For financial adviser use only.

Elevate help guide: Creating and editing users

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Contents

Setting up a new user

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	· view data on client records, both personal data and investment data · view completed processes	· 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	· view data on client records, both personal data and investment data · add clients	· transact business · generate and view company level reports · generate client account documents	· add or edit platform users · view remuneration statements	
3. Management Group	· view data on client records, both personal data and investment data · add clients · transact business	· generate and view company level reports · generate client account documents	· add or edit platform users · view remuneration statements	
4. Administrator Groupt	· 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	· 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

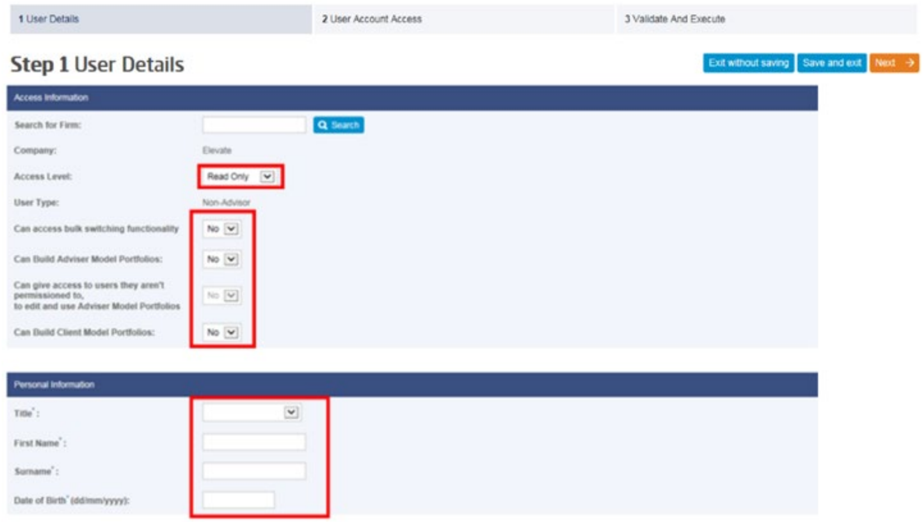
Now you have the necessary information you can set up your user on platform. Click the Business Management – New User tabs and decide your user type.

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.



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

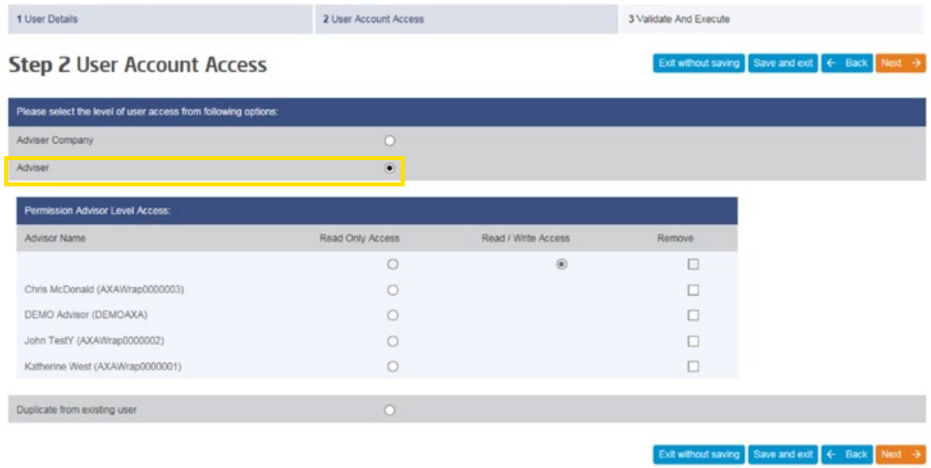
Setting up a new user - continued

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.

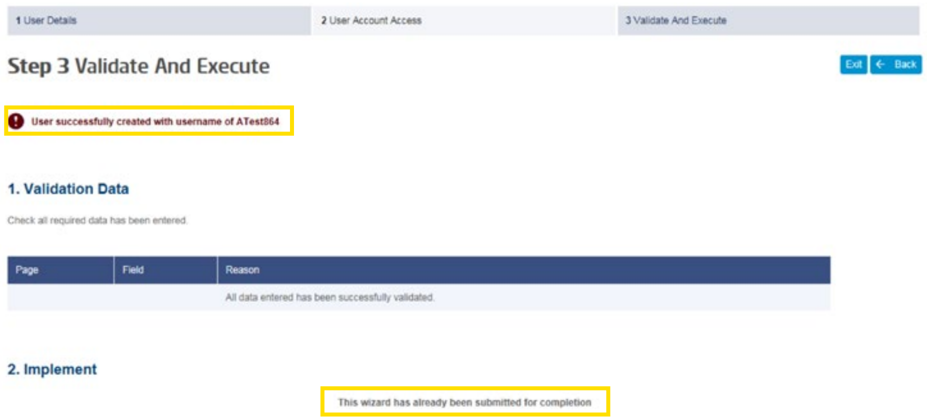
By clicking next you will move onto the next step of the wizard called **User Account Access**.

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.



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.



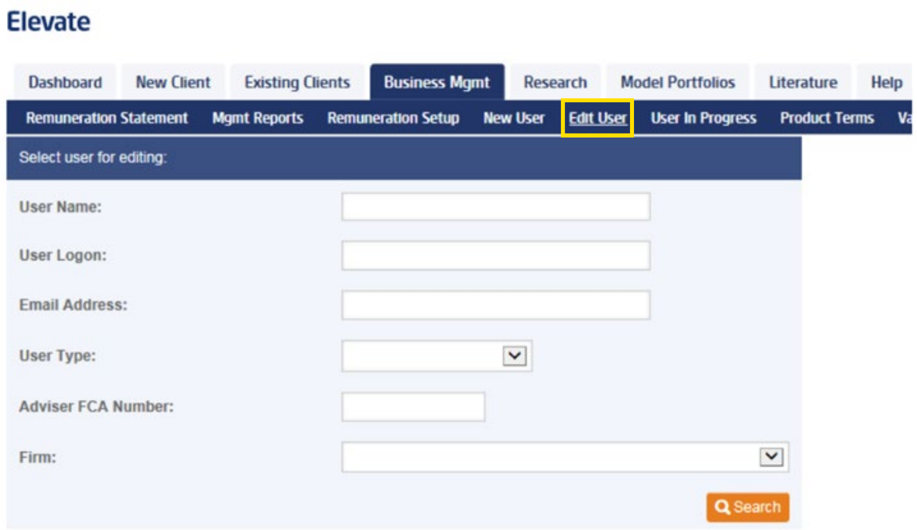
You can then inform your new user of their Unique ID and their password will be sent to their email address specified on the first section of the wizard.

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.

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.



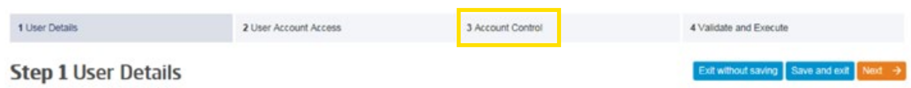
Please note that you can search for all users by simply clicking search. You do not have to enter any search criteria but may find this useful if you have a lot of users on your platform.

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:



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.

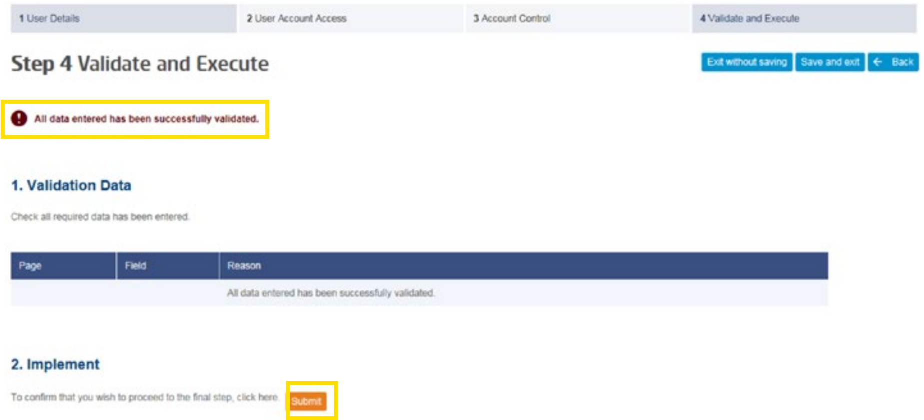
User Account Access: permission to see which advisers clients or simply the whole firms clients.

Editing an existing user - continued

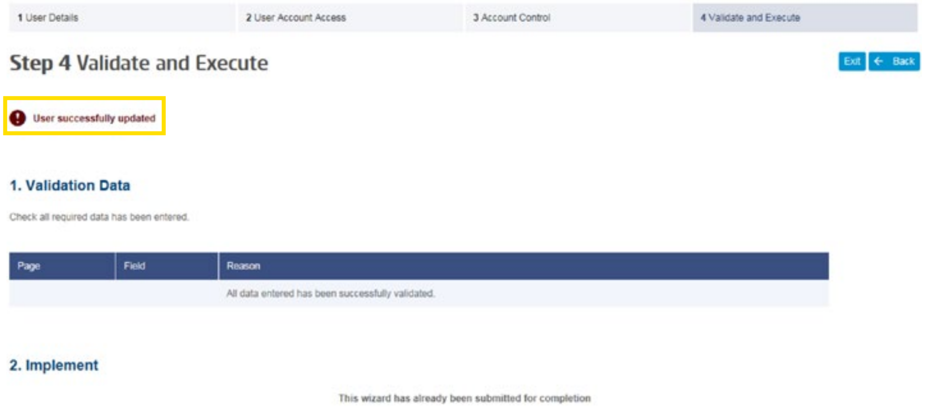
You'll notice that an extra step in the wizard is now available called Account Control. You can see if an account is active/locked & when they last logged in. You'll also be able to reset the users password and/or memorable word at this stage. *See the How to Reset Passwords guide in the Help Centre.

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.

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.



The following message will then appear:



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

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For more information visit abrdn.com/adviser

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