

Upgrading account to new Morgans website

- You will be required to upgrade your account the first time you log in to the new website. The upgrade will enable you to log in using an email address and password, instead of account number and password.
- For additional security, you will be asked to setup 3 secret questions and answers for the new website
- Upgrade process will allow you to link all your account(s) under one web account
- Upgrade process will automatically merge your existing research subscriptions and watchlists into the new web login.

1. Enter the web address in your browser and click on login.

<http://www.morgans.com.au/login>

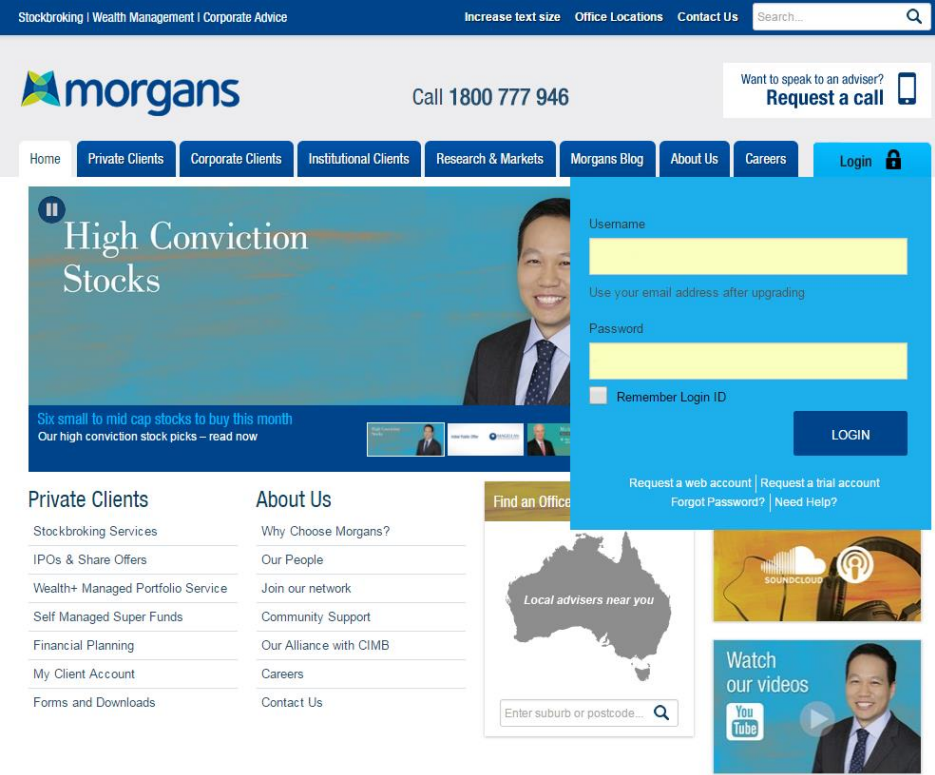

Enter your account number and password.

Forgot Password?

If you have forgotten your password to the old account, refer to point 12 of this document.

Quick Reference Guide – Upgrade Account



	 <p>Print this page </p>
<p>2. System automatically checks if the account is already upgraded. If it is not upgraded a form is displayed with the following fields:</p> <ul style="list-style-type: none"> • Given name • Surname • Email Address 	

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This form may be presented with pre-populated information if Morgans has your details on file for this account.

You can edit this form and enter / correct your details and click on [APPLY NOW](#).

[Help](#)

The Morgans logo, featuring a stylized blue and green 'M' icon followed by the word 'morgans' in a blue sans-serif font.

Upgrade Account

Given Name*

Surname*

E-mail Address*

[APPLY NOW](#)

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3. Once you complete the mandatory fields and submit the form a confirmatory message that an email has been sent to the your nominated email address is displayed.

A screenshot of the Morgans website's 'Upgrade Account' confirmation page. The page has a dark blue header bar with a 'Help' link on the right. Below the header is a light grey banner containing the Morgans logo. The main content area is white and features a light grey box with the title 'Upgrade Account' and a message: 'An email has been sent to your email address. Please check your email and follow instructions.'

Help

morgans

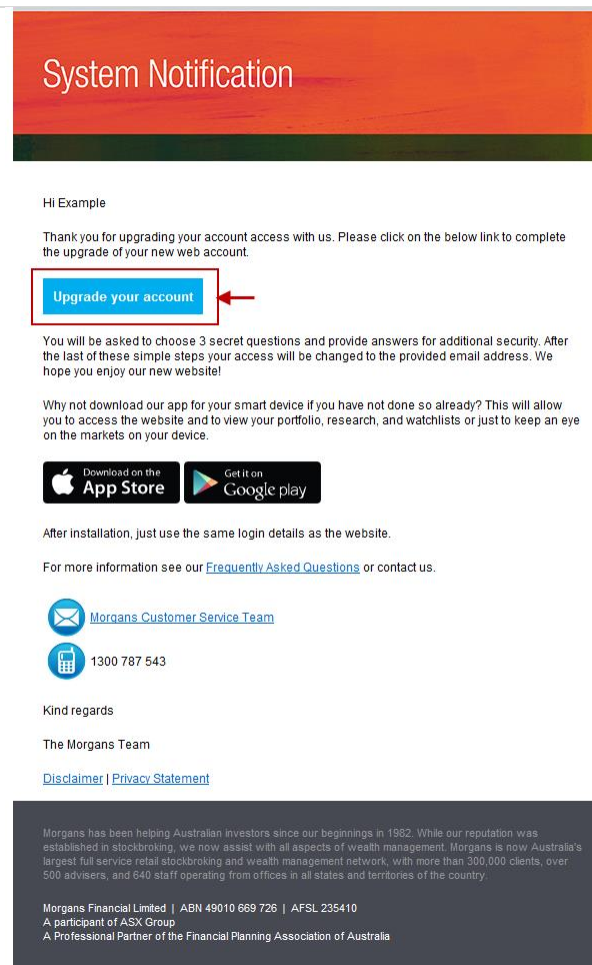
Upgrade Account

An email has been sent to your email address. Please check your email and follow instructions.

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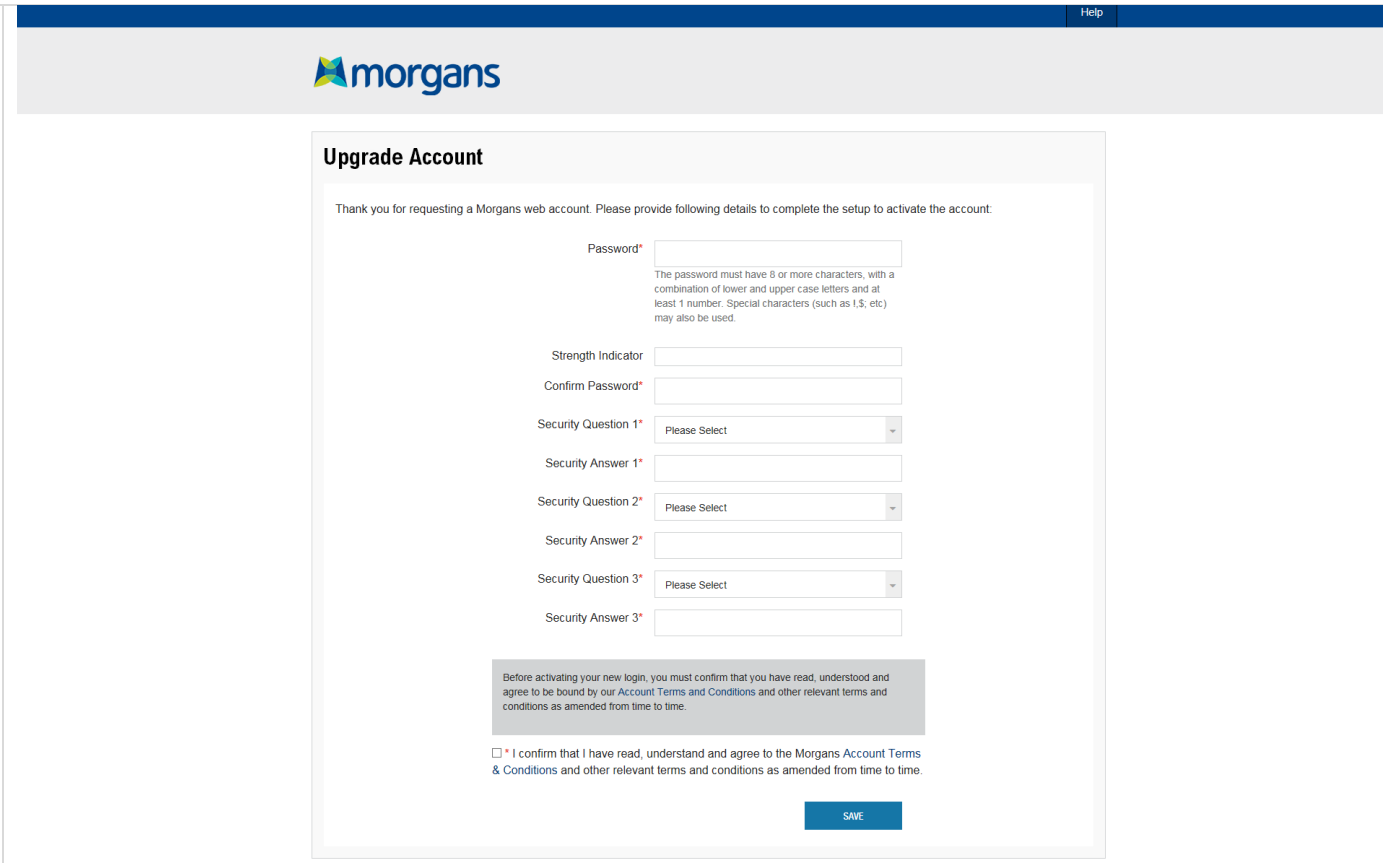

4. Check your nominated email address to open the email with the subject line 'Morgans Upgrade Confirmation' which would look similar to the one shown here.




5. Click on **Upgrade your account**. A new browser window opens displaying the following fields:

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<ul style="list-style-type: none"> • Password • Confirm password • Security Question 1 • Security Question 2 • Security Question 3 <p>While setting up your password please note that Password must have 8 or more characters, with a combination of lower and uppercase letters and at least 1 number. Special characters may also be used.</p> <p>6. Secret Questions are a standard set of questions, please ensure you provide unique answers to each question to avoid error messages.</p>	
<p>7. After completing all the mandatory field in the form click on</p> 	
<p>8. A confirmation message is displayed when the account has been upgraded.</p> <p>9. Click on 'here' to take you to the login page.</p>	

Help



Upgrade Account

Congratulations! Your account has been upgraded successfully. Please click [here](#) to login.

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10. Enter your emails address and password that you have setup.

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Find an Office

Local advisers near you

Login

Username

Use your email address after upgrading

Password

☐ Remember Login ID

LOGIN

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11. Once logged in you would be able to access your portfolio, markets, research & blogs, Watchlists, My account and My adviser information.

NOTE: You can access your account information via the morgans Client Connect app. Download it from the app store or google play and use the same email address and password to login as the website.

Welcome Joe DemoMessages (0)Log OutHelp

PORTFOLIO

MARKETS

RESEARCH & BLOGS

WATCHLISTS

MY ACCOUNT

MY ADVISER

Account Summary

Contract Notes

Transactions

Asset Allocation

Tax Gains/Losses

Reports

AEST: 14/11/2017 10:24AM (unit prices 20min delayed)

Portfolio

	Cost	Current Value	Change	Total F/Cast Gross Yield
Totals	\$1,169,036.06	\$2,701,250.25	\$1,532,214.19 (131.07%)	\$230,584.00 (8.54%)

Accounts

PRODUCTION TEST ACCOUNT 666666 - 2ND HIN A/C	\$329,143.70	\$1,573,347.44	\$1,244,203.74 (378.01%)	\$179,102.00 (11.38%)
INCOME MODEL PORTFOLIO 9900001	\$443,735.30	\$527,842.97	\$84,107.67 (18.95%)	\$29,350.00 (5.56%)
GROWTH MODEL PORTFOLIO 9900002	\$396,157.06	\$600,059.84	\$203,902.78 (51.47%)	\$22,132.00 (3.69%)

Tony Dennis
 Authorised Representative: 000259126
Director - Equities
 P: 07 3334 4887
 Brisbane Branch

EMAIL TONY

REQUEST A CALL

ADVISER BLOG

If you haven't already, download the new [MorgansLink](#) app.

Resetting forgotten password for unupgraded account

12. Click on **Forgot Password?** from the home page as shown.

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About Us

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- Community Support
- Our Alliance with CIMB
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Find an Office

Local advisers near you

Enter suburb or postcode...

Username: demo@example.com

Use your email address after upgrading

Password:

☐ Remember Login ID

LOGIN

[Request a web account](#) | [Request a trial account](#) | [Forgot Password?](#) | [Need Help?](#)

your pre-market briefing.

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13. Enter the account number in the User ID/Email field and click on

SUBMIT




Forgotten Password

User ID / E-Mail*

SUBMIT

14.

[Help](#)



Forgotten Password

Email sent to [REDACTED] To get back into your account, please follow the instructions we've sent to your email address.

Didn't receive the password reset email? Check your spam folder alternatively [try again](#).

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15. Open you email inbox and look for the email with subject line 'Morgans Reset Password Confirmation'

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Morgans

IN ALLIANCE WITH
CIMB

System Notification

Hi Example

We received a request to reset the password associated with this email.

If you made this request, please click the link below to reset your password.

Reset Password

The link within this message can be accessed until 29-Oct-2015 3:06 PM. It will then expire and no longer be valid.

If you have not requested any changes please contact your Adviser or our team between 8.00am and 4.30pm Monday to Friday (EST) to help you.

[Morgans Customer Service Team](#)

1300 787 543

Kind regards

The Morgans Team

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16. Click on **Reset Password** from the email and a new browser window opens with the form to enter new password and confirm password.

Click **SUBMIT** to submit the form to set the new password.



The screenshot shows the Morgans website's 'Reset Password' form. At the top, there is a dark blue header with the Morgans logo and 'IN ALLIANCE WITH CIMB' on the left, and a 'Help' link on the right. Below the header, the page has a light gray background. The main content area is titled 'Reset Password' and contains three input fields: 'New Password*', 'Strength Indicator', and 'Confirm Password*'. Each field has a corresponding label to its left. Below these fields is a blue 'SUBMIT' button.

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17. A confirmation is displayed on screen that the password has been reset. You can click 'here' to go to the login page.

Enter your email address and password to login.

		Help
<div><small>IN ALLIANCE WITH</small> </div>		
<h3>Reset Password</h3>		
<p>Thank you, your password has been reset successfully. Please click here to login.</p>		