

For financial adviser use only.

Elevate help guide

Reports & Documents Library

The Reports & Documents library holds platform generated documents and any other correspondence that we send or receive in relation to your client's account.

This guide shows how you can also choose to upload and store your own documents to their library.

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Uploading documents

What you will see

SummaryPortfolioNew WorkCash AccountAccount HoldersTransactionsReports & DocumentsCharges & Remuneration

Request ReportLibrary

Document:

All

Status:

All

Type:

All

Created By:

All

ClearSearch

Add

296 RECORDS

ID	Type	Document	Date Added	Report Status	Archive Status	Created By
11118710	Other	Elevate 6 Monthly Statement	04-Jun-15 8:57 am	Complete	Received from Client	Elevate Platform
10785279	Document	Charges Information (ID: 43654406)	29-Apr-15 9:07 am	Complete	Created	Mr James Eckersley
10785278	Form	Transfer Form	29-Apr-15 9:07 am	Complete	Created	Mr James Eckersley
10785277	Document	Disclosure Illustration (ID: 43654406)	29-Apr-15 9:07 am	Complete	Created	Elevate Platform
10695857	Document	Charges Information	17-Apr-15 12:20 pm	Complete	Created	Mr James Eckersley
10695856	Form	Transfer Form	17-Apr-15 12:20 pm	Complete	Created	Mr James Eckersley

1.

2.

What you will need to do

1. From your client's account, go to:
Reports & Documents > Library.
2. Click **Add**.

Notes

1. From here you can see all the correspondence that has been generated, sent or received on this account.

Uploading documents – cont.

What you will see

The screenshot shows a document upload form with the following fields and buttons:

- Document Type:** A dropdown menu currently showing 'Other'. A callout line points to this field with the number '3'.
- Status:** A dropdown menu currently showing 'Created'. A callout line points to this field with the number '4'.
- File:** A text input field containing 'H:\List.pdf' and a 'Browse...' button. A callout line points to the 'Browse...' button with the number '5'.
- Document Name:** A text input field containing 'Test'.
- Buttons:** At the bottom, there are three buttons: 'Delete' (blue), 'Add another document' (blue), and 'Save' (yellow).

Callout numbers 3, 4, and 5 are shown in grey circles on the right side of the form, with lines pointing to the respective fields.

What you will need to do

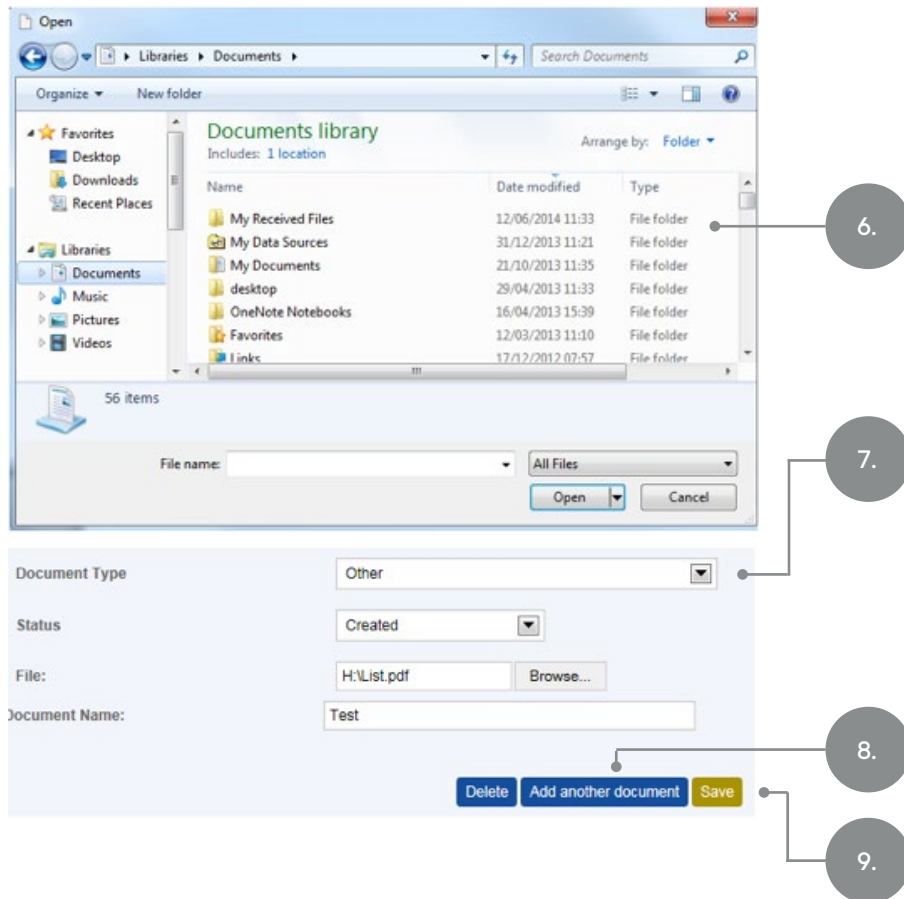
3. In **Document Type**, select from the list of available documents or select **Other** to name you own.
4. In **Status**, select the status you want to apply to your document.
5. You can choose from:
 - Created
 - Sent to client
 - Received from client
 - Sent to Customer Services
 - Archived
6. In **File**, click **Browse** to locate the document you want to upload to you client's **Reports & Documents** library.

Notes

3. Selecting from the pre-determined list, if appropriate, can make searching for your document in the future easier.
4. You are free to manage the status of any documents you choose to upload. You can amend the status of these documents at any time.

Uploading documents – cont.

What you will see



What you will need to do

6. In the pop-up window, navigate to the file location and select the file you want to upload.

7. In **Document Name**, enter the name of the document.

8. Click **Add another document** if you want to upload multiple documents at the same time.

9. Click **Save**, when you are ready to upload the selected files.

Your files will now be available in your client's **Reports & Documents** library.

Notes

7. This option is not available if you selected one of our pre-determined document types. Once you upload the document you will not be able to change the document name.

8. You can click **Delete** to remove any files you have selected here in error.

Locating and viewing client documents

You can scroll through the full list of documents to find the one you are looking for or you can use the selection boxes to help narrow the search.

What you will see

The screenshot shows the 'Reports & Documents' library interface. At the top, there's a navigation bar with tabs: Summary, Portfolio, New Work, Cash Account, Account Holders, Transactions, Reports & Documents (selected), and Charges & Remunerations. Below this is a sub-navigation bar with 'Request Report' and 'Library' (selected). The main area contains search filters: Document (dropdown), Status (dropdown), Type (dropdown), and Created By (dropdown). There are 'Clear' and 'Search' buttons. Below the filters is an 'Add New Document' section with an 'Add' button. The main content is a table titled '296 RECORDS' with columns: ID, Type, Document, Date Added, Report Status, Archive Status, and Created By. The table lists several documents, including 'Elevate 6 Monthly Statement', 'Charges Information', 'Transfer Form', and 'Disclosure Illustration'. Callouts point to specific elements: 1a points to the Document dropdown, 1b points to the Status dropdown, 1c points to the Created By dropdown, and 2 points to the 'Complete' status in the table.

ID	Type	Document	Date Added	Report Status	Archive Status	Created By
11119710	Other	Elevate 6 Monthly Statement	04-Jun-15 8:57 am	Complete	Received from Client	Elevate Platform
10785279	Document	Charges Information (ID: 43654406)	29-Apr-15 9:07 am	Complete	Created	Mr James Eckersley
10785278	Form	Transfer Form	29-Apr-15 9:07 am	Complete	Created	Mr James Eckersley
10785277	Document	Disclosure Illustration (ID: 43654406)	29-Apr-15 9:07 am	Complete	Created	Elevate Platform
10695957	Document	Charges Information	17-Apr-15 12:20 pm	Complete	Created	Mr James Eckersley
10695956	Form	Transfer Form	17-Apr-15 12:20 pm	Complete	Created	Mr James Eckersley

What you will need to do

1. Select from the appropriate fields to help search for a file.
 - 1a. **Document** allows you to search via the document name.
 - 1b. **Status** helps you to find documents of a specific status.
 - 1c. **Created By** displays only the documents that you (or another person) have uploaded.
2. To open and view a document, click on **Complete** for the appropriate file.

Notes

- 1a. If you have used your own naming convention for uploaded documents this will not appear here.
- 1c. This will also include platform literature generated automatically when you have completed any platform transactions (for example the documents produced in the New Business Wizard).

Helpful hints

Your client, if they have read-only platform access to their account, will be able to view any documents that you choose to upload.

If one of your documents has been uploaded in error and you want to delete it, please contact Elevate Client Operations.

You can print documents held in the Reports and Document library or choose to save them to your desktop.

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@abrtn.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.

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For more information visit abrtn.com/adviser

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