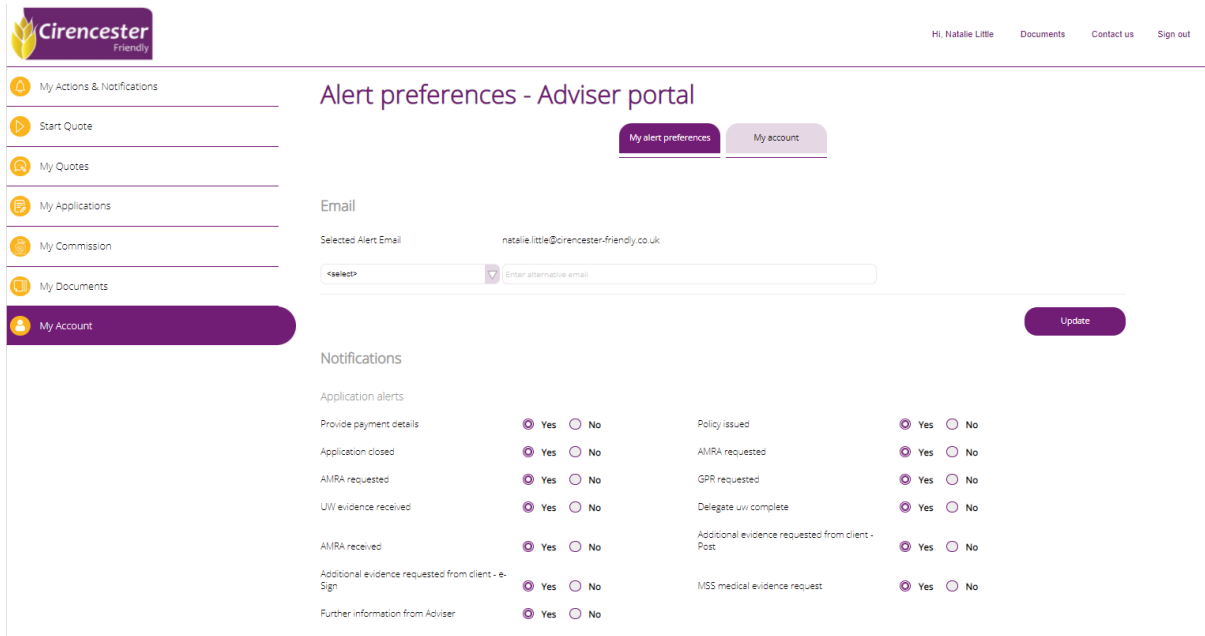


Amending Adviser details, settings & preferences in the Adviser portal

- You will need to log in to the Adviser portal and select 'My Account' in the left-hand side bar.
- You will then be taken to 'My Alert Preferences', in this screen you will be able to select/unselect notifications that you may or may not require alerts for.



The screenshot shows the 'Alert preferences - Adviser portal' page. On the left is a navigation menu with 'My Account' selected. The main content area has two tabs: 'My alert preferences' (active) and 'My account'. Under the 'Email' section, the 'Selected Alert Email' is 'natalie.little@cirencester-friendly.co.uk' and there is a dropdown menu for selecting an email. An 'Update' button is located at the bottom right of the email section. The 'Notifications' section is titled 'Application alerts' and contains a list of notification types with 'Yes' and 'No' radio buttons. All 'Yes' buttons are selected.

Application alerts			
Provide payment details	<input checked="" type="radio"/> Yes <input type="radio"/> No	Policy issued	<input checked="" type="radio"/> Yes <input type="radio"/> No
Application closed	<input checked="" type="radio"/> Yes <input type="radio"/> No	AMRA requested	<input checked="" type="radio"/> Yes <input type="radio"/> No
AMRA requested	<input checked="" type="radio"/> Yes <input type="radio"/> No	GPR requested	<input checked="" type="radio"/> Yes <input type="radio"/> No
UW evidence received	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delegate uw complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
AMRA received	<input checked="" type="radio"/> Yes <input type="radio"/> No	Additional evidence requested from client - Post	<input checked="" type="radio"/> Yes <input type="radio"/> No
Additional evidence requested from client - e-Sign	<input checked="" type="radio"/> Yes <input type="radio"/> No	MSS medical evidence request	<input checked="" type="radio"/> Yes <input type="radio"/> No
Further information from Adviser	<input checked="" type="radio"/> Yes <input type="radio"/> No		

- If you select the 'My Account' tab (next to 'My Alert Preferences'), in this screen you will be able to edit your address, contact details, view terms of business and view your commission options.

Hi, Natalie Little Documents Contact us Sign out

Cirencester
Friendly

My Actions & Notifications
Start Quote
My Quotes
My Applications
My Commission
My Documents
My Account

My Account - Adviser Portal

My alert preferences My account

Financial adviser summary

Name	Account manager
Miss Natalie Little	

Contact details

Address

Address type: Correspondence

Cirencester Friendly Society
Mutuality House
Cirencester
GL7 5TQ

Edit

Email / telephone

Selected Alert Email	natalie.little@cirencester-friendly.co.uk
Email	natalie.little@cirencester-friendly.co.uk
Telephone	0000000000
Mobile Phone Number	0000000000
Fax	-

Edit

Terms of business

Commission options

Cirencester Friendly is a trading name of Cirencester Friendly Society Limited. Registered and incorporated under the Friendly Societies Act 1992. Reg. No. 149F. Cirencester Friendly Society Limited is Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority