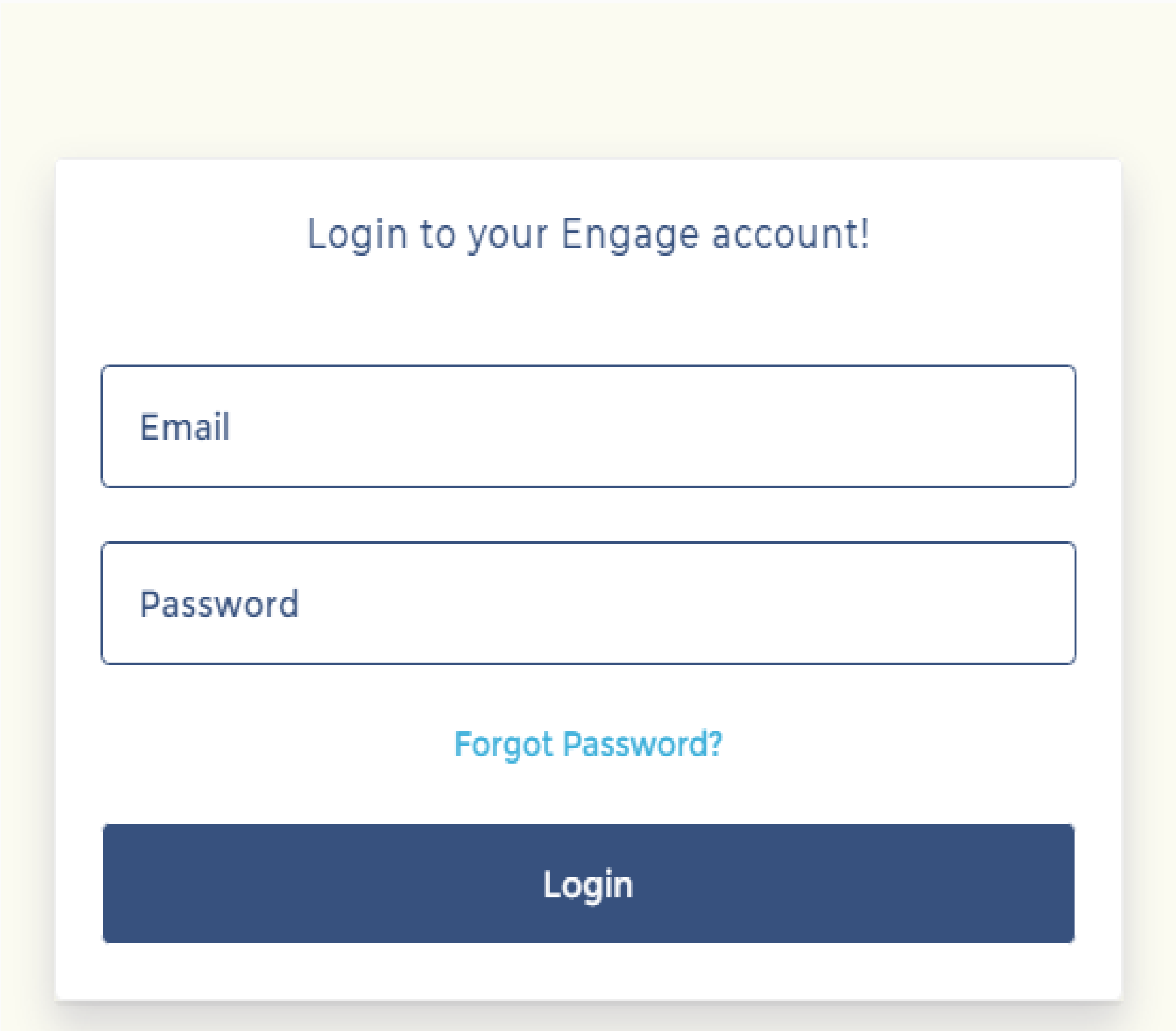
Engage Portal Set up

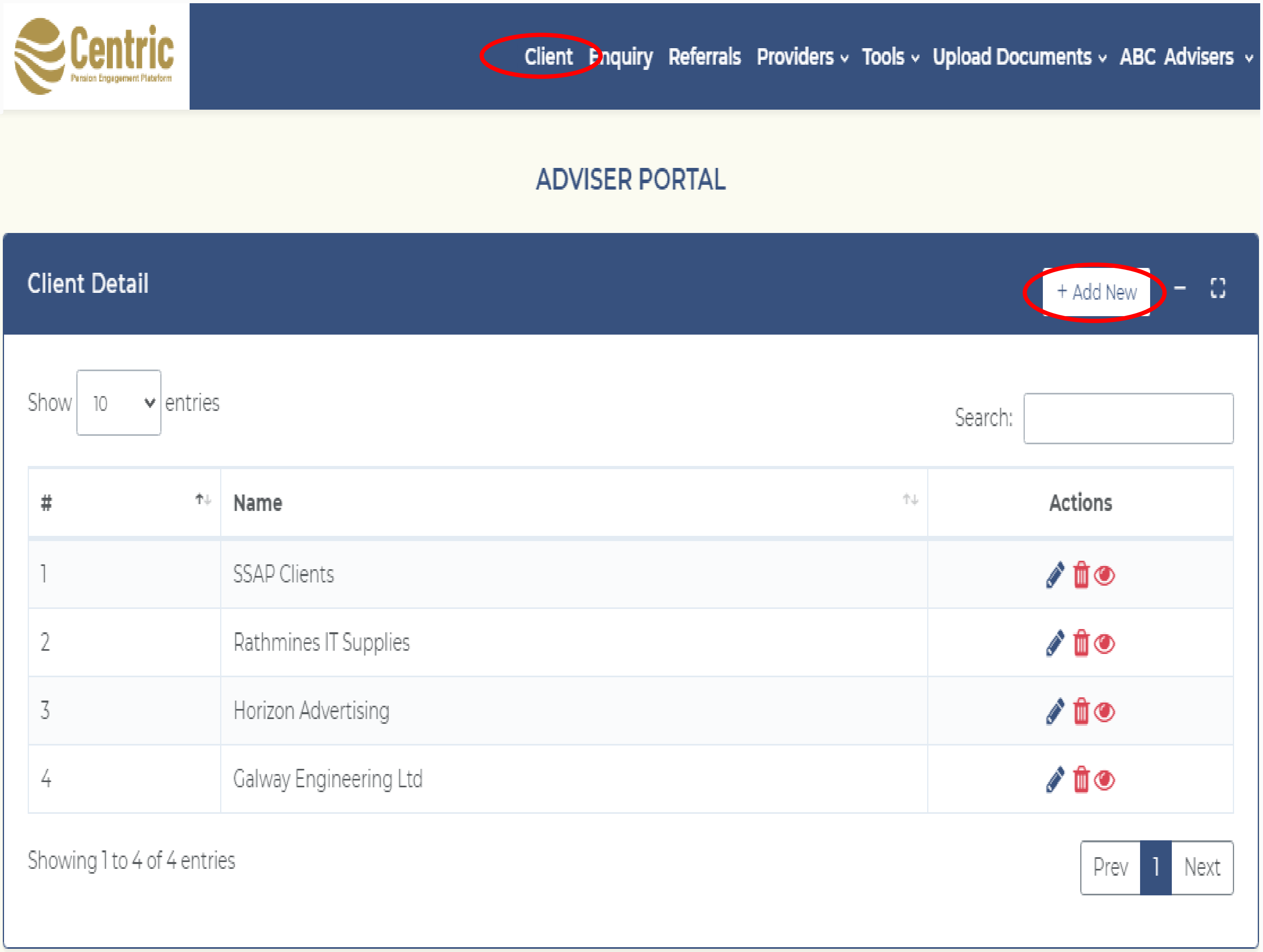
The Engage Adviser Portal can be accessed at www.centric.ie or using the following link https://app.centric.ie/login

Getting Started

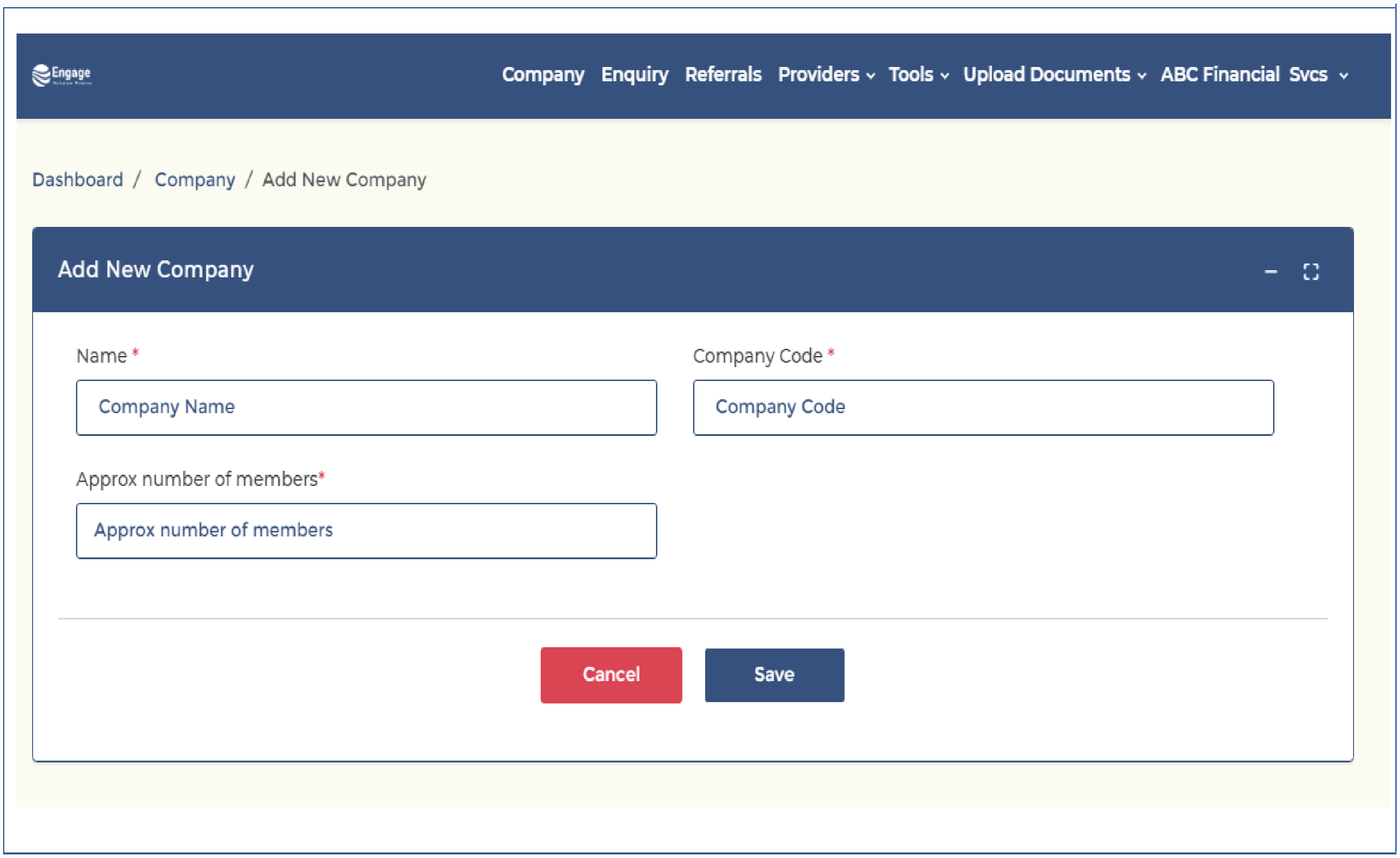


Enter e mail address and password provided at registration

Adding a new scheme



Adding a new scheme



INSTRUCTIONS:

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

NOTES:

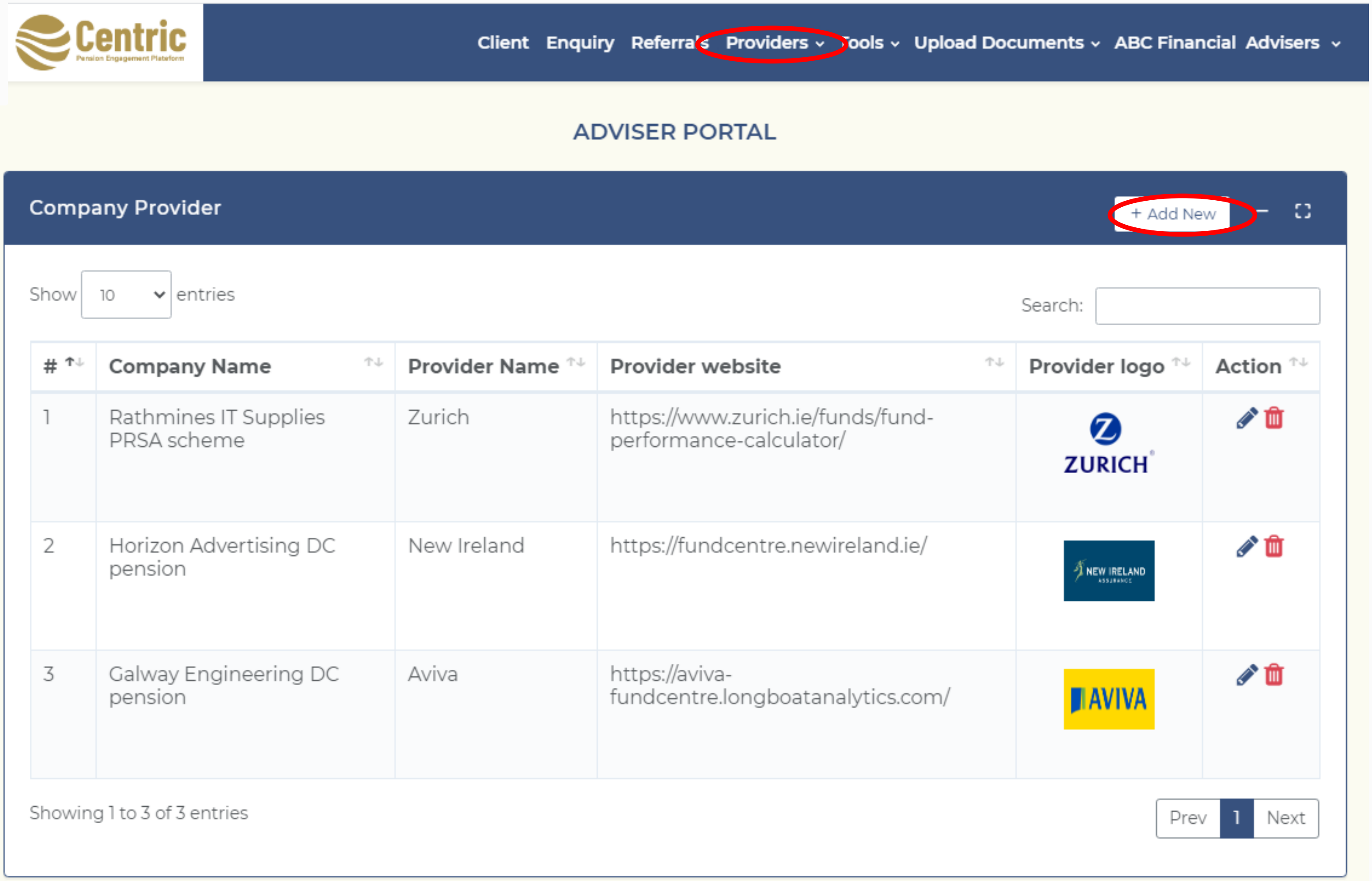
The code will be unique to <u>THIS</u> scheme. (min 6 characters/<u>not</u> case sensitive)

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

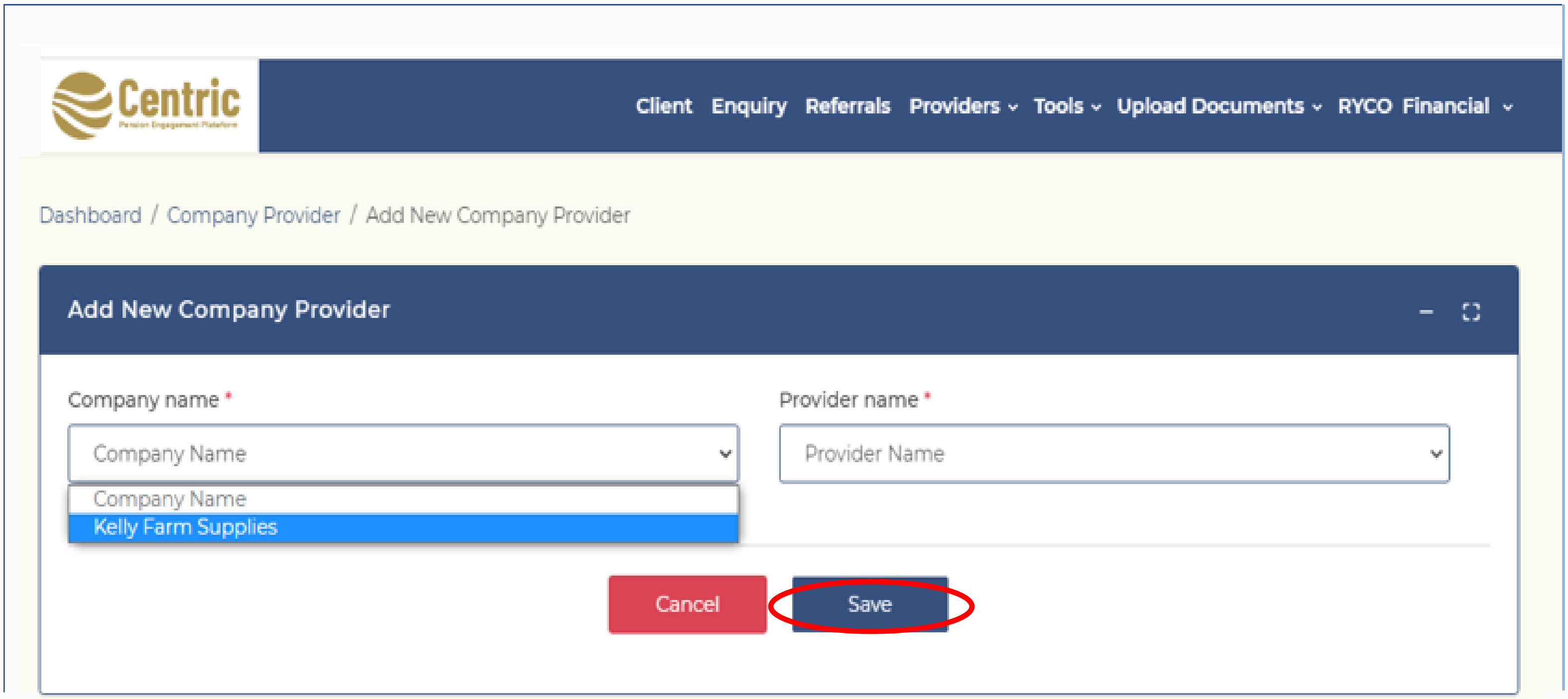
Once code is assigned it <u>cannot</u> be changed

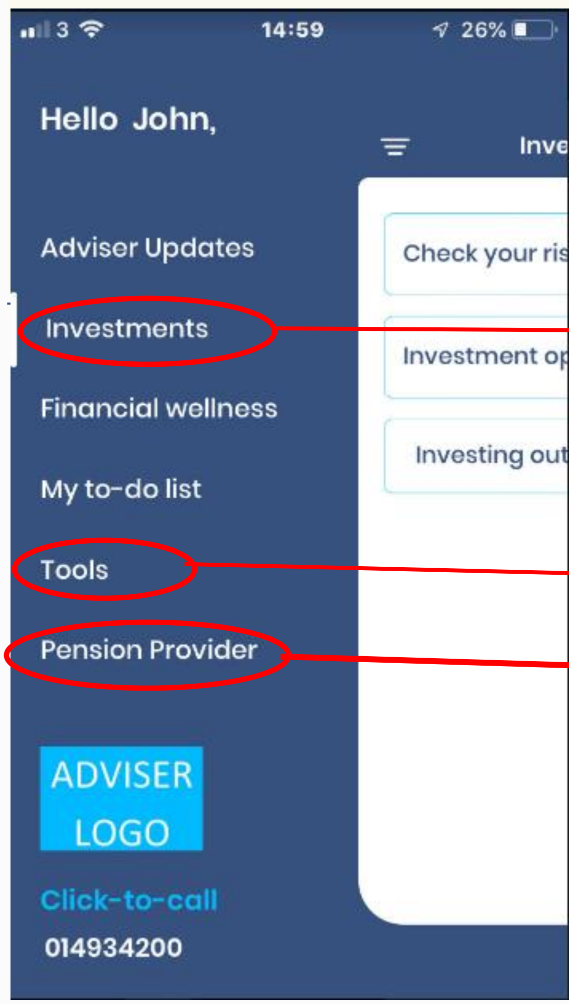
Code will be given to all scheme members within **<u>THIS</u>** scheme to access Engage App

Allocating a pension provider



Allocating a pension provider





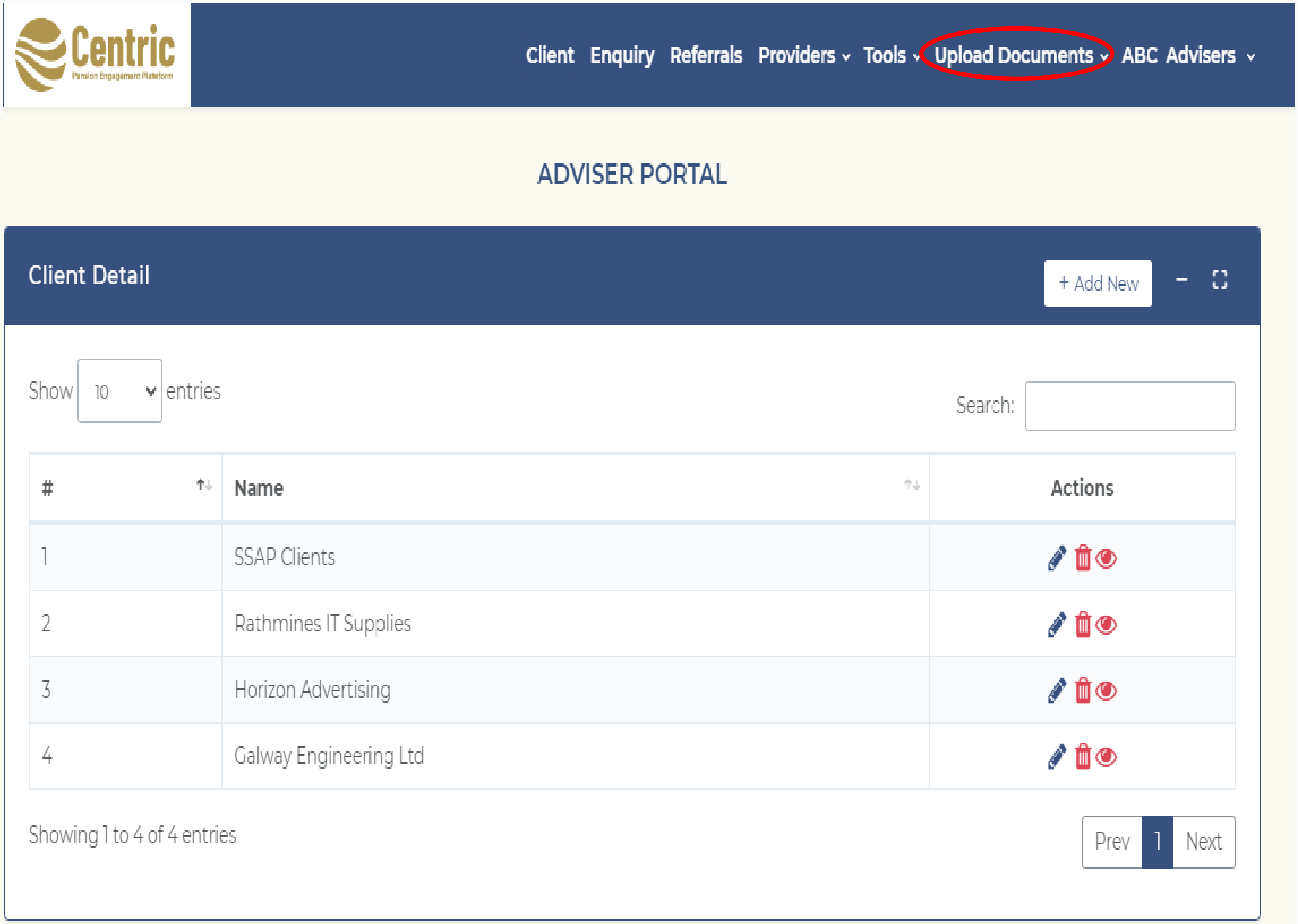
Changing provider changes 3 data points in the Engage APP

Determines which insurers funds are displayed

Determines which videos & calculators are displayed

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

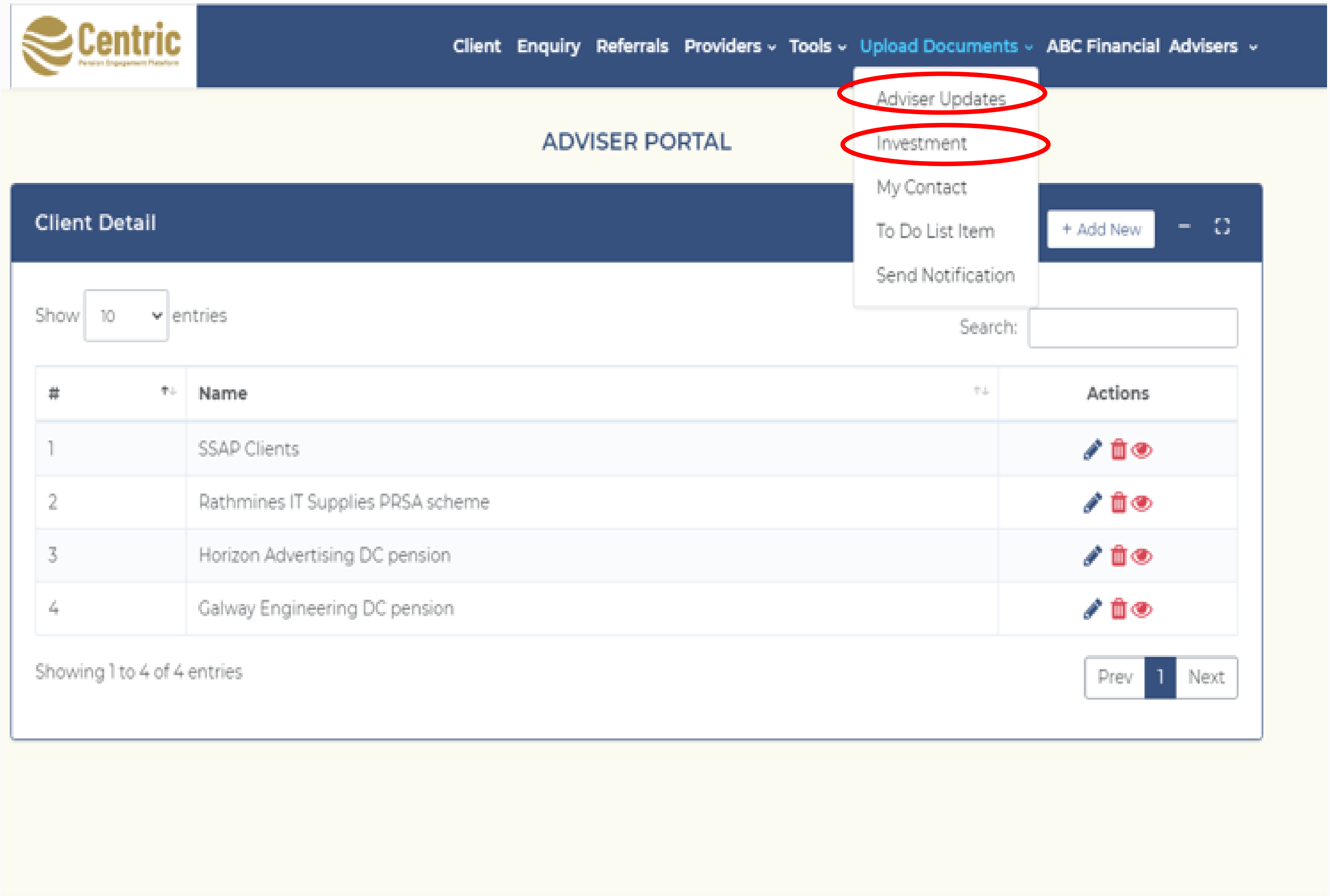
Uploading a document



NOTES:

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

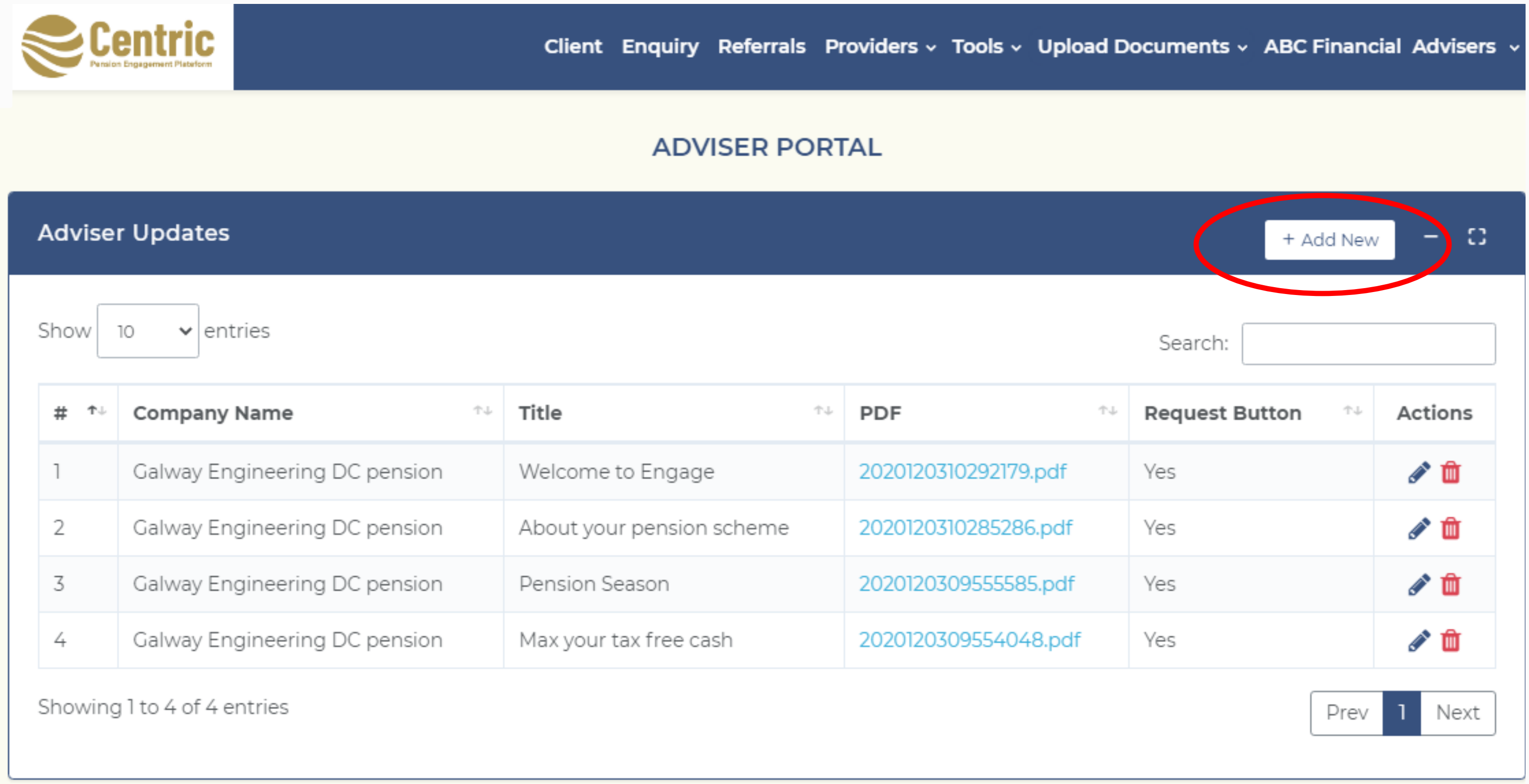
Uploading a document



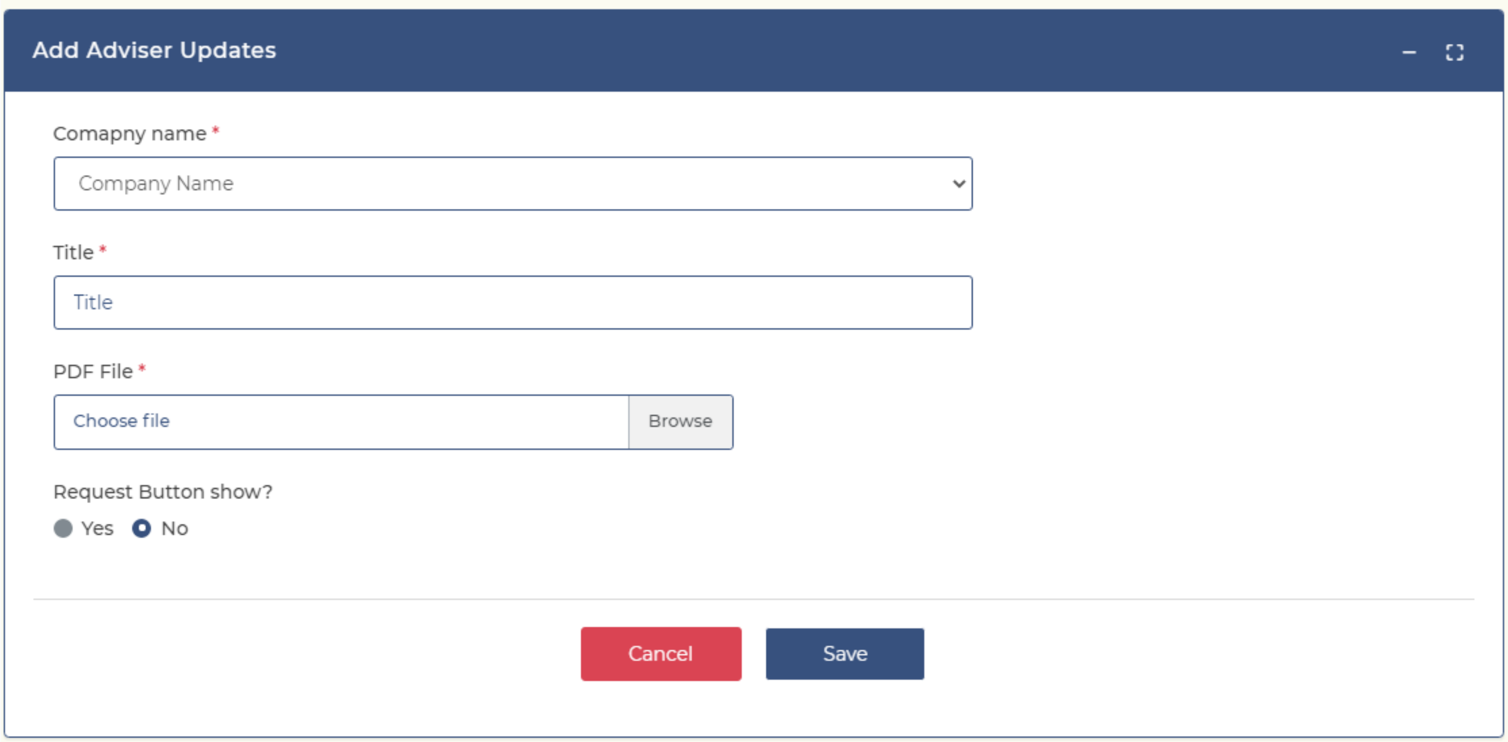
NOTES:

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



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



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

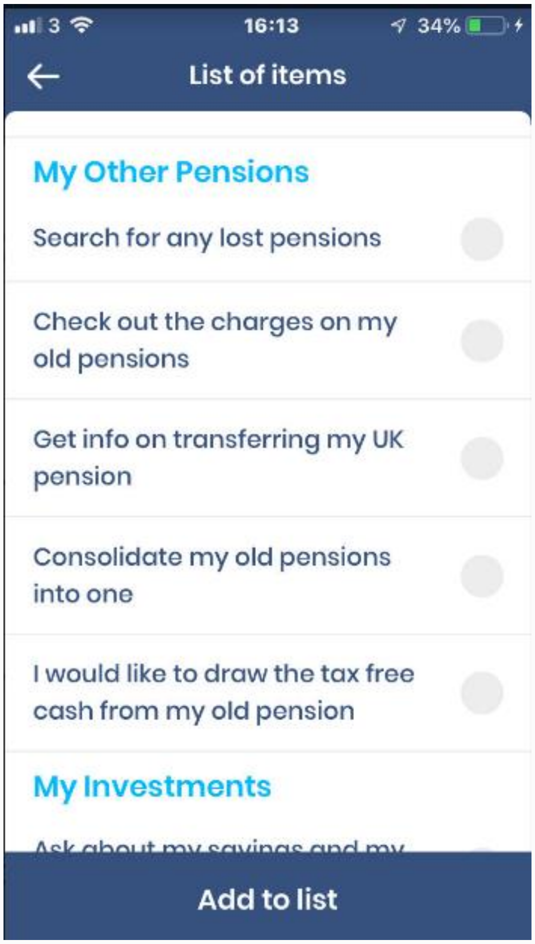
The Engage App contains an interactive *To Do List*.

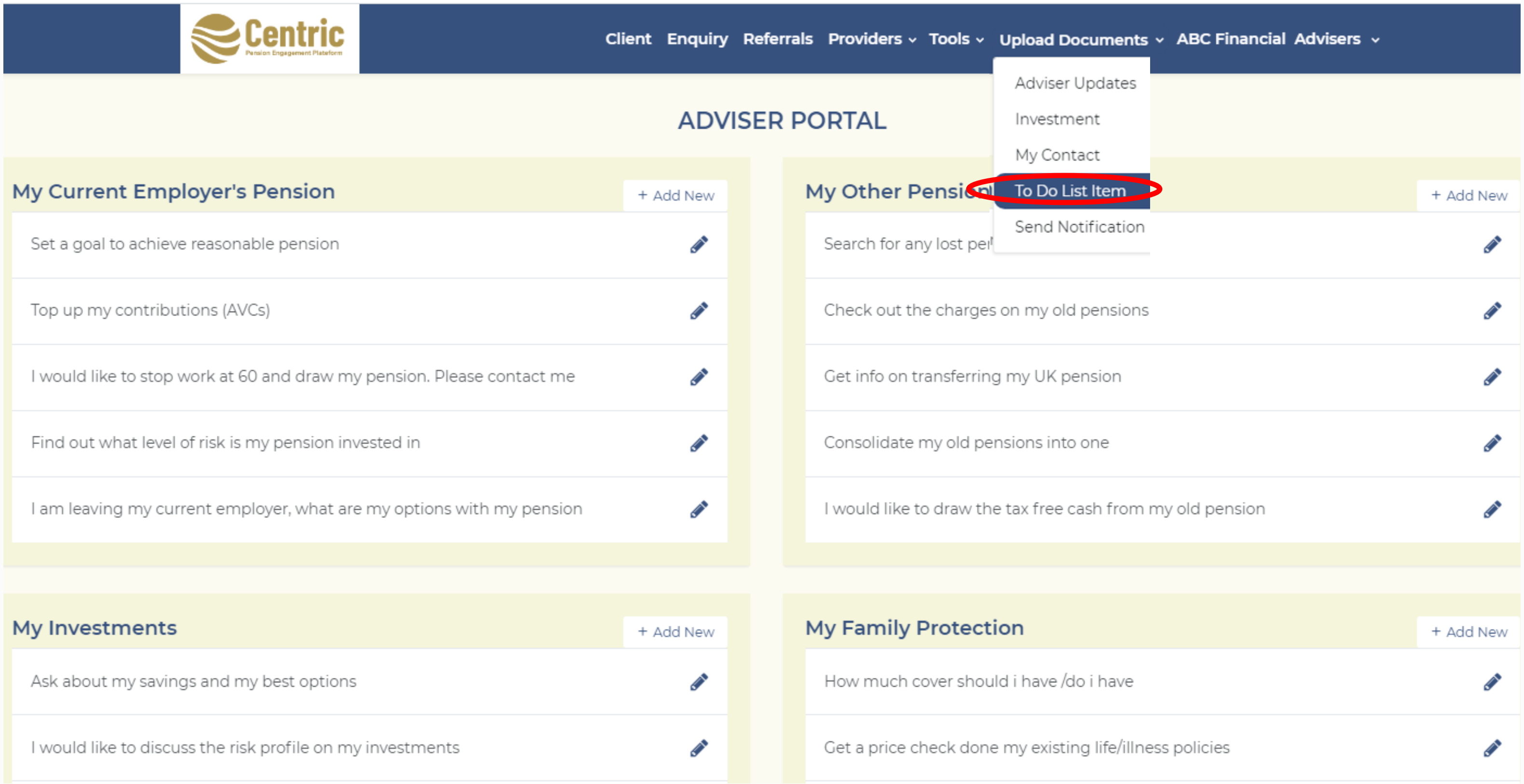
Members can select from a list of suggested tasks that they can add to their list. They can also add tasks of their own that are not on the suggested list.

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.





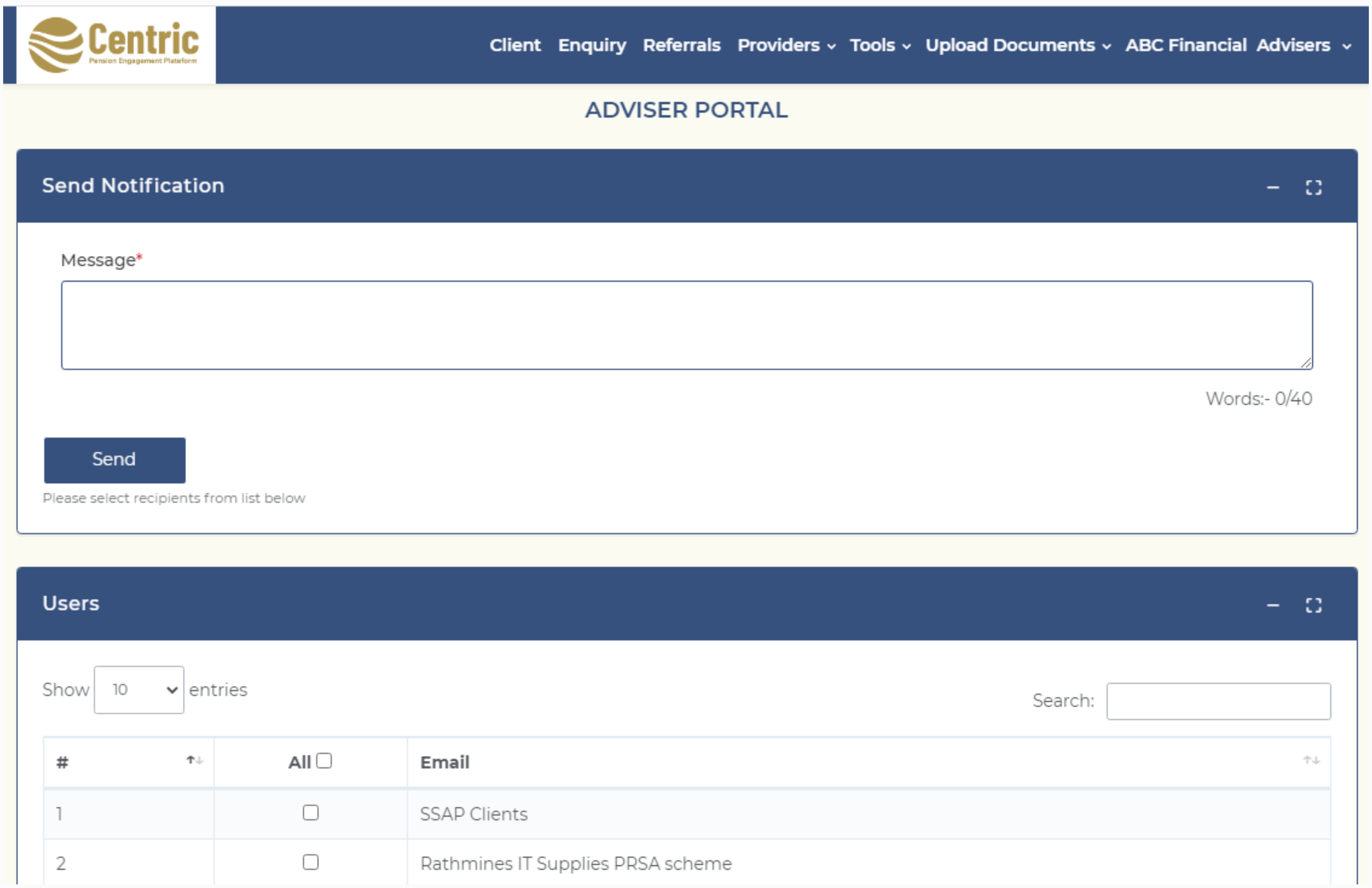
Push Notifications

When documents are uploaded by the adviser, they appear in the member App but members are **<u>not</u>** 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.



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.

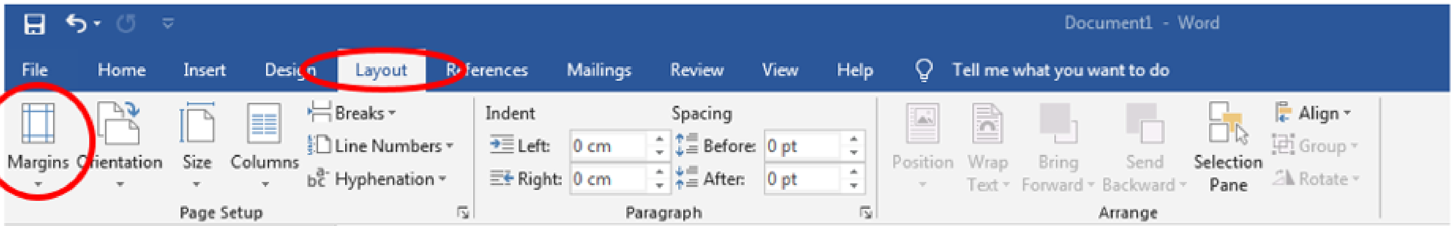
5. Insert your logo on the document (optional)

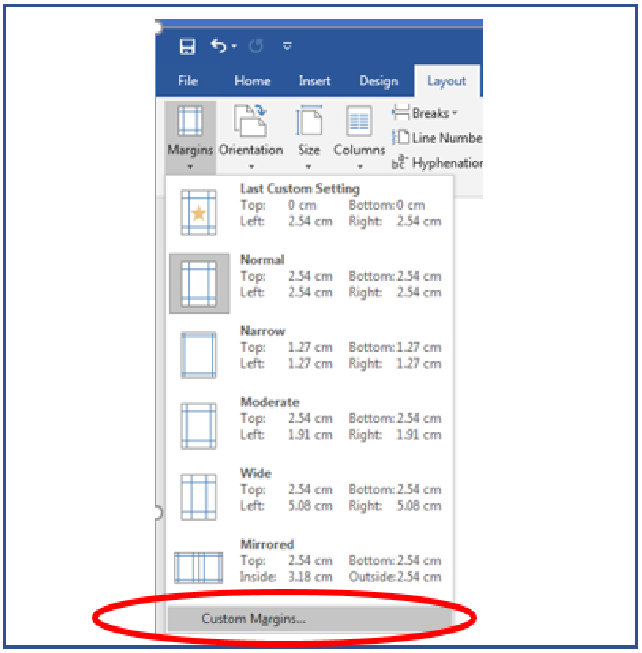
Once this is complete you can convert to your document to a PDF & upload it to the Engage Portal.

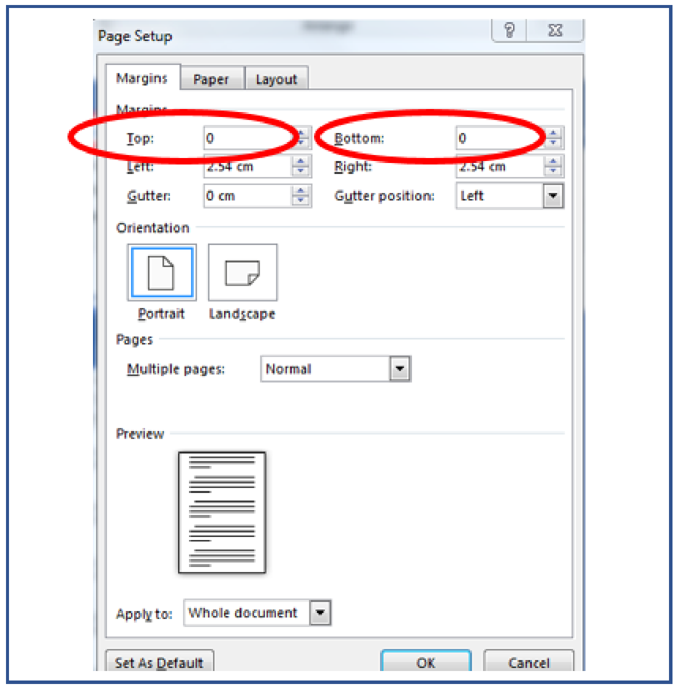
Tip
Keep an online folder to store the Word and PDF versions of each document you produce. After you see the document on the App you may wish to go back to the Word version to make some alterations.

Steps 1-4 are illustrated in detail below

Step 1
Changing top/bottom margins to 0







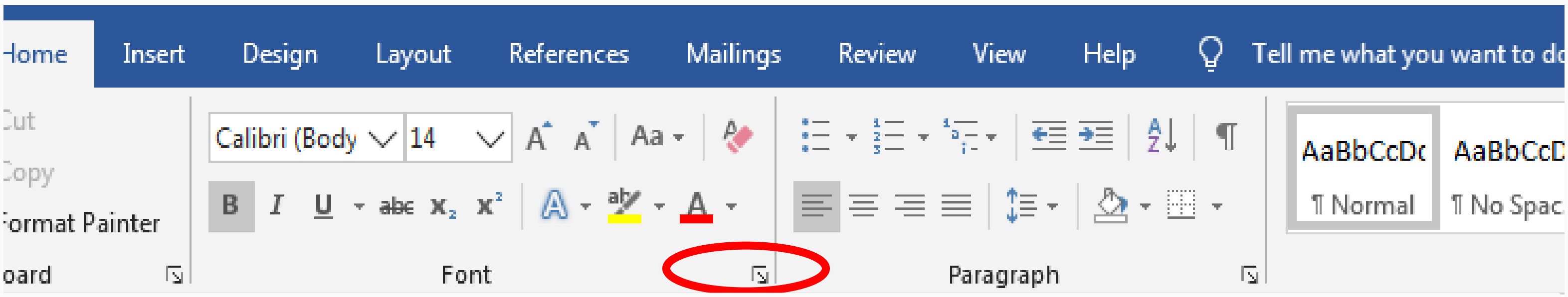
Step 2
Changing the font size to 24

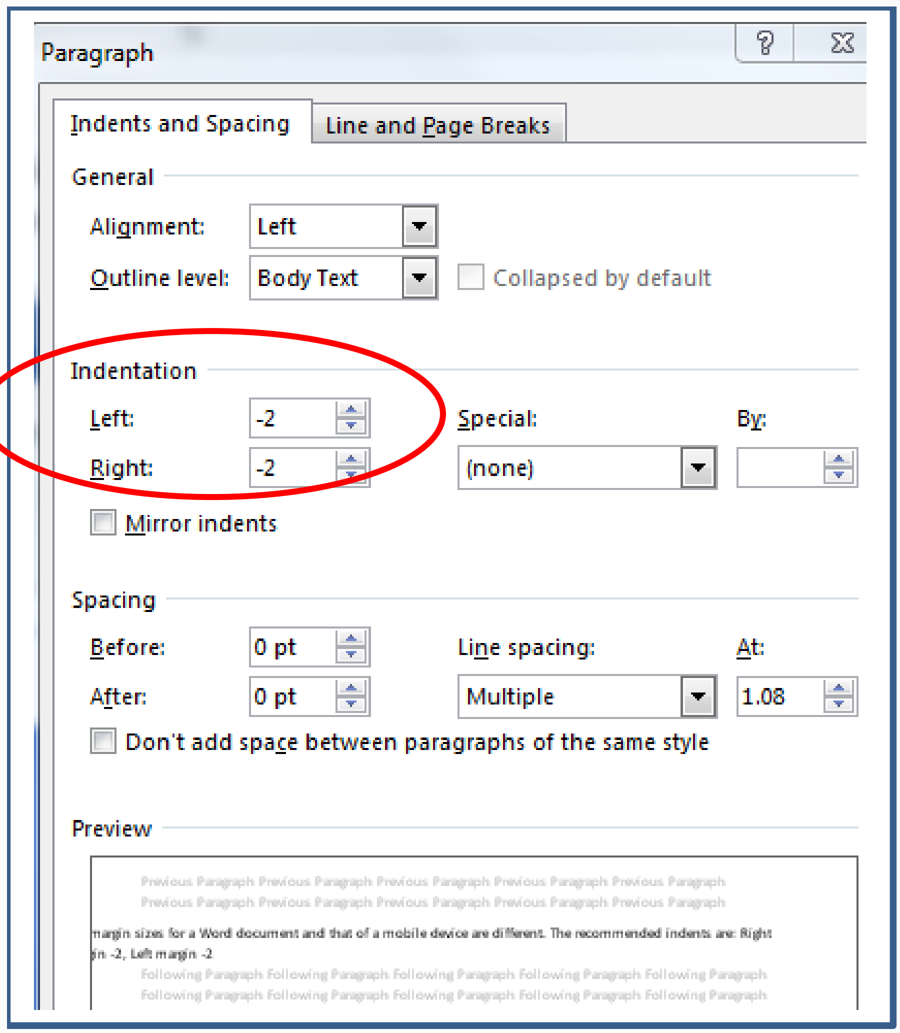
The recommended font size is at least 24. This seems very big on a word document but is needed for viewing on a mobile device.

There is no particular font style. Testing different styles can be done by setting up a mock scheme and jointing 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

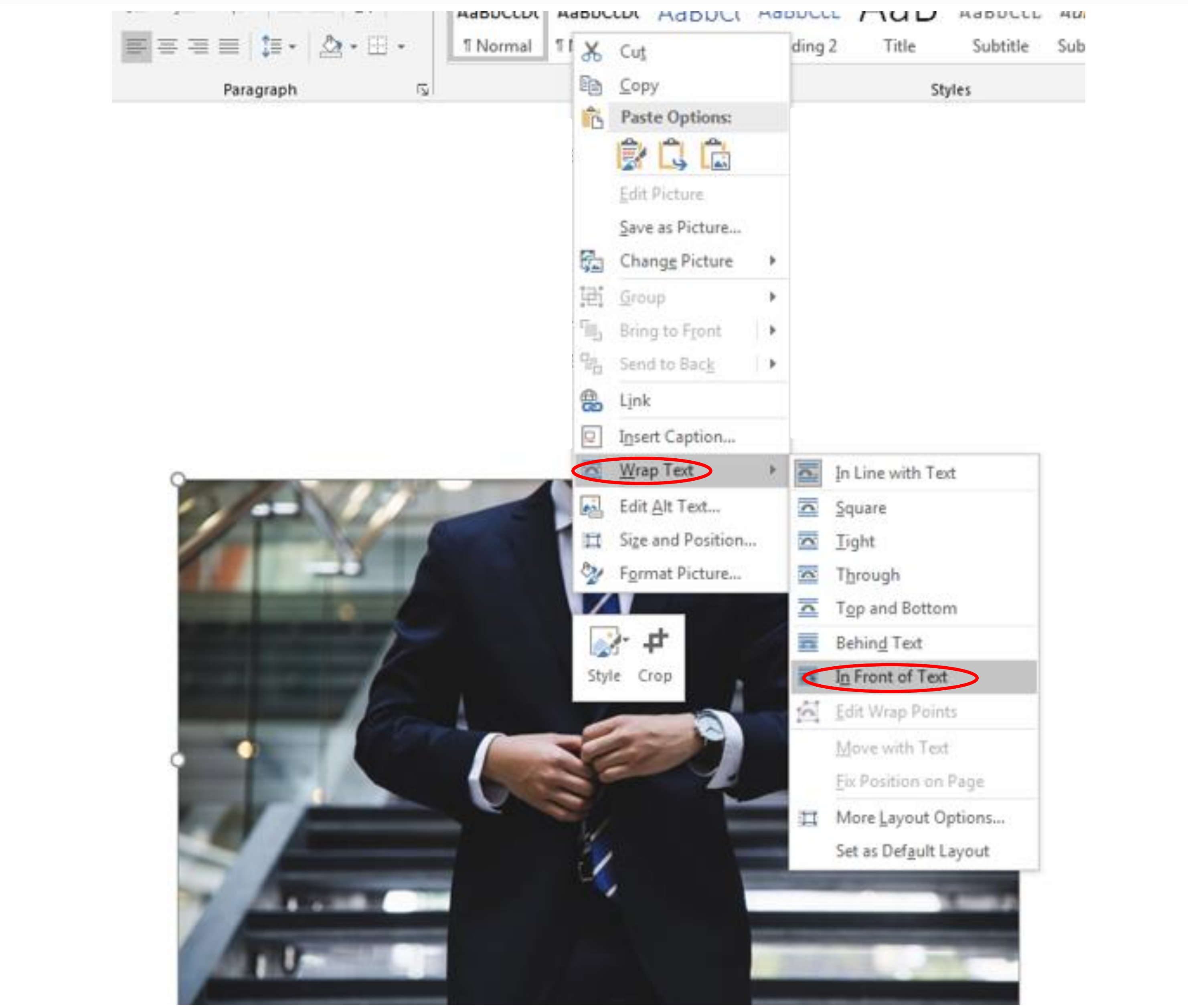
Adding images to documents significant enhances the appearance, professionalism and ease of reading for the user on a mobile device.

An excellent source of unique and free images is www.upsplash.com. 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 a 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