

## Support Staff Access

**Help Guide** 

## Setup a new support staff user

1. Under the Access menu on the main banner select 'Access Management'.

Acclaim Home Clients Portfolio Management V	Activities ♥ Reporting ♥	Product ♥ Support ♥ Access ♥	Se Contact Us Logout
Client Search		Access Management     Event Alert Management     PDS & Product Information	<ul> <li>Activity Management</li> </ul>
Ø Client/Account name or number	Search	Product Forms	<ul> <li>Upload Documents</li> </ul>
DISPLAY ALL CLIENTS FAVOURITES () RECENTLY ADDED	RECENTLY VIEWED	<ul> <li>Term Deposit Rates</li> </ul>	
Create New Client	Activity Mar	agement	E) Literature

- 2. Expand the section *Manage Support Staff User Accounts*, then click the [Create User] button. An input line will appear with an editable box under the *User ID* column.
  - a. If your support staff person already has an ID for the portal, enter that User ID here and their details will autopopulate.

Access	Access management						3353.
Access N	Ianagement						
	Ť						
+ Personal	Details						
+ Change N	Ay Password						
+ Change I	he Number Of M	lost Recent View	ved Clients				
- Manage S	Manage Support Staff User Accounts						
To update the name	omail address or mobile numb	or for a pop-oditable delegate	ad user places contact the service contra				
to update the name,	email address of mobile numb	er for a non-eurable delegate	eu user, please contact the service centre.				
User ID	Given names	Surname	Email address	Mobile	Access mode	Delegate aut	thority?
PPARA001	TEST	RKS	Rishabh.Kapoor@au.dstsystems.com	0432238893	Report Only	$\checkmark$	Edit details
PPARA002	Test	Test	test@dst.com	0406186003	Full Access	$\checkmark$	Edit details
PPARA003	IAM	Test	test@dstbluedoor.com	0412387009	Full Access	$\checkmark$	Edit details
TEST123	TEST123	TEST123	test@dstbluedoor.com	0399036700	Full Access	$\checkmark$	Edit details
					Full Access	$\checkmark$	Cancel
							1 2
						Л	Create User Sava

b. If your support staff person has never been issued with a User ID for Acclaim Online, you can create them one now as shown below.



- 3. Click [Save] to create your support staff user. You can now share the User ID you created with your support staff user, who must follow the registration journey on the login page of the portal to gain access. See the Register for Online Access Help Guide for assitance.
- 4. If your support person already had a User ID, when they next log into the portal they should see your clients and have the ability to transact on your behalf if you granted Full Access.

## **Revoke support staff access**

- 1. Under the Access menu on the main banner select 'Access Management'.
- 2. Expand the section Manage Support Staff User Accounts and find the user whose access you wish to remove.
- 3. Click 'Edit Details' to the far right of their name, then untick the Delegate authority box.
- 4. Click [Save] and the user will no longer have access to view or transact client accounts under this adviser profile.
- Manage Support Staff User Accounts

To update the name, email address or mobile number for a non-editable delegated user, please contact the service centre.								
User ID	Given names	Surname	Email address	Mobile	Access mode	Delegate authority?		
PLANTITLE	Plan	title	test	04000000	Report Only 🗸		Cancel	