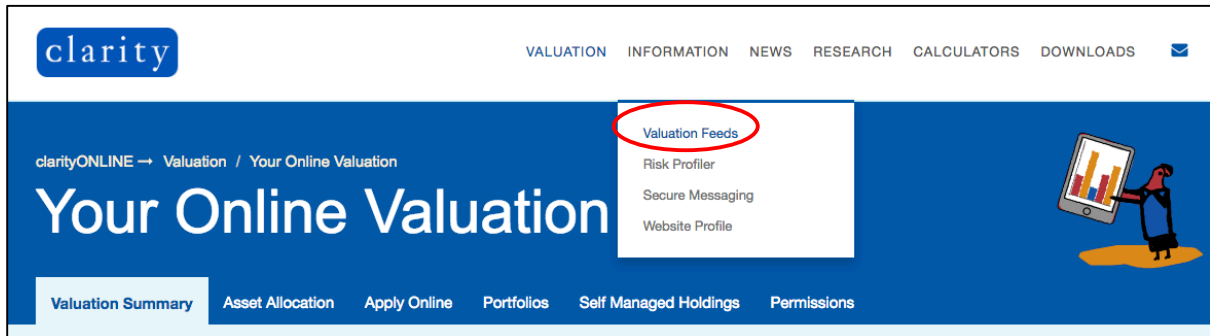


Setup platform valuation feeds guide

The Valuation Feeds page can be navigated to from the top navigation panel (Information > Valuation Feeds)



clarity

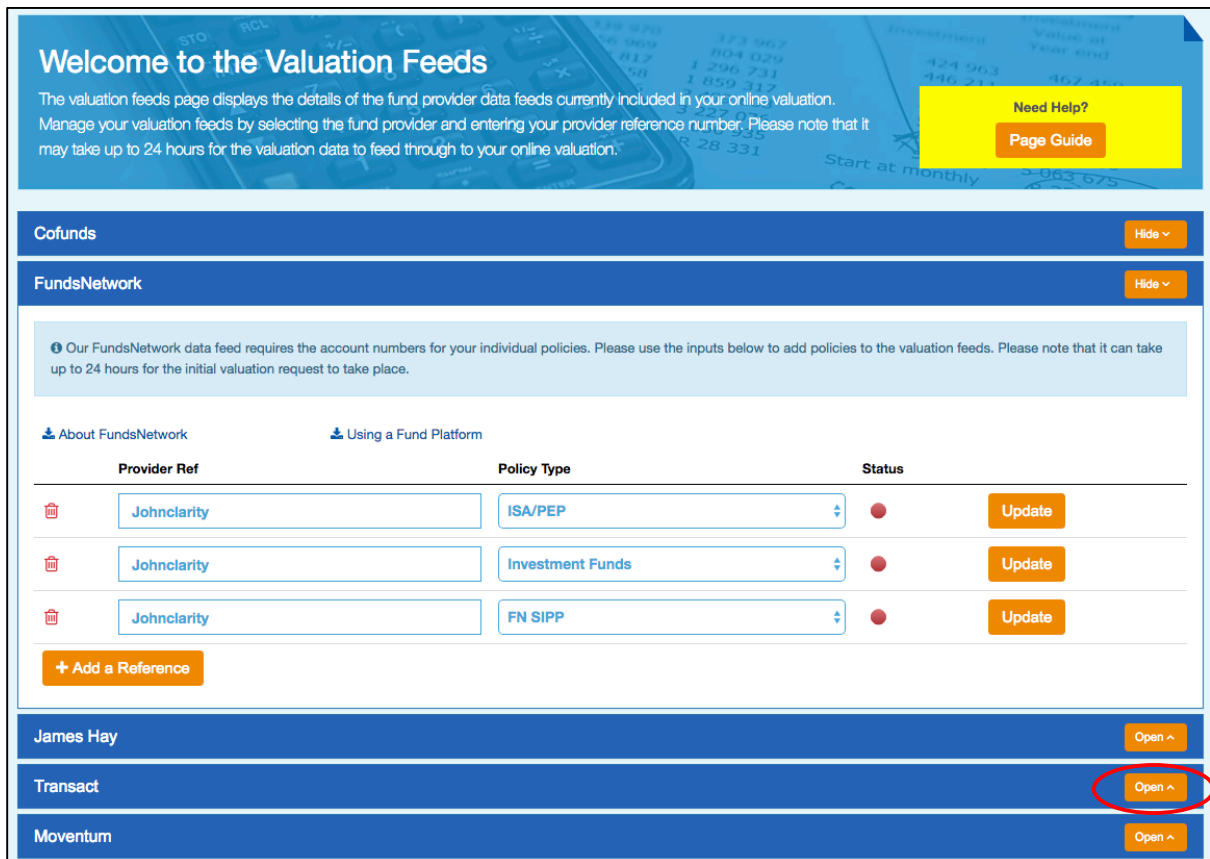
VALUATION INFORMATION NEWS RESEARCH CALCULATORS DOWNLOADS

clarityONLINE → Valuation / Your Online Valuation

Your Online Valuation

Valuation Feeds
Risk Profiler
Secure Messaging
Website Profile

Valuation Summary Asset Allocation Apply Online Portfolios Self Managed Holdings Permissions



Welcome to the Valuation Feeds

The valuation feeds page displays the details of the fund provider data feeds currently included in your online valuation. Manage your valuation feeds by selecting the fund provider and entering your provider reference number. Please note that it may take up to 24 hours for the valuation data to feed through to your online valuation.

Need Help?
Page Guide

Cofunds Hide

FundsNetwork Hide

Our FundsNetwork data feed requires the account numbers for your individual policies. Please use the inputs below to add policies to the valuation feeds. Please note that it can take up to 24 hours for the initial valuation request to take place.

About FundsNetwork Using a Fund Platform

Provider Ref	Policy Type	Status	
Johnclearity	ISA/PEP	●	Update
Johnclearity	Investment Funds	●	Update
Johnclearity	FN SIPP	●	Update

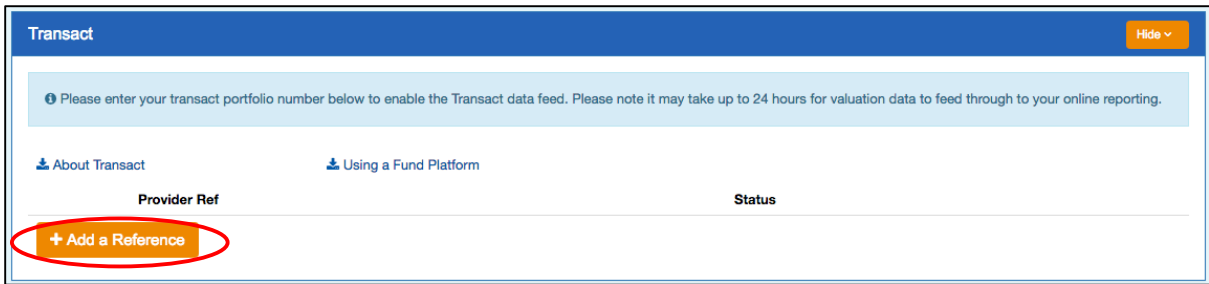
+ Add a Reference

James Hay Open

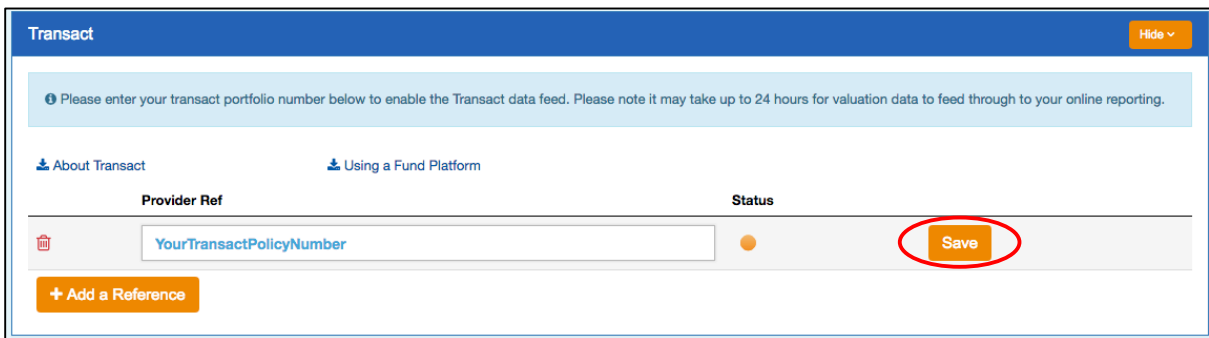
Transact Open

Moventum Open

From the Valuation Feeds page, scroll down until you see the Transact section, click on the *Open* button to expand the section.



The Transact section will open. Click on the *Add a Reference* button.



Add your 9-digit reference number. You can find your reference number on your Transact statement. Click the *Save* button to complete the process.