Customer registration journey

In this video we are going to run through the customer registration process, so that you can see what your client will have access to once they have registered for the Prudential ISA online service.

Let’s begin.

There are two ways your client will be able to register, either after reviewing the summary of an application performed by you, as their adviser, on their behalf, or via a direct invite from you as their adviser.

In both instances your client will receive two emails, one with a link to the site, and another with a onetime password.

Clicking the link in the first email will take your client to a sign in page, Where the password from the second email can be entered.

On the next screen your client will be asked to create a custom password to access the service going forward, the temporary password will no longer apply.

On the next screen your client is required to set a memorable word. They’ll use this and their password each time they sign into the online service.

After setting their password and memorable word, your client will be asked to enter their date of birth and national insurance number for security purposes.

Once everything has been entered correctly and your client has been verified, they’ll go through to this page where they must read and accept the terms of use – the acceptance of these confirm they understand they will become a digital client, and all their documents will be available in the document store, they will no longer be sent paper copies.

Once accepted your client will be taken to their dashboard. You’ll see from this the information shown is very similar to what you see for your client’s ISA under the Client record page.

The main differences between what you see on the Client record page and what your client sees on their Dashboard is there’s current no Case tracking information.

Your client can view their documents by clicking ‘Documents’ in the top navigation bar. All documents are listed separately, and there is an option to filter by document type for easier viewing.

In the same navigation bar your client can view ‘My details’ – this page details all their personal information.

Their bank details can be viewed here, and where more than one bank account is held on their Prudential ISA they can view the details for each.

If your client is paying an ongoing adviser charge, details of the charge can also be viewed. There is also an option for your client to change their password and memorable word as well as view relevant contact details here.

The first point of call would be yourself as their adviser, but there is additional information for Link Financial Investments Limited should they need to get in touch with them directly.