

Client Portal

USER GUIDE

INSTRUCTION

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

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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

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

New Password

Confirm New Password

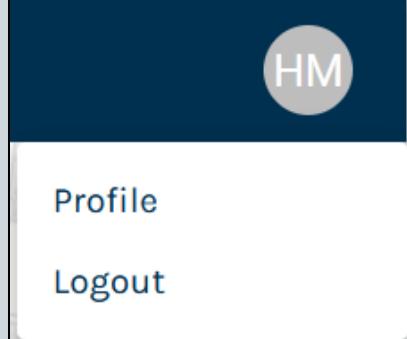
Continue

Cancel

menu

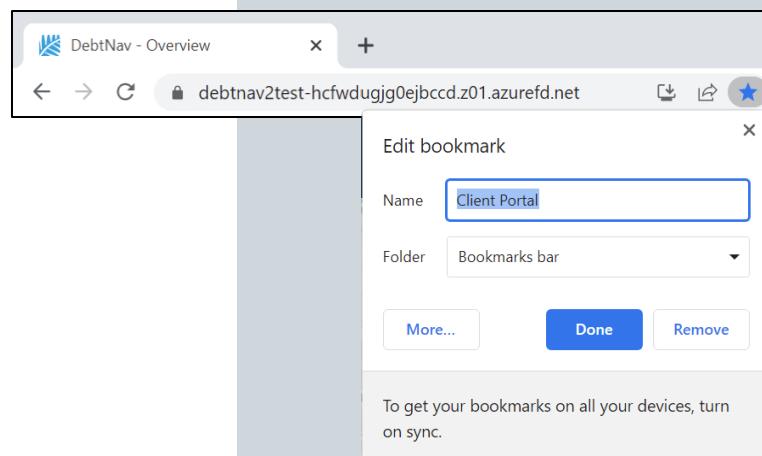
Log Out

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

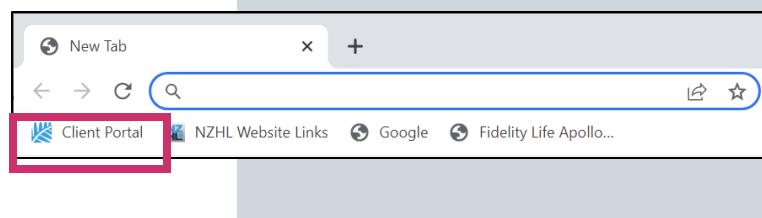


Bookmark Website - Windows

- 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.

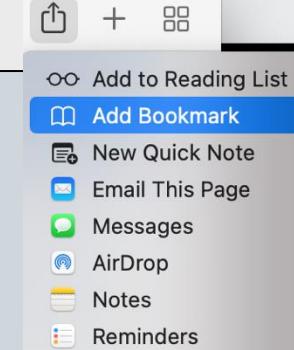


- 4 Click Done
When you open a new browser window the new link to client portal is visual on the bookmark bar.

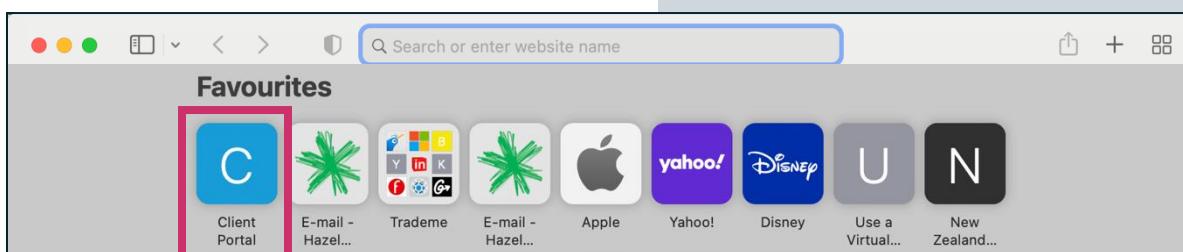


Bookmark Website - Mac

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

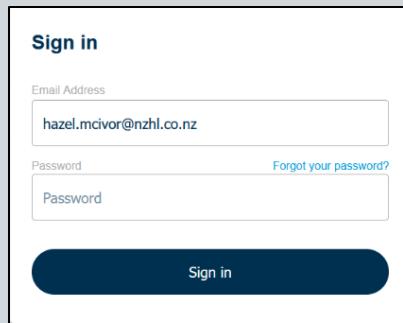


- 3 Enter name you will remember it by.
- 4 Click Add
When you open a new browser window the new link to client portal is visual under Favourites.



Forgot Password

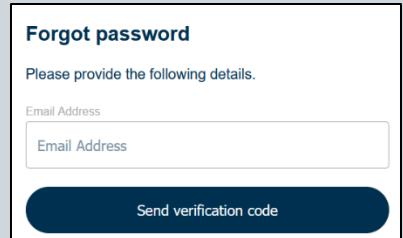
1 From the login screen, click Forgot your password.



The image shows a 'Sign in' form with fields for 'Email Address' (hazel.mcivor@nzhl.co.nz) and 'Password'. A blue link 'Forgot your password?' is located to the right of the password field.

2 Enter your email address.

3 Click Send verification code.

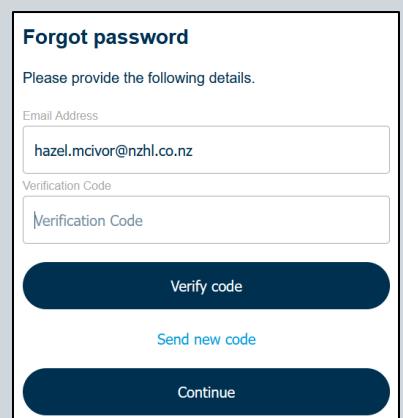


The image shows a 'Forgot password' form with a single 'Email Address' field. A blue 'Send verification code' button is at the bottom.

4 Enter verification code from email.

5 Click Verify Code.

6 Click Continue.



The image shows a 'Forgot password' form with fields for 'Email Address' (hazel.mcivor@nzhl.co.nz) and 'Verification Code'. It includes a 'Verify code' button, a 'Send new code' link, and a 'Continue' button.

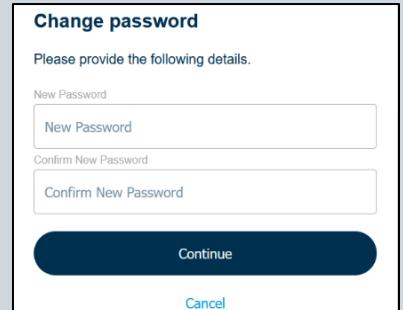
7 Enter in new password.

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

8 Re-enter password to confirm.

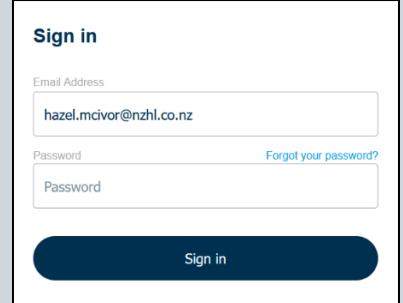
9 Click Continue.



The image shows a 'Change password' form with fields for 'New Password' and 'Confirm New Password'. It includes a 'Continue' button and a 'Cancel' link.

10 The client login screen will appear.
Enter in new password.

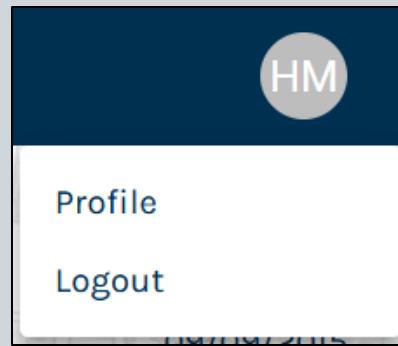
11 Click Sign in.



The image shows a 'Sign in' form with fields for 'Email Address' (hazel.mcivor@nzhl.co.nz) and 'Password'. A blue link 'Forgot your password?' is located to the right of the password field.

Change Password

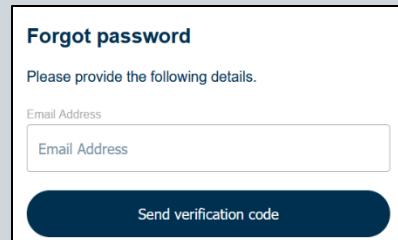
- 1 Click on the setting icon at the top right of your screen.
- 2 Click Profile from the drop-down menu.



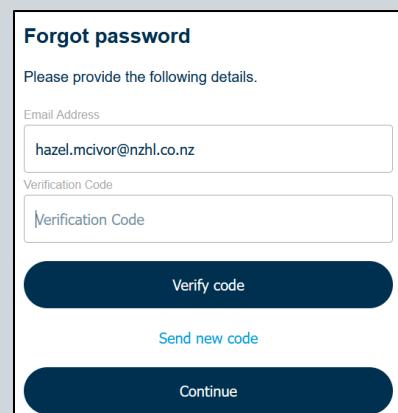
- 3 Click change password.



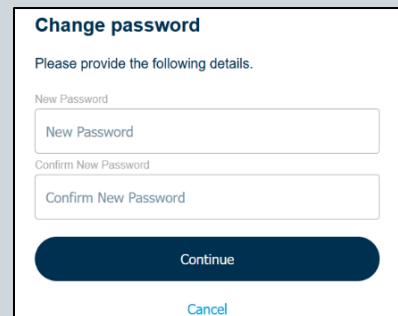
- 4 Enter in their email address.
- 5 Click Send Verification code.



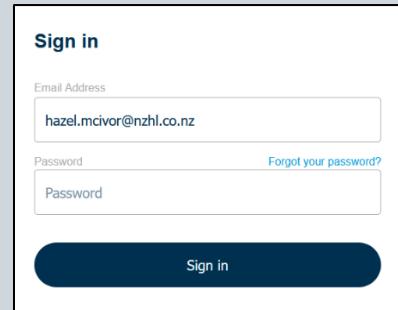
- 6 The Verification Code field appears. Enter the code you received via email.
- 7 Click Verify code.
- 8 Click Continue.



- 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



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



- 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.

New goal

New goal

Name *

Holiday Home

When

12/05/2027

Cost

\$ 100000



Frequency

Once

SAVE

menu

Edit / Delete a Goal

Edit

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

Edit

Goal editing

Name *

Car

When

11/04/2023

Cost

\$ 30000



Frequency

Once

SAVE

DELETE GOAL

menu

Hide / Show a Goal

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

Hide

Show

menu

Saving Plan

- 1 Click Save Plan

Save plan

- 2 Enter name for the plan
- 3 Click Save

A green message will pop up saying
Plan Saved Successfully.

Save plan

Please provide a name for the plan.

e.g. 1st March 2022

CLOSE 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! X

menu

Manage Saved Plans

- 1 Click the drop-down menu

⌚ 22 May 2022 ▾

- 2 Click on the tick of the plan you want to view

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



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 x

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 Amount Frequency Start Date End Date

SAVE CHANGE

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

Add new income x
Previous budget line will no longer be editable upon saving.

Name *

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 Amount Frequency Start Date End Date

DELETE SAVE

menu

Add Expense

- 1 Click the  icon.

● Household expenses



- 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.

Add new expense 

Previous budget line will no longer be editable upon saving.

Name *	electricity
Frequency	Amount
Monthly	\$ 200
Start date	End date
23/05/2022	
Category	
Other	
Food / Drink	
Transport	
Entertainment	
Utilities	
Other	

menu

Edit Expense

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

\$150 Groceries Weekly from 23/01/2010 

Name	Amount	Frequency
Groceries	150	Weekly
Start Date	End Date	Category
23/01/2010		Food / Drink
 		

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.

Add new expense 

Previous budget line will no longer be editable upon saving.

Name *	Groceries
Frequency	Amount
Weekly	\$ 150
Start date	End date
22/07/2022	
Category	
Other	

menu

Editing a Past Dated Income / Expense

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

Name	Amount	Frequency
Billy's Income	5900	Monthly
Start Date	End Date	
28/07/2021	28/07/2021	

SAVE **CHANGE**

\$150 Groceries Weekly from 23/01/2010

Name	Amount	Frequency
Groceries	150	Weekly
Start Date	Category	
23/01/2010	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	Amount	Frequency
Simon	960	Weekly
Start Date	End Date	
20/05/2022	20/05/2022	

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

Previous budget line will no longer be editable upon saving

Name *	Simon
Frequency	Amount
Weekly	\$ 1010
Start date	End date
22/07/2022	22/07/2022

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

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 23/05/2022	End date
SAVE	

menu