



Client Portal-  
Frequently  
Asked  
Questions



# 01. How do I access the Client Portal?



You will receive 2 emails once you have been given access to the Client Portal.



1<sup>st</sup> email with the login id and the URL



Dear Douglas Mcleod,

As a regulated Financial Services firm, M&G plc must demonstrate that it has completed appropriate levels of due diligence on all organisations and individuals we do business with, including any associated parties. M&G plc is subject to ongoing regulatory requirements to maintain information it holds and must ensure our information is kept up to date. As such, M&G plc requires relevant and appropriate information from you in order to ensure our records remain accurate.

You have been identified as the primary contact to support this activity. If this is not the case, please provide the contact details of the relevant individual, including their name, e-mail address and telephone number.

Our Reference	UATSSS	Country	United Kingdom
Name	WHITBREAD PLC		

#### Information requested

Details of the information required and how to send it to us can be found by accessing our due diligence portal. Our portal enables you to provide electronic copies of key legal and regulatory documents to us in a quick, convenient and secure manner.

Please log in to <https://outreach.mandg.com> using the details below:

Username [Douglas.Mcleod@MandG.co.uk](mailto:Douglas.Mcleod@MandG.co.uk)

A password will follow in a separate e-mail. If you do not receive this, have any issues accessing the due diligence portal or have any queries, please contact us at [DueDiligence\\_Support@Mandg.com](mailto:DueDiligence_Support@Mandg.com).

#### What happens next

To ensure your information is received securely and dealt with in an efficient manner, please provide the requested documentation using the due diligence portal within 14 days.

We will review the documentation provided and if it meets our requirements we will make the relevant updates to our records. We will only contact you again if we need further information.

Thank you in advance for your co-operation.

Kind regards

M&G Due Diligence Support Team



2<sup>nd</sup> email with the one time password



Dear Douglas Mcleod,

You will have received an e-mail communication from us requesting information from you. M&G plc is subject to ongoing regulatory requirements to maintain information it holds and must ensure it is kept up to date. As such, M&G plc requires relevant and appropriate information from you in order to ensure our records remain accurate.

The e-mail contained a link to the M&G due diligence portal along with your username. The following one time password will allow you to access the portal where you will be prompted to change your password.

Password: f8C5@p\$C

If you have any issues accessing the portal, haven't received the previous communication e-mail, or have any queries then contact us at [DueDiligence\\_Support@Mandg.com](mailto:DueDiligence_Support@Mandg.com).

Kind regards

M&G Due Diligence Support Team

## 02. Can I use the password I received by email for my client portal access ?



This is a one time password, you will be asked to change the password on your first login attempt.

1. Enter the **one time password** you received by email for your **first login attempt**.

2. You will be asked to create a new password.

The Client Portal password requirements are:

A. **A minimum of 8 characters**

B. At least one or more:

**Numeric character(s)**

**Upper case character(s)**

**Lower case character(s)**

**Special character(s)(@ # \$ &)**

C. Your account will be **locked after 5 incorrect password attempts**

3. Below is a snapshot of the **Change Password option, where you can enter your “one time password”** and create a new password of your choosing, provided it complies with the password requirements. Please keep your password safe and never share it with anyone.

outreach.mandg.com/Login/SaveNewPassword?intDisableHeader=1

ord reset MyeSoft SoftPhone RM+Customer https://attendance... Compliance Manager Design\_5 Apr Other bookmarks

M & G

Old password ← One Time Password

New password ← What you would like to setup as your login password

Confirm password

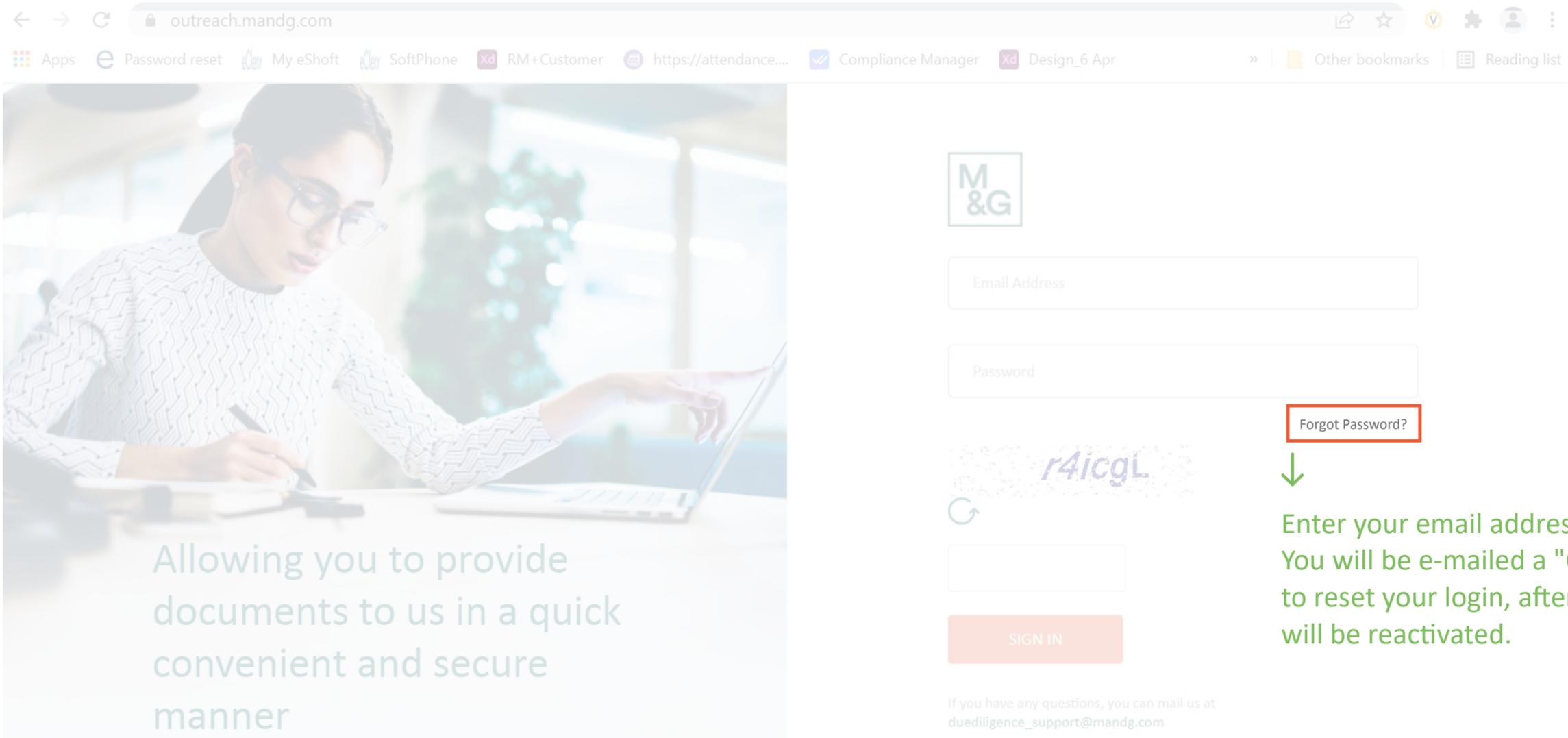
Return to Home

UPDATE

# 03. I am getting the message “Logon failure: you have been deactivated on tool”, What do I do ?



If you receive this message,  Please click on the **Forgot Password** option shown below:



← → ↻ outreach.mandg.com

Apps Password reset My eShoft SoftPhone RM+Customer https://attendance... Compliance Manager Design\_6 Apr Other bookmarks Reading list

M & G

Email Address

Password

Forgot Password?

↓

Enter your email address and select send. You will be e-mailed a "One Time Password" to reset your login, after which your account will be reactivated.

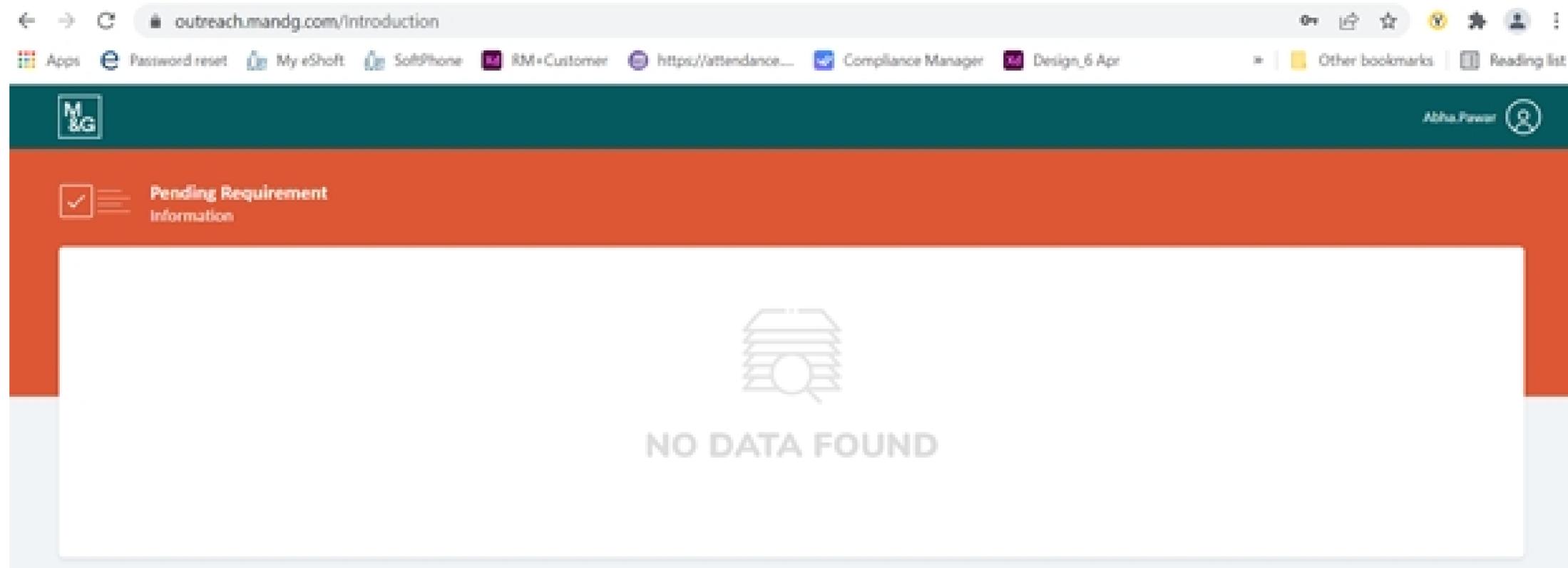
Allowing you to provide documents to us in a quick convenient and secure manner

If you have any questions, you can mail us at [duediligence\\_support@mandg.com](mailto:duediligence_support@mandg.com)

## 04. What do I do if I get “No Data Found” on the Client Portal after login ?



This is because all requirements have been fulfilled, there is no response required from you in this instance.



## 05. How do I know what is required from me?



You will see “**In Progress**” requests for your action. Click on the “**View**” button to review any pending requirements. Select the “i” icon to review individual requirement details and acceptable documents (where applicable).

The screenshot shows a dashboard titled "Pending Requirement Information" with the M&G logo and user "Abha.Pawar". It displays three requirement cards:

- Card 1:** OUR REFERENCE: UAT27094, Submitted. NAME: Divis Lab, COUNTRY: United Kingdom. View button.
- Card 2:** OUR REFERENCE: 24Sept05, Submitted. NAME: UAT\_IDFC, COUNTRY: United Kingdom. View button.
- Card 3:** OUR REFERENCE: UATSS139, In Progress. NAME: AA Advisors Europe Limited, COUNTRY: United Kingdom. View button (highlighted with a red border).

The screenshot shows the details for requirement "IDENTIFICATION OF RESIDENTIAL ADDRESS" (highlighted with a red box and 'i' icon). The breadcrumb path is: Pending Requirement > Our Reference: UATSS139 > Name: AA Advisors Europe Limited.

REQUIREMENT DETAILS	INSTRUCTIONS	DOCUMENTS	COMMENTS
We are required to verify your residential address. Please provide an appropriate certified <a href="#">Read More.....</a>	Documents not available	<b>ATTACH</b> Only zip, pdf, doc, docx, xlsx, txt, jpeg, jpg files of size less than 30MB are allowed	

## 06. How do I provide the required documents to you?



You can upload your documents by clicking "**Attach**". Select the documents you'd like to share and click "**Open**" and **your documents will be uploaded**.

There is a limit of 10 documents that can be uploaded via this portal. If you would like to share more documents, share them via email to **DueDiligence\_Support@mandg.com** and our team will acknowledge receipt and review the documents shared.

The screenshot displays the MandG portal interface for a pending requirement. The top navigation bar includes the MandG logo and the user name 'Abha.Pawar'. Below this, a breadcrumb trail shows 'Pending Requirement' with a back arrow, 'Our Reference UATSS139', and 'Name AA Advisors Europe Limited'. The main content area is titled 'IDENTIFICATION OF RESIDENTIAL ADDRESS' and contains three sections: 'REQUIREMENT DETAILS' with instructions to verify the residential address, 'INSTRUCTIONS' stating 'Documents not available', and 'DOCUMENTS' which features a red 'ATTACH' button and a note that only zip, pdf, doc, docx, xlsx, txt, jpeg, and jpg files of size less than 30MB are allowed. A 'COMMENTS' section with a text input field is also visible on the right.

## 07. What if I didn't click Save or Submit? Is it mandatory?



Please ensure that you click **"submit"** once you have uploaded all documents and your comments, in order that we can review the information you have provided.

The screenshot shows a web application interface with a sidebar on the left containing menu items like 'EVIDENCE OF...', 'BUSINESS IDE...', and 'PROVIDE TAX...'. The main content area is partially obscured by a modal dialog box titled 'E-Submit'. Inside this dialog, there is a section titled 'ELECTRONIC SUBMISSION DECLARATION' with a sub-header '(Please scroll through to accept declaration)'. The text below reads: 'Please read the statement below and if applicable confirm that the statement applies and is true and accurate. Lorem ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum. Lorem ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged.' At the bottom right of the dialog, a red 'NEXT' button is highlighted with a red box. In the background, 'SAVE' and 'SUBMIT' buttons are visible at the bottom of the page.

Read declaration and accept to submit



This screenshot shows the same web application interface, but the 'E-Submit' dialog is now closed, and a new dialog titled 'Electronic Statement' is open. This dialog contains two input fields: 'Signed By' with the text 'divya.pillai' and 'Date' with the text 'July 5, 2021'. Below these fields is a checkbox labeled 'Please confirm your acceptance', which is currently unchecked and highlighted with a red box. At the bottom right of the dialog, a red 'SUBMIT ELECTRONICALLY' button is highlighted with a red box. The background shows the 'E-Submit' dialog and the 'SAVE' and 'SUBMIT' buttons from the previous screenshot.

## 08. What does the sections on “Pending Requirements” mean?



You have an “**i**” icon on each requirement, which confirms the requirement details and what documents are acceptable.

However if you have any questions, you can mail us your queries to **DueDiligence\_Support@mandg.com**

The screenshot displays the M&G portal interface. At the top, the M&G logo is visible. Below it, a navigation bar shows 'Pending Requirement', 'Our Reference UATSS139', and 'Name AA Advisors Europe Limited'. The main content area is titled 'IDENTIFICATION OF RESIDENTIAL ADDRESS' and features an information icon (i) in a red box. Below this, there are three sections: 'REQUIREMENT DETAILS', 'INSTRUCTIONS', and 'DOCUMENTS'. The 'REQUIREMENT DETAILS' section contains the text: 'We are required to verify your residential address. Please provide an appropriate certified [Read More.....](#)'. The 'INSTRUCTIONS' section states 'Documents not available'. The 'DOCUMENTS' section includes an 'ATTACH' button and the text: 'Only zip, pdf, doc, docx, xlsx, txt, jpeg, jpg files of size less than 30MB are allowed'. A modal window titled 'REQUIREMENT DETAILS' is open on the right, showing the following information:

**REQUIREMENT DETAILS**

**Identification of Residential address**

**Requirement Description**

**Requirement details**  
We are required to verify your residential address.

Please provide an appropriate certified document from the acceptable documents list.

The document used to verify your address can not be the same document used to verify your identity.

**Acceptable documents:**

- Utility bill (i.e.: landline telephone, gas, electricity or water bill less than 3 months old. Mobile phone bills are not acceptable.)
- Bank statement (less than 3 months old)
- Full current driving licence (paper)
- Full current driving licence (photocard)
- National identity card (with photo and address) issued by a central or state government authority (i.e.: national ID cards, residence permit, Northern Ireland voters card, valid Shotgun or firearms certificate - UK only)

## 09. What if I am not the correct contact?



If you have the correct contact details, you can share this information by mailing us at,  
**DueDiligence\_Support@mandg.com**

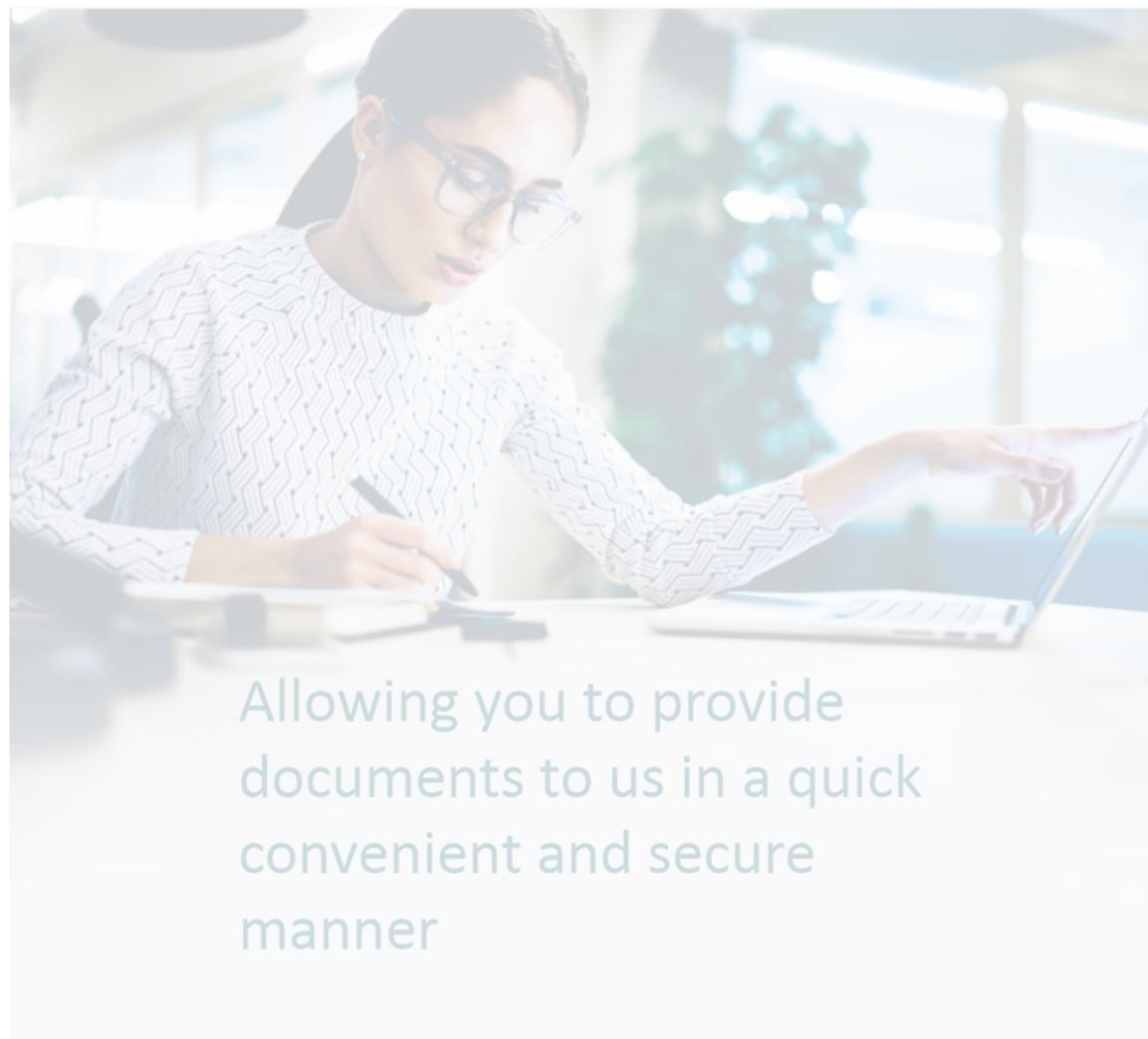
If you do not know the correct contact details, please still let us know so that we can update our records for future correspondence.

## 10. What is a Captcha? Why am I supposed to enter it ?



The captcha is a **random string which restricts bots from trying to log in** into the client portal.

If you have entered the captcha wrong the 1st time, you have the **option to refresh** it by clicking on the **refresh icon** below which will generate a new string for you to try.



M & G

Email Address  
Abha.pawar@eclerx.com

Password  
.....

Forgot password ?

ZA2phZ

ZA2phZ

SIGN IN

If you have any questions, you can mail us at duediligence\_support@mandg.com

## 11. I can't find the email with my login or password. What do I do?



Please try a keyword search in your email inbox:

You can search from the sender: **DueDiligence\_Support@mandg.com** or you can use any of the keywords in the standard subject like **“Action Required”**.

For **example** this is the subject: **“[Legal Entity Name] – Action Required”**

If you continue to have issues locating the password email, You can click on **“Forgot Password”** and a new **“one time password”** will be emailed to you which can be used to login.

**From:** [duediligence\\_support@mandg.com](mailto:duediligence_support@mandg.com)<[duediligence\\_support@mandg.com](mailto:duediligence_support@mandg.com)>

**Sent:** Tuesday, February 15, 2022 9:28 PM

**To:** [Douglas.Mcleod@mandg.com](mailto:Douglas.Mcleod@mandg.com)

**Subject:** CenterPoint Energy, Inc. – Action Required



Dear Douglas Mcleod,

As a regulated Financial Services firm, M&G plc must demonstrate that it has completed appropriate levels of due diligence on all organisations and individuals we do business with, including any associated parties. M&G plc is subject to ongoing regulatory requirements to maintain information it holds and must ensure our information is kept up to date. As such, M&G plc requires relevant and appropriate information from you in order to ensure our records remain accurate.

You have been identified as the primary contact to support this activity. If this is not the case, please provide the contact details of the relevant individual, including their name, e-mail address and telephone number.

Our Reference	<b>UAT_OR_001</b>	Country	<b>United Kingdom</b>
Name	<b>CenterPoint Energy, Inc.</b>		

### Information requested

Details of the information required and how to send it to us can be found by accessing our due diligence portal. Our portal enables you to provide electronic copies of key legal and regulatory documents to us in a quick, convenient and secure manner.

Please log in to <https://ecmoutreachariel.eclerx.com/> using the details below:

Username [Douglas.Mcleod@mandg.com](mailto:Douglas.Mcleod@mandg.com)

Please use the password you set up previously to access the M&G due diligence portal. If you have forgotten your password you can reset it by selecting ‘forgot password’ on the log in page and following the instructions. If you have any issues accessing the portal or have any queries then contact us at [DueDiligence\\_Support@Mandg.com](mailto:DueDiligence_Support@Mandg.com).