

# Secure Distributor Portal: ONBOARDING



In order to be set up on the Distributor Portal you will need to complete the linking form located on the SS&C Distributor Portal <https://distributorportal.co.uk/documents-guides/secure-distributor-portal/linking-guide>.

The following text serves as a guide when completing the linking form.

## Contact name

- Contact name should be an appropriate senior member of your organisation, this will be used by the Distributor Client Services team if they need to contact you regarding the form

## Company name

- This is required so we know which organisation this recipient is being set up for
- Any accounts/agents/brokers that are linked to the recipient should reflect this company name
- Please note any account /agent/broker not in the name of your company will require a letter of authority from the named entity before we will allow linking

## Email address

- To send notifications when reports are available to view
- To provide updates or notifications where relevant
- Please note we will only accept an e-mail address that matches your company name

## Contact number

- This should be the appropriate contact number for the contact name provided

## Account/Agent/Broker and report requirements

- We require a list of account numbers and/or agent/ broker codes along with the account / agent names to link to your recipient. The information for these will be shown on all reports that are linked to your recipient
- There are multiple reports available on the Secure Distributor Portal including different frequencies. We need your choice of frequency which can be either daily, weekly or monthly depending on the reports
- Reports are available the day after your data is linked. Historical data (prior to linking) will not be available
- There is a bulk spreadsheet if you have more accounts / agents to link. All blue fields still need to be completed.
- If you select reports and the frequency you state on the form is different to what you have currently the report frequency will be amended.

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## What to do when you have completed the linking form

All linking forms can be forwarded to our Distributor Client Services team at: [DCS@sscinc.com](mailto:DCS@sscinc.com) where your request will be dealt with and your access is created or updated on your behalf.

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## Using Secure Distributor Portal for the first time

Upon the creation of your Recipient Group an email will be sent to the email address you have provided. Within this email you will be provided with a link to register your account.

### Contact us

For more information please contact Distributor Client Services:

T: 0370 7070073 (UK) or +44 203 975 3976 (International) – Option 2 E: [DCS@sscinc.com](mailto:DCS@sscinc.com)