



Guide to using our Portal Service

Frog Financial Management
Make the leap to a better life



Frog Financial Management use a secure encrypted Client Portal service to allow you to safely share documents and any personal information.

The Client Portal uses the same high-level encryption and security measures used by banks and other financial institutions, so you can have peace of mind that your information is safe with us.

You will receive two emails; one with your username with the web link for the Portal, and a second with your initial password. This email may go through to your spam folder, so please check to see if you've received it.

To complete registration, create your own password to access the Portal at any time.

1. Where to access your Portal Service

Call us: 01923 718881

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You can access your Portal at any time by selecting **Client Portal** on our website at: frog-financial.co.uk

Home About Us Our Services Insights Testimonials **Client Portal** Contact Us



2. Accessing the Fact Find

Home Contact Details Products Documents Messages Checklist Change Password Log out

Why not refer friends, family or colleagues to Frog Financial Management? Refer a friend and receive £100 for EVERY introduction you make. We guarantee to pay you £100 for everyone you refer to us who we subsequently complete business with, what could be easier? If you think someone you know could benefit from a no-obligation introduction to Frog Financial Management, then please just get in touch.

Once logged into the Portal, click the **Fact Find** Button to access your questionnaire.

Case

Fact Find

Recent Documents	Recent Products	Recent Messages
No documents	Mortgage Further Advance -	No unread messages View All



3. Completing the Fact Find



Ensure you complete **all** information fields here on the Fact Find, including the Budget Planner (enter monthly figures)



Document upload. Upload documents to the Portal and we will receive notifications, making processing faster and more concise.

Uploading your documents to the Portal is the fastest, easiest and most secure way of sending us any documents we need.

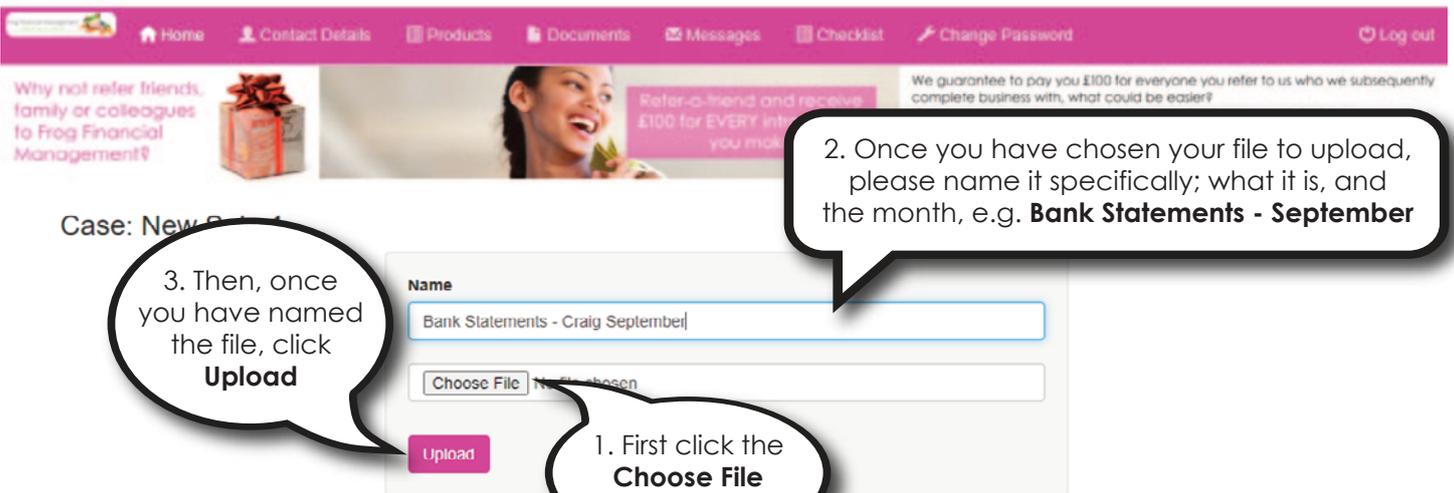
1. Uploading documents



...then click the **Add Document** button

To upload your documents, **first** click here...

2. Naming your documents



2. Once you have chosen your file to upload, please name it specifically; what it is, and the month, e.g. **Bank Statements - September**

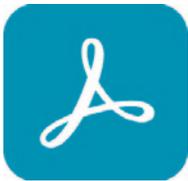
3. Then, once you have named the file, click **Upload**

1. First click the **Choose File** button



Scanning Guide. You can photograph documents using your phone or tablet, but these must be good usable quality, otherwise they will be rejected.

Use your phone or tablet to capture images and automatically transform them into high-quality PDFs with **Adobe Scan**, the **free** scanning App.



Download for free at the App Store or Goggle Play Store.

This App delivers quality copies of documents, by automatically removing shadows, highlights, whilst avoiding camera flashes or light glare that can obscure data.

Important initial setup:

The App has an option to include text recognition for all documents converted to PDF. Turn this feature off in 'Settings', then in 'Preferences', then 'run text recognition' as it speeds up file saving.

Using the App:

Include all four corners of the document and ensure the edges of the document are not cropped or cut off.

Lay the document on a flat surface and take the image from a birdseye view.

Make sure no objects (hands/fingers/pieces of paper, etc) are obscuring any information if you need to hold them down/open.

You can copy multiple pages of a document and bind them into one PDF, such as multiple pages of a bank statement, etc. Easily preview, enhance, crop, and rotate to fine-tune your scans.

Please note, do not upload Zip or similarly compressed files to the Portal, as the system does not support these file formats. The system is entirely secure with end-to-end encryption.

Below is an is an example of an acceptable scan and to the **right** an unusable image.



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Registered Office: 86a High Street, Rickmansworth WD3 1AQ. Frog Financial Management is a trading style of Frog Financial Management Ltd,
which is an Appointed Representative of The Right Mortgage Ltd, which is authorised and regulated by the Financial Conduct Authority