



Our User Guide to Your Portal



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.

1. Where to access your Portal Service - You will receive an email invitation (copy below)

You've been invited

Hi Craig,
Charlotte Banks has invited you to manage your application on behalf of Frog Financial Management Ltd. Once signed in, you'll be able to:

- Complete your profile
- Upload and manage your documents
- Share information with your adviser

Click the button below to get a secure log in link sent to your email that'll sign you into your portal.

[Get a secure log in link](#)

Click the box to receive your login email

Please note, please retain this email, as you will need it to log into the Portal in the future. There is no username or password required, as the link sent is unique and authentication is done on the fly when you access the system.

2. Accessing the Portal

Acre Client Portal: Your log in link

noreply@myac.re
To Craig Scott

Reply Reply All Forward

Mon 20/05/2024 11:19

If there are problems with how this message is displayed, click here to view it in a web browser.

Your client portal login link

Click the button below to sign in to your portal.

[Sign in](#)

Click the box to login to the Portal

Or copy and paste this link into your browser <https://portal.myac.re/login?token=Mo2omiFP0LvPJJZy%2B60k7y%2FprwKp6%2BUqReM5XQZru8k>

If you have any questions, please contact our customer service team by email at support@acresoftware.com



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.

Home Property Data Documents Messages Logout

Your mortgage application
Application type: Home Insurance

Getting to know you

Welcome to the first stage of your mortgage application!

The aim at the moment is for your advisor to get a clear picture of you, your goals and your credit history.

This stage is made up of 4 parts:

1. Getting your Credit Report
2. Passing an ID Verification step
3. Telling us more about you
4. Telling us what you are looking for with a mortgage

Read more

Get Started

Your credit score

Excellent
522
out of 700

See my credit report

Charlotte Banks from Frog Financial Management Ltd.
+441484358835

Message Email

5 mins ID Verification Status
Check the status of your ID verification

15 mins Tell us about you
Have your employment and address details to hand

15 mins Tell us about Ruth
Have your employment and address details to hand

10 mins Upload your documents
Add your bank statements and proof of address

Powered by acre

Complete your **Online ID verification** checks

Upload all of your **documents** here

Complete the **factfind** in full here

Access your Equifax **Credit Report**



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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1 Burkes Parade, Beaconsfield HP9 1NN ● Tel: 01494 358835 ● frog-financial.co.uk

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Registered Office: 1 Burkes Parade, Beaconsfield HP9 1NN. 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