

Getting started with Midwinter's *Client Manager*

Midwinter's *Client Manager* is a completely web based CRM that provides financial services licensees and advisers with the processes and automation required to control and grow your business.

Client Manager is an integrated central client relationship management system (CRM) - providing a standard operational platform for all advisers, simplifying the monitoring processes for financial services licensees.

Client Manager is flexible; you remain in full control of everything from your data through to your own look and feel.

Login Username & Password

A login username and password is required for *Client Manager*.

New users will receive an email from the Midwinter Support team, which confirms the username and a temporary password.

The user is guided to access *Client Manager* and on initial login, the password will need to be reset.

Dear MidWinter Client,

Welcome to [Midwinterclient!](#)

KEY BENEFITS OF MIDWINTERCLIENT

The Systems three main features are:

1. Practice Management Tool

You can run your business profitably and efficiently through [MidwinterClient](#). It has a comprehensive client relationship management function, practice administration forms, modelling tools, portfolio review reports, database search functions for marketing, and workflows to monitor tasks due for completion.

Basically [MidwinterClient](#) supports the end to end process of a Clients financial planning lifecycle.

2. Ability to produce compliant SoA's

The system contains over 80 strategies, with a range of SoA templates which reduces the amount of editing required to produce a financial planning report.

3. Paperless Office

[MidwinterClient](#) is a Web based application which allows you to take your office anywhere.

It has one centralised database which can be used by everyone no matter what their role in the business.

REGISTRATION DETAILS

Your registration details have automatically been emailed to you for future reference.

Name: MidWinter Client Trainer

Email: www.midwinter.com.au

Company: Midwinter Financial Services Pty Ltd

Licensee: Midwinter Financial Services Pty Ltd

Web Site: <http://www.midwinterclient.com.au>

User Name : MWCTraining

Password : xxxxxxxxxx

Please Note: The user name and password are case sensitive and need to be entered exactly as they appear above. To maintain the security of your client information on [MidwinterClient](#), please change your password on accessing [MidwinterClient](#) for the first time.

HOW TO GET HELP

To help you navigate [MidwinterClient](#) more effectively, here are some simple pointers:

There is detailed Online functionality Help available from the site. Click the [MidwinterClient](#) menu in the top menu, and then select the **Forms** folder under [MidwinterClient](#) Support, or any [?] button that is located on the screen.


HOW TO CUSTOMISE EMAIL STATIONERY

[MidwinterClient](#) provides each user with customised email stationery for emails sent from within [MidwinterClient](#).

Please note: passwords in *Client Manager* do not automatically expire however; it is recommended that in keeping with other applications, a regular audit and password change be performed.

Changing a Password

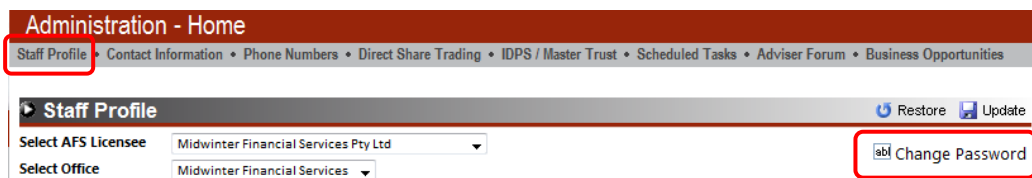
To change a password a User must first login to *Client Manager*.

1. In the 'User Name' field, enter your Username.
2. In the 'Password' field, enter your Password.
3. Click on the  button.



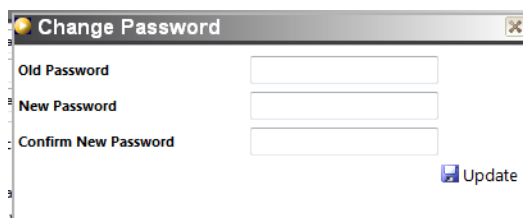
A screenshot of a login form. It has two input fields: 'User Name' and 'Password'. To the right of the 'Password' field is a green button with the text 'GO!'.

4. The 'Administration – Home' page will display.
5. Click on the 'Staff Profile'
6. Click on the 'Change Password'



A screenshot of the 'Administration - Home' page. The page has a navigation bar with links: Staff Profile, Contact Information, Phone Numbers, Direct Share Trading, IDPS / Master Trust, Scheduled Tasks, Adviser Forum, and Business Opportunities. Below the navigation bar is a 'Staff Profile' section with two dropdown menus: 'Select AFS Licensee' (set to 'Midwinter Financial Services Pty Ltd') and 'Select Office' (set to 'Midwinter Financial Services'). To the right of these menus are 'Restore' and 'Update' buttons. A 'Change Password' button is highlighted with a red box.

7. The 'Change Password' window will display.
8. In the 'Old Password' field, enter your old Password
9. In the 'New Password' field, enter your new Password
10. In the 'Confirm New Password' field, re-enter your new Password
11. Click on 'Update button' to continue



A screenshot of a 'Change Password' window. It has three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. To the right of the 'Confirm New Password' field is an 'Update' button.

A confirmation will display as follows:

Your password has been successfully changed.

Forgot your password?

If a user forgets their password, please contact Midwinter Support on 1300 882 938 to have their password reset.

Setting Guide


To enjoy the full functionality of *Client Manager* we ask that the user use the following guide to check and adjust their settings within Microsoft™ Internet Explorer. Additionally please check and modify the settings of any security arrangements or popup blocking software, to allow *Client Manager* to operate fully.

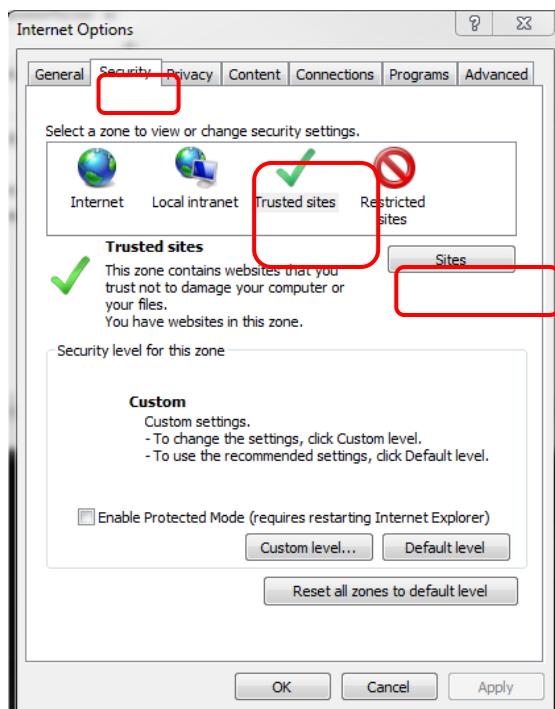
Settings Check to allow optimal performance of MidwinterClient

Security – Trusted Sites

By creating *Client Manager* as a recognised trusted site you will ensure that whilst Internet Explorer is being constantly updated with higher security that causes interruptions to how some internet pages display, *Client Manager* will be exempt from these issues.

To ensure that *Client Manager* is recognised as a ‘trusted site’, please follow the steps below:

1. From the ‘Tools’ option on the menu bar, arrow and click to select ‘Internet Options’.
2. Click on the ‘Security tab’.
3. In the ‘Select a zone to view or change security settings’, click to select the ‘Trusted sites’ icon.
4. Click on the  button to continue.

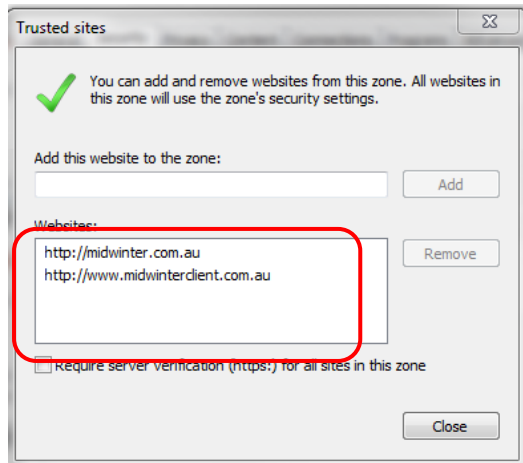


5. In the 'Add this Web site to the zone' field, enter and add the following sites:

<http://www.midwinter.com.au>

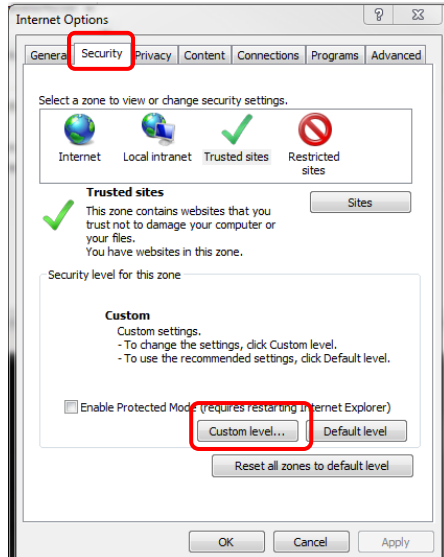
<http://midwinterclient.com.au>

6. When complete, your screen will look like this;

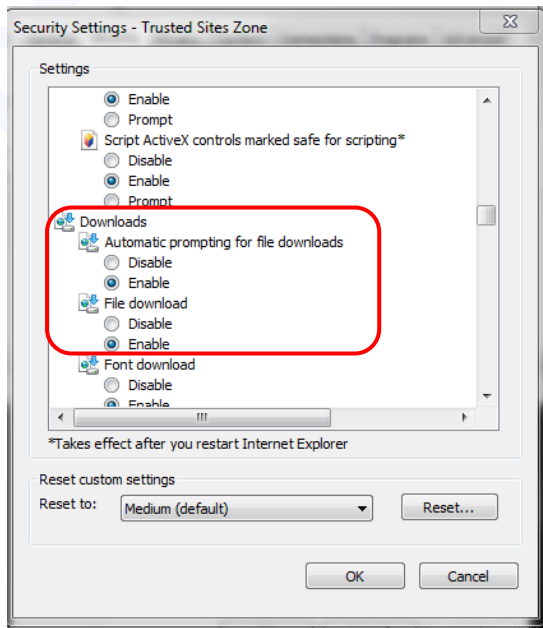


7. Un-tick 'Require server verification (https) for all sites in this zone' field. Click 'Close'.

8. While still in the 'Security' tab area, select 'Custom Level'

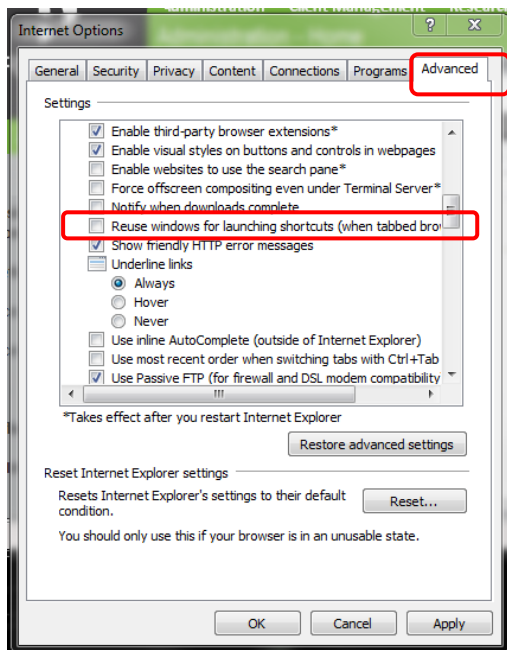


9. Scroll down the Settings page, until you find 'Downloads', and the words 'automatic prompting for file downloads'. Select 'Enable' as in the diagram below. Click 'OK'.



Advanced – Settings

Still in Internet Options, click on the 'Advanced' tab. Scroll down until you find 'Reuse windows for launching shortcuts'. Make sure that it is un-ticked. Click 'Apply' down the bottom of the Internet options screen.



The following instruction only applies to Microsoft XP™ Users

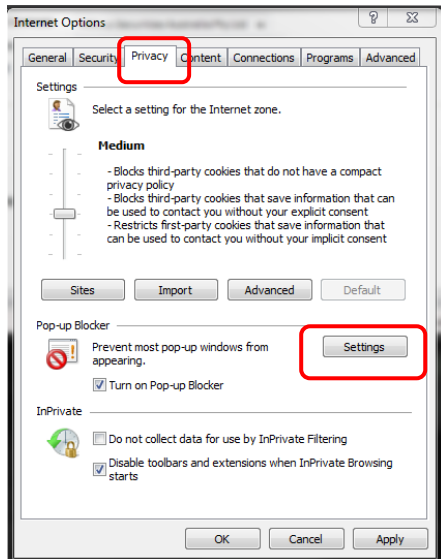
Disabling Pop-up blockers

The Pop-up Blocker is a new feature in Internet Explorer 7.0. This feature blocks most unwanted pop-up windows from appearing. By default, the Pop-up Blocker is turned on. When the Pop-up

Blocker is turned on, the automatic and background pop-up windows are blocked, but the pop-up windows that are opened by a user will still open in the usual manner.

To ensure that *Client Manager* pop-up windows remain available, follow these steps:

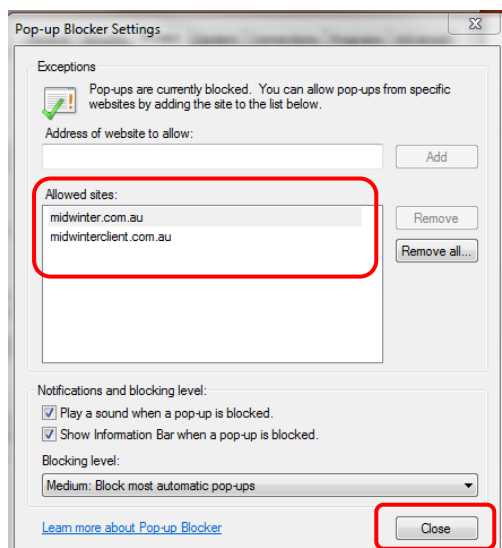
1. From 'Tools' option on the menu bar, select Internet Options, click the 'Privacy' tab and click on 'settings'




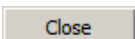
The pop-up 'Exceptions' window will display.

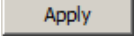
2. In 'Address of Website' enter the following sites

<http://www.midwinter.com.au> <http://midwinterclient.com.au>

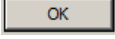


3. Click on the  button after each entry. The 'Allowed sites' window will update and display.

4. Click on the  button to continue.

- Click on the  button to continue.

The 'Privacy' Options window will update and display.

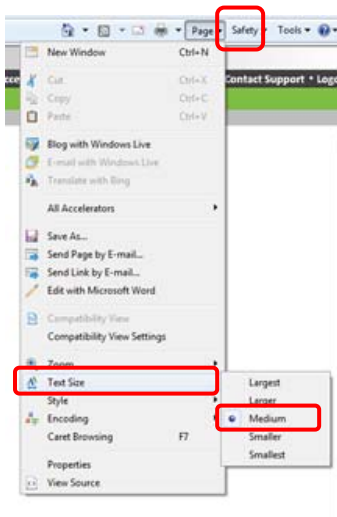
- Click on the  button to complete.

Note: This process will need to be performed on each computer used to access Client Manager.

Ideal Text Size

To prevent graphs from splitting on the printed page, you will need to ensure 'Text Size' setting in Internet Explorer is set to 'Medium' before printing.

From the Internet Explorer Toolbar, Select 'Page', then 'Text Size', and then 'Medium'.



Ideal Screen Resolution

The screen resolution, determines the size of the page the user is viewing.

In order for the user to view all the options on the menu bars, the user screen resolution needs to be set correctly. For the best view of the *Client Manager*, we recommend setting the screen resolution to the maximum number of pixels available.

Changing the Screen Resolution

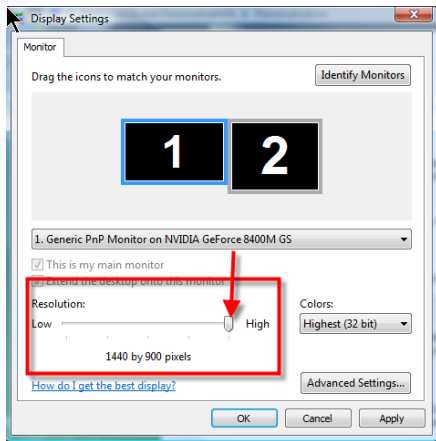
There are two ways of changing the Screen resolution, depending on how new your computer is;

Screen Resolution - 1

- The user desktop, right mouse click to enlist the desktop options.
- Arrow down the list and click to select 'Personalize'.
- Click on the 'Display Settings' tab.

The 'Display Properties' window will display.

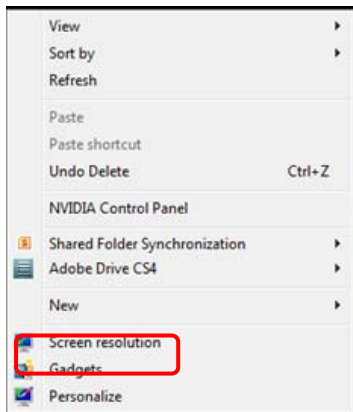
- Slide the 'Screen resolution' to high as shown below



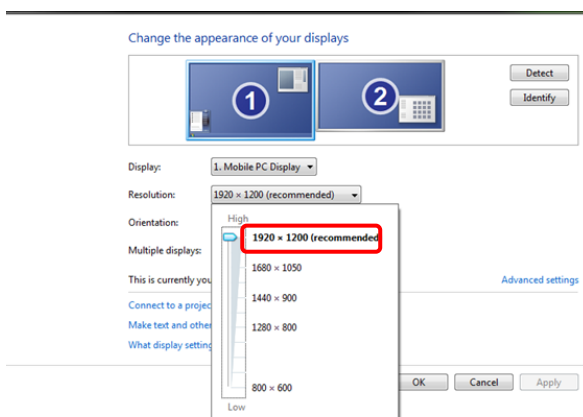
5. Click on the **Apply** to save.

Screen Resolution – 2

1. The user desktop, right mouse click to enlist the desktop options.
2. Arrow down the list and click to select 'Screen Resolution'.



3. Under the 'Resolution' section, click on the drop down list and select the highest resolution eg 1920 x 1200 (recommended) as shown below;



Contact Details

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To access your free trial of Midwinter's *Reasonable Basis* please click on this link – [Reasonable Basis Free Trial](#) - and call **1300 882 938** for your access code.

This is intended as general advice only and does not have regard to an investor's objectives, financial situation or needs. Before acting, investors should consider the advice in light of their own circumstances.

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Justifying
your advice just
got a whole lot
easier with...

 *reasonable basis*