True Potential Client Site

New Login Process

Including the iPhone & iPad app process

Account Activation & New Login Process

We're changing the way you log into your account on the True Potential Client Site to make it easier and more secure than ever before.

Rather than asking you to remember a user ID which can be forgotten easily, you will now be able to use your **email address** to log into your account online.

Whilst this is easier to remember, it also means that if you forget your login details you can quickly reset them yourself through the site.

Included in this document are step by step instructions showing how you can access your site and update your profile to use your email address. It also shows **how to reset your password or passphrase** if these details are forgotten.

This document will also show the same process for the **iPhone or iPad** which both allow you to access and update your account through the apps in the same way. The Android app will follow later in the year.

Click here to jump to the iPhone & iPad instructions

If you have any queries or concerns about this process please contact your financial adviser for more information or assistance.

Activating your New Username

You will first need to visit the client site, this can either be direct through the below link or via a 'Client Login' link on your financial adviser's website:

https://clientsite.tpinside.com

On the login page you will be asked to enter the access ID supplied by your financial adviser, your user ID and password. You will notice you are not asked for a passphrase at this stage.

Login - Step One

Access ID : *

Username : * Username

Password : * Password

☐ Remember me

Login

After clicking Login, you will then be prompted to enter your email address which will be used for all subsequent logins. **This email address must be unique.**

Login - Account Conversion

We're changing the way you login to your client account to make it easier than ever. Rather than ask you to remember your username, we'll be instead asking you to use your email address.

This also means that we can contact you if you've lost or forgotten your password. Please enter your email address below and then click the 'Submit' button to complete the process.

Email Address : *

Confirm Email Address : *

Submit

You will receive an email to your specified email address, if this does not arrive within a couple of minutes you should check your spam/junk folder.

The email will include a button which you can click to be taken back to the client site to activate your new username.

Activate your new username

We have received a request to change your username to be your email address.

To complete this process, please click the button below:

Activate Now

If you can't see this button, copy and paste this address into your web browser:
https://democlientsite.tpinside.com/activateAccount.aspx?id=587932cb-116b-4d05-9b03-2ea8972cacdf&aid=6504

Once you have clicked on the button or link in the email, you will see the below confirmation message and then be able to login using your email address.

Activation Complete
You have successfully activated your account, please now log in.
If you have forgotten your details you may request a reset below.

Please Note: Your Username is now your email address.

Login - Step One

Access ID : *	6504
Username : *	Username
Password : *	Password
	☐ Remember me

Login

If you are logging in for the first time you will be prompted to create a 12 character passphrase which is required for all subsequent logins.

Create Passphrase

In order to provide additional security to your system login, please create a pass phrase. This will be used in addition to your username and password when logging in to the system.

Your pass phrase can be anything you like, but must NOT include any spaces and MUST be a minimum of 12 characters long. Please use text and numbers only. Any illegal characters or punctuation will be removed.

Your pass phrase should be easy to remember, but try to avoid phrases that are easy to guess like your own name or that of any family members/pets etc...

Phrase

Confirm

Save

If you are having trouble converting your account or logging in, please continue in this document for troubleshooting tips.

Troubleshooting Tips

Q. How do I reset my password for the client site?

If you've forgotten your password for the client site you can click the 'Forgotten Password?' button at the bottom right of the Login page, enter your access ID and email address to be sent a link for resetting your password.

Reset Password

Please enter the access ID and email address associated with your account. We'll email you a link to a page where you can easily change this.

Access ID : *

Email Address : *

Submit

When you receive the email, click the link to be taken back to the client site where you will be prompted to create a new password and a new passphrase at the same time.

Reset Login Details

In order to reset your login details, we require you to choose a new Password and Passphrase.

Please note your passphrase must contain at least 12 characters, alphanumeric only and cannot have more than 6 of the same characters.

New password *

Confirm password *

New Passphrase *

Confirm Passphrase *

Submit

Q. How do I reset my passphrase for the client site?

Similarly to the password reset, you can click the below wording to reset your passphrase which will take you through the same reset procedure as outlined above.

Login - Step Two

Please provide the following characters from your Passphrase

Passphrase : *   [1   ▼] [5   ▼] [9   ▼]

I have forgotten my Passphrase

[Submit]

Q. Why have I received a message saying my email address is already in use?

This message will appear if the email address you have entered has already been used by another client. Each account on the client site must have a unique email address to be used as their username. If you and an associated client only have one email address then you can login using that email address and click the 'Joint View' button at the top of your screen to view both portfolios. (If you do not have the Joint View button please contact your Financial Adviser to get this set up).

Email Address already in use   ✕
The email address you have entered is already in use. Please enter a different one or contact your financial adviser to resolve this matter

Q. Why haven't I received the activation email?

If you have not received the activation email and it is not in your spam/junk folder, please go back to the client site login page and either resend the email or change the email address used to resend it.

[Resend Email] [Change Email]

iPhone and iPad Process for Converting and Logging In

First you need to have the iPhone or iPad Client App installed on your device. Once installed open the app and enter the access ID supplied by your financial adviser, your user ID and your password then click Login.
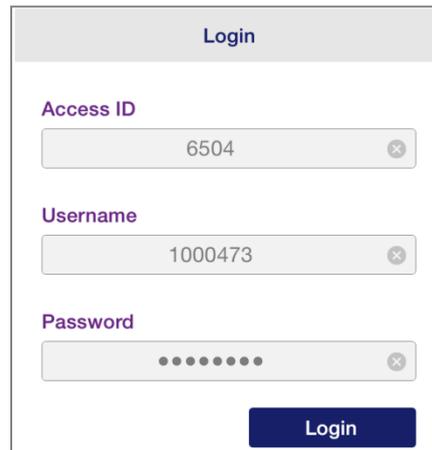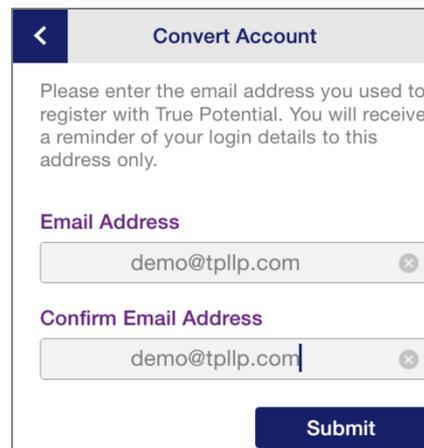
As with the online conversion process, you will be prompted to enter a unique email address to be used as your username going forward.

Once submitted you will see confirmation that a verification email has been sent.

You will then receive an email which will include a verification code.

To activate your username open the app again, click Verify Account and enter the code when prompted.

Once verified, you will be asked to login using your login details which now include your email address.

The final step is to set up your 12 character passphrase which is used for each subsequent login on the app or client site.
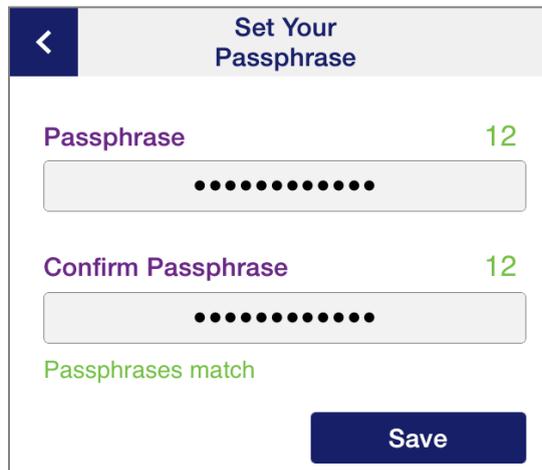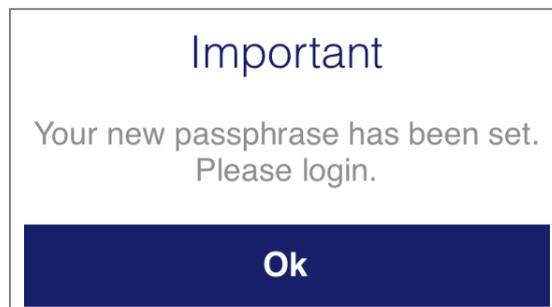

Once entered you will receive confirmation that this has been saved and from there you can continue to login using your new login details.