

PPOL Fund Fact Sheets

Introduction

This is a guide to how to add Fact Sheets to funds and portfolios so that they may be included in the Appendix of the Suitability Report when recommending those funds or portfolios.

In simple terms - images of each page of a fact sheet are stored on the internet and associated with its fund within PPOL.

There is a little work initially to set things up but this step-by-step guide should help.

Signup to Amazon S3 Service

You'll need a little bit of the internet to store your images. We recommend using Amazon's S3 service (part of Amazon Web Services (AWS)). See <http://aws.amazon.com/s3/> for all the details.

Create a *bucket* (it's like a folder) ready for all your fact sheets page images.

Create Page Images

Create an image (.jpg file) for each A4 page of the fact sheets. If you have a Word document (.doc or .docx file) or PDF (.pdf file) use <http://www.zamzar.com/> to convert them to .jpg images of each page. If you only have the paper document use a scanner to create the .jpg files.

You may want to consider the naming of the image files. When the fund provider re-issues them you'll need to use exactly the same file names.

Upload Images to Internet

Now upload the page image files to your bucket at Amazon S3. Once uploaded make them public.

Link Funds to the Images

Login to PPOL, select **My Funds** (or **My Portfolios**) then **Fact Sheets** then click **Edit** for the fund to link images to.

Set **Path** to the internet address of your bucket (eg *https://s3-eu-west-1.amazonaws.com/myname-mybucket*) and **Images** to the file names of the page images for this fund separated by commas (eg *FundAA-P1.jpg, FundAA-P2.jpg*).

Click **Done** when finished. If all okay thumbnails of each image will be displayed.

Write a Recommendation Report

Whenever the funds or portfolios are recommended in a Suitability Report all the appropriate fact sheets will be automatically included by ticking the **Include Fact Sheets in the Appendix** option.

Update Fact Sheets

When a fund provider issues a new version of their fact sheet you will need to update the page images too.

Create the page images as before, ensure they are named the same as the existing ones, then upload to your S3 bucket to overwrite the old ones. You will also have to repeat making them public.