



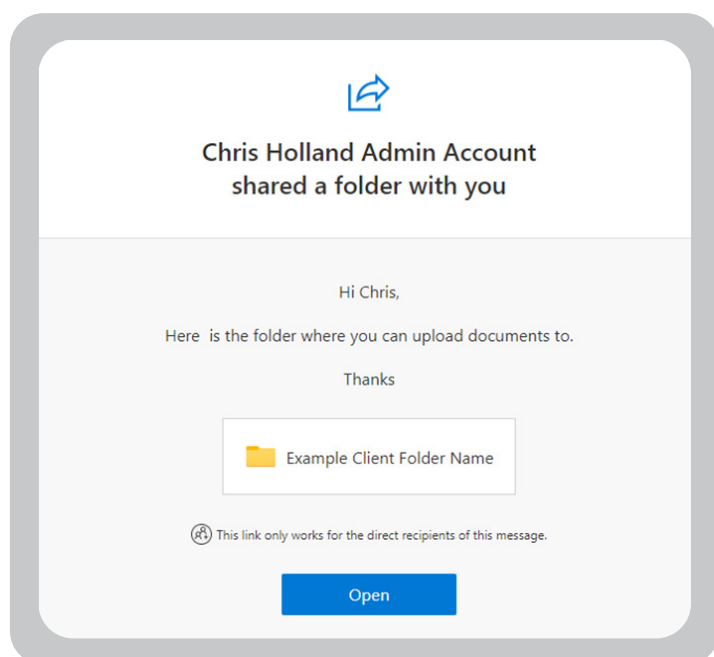
CPAL External Secure Document Portal - Access Instructions

The Document Portal is a central publicly available SharePoint site where CPAL staff will securely share documents with CPAL clients (Advisers and their staff) and vice versa. The document portal is the preferred method of secure sharing of documents.

There is a single folder for each Practice/Account within the SharePoint Document Portal. You will have access to your practice folder. There are 2 ways to access the folder, depending on your email account:

- [Microsoft associated account access](#)
- [Non Microsoft associated account access](#)

How to Access With a Microsoft Associated Account

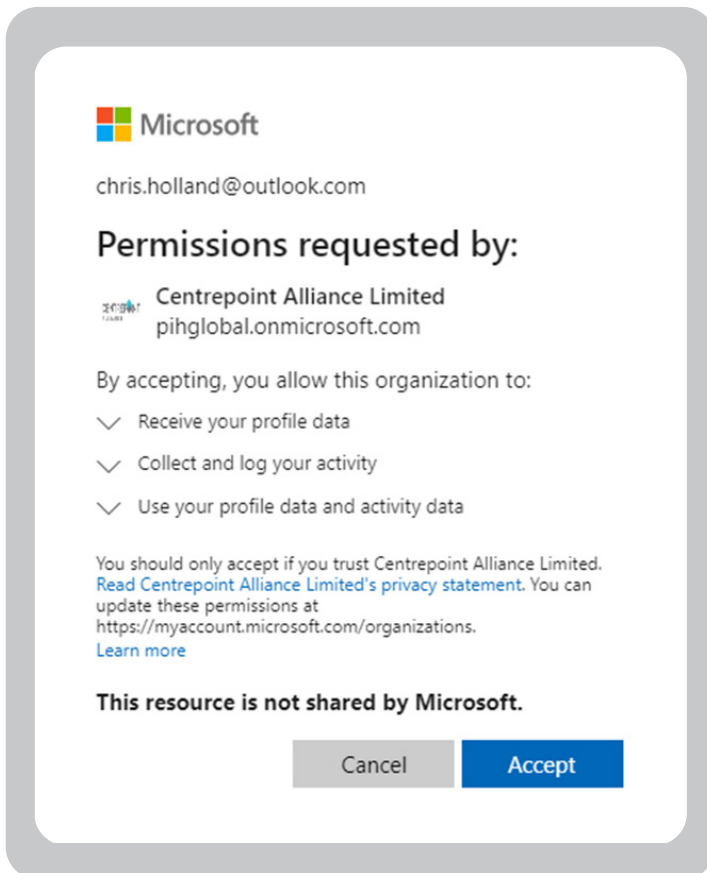
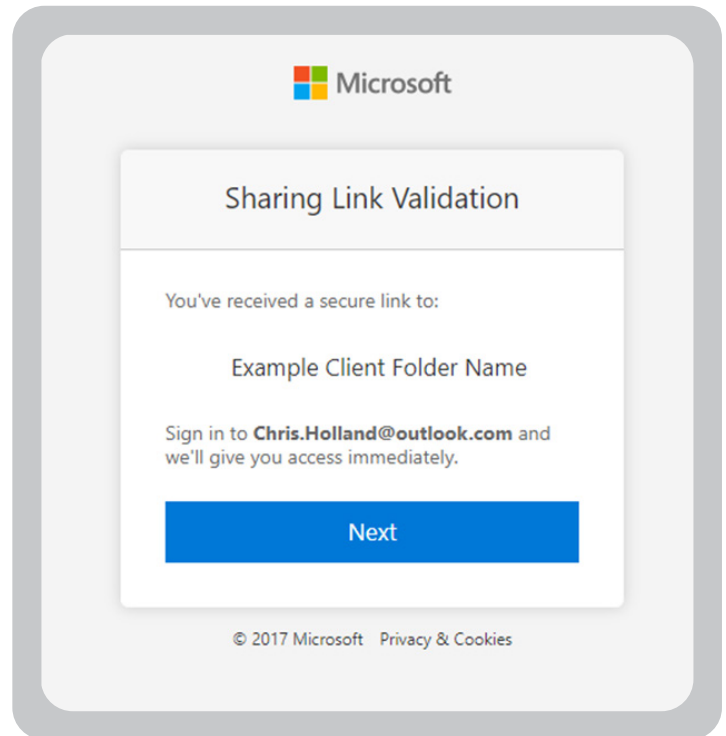


1.

Once the folder has been shared with you, you will receive an email similar to this.

2.

When you click 'Open' you will be presented with a login screen.

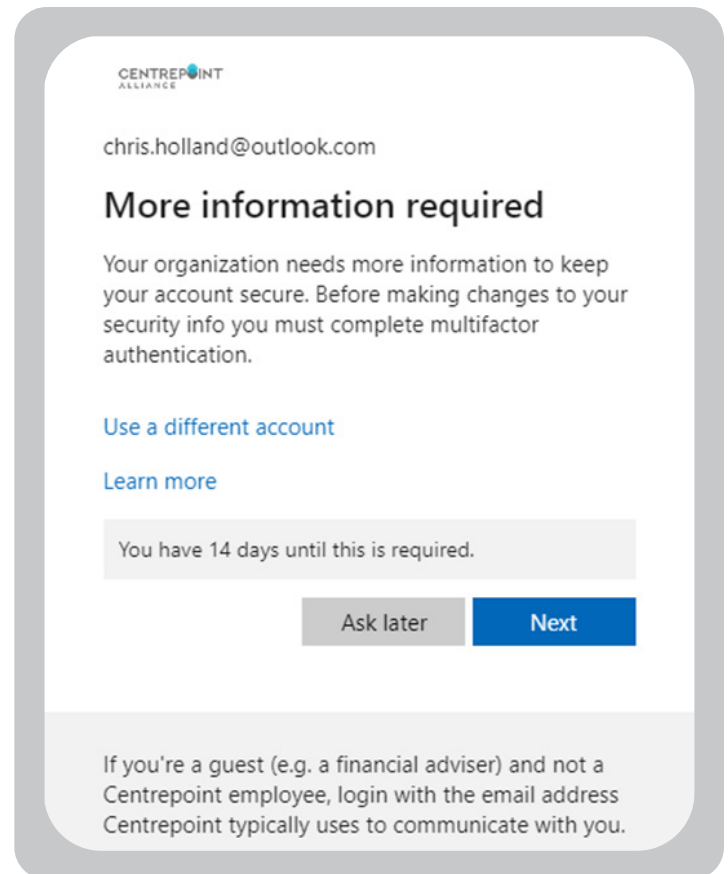


3.

If your email address is a Microsoft 365, Microsoft Outlook, or another email address that has a Microsoft account attached to it, you will be prompted to allow Centrepont Alliance Limited to use their account to login to our SharePoint site.

4.

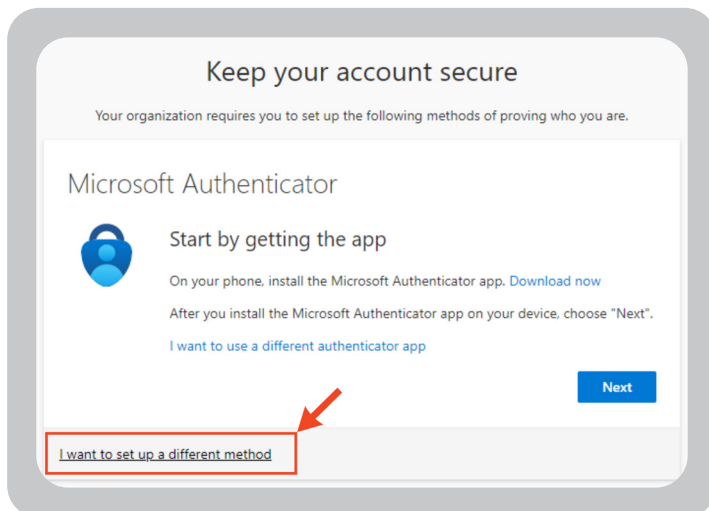
After clicking 'Accept,' you will be required to set up Multi Factor Authentication.



The screenshot shows a dialog box titled "More information required" with the email address "chris.holland@outlook.com" at the top. Below the title, a message states: "Your organization needs more information to keep your account secure. Before making changes to your security info you must complete multifactor authentication." There are two links: "Use a different account" and "Learn more". A grey box indicates "You have 14 days until this is required." At the bottom right are two buttons: "Ask later" and "Next". A footer note says: "If you're a guest (e.g. a financial adviser) and not a Centrepont employee, login with the email address Centrepont typically uses to communicate with you."

5.

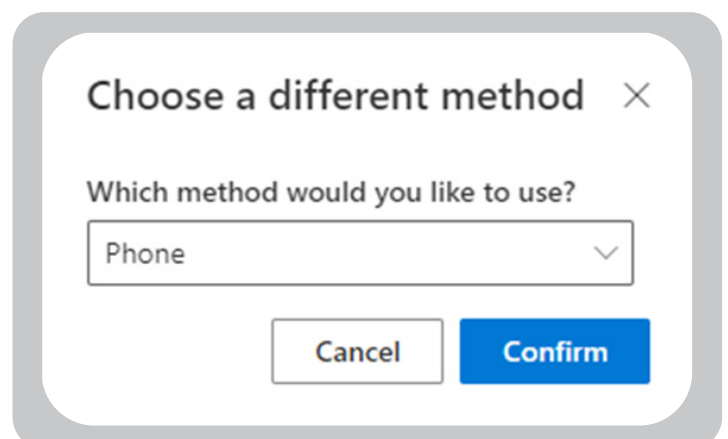
After clicking 'Next,' you will need to choose a secondary authentication method that will be required to login to Centrepont's SharePoint. For example, Setup SMS as a second authentication method.



The screenshot shows a dialog box titled "Keep your account secure" with the subtext "Your organization requires you to set up the following methods of proving who you are." The main heading is "Microsoft Authenticator". Below it, there is a blue shield icon and the text "Start by getting the app". Further instructions say: "On your phone, install the Microsoft Authenticator app. [Download now](#). After you install the Microsoft Authenticator app on your device, choose 'Next'." There is a link "I want to use a different authenticator app" and a "Next" button. At the bottom, a link "I want to set up a different method" is highlighted with a red box and a red arrow points to it.

6.

Select 'Phone' from the dropdown list and then select confirm.



The screenshot shows a dialog box titled "Choose a different method" with a close button (X) in the top right. The question is "Which method would you like to use?". Below the question is a dropdown menu with "Phone" selected. At the bottom are two buttons: "Cancel" and "Confirm".

7.

Choose 'Australia' for the country, enter your mobile number, select 'Text me a code' and then click 'Next.'

8.

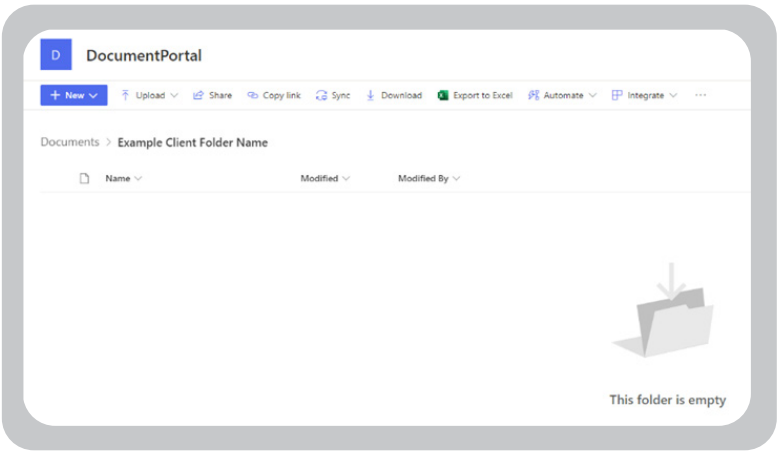
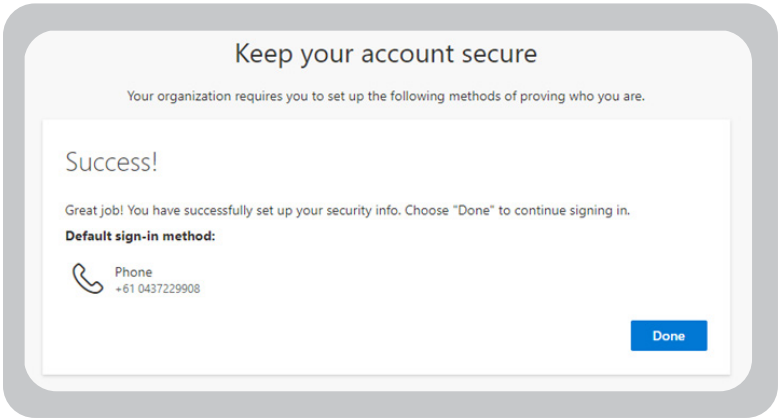
Enter the code from the SMS message and select "Next."

9.

You will get a notification that SMS authentication was registered successfully.

10.

Select 'Done' on the Success window.

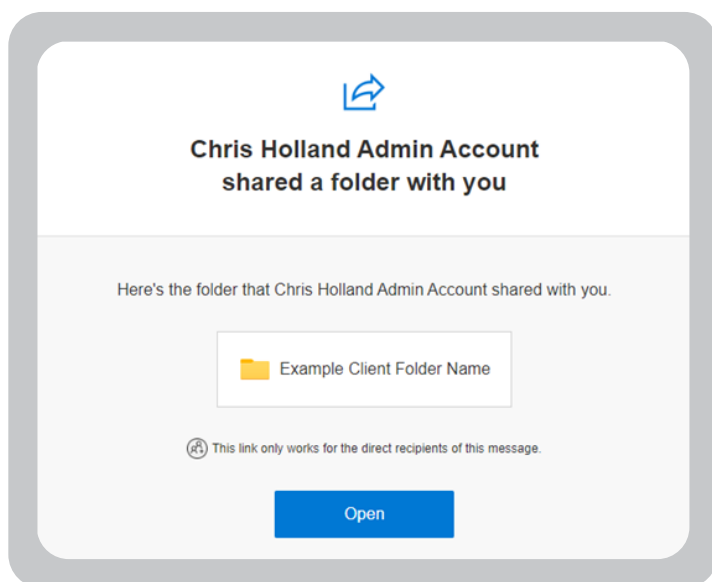


11.

You now have access to the shared folder.

How to Access With a Non-microsoft Associated Account

If you have an email address that is not a Microsoft 365, Microsoft Outlook or another email address that has a Microsoft account attached to it, for example, Google Gmail, the process is slightly different as the email address must be verified via One Time Code first.

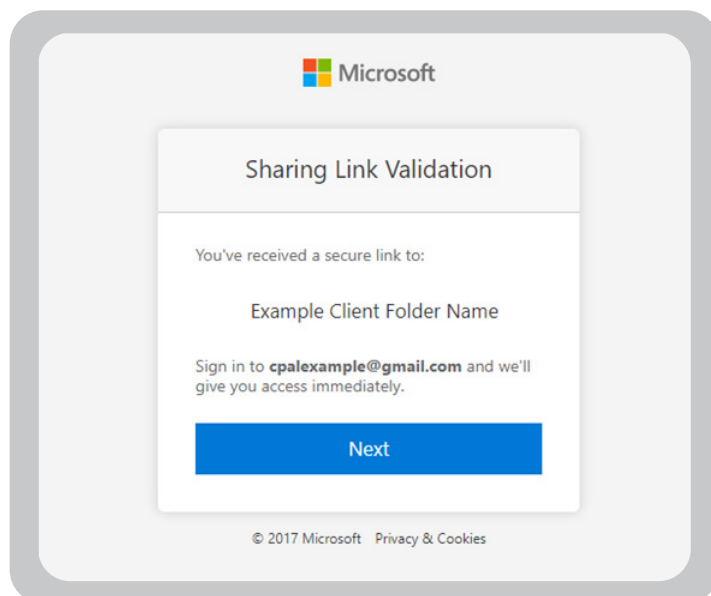


1.

You will receive an email stating that a folder has been shared with you.

2.

Once you select 'Open' you will see this screen.





cpalexample@gmail.com

Sign in

We'll send a code to cpalexample@gmail.com to sign you in.

Send code

3.

As the email address is not linked to any Microsoft services, the only way to complete the verification of the address is via a code that is sent to the email address.

4.

The code will be sent to the email address.

Your Centrepoint Alliance Limited account verification code ✕

Centrepoint Alliance Limited (via Microsoft) <account-security-noreply@accountprotection.microsoft.com>
to me

Centrepoint Alliance Limited

Account verification code

To access Centrepoint Alliance Limited's apps and resources, please use the code below for account verification. The code will only work for 30 minutes.

Account verification code:

89896246

If you didn't request a code, you can ignore this email.

← Reply

→ Forward



← cpalexample@gmail.com

Enter code

We just sent a code to cpalexample@gmail.com

89896246


Sign in

5.

Enter the code into the window.


6.

Once you have selected 'Sign In,' you will need to set up the Multi Factor Authentication. You will be prompted to allow Centrepont Alliance Limited to use their account to login to our SharePoint site.

 Microsoft

chris.holland@outlook.com

Permissions requested by:

 Centrepont Alliance Limited
pihglobal.onmicrosoft.com

By accepting, you allow this organization to:

✓

 Receive your profile data

✓

 Collect and log your activity

✓


 Use your profile data and activity data

You should only accept if you trust Centrepont Alliance Limited. [Read Centrepont Alliance Limited's privacy statement](#). You can update these permissions at <https://myaccount.microsoft.com/organizations>. [Learn more](#)

This resource is not shared by Microsoft.

Cancel

Accept

 CENTREPONT ALLIANCE

chris.holland@outlook.com

More information required

Your organization needs more information to keep your account secure. Before making changes to your security info you must complete multifactor authentication.

[Use a different account](#)

[Learn more](#)

You have 14 days until this is required.

Ask later

Next

If you're a guest (e.g. a financial adviser) and not a Centrepont employee, login with the email address Centrepont typically uses to communicate with you.

7.

After clicking 'Accept' you will be required to set up Multi Factor Authentication.

8.

After clicking 'Next,' you will need to choose a secondary authentication method that will be required to login to Centrepont's SharePoint. For example, set up SMS as a second authentication method.

Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Microsoft Authenticator

Start by getting the app

On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose "Next".

[I want to use a different authenticator app](#)

[Next](#)

[I want to set up a different method](#)

9.

Select 'Phone' from the dropdown list and select 'Confirm.'

Choose a different method ✕

Which method would you like to use?

Phone ▾

[Cancel](#) [Confirm](#)

Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Phone

You can prove who you are by answering a call on your phone or texting a code to your phone.

What phone number would you like to use?

Australia (+61) 0437729908

☒ Text me a code

☐ Call me

Message and data rates may apply. Choosing Next means that you agree to the [Terms of service](#) and [Privacy and cookies statement](#).

[Next](#)

[I want to set up a different method](#)

10.

Choose 'Australia' for the country, enter your mobile number, select 'Text me a code' and select 'Next.'

Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Phone

We just sent a 6 digit code to +61 0437229908. Enter the code below.

833905

[Resend code](#)

[Back](#) [Next](#)

[I want to set up a different method](#)

11.

Enter the code from the SMS message and select 'Next.'

12.

You will get a notification that SMS authentication was registered successfully.

Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Phone

✓ SMS verified. Your phone was registered successfully.

[Next](#)

Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Success!

Great job! You have successfully set up your security info. Choose "Done" to continue signing in.

Default sign-in method:

Phone
+61 0437229908

[Done](#)

13.

Select 'Next,' then 'Done' on the Success window.

14.


You now have access to the shared folder.

DocumentPortal

+ New Upload Share Copy link Sync Download Export to Excel Automate Integrate

Documents > Example Client Folder Name

Name	Modified	Modified By
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This folder is empty