7IM Platform user guide

Using our login and forgotten password tools

Succeeding together

7IM

Important information

This login user guide is only for those who have an existing 7IM Platform account. If you wish to register with 7IM, please email us **here**.

7IM Platform

Welcome

This guide will walk you through the changes to our new login process and password requirements. We implemented these changes to make your accounts safer and more secure.
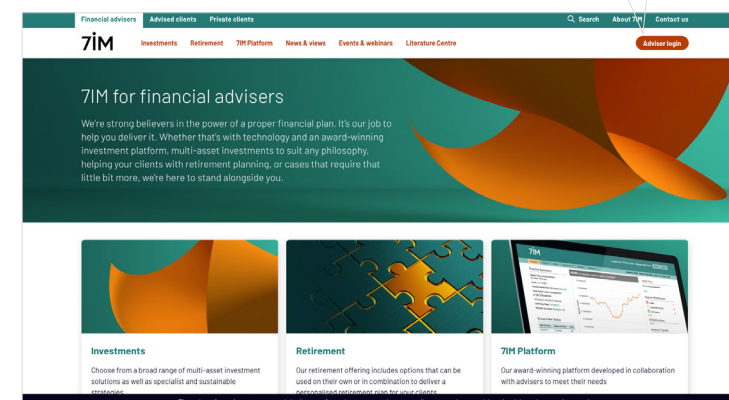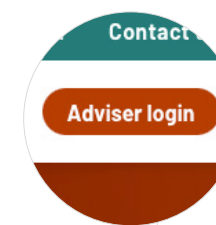
Contents

Logging into your account

STEP 01

Adviser login

1. Navigate to the financial adviser 7IM website **here** and click the orange adviser login button to begin.
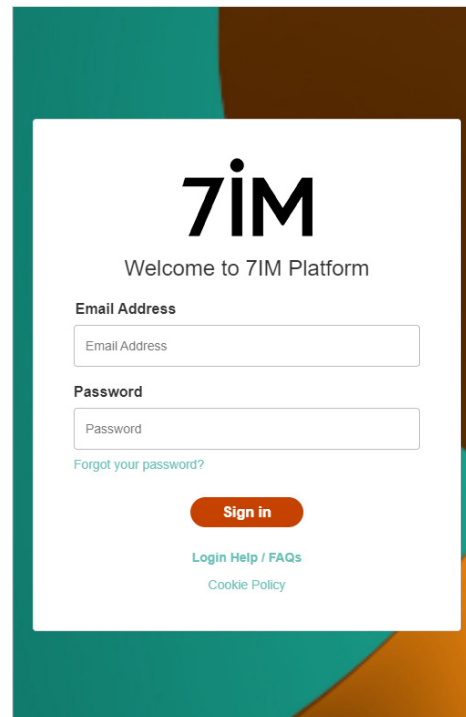
STEP 02

Entering your credentials

1. Enter the email address linked to your account.

2. Enter the current password you use to login to the 7IM Platform.

3. Click 'Sign in'.

N.B. we are always making updates to our design to enhance our clients' experience, so this screen might have a new look and feel.

7IM

Welcome to 7IM Platform

Email Address

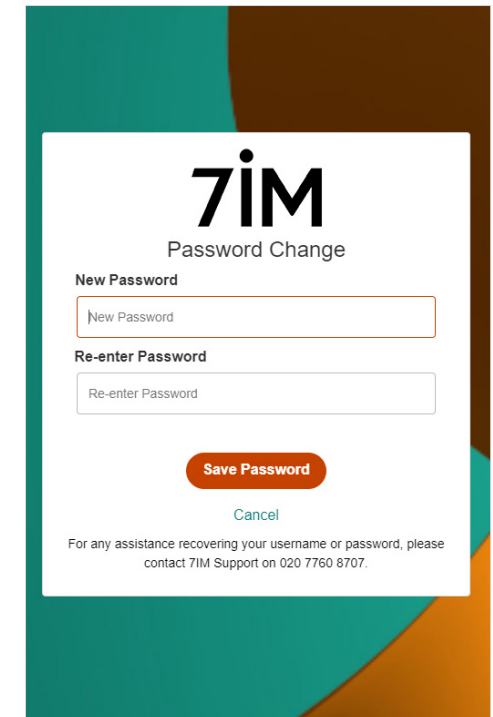Email Address

Password

Password

Forgot your password?

Sign in

Login Help / FAQs

Cookie Policy

STEP 03

Updating your password

1. You'll need to create a new password to meet improved security standards.

2. This must be between **12–64 characters** and have at least **three** of the following:

3. A lowercase letter

4. An uppercase letter

5. A number

6. A symbol

7. Re-enter your new password.

8. Click 'Save Password'.

9. Your new password is now set.

7IM

Password Change

New Password

New Password

Re-enter Password

Re-enter Password

Save Password

Cancel

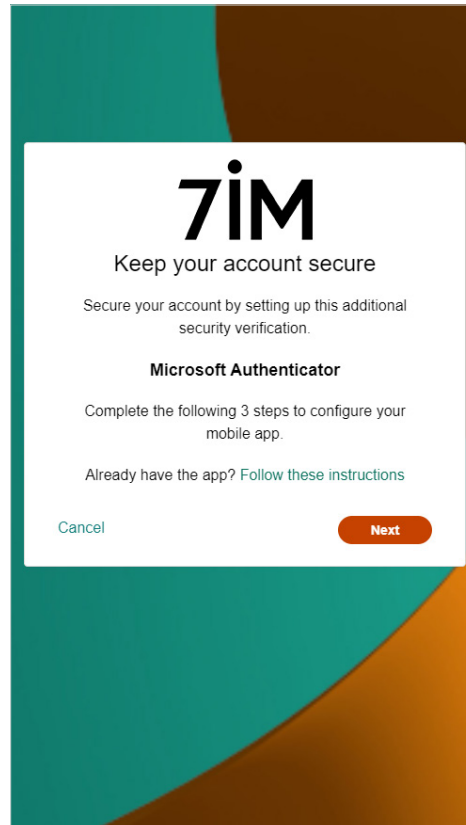For any assistance recovering your username or password, please contact 7IM Support on 020 7760 8707.

Note that the Microsoft Authenticator app steps of this guide will need to be completed on a mobile device, such as a phone or tablet.

STEP 04

4a

Getting started with Microsoft Authenticator

We have introduced a multi-factor authentication with the Microsoft Authenticator app, to make your account more secure.
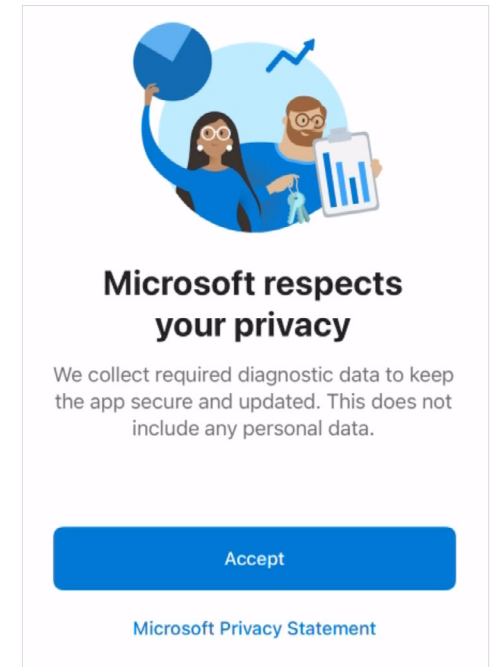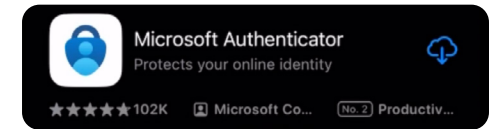
Follow the next steps to activate this service.

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Keep your account secure

Secure your account by setting up this additional security verification.

Microsoft Authenticator

Complete the following 3 steps to configure your mobile app.

Already have the app? Follow these instructions

Cancel   **Next**

Installing the Microsoft Authenticator app

1. Using a compatible device, head to your app store and search for 'Microsoft Authenticator'. Look for the app that matches our example logo:

   Click download/install. Head back to your 7IM login screen, click 'Next' for step two.

2. Using the Microsoft Authenticator app on your device, review the relevant privacy permissions.

3. Head back to your 7IM login screen and click 'Next'.

Microsoft Authenticator
Protects your online identity
★★★★★102K   Microsoft Co...   No. 2 Productiv...

Microsoft respects your privacy

We collect required diagnostic data to keep the app secure and updated. This does not include any personal data.

Accept

Microsoft Privacy Statement

4b

Already a Microsoft Authenticator app user?

1. Log into your app on your device.
2. On the home screen, go to the top right hand corner and select the '+' symbol.
3. Choose an account type to add. You can choose 'Work or school account' or 'Other'.
4. Once done, go back to your 7IM login screen and click 'Next'.

☰ **Authenticator** 🔍 +

Add account

WHAT KIND OF ACCOUNT ARE YOU ADDING?

Personal account ＞

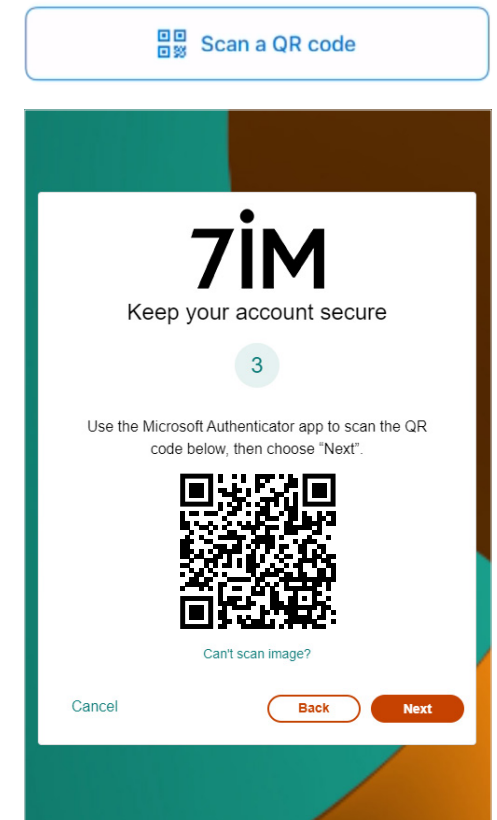Work or school account ＞

Other (Google, Facebook, etc.) ＞
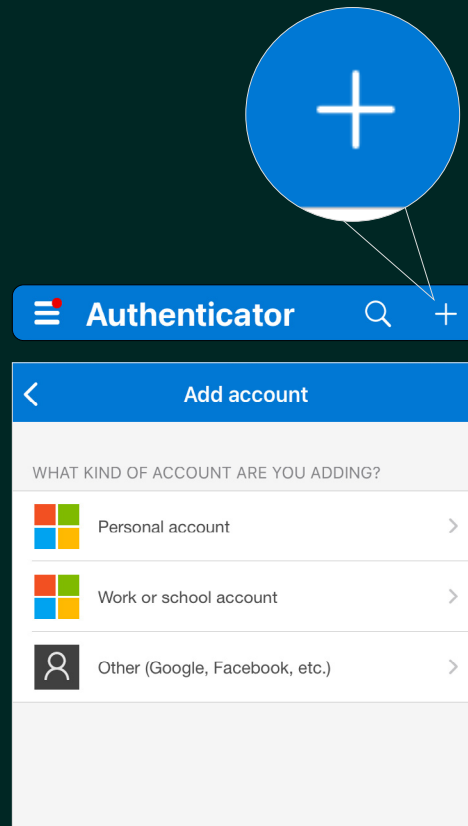
STEP 05

Scanning the QR code

1. On the app screen 'Secure Your Digital Life', click the 'Scan a QR code' button. Head back to your 7IM login screen and click 'Next'. A QR code will now appear on your 7IM login screen.
2. Using the Microsoft Authenticator app on your mobile device, scan the on-screen QR code.

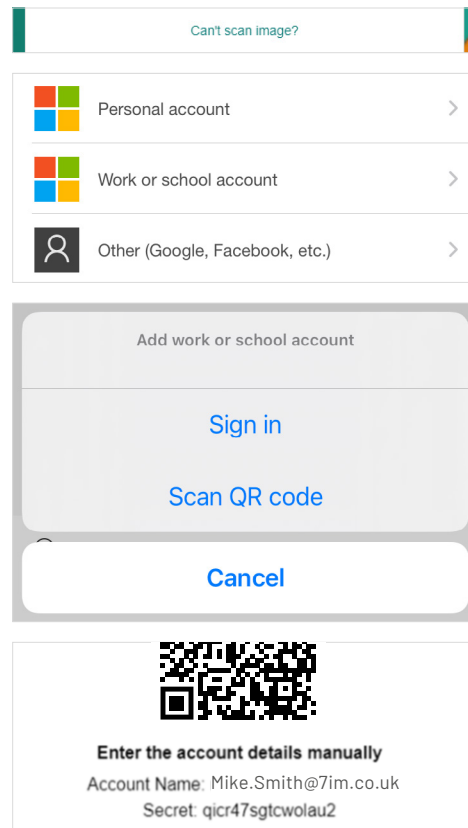**N.B.** You might need to give the app permission to access your camera.

🔳 Scan a QR code

7IM

Keep your account secure

3

Use the Microsoft Authenticator app to scan the QR code below, then choose "Next".

Can't scan image?

Cancel   Back   Next

5a

STEP 06

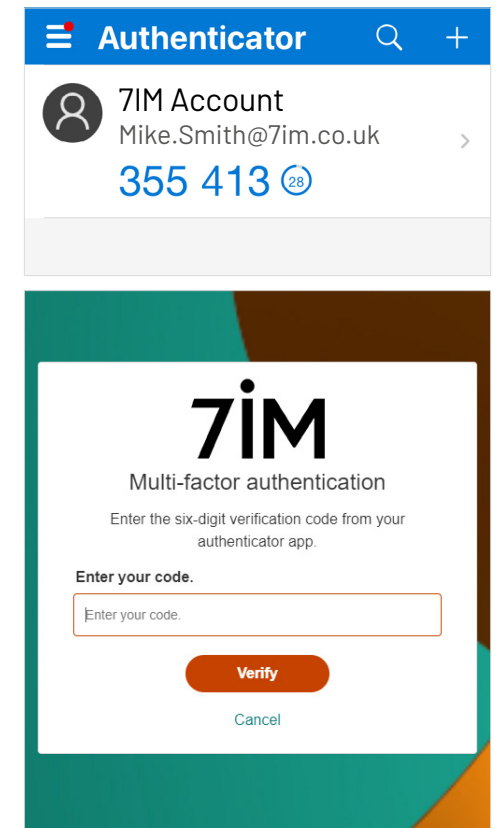### Having difficulty scanning the QR code?

1. Select the 'Can't scan image?' link below the QR code.

2. This will prompt a manual sign in process.

3. Go back to your Microsoft Authenticator app and select 'Other'.

4. Once selected, a pop-up window will appear on your phone, select 'Sign in'.

5. Go back to your 7IM login screen and enter the account details manually into your Microsoft Authenticator as displayed on the screen.

6. You will now be signed into your 7IM Platform Account on the Microsoft Authenticator app.

	Can't scan image?	
	Personal account	>
	Work or school account	>
	Other (Google, Facebook, etc.)	>

Add work or school account

Sign in

Scan QR code

Cancel

Enter the account details manually
Account Name: Mike.Smith@7im.co.uk
Secret: qicr47sgtcwolau2

Using your secure six-digit code

1. When you scan the QR code with the Microsoft Auhenticator app, it will generate a timed six-digit secure code in the app.

2. Click 'Next' on the 7IM login screen, read the relevant information and click 'Next'.

3. Enter the six-digit code displayed in your Microsoft Authenticator app into the box, and click 'Verify'. You can now access the 7IM Platform.

☰ **Authenticator**   Q   +

7IM Account
Mike.Smith@7im.co.uk   >

355 413 (28)

7IM

Multi-factor authentication

Enter the six-digit verification code from your authenticator app.

Enter your code.

Enter your code.

Verify

Cancel

Choosing your role

You might currently have more than one set of login details to the 7IM Platform. We have now removed the need for multiple logins. Once logged in, you will be able to select the access you require.

1. Choose the role you would like to log in with.

2. You should now be logged into the 7IM Platform with this chosen role.

3. If you have selected the wrong role or wish to choose a different account, please log out and log back in.

Role Selection

Name	Role	Username	Company	
Mr Richard Gray	Discretionary Fund Manager User	dfmpmar	Guinyard Technologica	Select
Mr Richard Gray	Wealth Manager	adfpm28	Baum Group	Select

|◀ ◀ ① ▶ ▶| 20 items per page   1 - 2 of 2 items

Please note:

If you have an account linked to a different email address, it will not display on this screen. This will only show the accounts linked to the email in current use.

You will have to repeat the new login process for your other email.
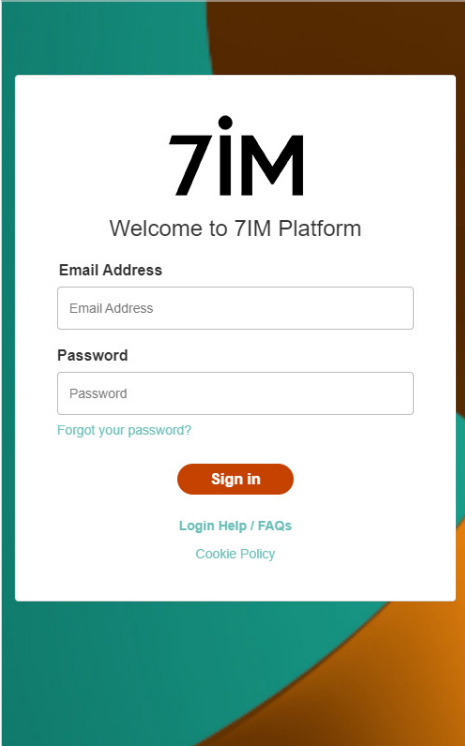
Resetting your password

Welcome to our new 7IM password process. We have made some exciting new changes to make this process easier for you. This is a two-factor authentication process consisting of an email verification code and a Microsoft Authenticator app code. Both codes will need to be verified before you can change your password.

STEP 01

Forgotten your password?

1. Under the password box you'll find a link which says 'Forgot your password?'

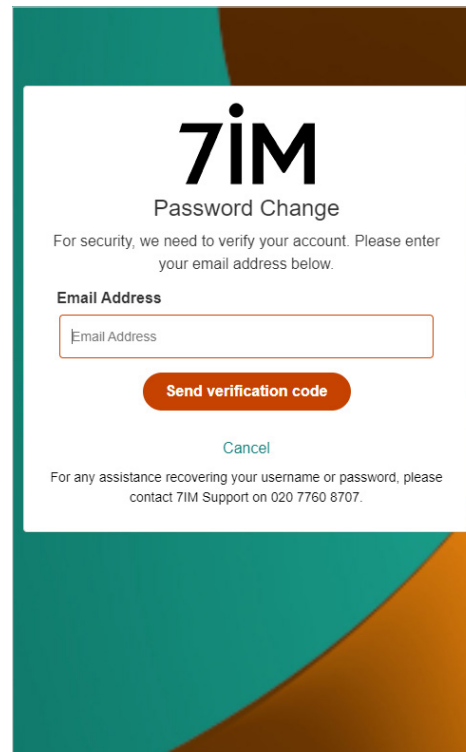2. Click on this link to start the process.

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Welcome to 7IM Platform

Email Address

Email Address

Password

Password

Forgot your password?

Sign in

Login Help / FAQs

Cookie Policy

STEP 02

Enter your email address

1. Enter your email into the specified box.

2. Once complete, select 'Send verification code'.

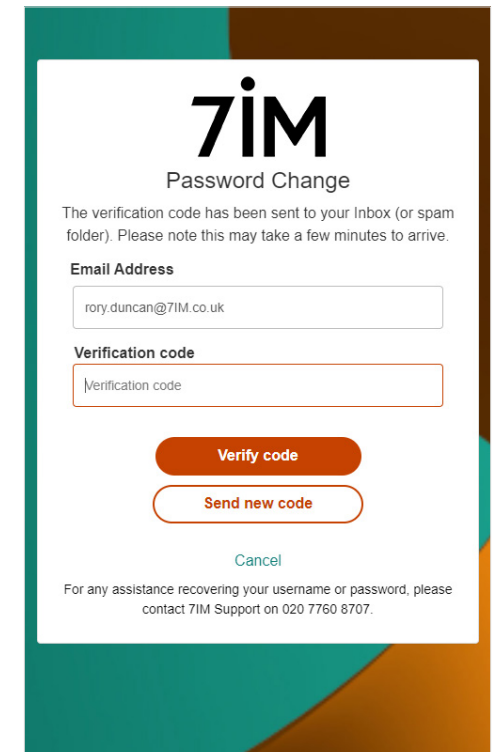3. You'll then receive an email with a verification code. This can take up to five minutes.

7IM

Password Change

For security, we need to verify your account. Please enter your email address below.

Email Address

Email Address

Send verification code

Cancel

For any assistance recovering your username or password, please contact 7IM Support on 020 7760 8707.

STEP 03

Verifying your email address

1. Take the code provided in the email and type this into the 'Verification code' box.

2. Click 'Verify code'.

3. If the email did not arrive or the code was entered incorrectly, you can request another code by selecting 'Send new code'.

4. Once the code has been verified you will be taken to the next screen.

7IM

Password Change

The verification code has been sent to your Inbox (or spam folder). Please note this may take a few minutes to arrive.

Email Address

rory.duncan@7IM.co.uk

Verification code

Verification code

Verify code

Send new code

Cancel

For any assistance recovering your username or password, please contact 7IM Support on 020 7760 8707.

STEP
04

Setting your password

1. Enter your new password. This must be between **12-64 characters** and have at least **three** of the following:

- A lowercase letter

- An uppercase letter

- A number

- A symbol

2. Re-enter the password to confirm.

3. Press 'Save Password'.

4. You can now use your new password to log into the 7IM Platform as usual.

7İM
Password Change

The password entry fields do not match. Please enter the same password in both fields and try again.

New Password

The password must be between 12 and 64 characters. Your password must have at least 3 of the following:
- a lowercase letter
- an uppercase letter
- a digit
- a symbol

```
•••
```

Re-enter Password

This information is required.

```
Re-enter Password
```

Save Password

Cancel

For any assistance recovering your username or password, please contact 7IM Support on 020 7760 8707.

STEP
05

Verifying you with Microsoft Authenticator

1. As part of the new, safer multi-factor authentication process, you'll need to access your Microsoft Authenticator app.

2. View your six-digit code relating to your 7IM Platform account in the app.

3. Type in the six-digit code on the 7IM login screen, click 'Verify'.

4. You will now have access to the 7IM Platform.

7İM
Multi-factor authentication

Enter the six-digit verification code from your authenticator app.

Enter your code.

```
Enter your code.
```

Verify

Cancel

We're here to help

If you have any questions or would like more information on any of our services, please reach out to us.

020 7760 8777   **platformmailbox@7im.co.uk**

There's also always great information on our platform help centre. Click here to take a look.

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