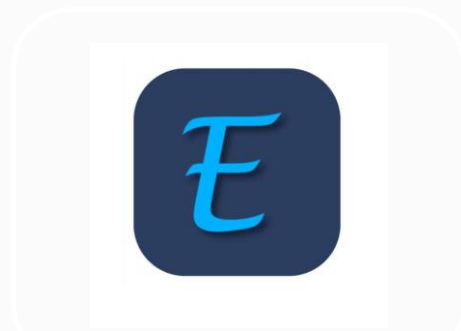


# Engage Portal Set up



The Engage Adviser Portal can be accessed at [www.centric.ie](http://www.centric.ie) or using the following link <https://app.centric.ie/login>

## Getting Started

Login to your Engage account!

[Forgot Password?](#)

Enter e mail address and password  
provided at registration

# Adding a new scheme



[Client](#) [Enquiry](#) [Referrals](#) [Providers](#) [Tools](#) [Upload Documents](#) [ABC Advisers](#)

## ADVISER PORTAL

Client Detail

[+ Add New](#)

Show  entries

Search:

#	Name	Actions
1	SSAP Clients	
2	Rathmines IT Supplies	
3	Horizon Advertising	
4	Galway Engineering Ltd	

Showing 1 to 4 of 4 entries

Prev **1** Next

# Adding a new scheme

The screenshot shows the Engage app interface for adding a new company. At the top, there is a dark blue navigation bar with the Engage logo on the left and menu items: Company, Enquiry, Referrals, Providers, Tools, Upload Documents, and ABC Financial Svcs. Below this is a breadcrumb trail: Dashboard / Company / Add New Company. The main content area is a light yellow background with a dark blue header for the 'Add New Company' form. The form contains three input fields: 'Name' (with a red asterisk), 'Company Code' (with a red asterisk), and 'Approx number of members' (with a red asterisk). Each field has a placeholder text: 'Company Name', 'Company Code', and 'Approx number of members' respectively. At the bottom of the form are two buttons: a red 'Cancel' button and a dark blue 'Save' button.

## INSTRUCTIONS:

- Enter the name of scheme
- Enter approx. # members (active & deferred)
- Assign a company CODE

## NOTES:

The code will be unique to THIS scheme. (min 6 characters/not case sensitive)

Use letters and numbers. Recommended to **relate to scheme** eg for Horizon Kitchens use *Horizon2021*

Once code is assigned it cannot be changed

Code will be given to all scheme members within THIS scheme to access Engage App

# Allocating a pension provider




## ADVISER PORTAL

### Company Provider

+ Add New

Show 10 entries

Search:

#	Company Name	Provider Name	Provider website	Provider logo	Action
1	Rathmines IT Supplies PRSA scheme	Zurich	<a href="https://www.zurich.ie/funds/fund-performance-calculator/">https://www.zurich.ie/funds/fund-performance-calculator/</a>		 
2	Horizon Advertising DC pension	New Ireland	<a href="https://fundcentre.newireland.ie/">https://fundcentre.newireland.ie/</a>		 
3	Galway Engineering DC pension	Aviva	<a href="https://aviva-fundcentre.longboatanalytics.com/">https://aviva-fundcentre.longboatanalytics.com/</a>		 

Showing 1 to 3 of 3 entries

Prev 1 Next

# Allocating a pension provider



## Add New Company Provider

Company name \*

Company Name  
Company Name  
Kelly Farm Supplies

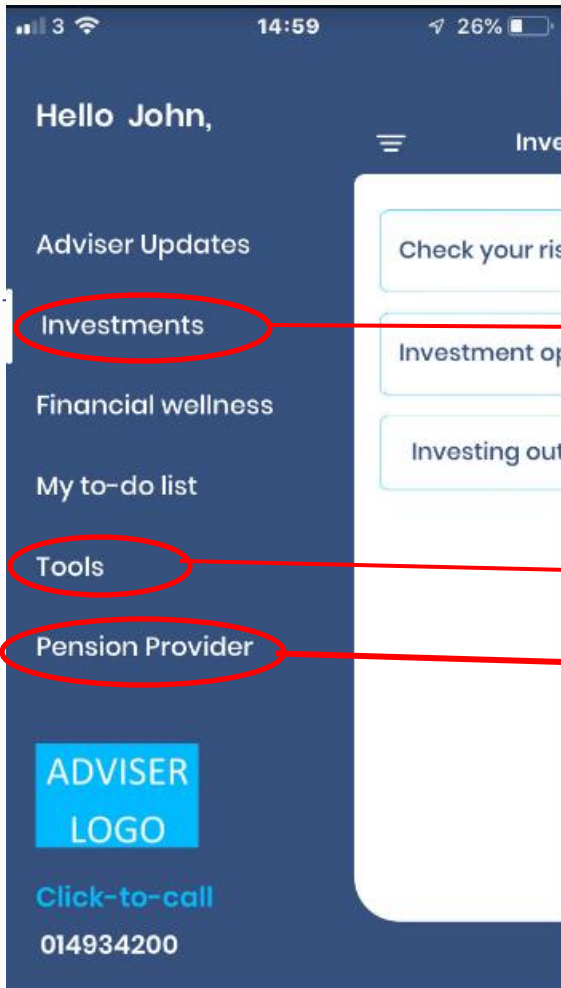
Provider name \*

Provider Name

Cancel

Save

Changing provider changes 3 data points in the Engage APP



Investments

Determines which insurers funds are displayed

Tools

Determines which videos & calculators are displayed

Pension Provider

Determines what logo is displayed and which insurer's portal can be accessed

# Uploading a document



## ADVISER PORTAL

### Client Detail

+ Add New - 🔄

Show  entries Search:

#	↑↓ Name	↑↓ Actions
1	SSAP Clients	
2	Rathmines IT Supplies	
3	Horizon Advertising	
4	Galway Engineering Ltd	

Showing 1 to 4 of 4 entries Prev **1** Next

### NOTES:

Once a document is uploaded on the Adviser Portal it will appear immediately on the Member APP













# Uploading a document

The screenshot shows the Centric Adviser Portal interface. At the top, there is a navigation bar with the Centric logo and menu items: Client, Enquiry, Referrals, Providers, Tools, Upload Documents, and ABC Financial Advisers. The 'Upload Documents' menu is open, showing options: Adviser Updates, Investment, My Contact, To Do List Item, and Send Notification. The 'Adviser Updates' and 'Investment' options are circled in red. Below the navigation bar, the main content area is titled 'ADVISER PORTAL'. On the left, there is a 'Client Detail' section with a 'Show 10 entries' dropdown and a search box. The main content area contains a table with 4 entries, each with a '#', 'Name', and 'Actions' column. The table is paginated to show 1 to 4 of 4 entries.

Client Detail

Show 10 entries

Search:

#	Name	Actions
1	SSAP Clients	  
2	Rathmines IT Supplies PRSA scheme	  
3	Horizon Advertising DC pension	  
4	Galway Engineering DC pension	  

Showing 1 to 4 of 4 entries

Prev 1 Next

## NOTES:

Documents can be upload in PDF format to the **ADVISER UPDATES** or **INVESTMENTS** sections of the member App. See Section below **Formatting Documents**.



# Uploading a document



## ADVISER PORTAL

### Adviser Updates

+ Add New

Show 10 entries

Search:

#	Company Name	Title	PDF	Request Button	Actions
1	Galway Engineering DC pension	Welcome to Engage	<a href="#">2020120310292179.pdf</a>	Yes	
2	Galway Engineering DC pension	About your pension scheme	<a href="#">2020120310285286.pdf</a>	Yes	
3	Galway Engineering DC pension	Pension Season	<a href="#">2020120309555585.pdf</a>	Yes	
4	Galway Engineering DC pension	Max your tax free cash	<a href="#">2020120309554048.pdf</a>	Yes	

Showing 1 to 4 of 4 entries

Prev 1 Next

### Add Adviser Updates

Company name \*

Title \*

PDF File \*

Request Button show?

Yes  No

Cancel

Save

### NOTES:

The title (above) will be the title of your document that will be displayed in the APP

Keep the title to under 25 characters, so that the full title is displayed on the App

When the **Request Button** (above) is selected there will an option at the bottom of the document in the APP for the members to select to "request more information".

# Member To-do-list

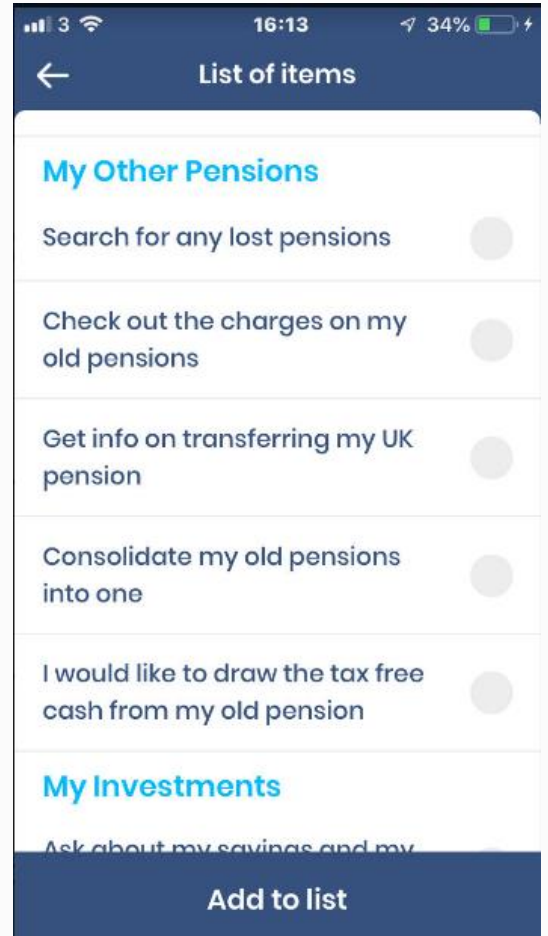
The Engage App contains an interactive *To Do List*.

Members can select from a list of suggested tasks that they can add to their list. They can also add tasks of their own that are not on the suggested list.

Once added the member can send the task to their adviser to be actioned.

The adviser can determine what tasks appear in the portal. By going to the *To do list* on the portal the adviser can change existing tasks and ADD other tasks, that are more relevant to the business.

The tasks are at adviser level, so they will appear for all schemes. You cannot have separate task lists for separate schemes.



Client Enquiry Referrals Providers Tools Upload Documents ABC Financial Advisers

## ADVISER PORTAL

### My Current Employer's Pension

+ Add New

- Set a goal to achieve reasonable pension
- Top up my contributions (AVCs)
- I would like to stop work at 60 and draw my pension. Please contact me
- Find out what level of risk is my pension invested in
- I am leaving my current employer, what are my options with my pension

### My Other Pensions

+ Add New

- Search for any lost pensions
- Check out the charges on my old pensions
- Get info on transferring my UK pension
- Consolidate my old pensions into one
- I would like to draw the tax free cash from my old pension

- Adviser Updates
- Investment
- My Contact

To Do List Item

Send Notification

### My Investments

+ Add New

- Ask about my savings and my best options
- I would like to discuss the risk profile on my investments

### My Family Protection

+ Add New

- How much cover should i have /do i have
- Get a price check done my existing life/illness policies

# Push Notifications

When documents are uploaded by the adviser, they appear in the member App but members are **not** notified.

For this reason, the Engage App provides the facility for Advisers to send push notifications to scheme members, where there is immediate notification.

Once sent, the push notifications will display on a member home-screen even if they are not in the Engage App, (once they have accepted notification when they downloaded the Engage App). Notifications are also saved in the Notifications menu of their App.

Notifications can be sent to a single scheme eg reminder of renewal meeting or to ALL schemes eg reminder of tax deadline for AVC payments.

The screenshot displays the Centric Adviser Portal interface. At the top left is the Centric logo. The navigation bar includes links for Client, Enquiry, Referrals, Providers, Tools, Upload Documents, and ABC Financial Advisers. The main heading is 'ADVISER PORTAL'. Below this, there are two main sections: 'Send Notification' and 'Users'.

**Send Notification**

Message\*

Words:- 0/40

Send

Please select recipients from list below

**Users**

Show 10 entries Search:

#	All <input type="checkbox"/>	Email
1	<input type="checkbox"/>	SSAP Clients
2	<input type="checkbox"/>	Rathmines IT Supplies PRSA scheme

## IMPORTANT

Adviser should set expectations with members that they have this useful facility but they will only contact member with important information such as deadlines or opportunities that are closing.

Push notifications should be used sparingly. If members get too many they will dis-engage, turn off their notifications or even delete the Engage App.

We would recommend no more than 3-4 in the scheme year but certain schemes/situations may warrant more.

# **Formatting Documents**

## **Before upload to Engage Portal**

## Making documents look professional

Before uploading a document, it needs to be formatted so it can be viewed in the optimum format for a phone screen and to look professional to the user.

### The Basics

- Document are uploaded on the Engage portal as PDFs.
- Word documents must be converted to PDF before upload.
- Documents can include text and pictures.
- It is recommended to use pictures and images within documents to make them more meaningful and engaging.
- Once documents are uploaded to the portal, they will appear on the Engage App.

There are a number of simple formatting steps that you need to do to your document before you upload it onto the Engage portal.

### Formatting Steps:

1. Change Top and Bottom **margin to 0**
2. Change the **font size to 24**
3. Change right and left indentations to **-2**
4. Insert a picture(s) (optional)  
It is recommended to use pictures or images in documents with a lot of text.
5. Insert your logo on the document (optional)

Once this is complete you can convert to your document to a PDF & upload it to the Engage Portal.

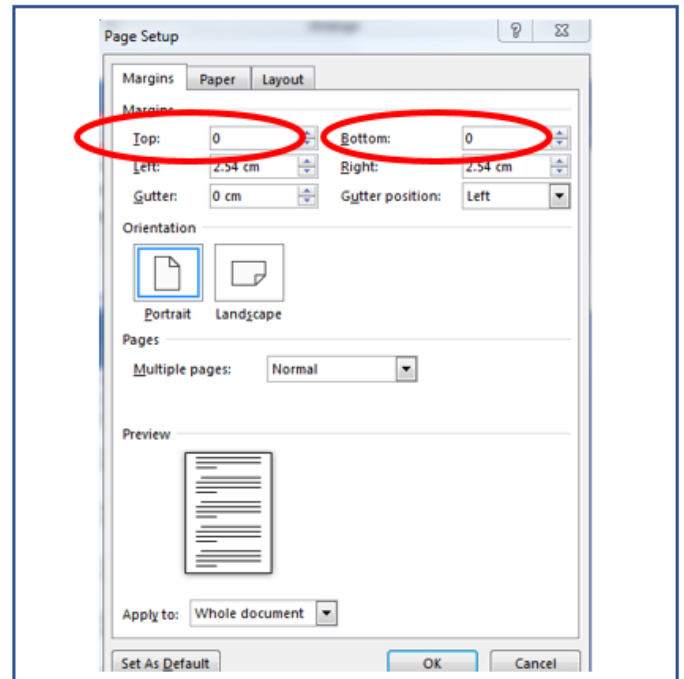
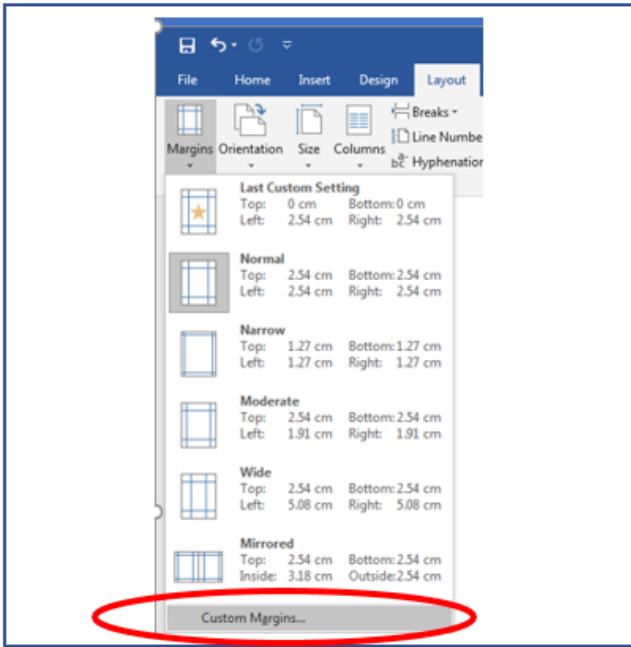
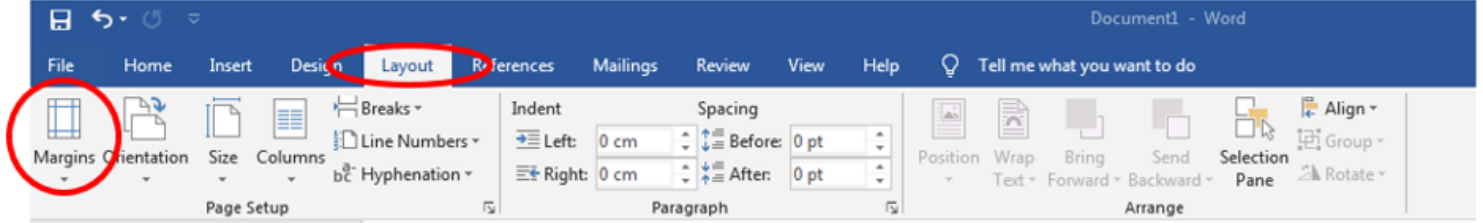
### Tip

Keep an online folder to store the Word and PDF versions of each document you produce. After you see the document on the App you may wish to go back to the Word version to make some alterations.

**Steps 1-4 are illustrated in detail below**

# Step 1

## Changing top/bottom margins to 0



## Step 2

### Changing the font size to 24

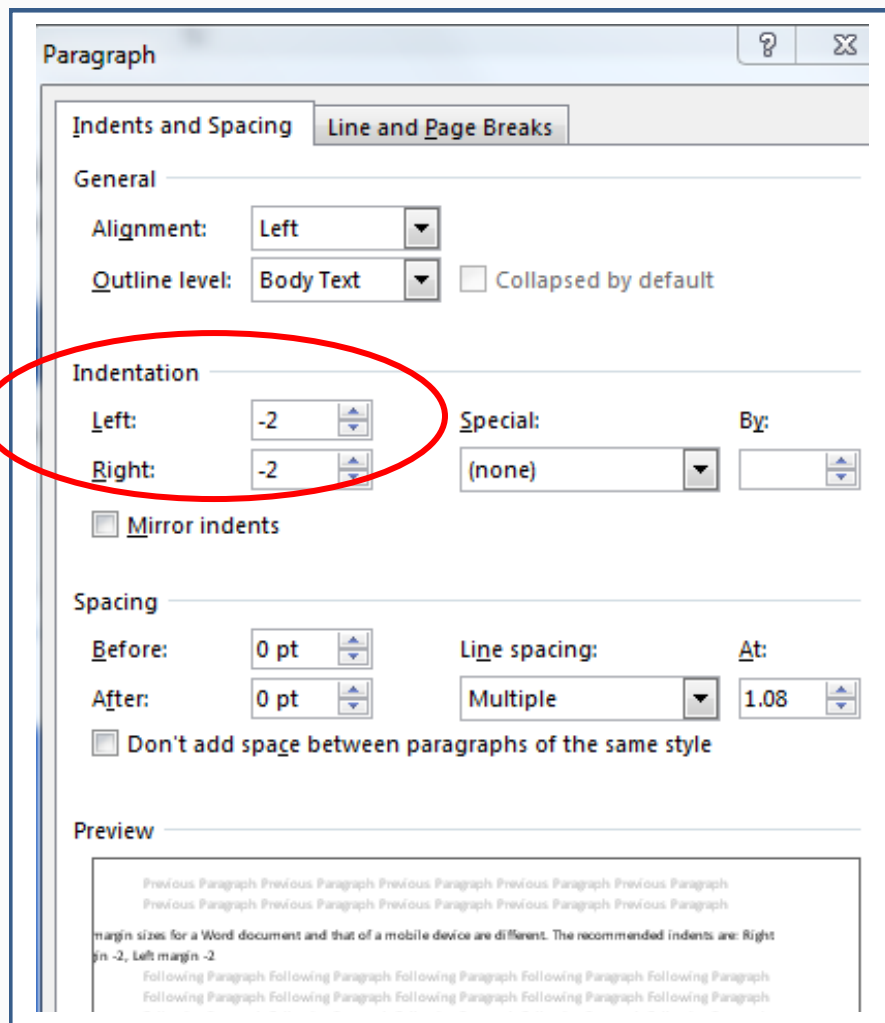
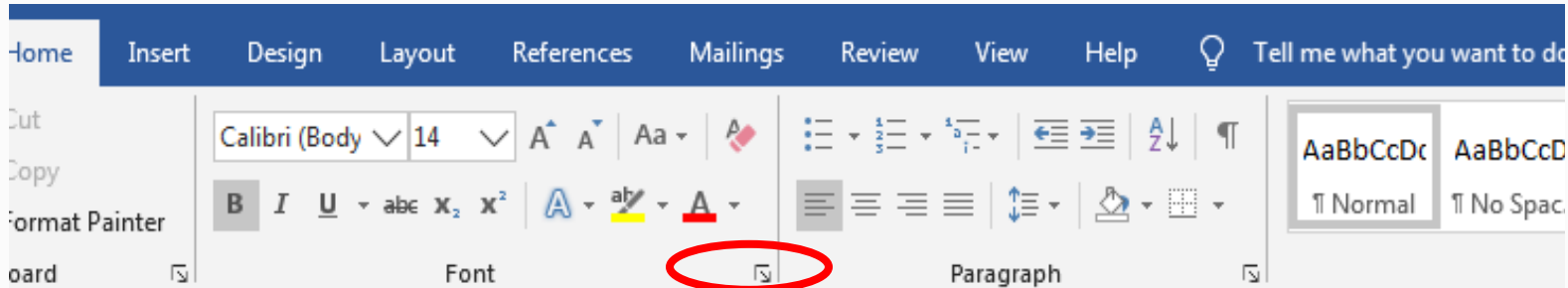
The recommended font size is at least **24**. This seems very big on a word document but is needed for viewing on a mobile device.

There is no particular font style. Testing different styles can be done by setting up a mock scheme and joining as a member. In this way you can test documents and check how it looks on the App on your phone.

# Step 3

## Change indentations to -2

The margin sizes for a Word document and that of a mobile device are different. The recommended indentations are: **Right margin -2, Left margin -2**



Once you change the font size and alter the indentation the sentence will look like this. You will notice that the text goes all the way to the edges of the page.

# Step 4

## Adding an image

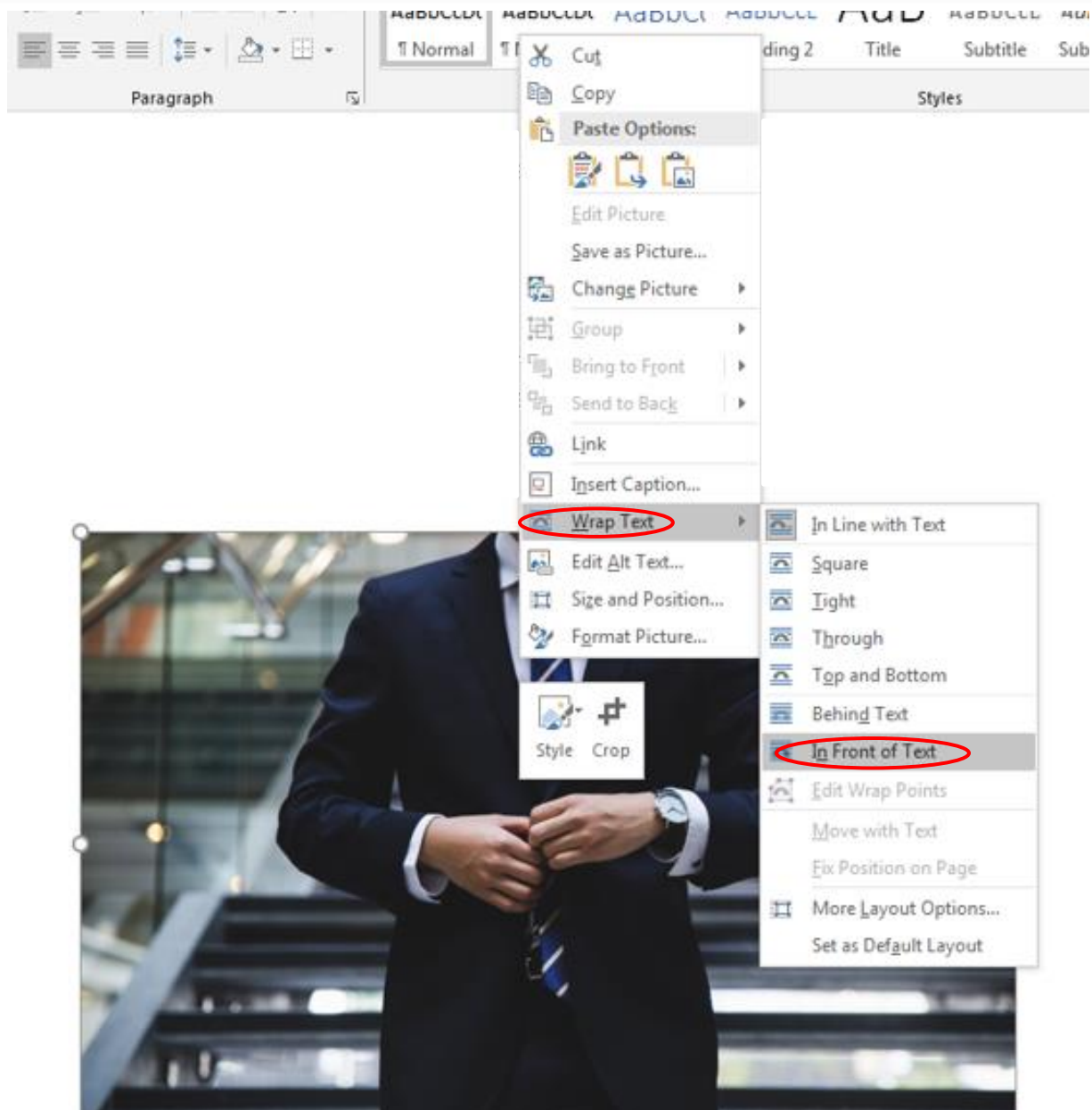
Adding images to documents significantly enhances the appearance, professionalism and ease of reading for the user on a mobile device.

An excellent source of unique and free images is [www.upsplash.com](http://www.upsplash.com). These are all high-resolution images and can all be downloaded free of charge.

For best appearance images should stretch across the page, not just default to the Word margins.

### Steps to inserting image:

- Select the image you want by selecting right click/copy
- Paste the image onto the page where you want it
- Right click on image and select **wrap** text/ **in front** of text





This will allow you move the image to the very edge of the Word document as illustrated below.



### **Tips:**

Text and images that look over-sized on Word documents will look in proportion on a mobile device

To make images bigger always stretch them diagonally not horizontally so they are not stretched out of proportion.

Ensure text goes to the very bottom of a page and starts at the very top of the next page. A small gap in the Word document will look like a big gap on the mobile device.

Ensure you set up a mock scheme and using your personal e mail address, set yourself up as a member, in this way you can test the appearance of documents do some trial and error until you are happy with how they look on the App.

**For assistance in formatting any documents  
contact [info@centric.ie](mailto:info@centric.ie)**