

# **Linking to the FinaMetrica Website: Automatic Client Registration Process Outline**

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FinaMetrica Pty Limited**

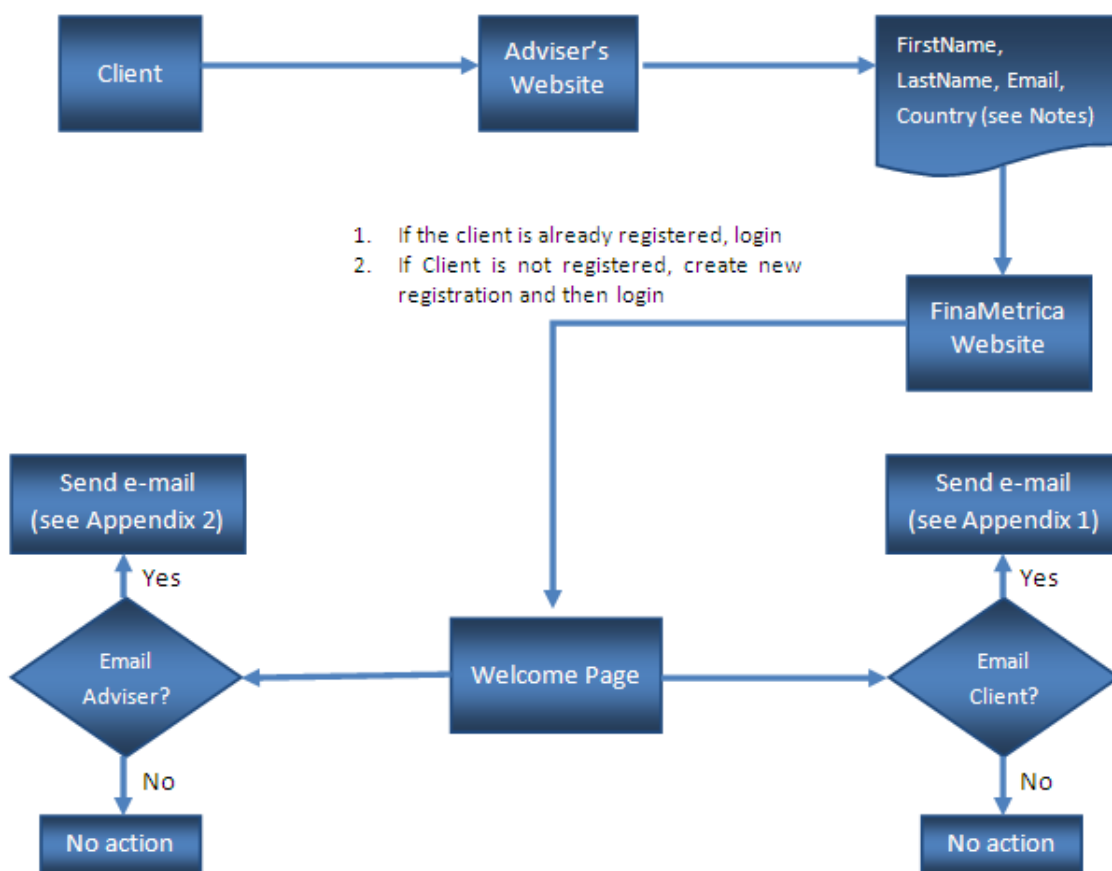
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## 1. Automatic Client Registration Process

With the automatic client registration link set up, advisers can offer their clients the ability to click on a button (or link) on their website which will automatically register and log them in at [www.finametrica.com](http://www.finametrica.com). Clients can then navigate around the FinaMetrica website to complete their risk questionnaire and view their risk report.

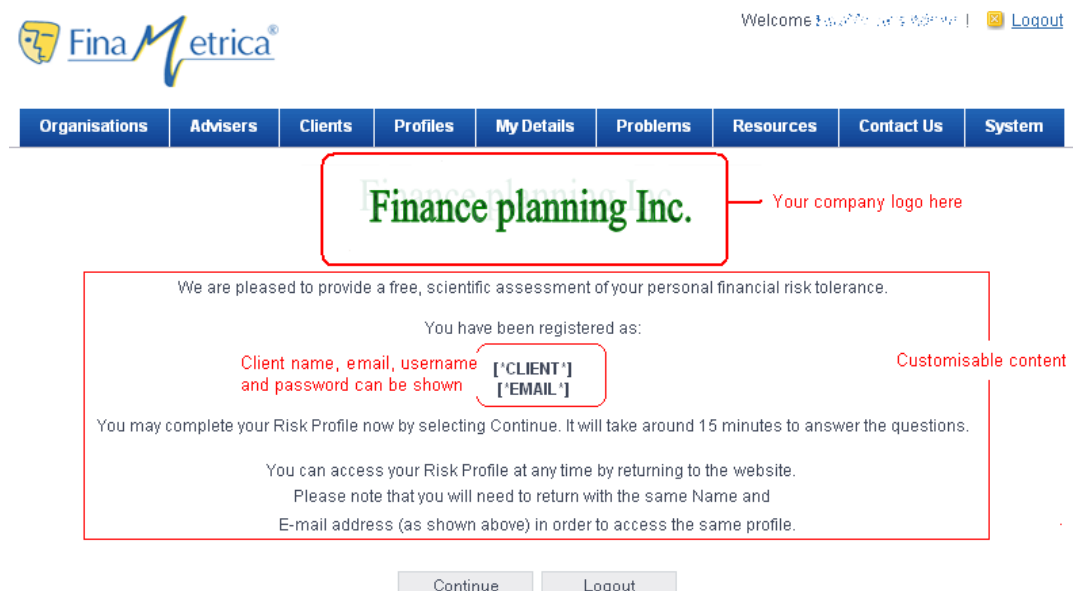
FinaMetrica will provide you with a unique URL through which you will send a set of variables (via HTTP) such as the Client's First Name, Last Name and E-mail address (the specifics will be confirmed as we progress with the setup) after which the client will be logged in to complete and view their risk profile.



## 2. Requirements

### a) Setup Requirements

When a client is registered i.e. successfully clicks through to the FinaMetrica site, a set of actions are triggered and they will be presented with a Welcome Page. These actions and the subsequent on screen text are based on your preferences.



**Required: please let us know your preferences for EACH of the 4 options.**

Option 1: Do you want to e-mail the FinaMetrica login details to the client? YES/NO

Option 2: Do you want to receive an e-mail to confirm that a client has been registered? YES/NO

Option 3: Please provide us with the content you want to display on the welcome page.

Option 4: Please let us know which fields you want to display, you can select as many as you like:

Client name, client email, username, password.

#### Notes:

The FinaMetrica login details provide direct access to [www.finametrica.com](http://www.finametrica.com) and are different to the login details on the adviser's site. If you want to restrict clients' access to their risk profiles exclusively to your website, it is best to not disclose the FinaMetrica login details to the clients.

In Option 2, the notification e-mail will be sent to the address that is registered under the adviser's FinaMetrica account. This can be updated by logging directly into [www.finametrica.com](http://www.finametrica.com).

#### Important:

Please note that a client can only have one (1) account attached to his/her registration. Consequently, for advisers who want to re-profile a client, or for clients who want to re-do a questionnaire, the adviser must log in separately to create the second profile.

## b) Automatic Client Registration requirements

The adviser's website will need to have form functionality to send client information to [www.finametrica.com](http://www.finametrica.com) (the exact link will be provided at a later stage). The variables to be sent (via HTTP) are:

Variable Name	Description	Required
ID	Unique Identifier	<i>Optional</i> , less than 100 chars
p1	Client's First Name	Required, less than 50 chars
p2	Client's Last Name	Required, less than 50 chars
p3	Email Address	Required, less than 100 chars
p4	Country Code	Required, only in the format: AUS, US, UK, CAE, CAF, GER and IND. (see note 2)
p5	FinaMetrica user role	Required, static value: <i>FinaMetrica to provide during setup</i>
p6	FinaMetrica client key	Required, static value: <i>FinaMetrica to provide during setup</i>

For example:

[www.finametrica.com/Login.aspx?p1=jane&p2=doe&p3=client@email.com&p4=AUS&p5=client&p6=12](http://www.finametrica.com/Login.aspx?p1=jane&p2=doe&p3=client@email.com&p4=AUS&p5=client&p6=12)

### Notes:

1. The UniqueID can simply be the client's UserID from the adviser's website – anything which uniquely distinguishes one client from another. If no UniqueID is provided, FinaMetrica.com will use the client's FirstName and E-mail as the default identifier.

2. CAE is the code for Canadian English whilst CAF is Canadian French.

## 4. How do I access clients' results?

You will still need to log into [www.finametrica.com](http://www.finametrica.com) using your adviser account in order to see clients' completed questionnaires and risk reports. The automatic linking is designed only to register clients under the one adviser account.

## Appendix 1: Notification E-mail to Clients (in Plain-text format)

Hi [\*FIRSTNAME\*],

You have been registered to complete your FinaMetrica Risk Profile at the FinaMetrica website -  
[\*LINK\*]

Your login details are:

Username: [\*USERNAME\*]

Password: [\*PASSWORD\*]

If you have not already completed your Risk Profile, you will be able to do the Risk Tolerance and Demographic questionnaires online and immediately view your Risk Profile report.

Once you have completed your Risk Profile, you can return to view your Risk Tolerance questionnaire and Risk Profile report whenever you choose.

### GETTING HELP

If you have any difficulty accessing the FinaMetrica system, please send an email to [problems@finametrica.com](mailto:problems@finametrica.com).

We trust the FinaMetrica experience will be both interesting and informative.

Best Wishes,

The Team at FinaMetrica.

## Appendix 2: Notification E-mail to Adviser (in Plain-text format)

Hi [\*FIRSTNAME\*],

There has been a FinaMetrica Risk Profile registration.

The Client Name was: [\*FIRSTNAME\* \*LASTNAME\*],

The Client Email Address was: [\*EMAIL\*]

The logon details are:

Username: [\*USERNAME\*]

Password: [\*PASSWORD\*]

Best Wishes,

The Team @ FinaMetrica.