

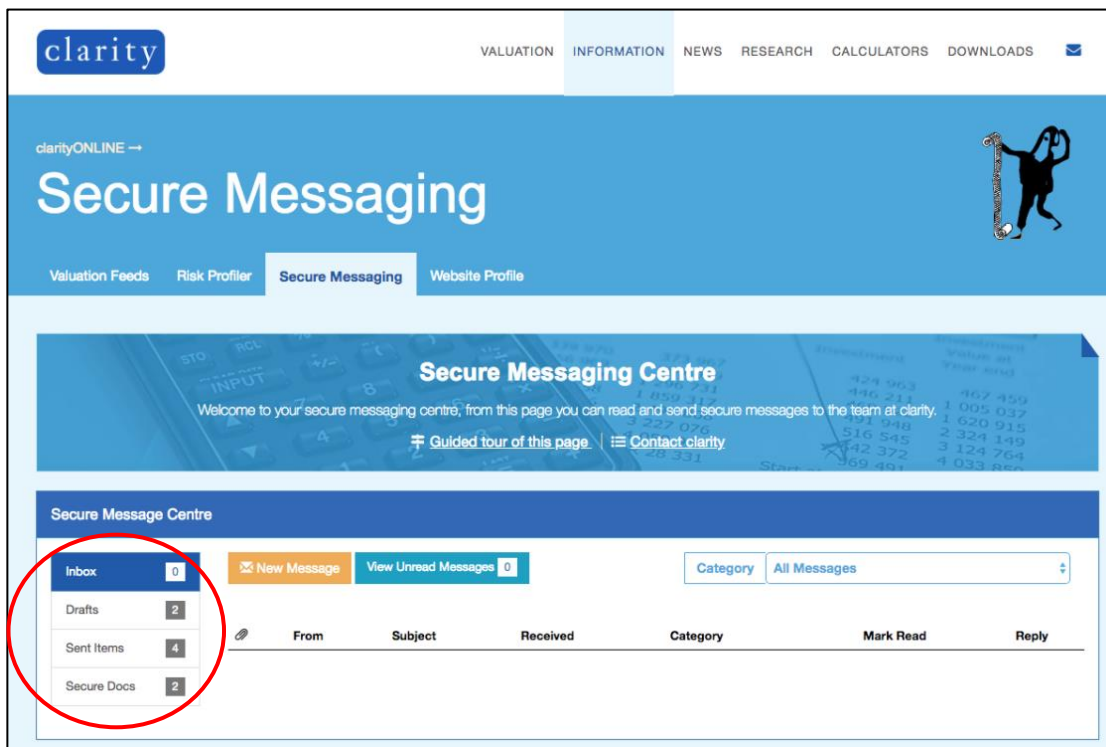
How to use the secure messaging feature

The clarity website has a built-in secure messaging feature that allows you to send messages if you wish to communicate with the clarity team.

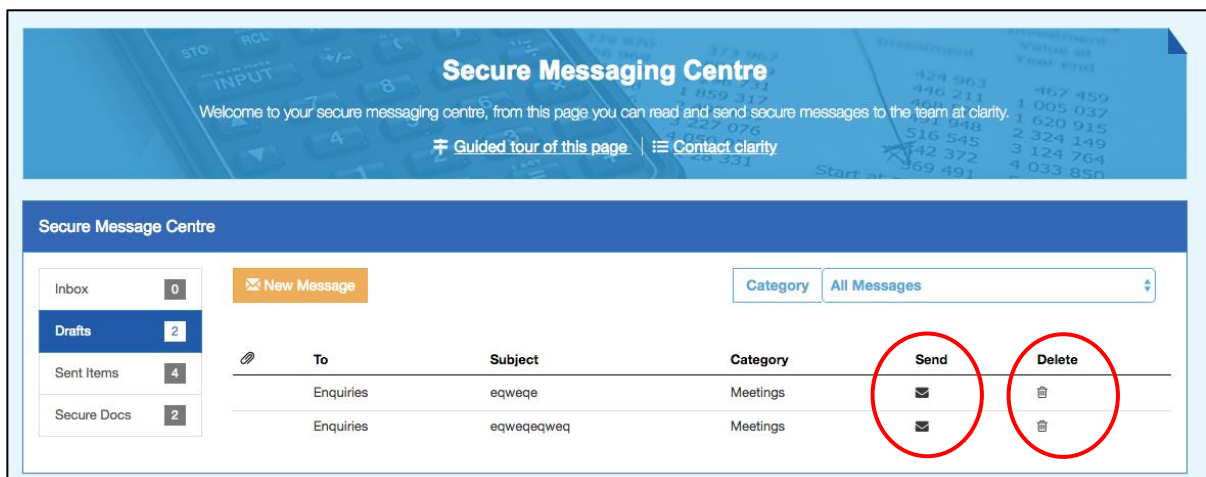
The secure messaging feature can be accessed by clicking on the mail icon located on the right side of the top menu bar. The mail icon appears on every website page.

The screenshot displays the clarity website interface. At the top, the 'clarity' logo is on the left, and a navigation menu includes 'VALUATION', 'INFORMATION', 'NEWS', 'RESEARCH', 'CALCULATORS', 'DOWNLOADS', and a mail icon circled in red. Below the navigation, the page title is 'Your Online Valuation' with a sub-header 'clarityONLINE → Valuation / Your Online Valuation'. A navigation bar contains 'Valuation Summary', 'Asset Allocation', 'Apply Online', 'Portfolios', 'Self Managed Holdings', and 'Permissions'. The main content area is for 'John clarity: All Holdings'. It features a description: 'A combined view of the data from your automated data feeds as well as any self managed holdings you have added to the website.' Below this are links for 'More about valuations...', 'Guided tour of this page', and 'Add/update valuation feeds'. A section titled 'Tools and reports for the 'All holdings' portfolio' includes buttons for 'Historical Valuations', 'ISIN Codes', 'Transaction History', 'Download Report', and 'Printer Friendly Report'. A yellow banner states: 'Policies included in your IMS Portfolio are highlighted with the IMS icon. If you would like to make changes to your IMS Portfolio please contact your usual adviser.' The main portfolio section is titled 'Portfolio: All Holdings' and includes a 'Hide' button. It has tabs for 'Summary', 'Assets', and 'Liabilities'. The 'Summary' tab is active, showing a 'Valuation History' chart for the last 12 months and an 'Assets Vs Liabilities' bar chart. The 'Assets Vs Liabilities' chart shows Assets at £1.71M and Liabilities at £50K, with a 'Current Value' of £1.66M. At the bottom, there are buttons for '+ Add a new Asset' and '+ Add a new Liability', and a 'Valuation Date' dropdown set to '30-2018'.

After clicking on the mail icon, you will arrive at the secure messaging page. You will arrive in the *Inbox* section by default. From the left menu bar, you can access your *Drafts*, *Sent Items* and *Secure Docs*.



In the *Drafts* section, you can view any draft messages saved. You can continue to work on any draft messages by clicking on the mail icon located under *Send*. If you wish to delete a draft message, click on the trash icon located under *Delete*.



In the *Sent Items* section, you can view the messages you have previously sent. Under the *Read By Recipient* section, you will be notified when the clarity team have read your message.

Secure Messaging Centre
Welcome to your secure messaging centre, from this page you can read and send secure messages to the team at clarity.
[Guided tour of this page](#) | [Contact clarity](#)

Secure Message Centre

Inbox 0 | Drafts 2 | **Sent Items 4** | Secure Docs 2

[New Message](#) | Category: All Messages

To	Subject	Sent	Category	Read By Recipient
Enquiries	Test	27-06-2018 16:33:21	Meetings	Not Opened
Enquiries	eqweqeeg	03-10-2017 17:32:55	Meetings	13-10-2017 02:56:11
Enquiries	testing	15-09-2017 18:56:43	Meetings	13-10-2017 02:56:10
Enquiries	test to enquiries	14-09-2017 18:55:33	Meetings	14-09-2017 18:56:15

In the *Secure Docs* section, you will be able to view any files received and sent by you. You can download a file under the *Download* section. If you wish to view the message containing a particular file, click on the mail icon located under the *Message* section.

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Secure Message Centre

Inbox 0 | Drafts 2 | Sent Items 4 | **Secure Docs 2**

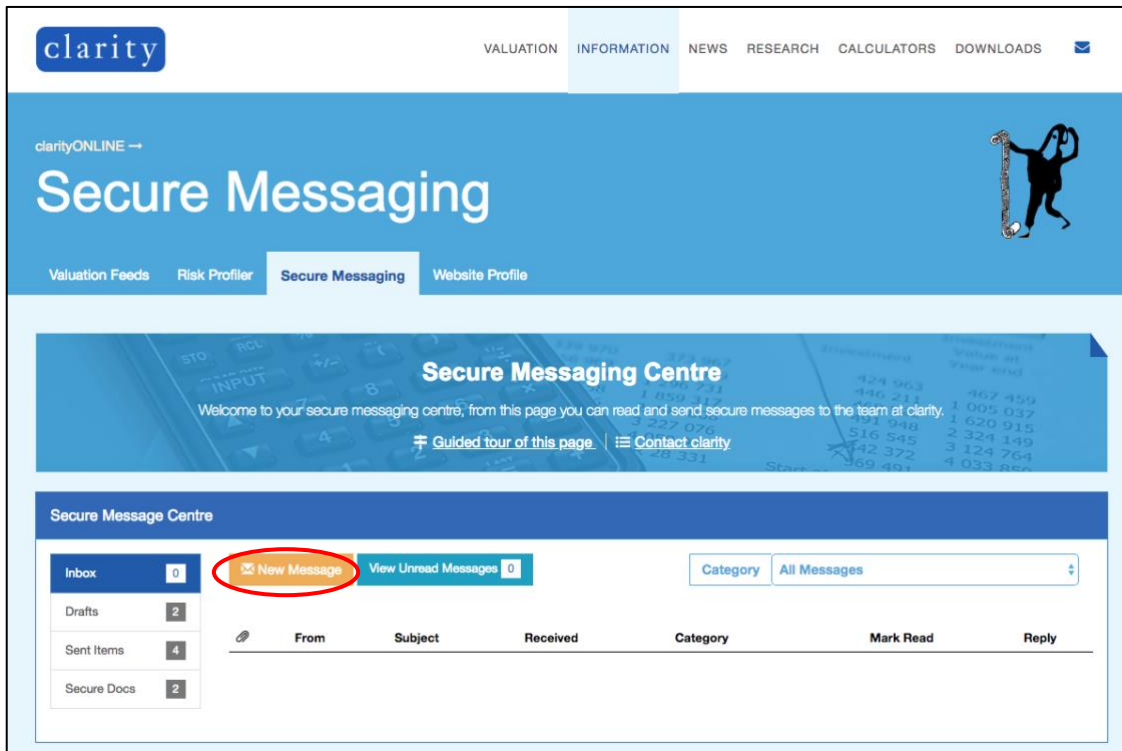
Files Received

Download	File Name	Type	Size	Date	Message
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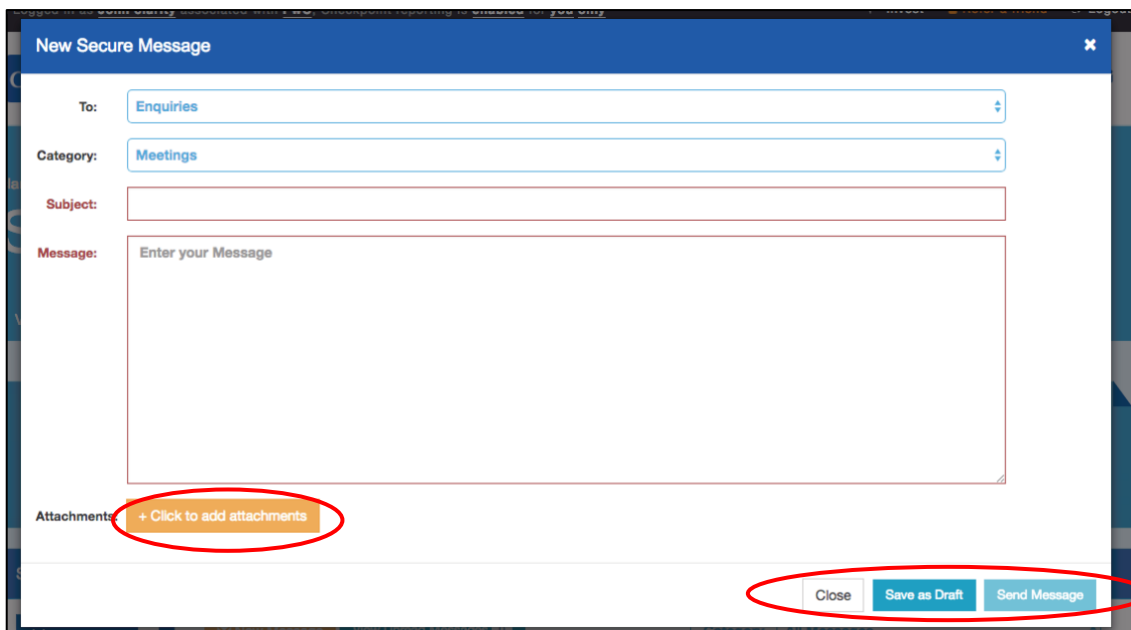
Files Sent

Download	File Name	Type	Size	Date	Message
	example.pdf	PDF	419.67 kB	27-06-2018 16:33:21	
	Selection_042.png	PNG	86.8 kB	14-09-2017 18:55:33	

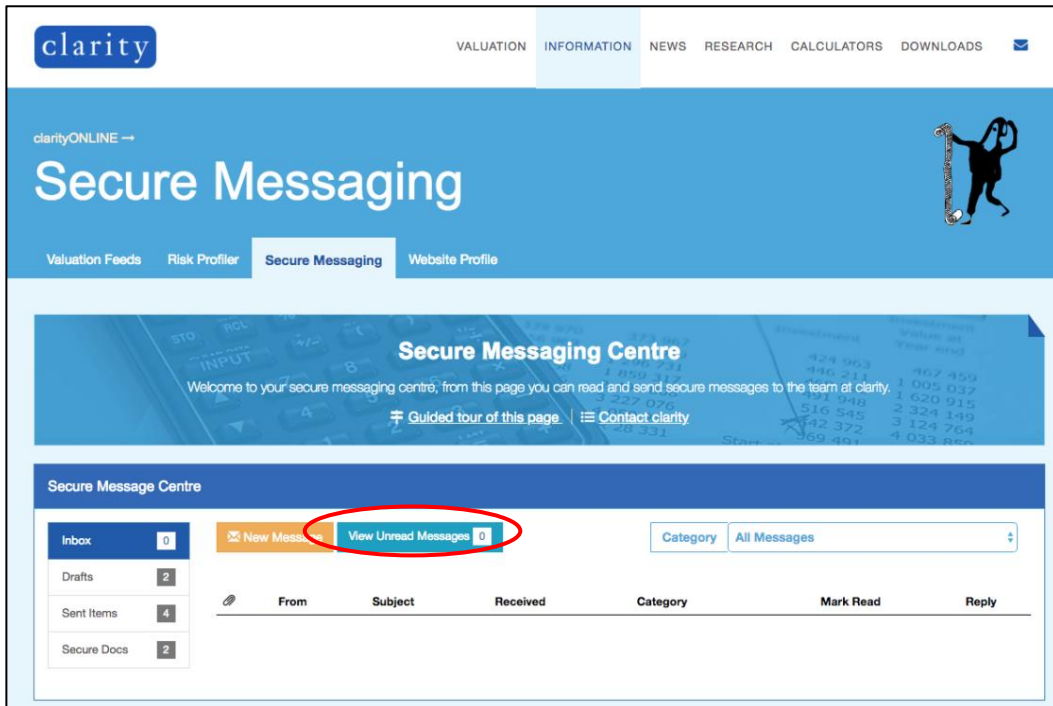
To send a message, click on the *New Message* button.



A pop-up form will appear. Select the recipient of the message, the category, the subject and enter your message content. Click on the *Click to add attachments* button if you wish to attach any files to the message. Once you have entered your message, you can choose either to save the message as a draft or send the message.



To view any unread messages, click on the *View Unread Messages* button.



To sort your messages based on their respective category, select the category from the drop-down list.

