

For financial adviser use only.

Elevate help guide: Creating and editing users

abrdn.com

Contents

Setting up a new user	3
Editing an existing user	6
Contact us	8

Setting up a new user

Elevate



Before you get started you'll need the following personal information from your new user:

First Name	Telephone number
Last Name	Email address
DOB	Individual FCA number *only required for adviser users

Next, you should consider the access type for your new user. See below for comparison of the different access levels.

	Members of this user group can:	Members of this user group cannot:
1. Read Only Group	<ul style="list-style-type: none"> view data on client records, both personal data and investment data view completed processes 	<ul style="list-style-type: none"> generate and view company level reports make any data changes add clients transact business add or edit platform users generate client account documents view remuneration statements
2. Transact Group	<ul style="list-style-type: none"> view data on client records, both personal data and investment data add clients 	<ul style="list-style-type: none"> transact business generate and view company level reports generate client account documents add or edit platform users view remuneration statements
3. Management Group	<ul style="list-style-type: none"> view data on client records, both personal data and investment data add clients transact business 	<ul style="list-style-type: none"> generate and view company level reports generate client account documents add or edit platform users view remuneration statements
4. Administrator Group	<ul style="list-style-type: none"> view data on client records, both personal data and investment data add clients transact business generate and view company level reports and client account documents 	<ul style="list-style-type: none"> edit platform users at the network level, e.g. password reset or locking a user account view remuneration statements add platform users at the network level

Setting up a new user – continued

Now you have the necessary information you can set up your user on platform. Click the Business Management – New User tabs and decide your user type.

Elevate

Dashboard New Client Existing Clients **Business Mgmt** Research Model Portfolios Literature Help Admin
Remuneration Statement Mgmt Reports Remuneration Setup New User **Edit User** User In Progress Product Terms Bulk EPC Update

Select one of the following.

- Set up a new adviser type user
- Set up a new non-adviser type user

Start

You would set up an adviser in your firm as an **Adviser Type User** as they will not only be able to use the platform, they will also be part of the data in the platform i.e. they will record clients against their name. to manage.

Alternatively you can set a new user up as a **Non-Adviser Type User** so they can use the platform but won't appear as data in the platform. Traditionally this is an administrator, para-planner, office manager etc.

Having decided your user type (adviser or non-adviser) and clicking start the following screen will appear consisting of 3 stages, **USER DETAILS**, **USER ACCOUNT ACCESS** and **VALIDATE AND EXECUTE**.

Choose the **ACCESS LEVEL** by using the drop down box. Then complete the question immediately below regarding bulk switching and model portfolio functionality. Finally on this section complete the personal information fields.

1 User Details 2 User Account Access 3 Validate And Execute

Step 1 User Details

Exit without saving Save and exit Next ->

Access Information

Search for Firm:

Company: Elevate

Access Level:

User Type:

Can access bulk switching functionality:

Can Build Adviser Model Portfolios:

Can give access to users they aren't permissioned to, to edit and use Adviser Model Portfolios:

Can Build Client Model Portfolios:

Personal Information

Title:

First Name:

Surname:

Date of Birth (dd/mm/yyyy):

If you wish to use the firm address for your user simply tick the use default address box.

Postal Address Information

Use Default Address:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Postcode:

Country:

Setting up a new user – continued

Below the postal address information box there are three further boxes for completion. Please note work phone number and email address is mandatory and for adviser users the individual FCA number must be in the correct format.

Contact Information

Work Phone^{*}:

Mobile Phone:

Fax:

Email^{*}:

Confirm Email^{*}:

FCA Details

FCA Number^{*}:

Elevate Account Manager

Elevate Account Manager

By clicking next you will move onto the next step of the wizard called **User Account Access**.

You will need to identify whether the user is to have Read only access or Read/Write access (Transact) for the company or for each adviser.

If you are happy for your user to have access to all clients on your platform tick the adviser company box. Alternatively you can tailor permission for a user to see only their own clients or the clients of a specific adviser by clicking adviser and choosing the user/s you want permission to work with.

Step 2 User Account Access

Please select the level of user access from following options:

Adviser Company

Adviser

Permission Advisor Level Access:

Advisor Name	Read Only Access	Read / Write Access	Remove
Chris McDonald (AXAWrap0000003)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
DEMO Advisor (DEMOAXA)	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
John TestY (AXAWrap0000002)	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Katherine West (AXAWrap0000001)	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Duplicate from existing user	<input type="radio"/>		

Once entered, click **Next** to continue to the final part of the wizard called **validate and execute**. Once you have submitted the wizard the screen will show the new username.

Step 3 Validate And Execute

User successfully created with username of ATest864

1. Validation Data

Check: all required data has been entered.

Page	Field	Reason
All data entered has been successfully validated.		

2. Implement

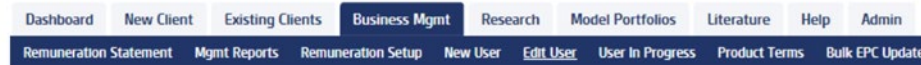
This wizard has already been submitted for completion

You can then inform your new user of their Unique ID and their password will be sent to their email address specified on the first section of the wizard.

Editing an existing user

Platform users with Administrator permission have the ability to set up and edit new users on the platform. This is accessed via the Business Management Tab.

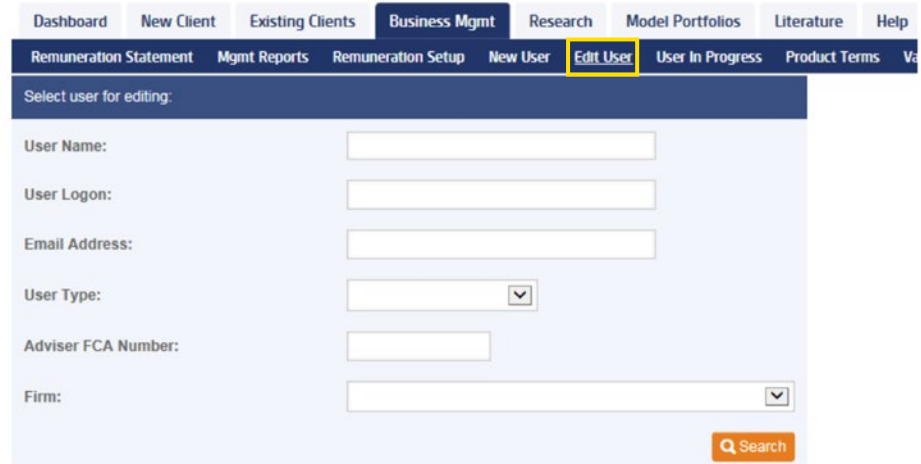
Elevate



There will be occasions when you need to change the details of an existing user. This section will show you how to do this. In the Business Management – Edit User tabs you can search for your existing user using name, user ID, email address etc.

Hint: occasionally a user might be set up more than once so it's good practice to search using their email address. If appropriate this will find any user names connected to the email address.

Elevate

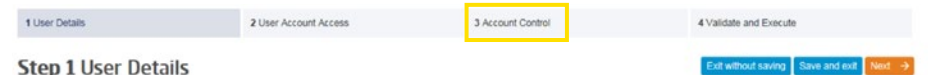


Please note that you can search for all users by simply clicking search. You do not have to enter any search criteria but may find this useful if you have a lot of users on your platform.

A list of users will be displayed. Click on the username of the user you would like edit.

5 USERS					
User Name	User Logon	Email	Company	User Type	FCA Authorisation Number
Bob V Mortimer	bmortimer628	bob@elevateplatform.co.uk	Lowther Financial Ltd	Adviser	5687954
David Wilson	dwilson110	david@elevateplatform.co.uk	Lowther Financial Ltd	Non-Adviser	
Elizabeth Lowther	elowther527	liz@elevateplatform.co.uk	Lowther Financial Ltd	Non-Adviser	
Ian Lowther	ilowther402	ian@elevateplatform.co.uk	Lowther Financial Ltd	Adviser	2345678
Ian Lowther	ilowther430	ian@elevateplatform.co.uk	Lowther Financial Ltd	Adviser	5875827

The following screen will appear:



Step 1 User Details

You can edit the following info in each step:

User Details: access type i.e. read only to transact. You can also amend personal details like DOB here.

User Account Access: permission to see which advisers clients or simply the whole firms clients.

Editing an existing user – continued

You'll notice that an extra step in the wizard is now available called Account Control. You can see if an account is active/locked & when they last logged in. You'll also be able to reset the users password and/or memorable word at this stage. *See the How to Reset Passwords guide in the Help Centre.

If you need to lock a user's account for example a member of staff leaving your business you can do so by ticking the Lock Password, Expire Password & Lock Account boxes before submitting in the next steps. When locking a user's account you should consider amending their email address in step 1 to **donotemail@abrdn.com** and emailing **elevate_enquiries@abrdn.com** to confirm they have left your business with confirmation they wish to stop receiving emails from abrdn.

Step 3 Account Control

Current Access:		Edit Access:	
Password Status:	Unlocked	Lock Password:	<input type="checkbox"/>
Password Expiry Date:	09/05/2021 10:11:42	Expire Password:	<input type="checkbox"/>
Account Status:	Enabled	Lock Account:	<input type="checkbox"/>
Terms and Conditions Version:	10	Reset Password:	<input type="checkbox"/>
Last Logon Date:	09/02/2021 10:12:19	Reset Memorable Word or Phrase:	<input type="checkbox"/>
		Reset Password and Memorable Word or Phrase:	<input type="checkbox"/>

By clicking next you will move on to the last step in the wizard, validate and execute. If you are happy with the changes click submit.

1 User Details | 2 User Account Access | 3 Account Control | 4 Validate and Execute

Step 4 Validate and Execute

Exit without saving | Save and exit | < Back

1. Validation Data

Check all required data has been entered.

Page	Field	Reason
All data entered has been successfully validated.		

2. Implement

To confirm that you wish to proceed to the final step, click here: **Submit**

The following message will then appear:

1 User Details | 2 User Account Access | 3 Account Control | 4 Validate and Execute

Step 4 Validate and Execute

Exit < Back

1. User successfully updated

1. Validation Data

Check all required data has been entered.

Page	Field	Reason
All data entered has been successfully validated.		

2. Implement

This wizard has already been submitted for completion

Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm. If there is anything more you want to know, please contact us.

Call us on 0345 600 2399

Our lines are open 9am to 5pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@abrdn.com

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

For more information visit abrdn.com/adviser

Elevate Portfolio Services Limited is part of abrdn Group, which comprises abrdn plc and its subsidiaries..

Elevate Portfolio Services Limited is registered in England (01128611) at 280 Bishopsgate, London, EC2M 4AG, and authorised and regulated by the Financial Conduct Authority.

SLE0357 0823 ©abrdn plc 2023. All rights reserved.

abrdn.com