- Portal Notifications, which determines how you and your clients are notified when activity takes place within the CWP.

Once created, settings will apply to all of your clients portals, meaning you can create settings for a specific client or subset of clients.

To access the Client Web Portal Setup window, from the Header, click the Account Icon. Then select Client Web Portal Setup. The Client Web Portal Set up window opens.

![Client Web Portal Setup Window](image-url)
The Portal Branding area of the Client Web Portal Set up window determines the type of information you display on your clients' portals.

The table below describes each setting option.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Alerts you that you can add your firm's logo using Global Settings.</td>
</tr>
<tr>
<td>Footer</td>
<td>Select from the following options:</td>
</tr>
<tr>
<td></td>
<td>- Display Disclosure, once enabled, type disclosure text.</td>
</tr>
<tr>
<td></td>
<td>- Display Morningstar Logo.</td>
</tr>
<tr>
<td>Pages to Include</td>
<td>Select the sliders for Display Overview and Display Investment to display both the Overview and Investments page of the CWP. Note: You must select Display Investments in order for Investments information to display on the Overview tab. Once selected, customize the Investments page by selecting from the following options;</td>
</tr>
<tr>
<td></td>
<td>- Display Account Details, this enables the account details page for each transactional account within a clients portfolio.</td>
</tr>
<tr>
<td></td>
<td>- Display Benchmark Returns, this enables the benchmark comparison within the bar chart.</td>
</tr>
<tr>
<td></td>
<td>- Allow Clients to Generate Reports, this enables a button that generates the Snapshot report.</td>
</tr>
<tr>
<td></td>
<td>Select the slider for Display Document Manager to enable the Documents page of the CWP. Once enabled, select the slider for Allow Clients to Upload Documents if you choose to allow your clients to upload documents to you. Note: You must select Display Document Manager in order for documents to display on the Overview tab.</td>
</tr>
</tbody>
</table>
### Setting up the Client Web Portal

#### What settings do I create within Portal Notifications?

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data to Include</td>
<td>Select from the following options:</td>
</tr>
<tr>
<td></td>
<td>▶ Display Return Information, this enables performance information to</td>
</tr>
<tr>
<td></td>
<td>be included in CWP data points and charts</td>
</tr>
<tr>
<td></td>
<td>▶ Display Net Investment Information, this enables the Net Investment</td>
</tr>
<tr>
<td></td>
<td>data point to display. Once select, Select Display Additions and</td>
</tr>
<tr>
<td></td>
<td>Withdrawals to include those data points.</td>
</tr>
<tr>
<td>As of Date</td>
<td>Select from the following options</td>
</tr>
<tr>
<td></td>
<td>▶ Last Month End</td>
</tr>
<tr>
<td></td>
<td>▶ Last Market Close</td>
</tr>
</tbody>
</table>

The Portal Notification area of the Client Web Portal Setup window controls the notifications related to the CWP.

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**What settings do I create within Portal Notifications?**

- Click here to save
- Enter a custom email signature here
- Select each slider to enable notification emails.
- Click here to edit the content of your electronic delivery consent notification
The table below describes each setting option:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic Notifications</td>
<td>Select the slider to disable the following automatic notifications, including the following;</td>
</tr>
<tr>
<td></td>
<td>• E-mail for posted reports. You can also customize the content that your clients receive.</td>
</tr>
<tr>
<td></td>
<td>• Blind copy (BCC) e-mail notifications sent to your client.</td>
</tr>
<tr>
<td></td>
<td>• Email notifications when your client uploads documentation to you.</td>
</tr>
<tr>
<td>Delivery Consent</td>
<td>Select the slider to require your clients to consent to the electronic delivery of reports and documentation. Click Create New from Copy to update the content of your consent.</td>
</tr>
<tr>
<td></td>
<td>◦ Note: Each time you edit electronic delivery consent, your clients will be prompted to read and re-accept electronic delivery consent.</td>
</tr>
<tr>
<td>Custom E-mail Consent</td>
<td>Select the slider to enable a custom email signature for all automatic notification. Once enabled, type your custom email signature into the text box.</td>
</tr>
</tbody>
</table>
Managing CWP tasks in Office Cloud

Now that you’ve enabled the functionality you want to include in the CWP, invite your clients to activate their own portal. Once activated, publish and receive reports and other documentation for your activated clients. This section describes the following:

- Inviting Clients to the CWP
- Posting reports for a single client
- Posting reports for multiple clients at once, and
- Launching the CWP from inside Office Cloud.

Each one of your clients and prospects must be invited to the CWP separately. To invite clients and prospects to the CWP, do the following:

1. From the Menu, click either Clients & Accounts or Prospects. The Clients grid opens.

2. Hover the cursor within the client you want to enable the Client Web Portal for, then select the Actions icon. The Actions menu opens.

4. Type your **clients email address** into the text box, the select **Send Invite**. Your client will receive an email instructing them how to access the CWP.
Managing CWP tasks in Office Cloud

How do I publish reports for a single client to the CWP?

When generating reports in Office Cloud, they will generate in the background, allowing you to continue working within a client record. Once complete, access the Reports area to manage your reports. To publish a single report to the CWP, do the following.

1. From the Menu, click Reports. The Reports page opens.

2. Hover the cursor within the cell of the report you want to publish, then select the Actions icon. The Actions menu opens.

3. Select Publish to Client Web Portal.
To publish multiple reports to the CWP at once, do the following.

1. From the **Menu**, click **Reports**. The Reports page opens.

2. Select the **checkbox** next to each **report** you want to publish, then select the **Actions** icon at the top of the screen.

3. Select **Publish to Client Web Portal**.
Now that you’ve posted reports to the CWP, you may want to see how the reports appear on your clients’ portals. To launch the advisor view of the CWP from inside Office Cloud, do the following:

1. From the Menu, click Reports. The Reports page opens.

Click here to start...
2. Select the checkbox next to a **published report** you want to view within the CWP, then select the **Actions** menu. A drop-down menu appears.

3. From the **Actions** menu, select **View in Client Web Portal**. The advisor-view of the CWP launches in new browser.

To view reports you posted, click on the **Documents** tab within the CWP.