

Client Portal

USER GUIDE

INSTRUCTION

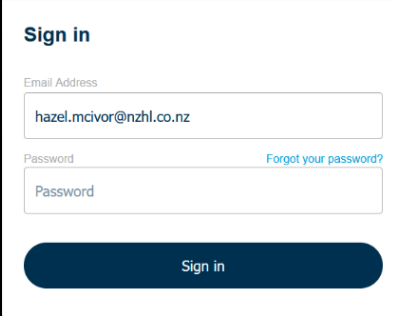
This user guide will help you navigate and use the DebtNav Client Portal.

Log In	2
Log Out	2
Bookmark Website - Windows User	3
Bookmark Website - Mac User	3
Forgot Password	4
Change Password	5
Add a Goal	6
Edit a Goal	6
Delete a Goal	6
Saving Plan	6
Set Target	7
Manage Saved Plan	7
Add an Income	8
Edit an Income	8
Delete a change in Income	8
Add an Expense	9
Edit an Expense	9
Edit a past dated Income / Expense	10
Add Insurance	11

Have a mortgage & a life.

Log In

- 1 Enter username and temporary password received via the email.
- 2 Click Sign in.



Sign in

Email Address

hazel.mcivor@nzhl.co.nz

Password [Forgot your password?](#)

Password

Sign in

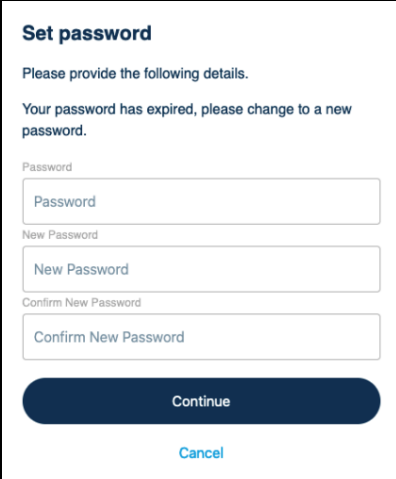
- 3 Enter the temporary password from the email.
- 4 Enter a new password, then reenter to confirm.

DebtNav uses Microsoft's default strong password policy.

This policy enforces that a password is between 8 and 64 characters and has at least three of the following:

- Uppercase letter
- Lowercase letter
- Number
- Symbol

- 5 Click Continue.



Set password

Please provide the following details.

Your password has expired, please change to a new password.

Password

Password

New Password

New Password

Confirm New Password

Confirm New Password

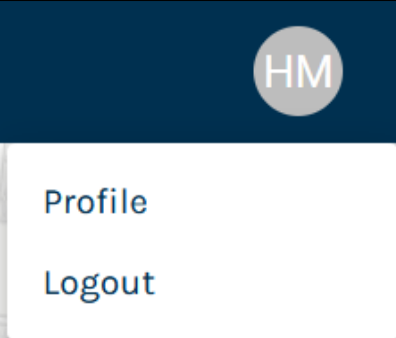
Continue

[Cancel](#)

menu

Log Out

- 1 Click on the setting icon at the top right of your screen.
- 2 Click Logout from the drop- down menu.



HM

Profile

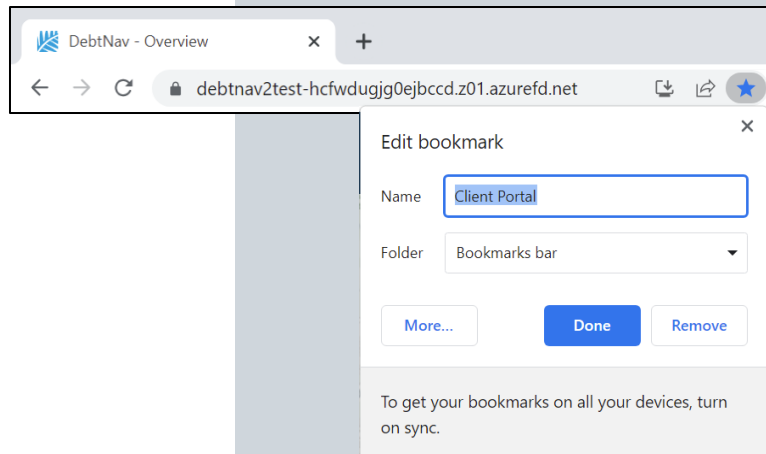
Logout

menu

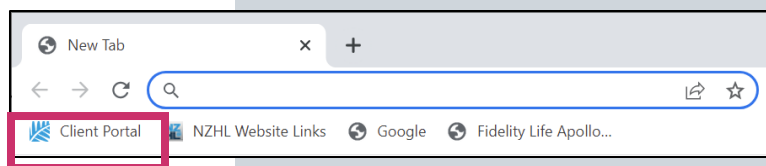
Bookmark Website - Windows

CTRL + D

- 1 Click on the star icon.
- 2 Enter name you will remember it by.
- 3 Select location, either in a folder or visual on the bookmark bar.



- 4 Click Done
When you open a new browser window the new link to client portal is visual on the bookmark bar.

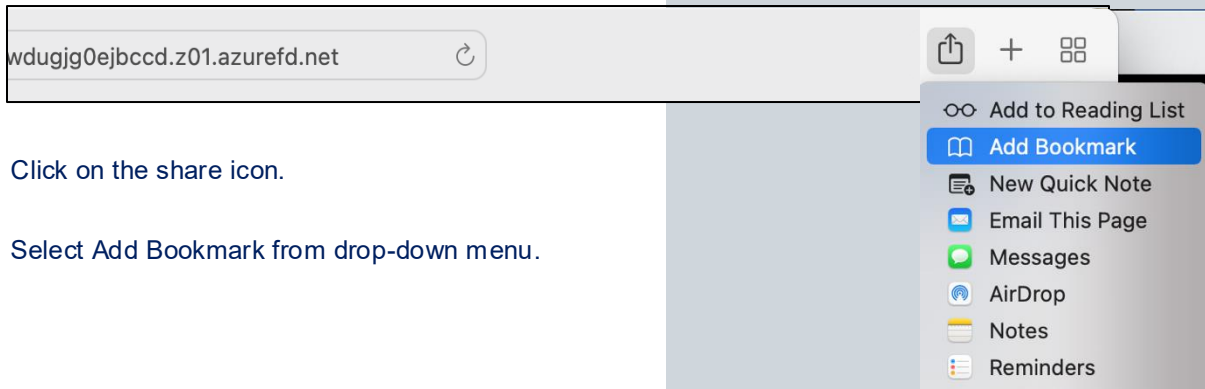


menu

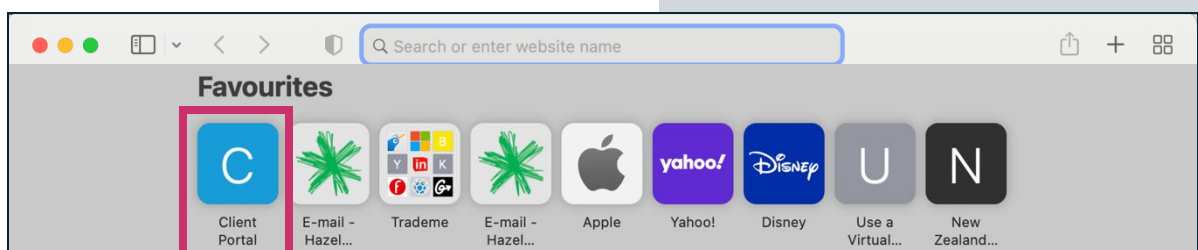
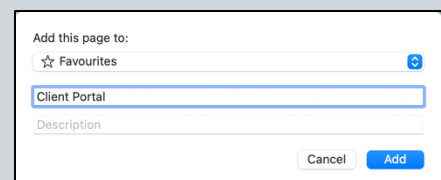
Bookmark Website - Mac

command + D

- 1 Click on the share icon.
- 2 Select Add Bookmark from drop-down menu.



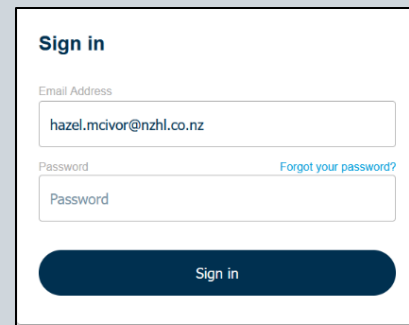
- 3 Enter name you will remember it by.
- 4 Click Add
When you open a new browser window the new link to client portal is visual under Favourites.



menu

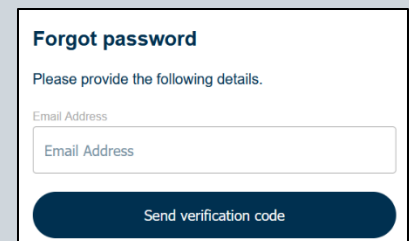
Forgot Password

- 1 From the login screen, click Forgot your password.



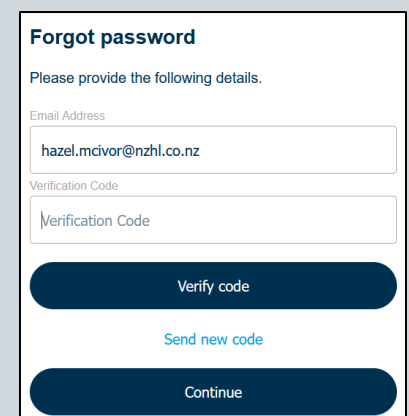
The 'Sign in' screen features a title 'Sign in' at the top. Below it is an 'Email Address' field containing 'hazel.mcivor@nzhl.co.nz'. Underneath is a 'Password' field with a 'Forgot your password?' link to its right. At the bottom is a dark blue 'Sign in' button.

- 2 Enter your email address.
- 3 Click Send verification code.



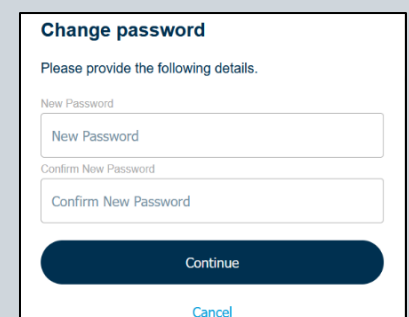
The 'Forgot password' screen has the title 'Forgot password' and the instruction 'Please provide the following details.' Below this is an 'Email Address' field. At the bottom is a dark blue 'Send verification code' button.

- 4 Enter verification code from email.
- 5 Click Verify Code.
- 6 Click Continue.



This 'Forgot password' screen is identical to the previous one but includes a 'Verification Code' field below the email field. It features a dark blue 'Verify code' button, a 'Send new code' link, and a dark blue 'Continue' button at the bottom.

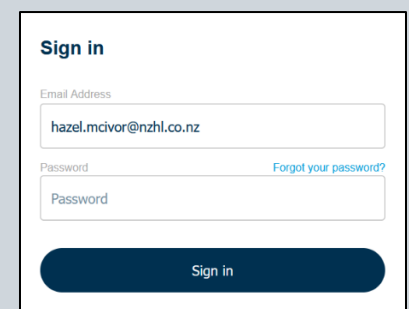
- 7 Enter in new password.
DebtNav uses Microsoft's default strong password policy. This policy enforces that a password is between 8 and 64 characters and has at least three of the following:
 - Uppercase letter
 - Lowercase letter
 - Number
 - Symbol



The 'Change password' screen has the title 'Change password' and the instruction 'Please provide the following details.' It contains two fields: 'New Password' and 'Confirm New Password'. At the bottom are a dark blue 'Continue' button and a 'Cancel' link.

- 8 Re-enter password to confirm.
- 9 Click Continue.

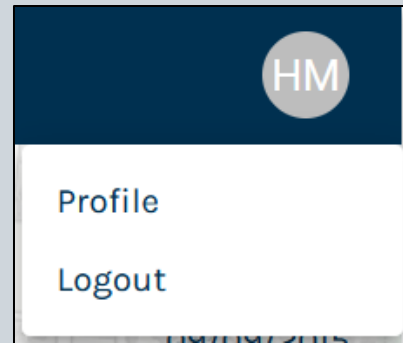
- 10 The client login screen will appear.
Enter in new password.
- 11 Click Sign in.



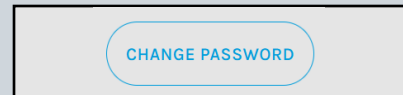
This 'Sign in' screen is identical to the first one, showing the 'Sign in' title, email field with 'hazel.mcivor@nzhl.co.nz', password field, 'Forgot your password?' link, and the 'Sign in' button.

Change Password

- 1 Click on the setting icon at the top right of your screen.
- 2 Click Profile from the drop-down menu.



- 3 Click change password.



- 4 Enter in their email address.
- 5 Click Send Verification code.

A screenshot of a mobile app interface for the 'Forgot password' screen. The title 'Forgot password' is in dark blue. Below it, the text 'Please provide the following details.' is in a smaller font. There is a label 'Email Address' above a white text input field. The input field contains the text 'Email Address'. Below the input field is a dark blue button with the text 'Send verification code' in white.

- 6 The Verification Code field appears.
Enter the code you received via email.
- 7 Click Verify code.
- 8 Click Continue.

A screenshot of a mobile app interface for the 'Forgot password' screen. The title 'Forgot password' is in dark blue. Below it, the text 'Please provide the following details.' is in a smaller font. There is a label 'Email Address' above a white text input field containing 'hazel.mcivor@nzhl.co.nz'. Below this is a label 'Verification Code' above another white text input field. Below the input fields are two dark blue buttons: 'Verify code' and 'Continue'. A link 'Send new code' in blue text is positioned between the two buttons.

- 9 Enter in new password.
DebtNav uses Microsoft's default strong password policy. This policy enforces that a password is between 8 and 64 characters and has at least three of the following:
 - Uppercase letter
 - Lowercase letter
 - Number
 - Symbol

A screenshot of a mobile app interface for the 'Change password' screen. The title 'Change password' is in dark blue. Below it, the text 'Please provide the following details.' is in a smaller font. There is a label 'New Password' above a white text input field. Below this is a label 'Confirm New Password' above another white text input field. Below the input fields are two dark blue buttons: 'Continue' and 'Cancel'.

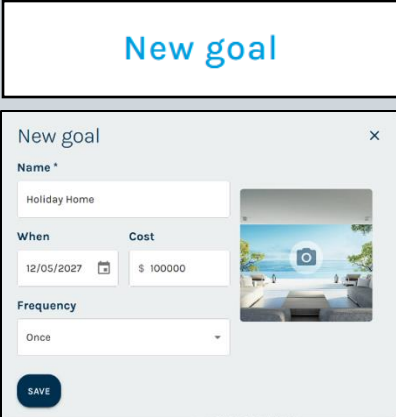
- 10 Re-enter password to confirm.
- 11 Click Continue.

A screenshot of a mobile app interface for the 'Sign in' screen. The title 'Sign in' is in dark blue. Below it, the text 'Please provide the following details.' is in a smaller font. There is a label 'Email Address' above a white text input field containing 'hazel.mcivor@nzhl.co.nz'. Below this is a label 'Password' above another white text input field. To the right of the password input field is a link 'Forgot your password?' in blue text. Below the input fields is a dark blue button with the text 'Sign in' in white.

- 12 The client login screen will appear.
Enter in new password.
- 13 Click Sign in.

Add a Goal

- 1 Click New Goal on the Projection screen.
- 2 Enter the name of goal.
- 3 Select the date.
- 4 Enter the amount for the goal.
Only numeric entry.
- 5 Select the frequency.
- 6 Click Add photo
- 7 Select photo. Click Open *(if selecting from your own camera roll)*.
- 8 Click Save.



The 'New goal' form is a modal window with a close button (X) in the top right. It contains the following fields: 'Name *' with the text 'Holiday Home'; 'When' with a date picker showing '12/05/2027'; 'Cost' with a text input showing '\$ 100000'; and 'Frequency' with a dropdown menu showing 'Once'. There is a 'SAVE' button at the bottom left and a photo of a beach house on the right.

menu

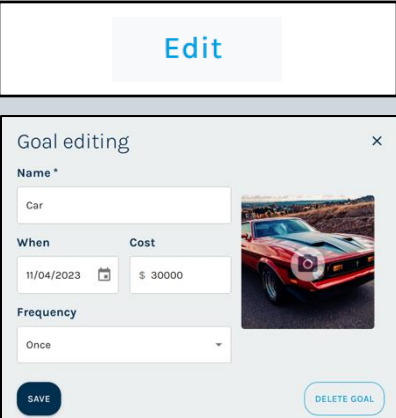
Edit / Delete a Goal

Edit

- 1 Click Edit. Make changes.
- 2 Click Save.

Delete

- 1 Select goal you want to delete.
- 2 Click Edit.
- 3 Click Delete Goal.




The 'Goal editing' form is a modal window with a close button (X) in the top right. It contains the following fields: 'Name *' with the text 'Car'; 'When' with a date picker showing '11/04/2023'; 'Cost' with a text input showing '\$ 30000'; and 'Frequency' with a dropdown menu showing 'Once'. There is a 'SAVE' button at the bottom left and a 'DELETE GOAL' button at the bottom right. A photo of a red sports car is on the right.

menu

Hide / Show a Goal

- 1 Click hide to remove goal from graph
- 2 Click show to add it to the graph

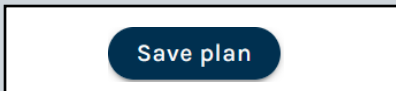


A horizontal button bar containing two buttons: 'Hide' and 'Show'.

menu

Saving Plan

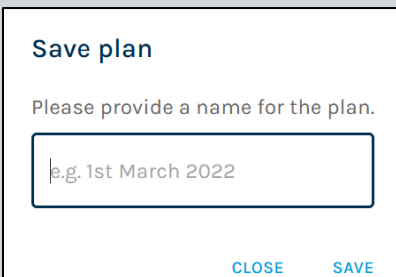
- 1 Click Save Plan



A single button labeled 'Save plan'.

- 2 Enter name for the plan
- 3 Click Save

A green message will pop up saying
Plan Saved Successfully.



The 'Save plan' form is a modal window with a title 'Save plan'. Below the title is the text 'Please provide a name for the plan.' followed by a text input field containing 'e.g. 1st March 2022'. At the bottom right are two buttons: 'CLOSE' and 'SAVE'.

menu

Set Target

- 1 When you update the plan, you may wish to reset the target line so that the graph correctly represents the correct target.
- 2 When you click on Set Target, this message will appear in the bottom right corner of your screen.

Set target

✓ Target updated successfully! ✕

menu

Manage Saved Plans

- 1 Click the drop-down menu
- 2 Click on the tick of the plan you want to view

🔄 22 May 2022 ▾

Switch to plan



22 May 2022



26 April 2022



- 3 Switch to plan message will appear.
If you are happy to proceed, click OK.

Switch to plan

You are switching to a previous version. Changes made to this version will be lost. Press ok to proceed, or cancel and Save Plan before switching.

CANCEL

OK

Click the pencil to edit the name of plan

Click the bin to delete plan

Switch to plan



22 May 2022




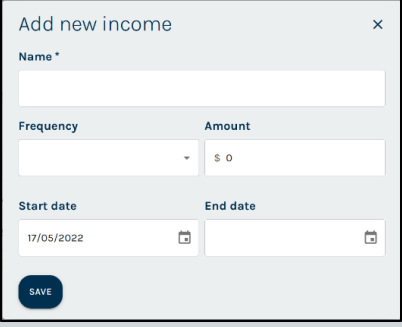
26 April 2022



menu

Add Income

- 1 Click the  icon next to Income.
- 2 Enter the name of the person who is receiving the income.
- 3 Click on the drop-down menu to select the frequency of income.
- 4 Enter the amount.
- 5 Click on the calendar icon to select the date the income started.
You cannot enter a past start date.
If you know the end date of income, enter this in, otherwise leave blank.
- 6 Click Save.



Add new income

Name *

Frequency

Amount

Start date

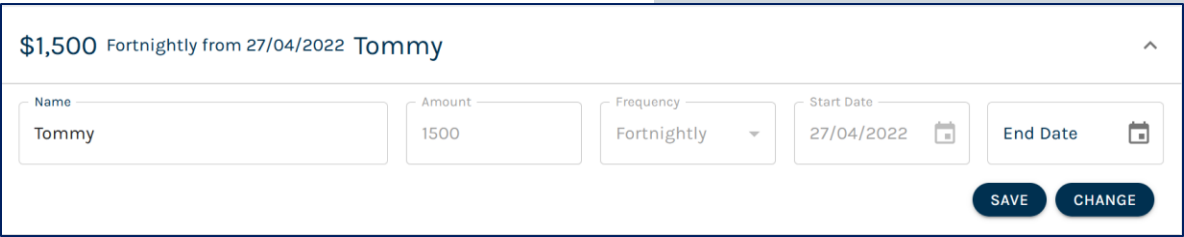
End date

SAVE

menu

Edit Income

- 1 Open the income panel for the income you want to change.
- 2 Click Change.



\$1,500 Fortnightly from 27/04/2022 Tommy

Name Tommy

Amount 1500

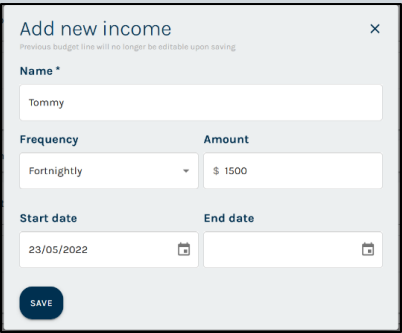
Frequency Fortnightly

Start Date 27/04/2022

End Date

SAVE CHANGE

- 3 Enter in the amendments required.
- 4 Click save.



Add new income

Previous budget line will no longer be editable upon saving

Name *

Tommy

Frequency

Amount

Start date

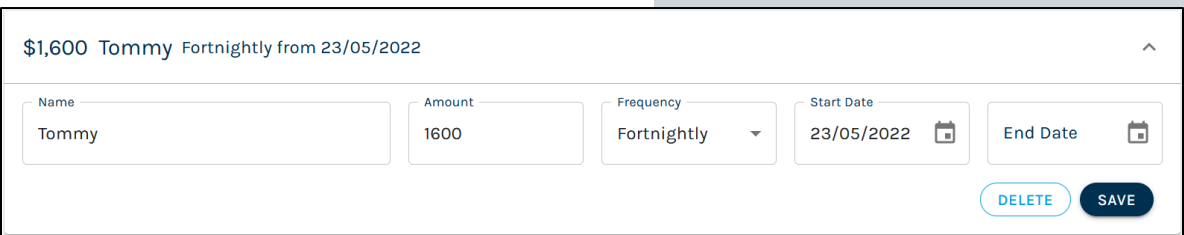
End date

SAVE

menu

Delete Change

- 1 You can delete a change to income or expenses if it's in the future.
There will be a delete option available.



\$1,600 Tommy Fortnightly from 23/05/2022

Name Tommy

Amount 1600

Frequency Fortnightly


Start Date 23/05/2022

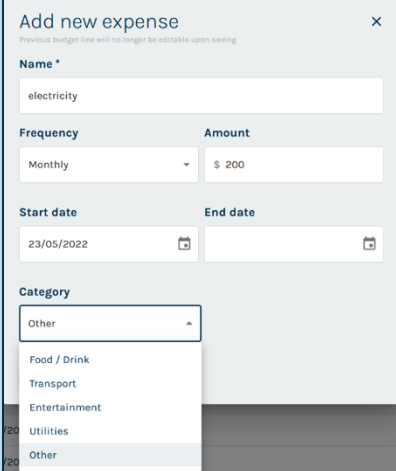
End Date

DELETE SAVE

menu

Add Expense

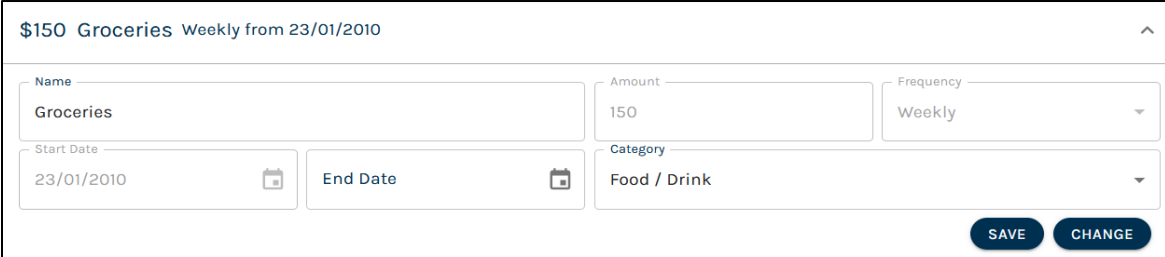
- 1 Click the  icon.
- 2 Enter the name of the expense.
- 3 Click on the drop-down menu to select the frequency of expense.
- 4 Enter the amount.
- 5 Click on the calendar icon to select the date the expense started. You cannot enter a past start date.
If you know the end date of expense, enter this in, otherwise leave blank.
- 6 Select from the drop-down menu the expense category.
- 7 Click Save.



menu

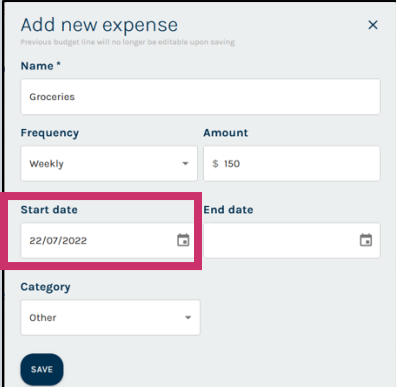
Edit Expense

- 1 Click on the drop-down arrow for the income/expense you want to change.
- 2 Click on Change.



The start date will default to today's date. Change the start date to the next time your income / this expense will be paid.

- 3 Amend any other fields as required.
- 4 Click Save.



menu

Editing a Past Dated Income / Expense

\$5,900 Billy's Income Monthly from 28/07/2021

Name

Billy's Income

Amount

5900

Frequency

Monthly

Start Date

28/07/2021

End Date

SAVE

CHANGE

\$150 Groceries Weekly from 23/01/2010

Name

Groceries

Amount

150

Frequency

Weekly

Start Date

23/01/2010

End Date

Category

Food / Drink

SAVE

CHANGE

The functions are the same for both income and expense.

You can only edit Name and End Date.
The category field in expenses is also editable.

If you need to amend the amount, frequency or start date, follow these steps.

- 1 Click on the drop-down arrow for the income/expense you want to change.
- 2 Click on Change.

\$960 Simon Weekly from 20/05/2022

Name

Simon

Amount

960

Frequency

Weekly

Start Date

20/05/2022

End Date

SAVE

CHANGE

The start date will default to today's date. Change the start date to the next time your income / this expense will be paid.

Add new income

Name *

Simon

Frequency

Weekly

Amount

\$ 1010

Start date

22/07/2022

End date

SAVE

- 3 Amend any other fields as required.
- 4 Click Save.

Editing a Past Dated Income / Expense... cont.

\$960 Simon Weekly from 20/05/2022

Name	Simon	Amount	960	Frequency	Weekly
Start Date	20/05/2022	End Date	21/07/2022		

SAVE CHANGE

Once you press Save on the pop-up window, the old line will have an End Date of today and the new line will be added to the Plan.

\$1,010 Simon Weekly from 22/07/2022

\$1,010 Simon Weekly from 22/07/2022

Name	Simon	Amount	1010	Frequency	Weekly
Start Date	22/07/2022	End Date			

DELETE SAVE

menu

Add Insurance

- 1 Click the  icon.

● Insurances



- 2 Enter the name of insurance.
- 3 Click on the drop-down menu to select the frequency of insurance payment.
- 4 Enter the amount.
- 5 Click on the calendar icon to select the date the insurance payment started.

If you know the end date of insurance payment, enter this in, otherwise leave blank.

- 6 Click Save.

Add new insurance

Name *

Frequency

Amount

Start date

End date

SAVE

menu