WEALTH PORTAL TIPS AND TRICKS

Q1. Who can I talk to if I have questions about the Wealth Portal?

We have experts available who can help you get the most out of your Wealth Portal. Contact Enrizen via phone or email and speak to someone in our private client team.

Q2. Once I've signed up to the Wealth Portal, how do I add a wealth item?

The Wealth Portal identifies any form of payment, expense, or income as a wealth item. You can easily log in to your Enrizen account from any location or device and access the Wealth Portal. Here you will be prompted to add the details of a receipt, invoice or expense. This item will be automatically categorised and securely stored for you.

Q3. Can I set up a budget in the Wealth Portal?

Absolutely. In fact, we do most of the hard budgeting work for you. Go to mycashflow, then click Budget. You will see your income and expenses automatically listed and broken up into categories. From here, quickly check all your details are categorised correctly, then set your Budget Values.

Q5. Can I add wealth items manually?

Yes. Open the Wealth Portal and click on the +Add button in the top righthand corner. Select the wealth item you wish to add, then chose the Manually Add Account Balance option.

Q6. Can I adjust the value of wealth items manually?

Yes. You can manually change the value of any wealth items, including properties and cars. Go to the Wealth Portal, select the wealth item you wish to alter, then click the Edit button next to the current valuation. Update the value and click Save.

Q7. How do I delete a wealth item?

Visit the Wealth Portal, select the wealth item you wish to delete, then click Edit. Click on the red trashcan at the bottom left of the screen. You will be asked to confirm that you wish to permanently delete this item. Click Delete, then Exit.

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Q8. Can I categorise and record transactions over a period of time on the Wealth Portal?

By linking your bank accounts, superannuation, loans, and other financial institutions you hold accounts with, the Wealth Portal will automatically categorise your incomings and outgoings. At times, the Wealth Portal may not categorise a transaction in the category you want.

If this happens, you can easily manually re-categorise a transaction, and the Wealth Portal will automatically apply this change to that transaction in the future. You can also view your income and expenses over different timeframes or a customised timeframe to see trends in your spending and earning that help to create a personalised budget.

Q9. Can I create my own categories to filter expenses in cashflow?

The Wealth Portal categories will already be set for you, but you can add your own customised tags. Employ filter options if you only want to view expenses related to a specific tag. To set a customised tag, open the pre-set category and flag the transactions you wish to add a tag to. Click on the tag button and select the tag to add or create your own tag, then click Apply. Close mycashflow and reopen it to check that the tags have successfully been applied.

Q10. How many free value property valuations do I get?

You'll receive a free property valuation once you've added your property to your account. Subsequent investment properties you add will also receive complimentary valuations. This is one of the many rewards the Wealth Portal offers.

Q11. My mortgage has been categorised as a personal loan. Can I change the category to mortgage?

Yes. the Wealth Portal will automatically categorise for you, but you can manually edit and personally categorise any wealth item or expense that you like. Open the Wealth Portal, then open the account you wish to re-categorise. Click on the green Edit Details button on the Details page, then select from the four options in the Category drop down list.

Q12. Can I delete my account?

We'll be sad to see you go, but yes, you can delete your account at any time. Log in to Enrizen, visit Myprofile/My Details/Account Details, then click on the red trashcan. Confirm your password and delete your account.