



For financial adviser use only.

Elevate help guide

Reset your password

abrdn.com

If you've forgotten your password

What you will see

If you've forgotten your password you can reset it yourself or, if your password is locked, any of your colleagues with **Administrator** access can reset it.

Username:
|

Password:
|

Login

[Forgot your password?](#)

The information contained on this site is restricted and confidential.
Service usage is restricted to authorised persons only.

Important Information for Advisers: The information on the screens available to you is for professional financial adviser use only. It is not to be distributed to, or relied upon, by retail clients.

Data source FNZ/Financial Express.

1.

Reset password

Please enter your username below to reset your password.

Username: |

I'm not a robot

reCAPTCHA
Privacy - Terms

Submit

2.

What you will need to do

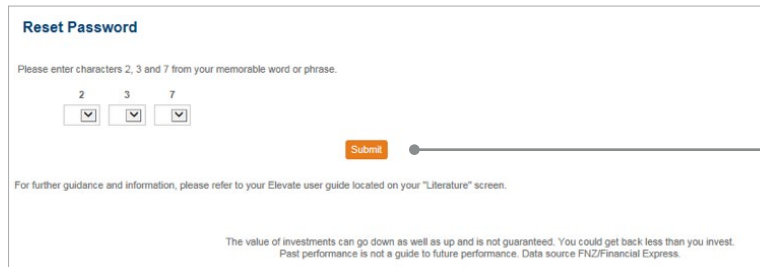
1. From the Elevate login screen, click **Forgot your password**.

2. Enter your username, confirm you are not a robot and click **Submit**.

Notes

If you've forgotten your password – cont.

What you will see



Reset Password

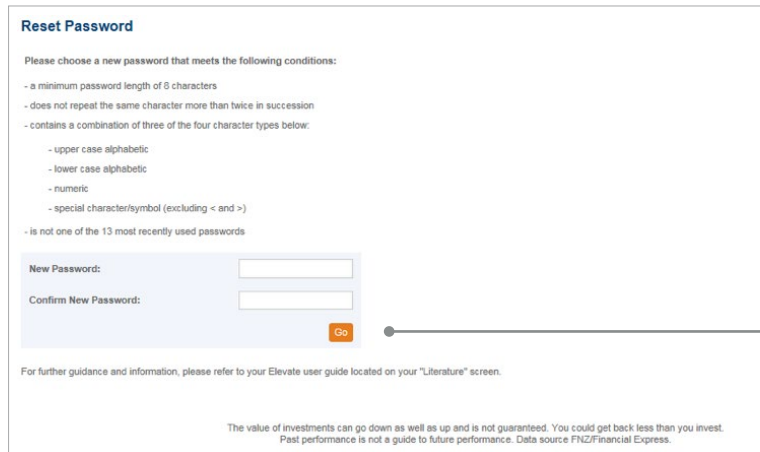
Please enter characters 2, 3 and 7 from your memorable word or phrase.

2 3 7

For further guidance and information, please refer to your Elevate user guide located on your "Literature" screen.

The value of investments can go down as well as up and is not guaranteed. You could get back less than you invest. Past performance is not a guide to future performance. Data source FNZ/Financial Express.

3.



Reset Password

Please choose a new password that meets the following conditions:

- a minimum password length of 8 characters
- does not repeat the same character more than twice in succession
- contains a combination of three of the four character types below:
 - upper case alphabetic
 - lower case alphabetic
 - numeric
 - special character/symbol (excluding < and >)
- is not one of the 13 most recently used passwords

New Password:

Confirm New Password:

For further guidance and information, please refer to your Elevate user guide located on your "Literature" screen.

The value of investments can go down as well as up and is not guaranteed. You could get back less than you invest. Past performance is not a guide to future performance. Data source FNZ/Financial Express.

4.

What you will need to do

3. Enter the three requested characters from your memorable word or phrase and click **Submit**.

4. Enter a new password, confirm your new password and click **Go**.

Notes

3. If you have forgotten your memorable word or phrase to get it and your password reset you will need to call us on 0345 600 2399. Our lines are open 9am to 5pm, Monday to Friday. You'll then be sent an email that will allow you to reset your password and memorable word or phrase.

4. After successful input of the new password and its confirmation, you'll be taken to the default Elevate login page where you will need to input your username and new password to login to Elevate.

An e-mail will be sent to you confirming that your password has been changed.

If your password is locked

What you will see

Any of your colleagues with **Administrator** access can follow these steps.

The screenshot shows a web application interface for user management. It includes a navigation menu at the top with options like 'Dashboard', 'New Client', 'Existing Clients', 'Business Mgmt', 'Research', 'Model Portfolios', 'Literature', 'Help', and 'Admin'. Under 'Business Mgmt', there are sub-menus: 'Remuneration Statement', 'Mgmt Reports', 'Remuneration Setup', 'New User', 'Edit User', 'User In Progress', 'Valuations', and 'Upload Firm Logo'. The 'Edit User' menu item is highlighted with a callout '1.'. Below the menu is a form titled 'Select user for editing:' with fields for 'User Name:', 'User Logon:', 'Email Address:', 'User Type:' (a dropdown menu), and 'Adviser FCA Number:'. An orange 'Search' button is at the bottom right of the form, with a callout '2.'. Below the form is a table titled '7 USERS' with columns: 'User ID', 'User Name', 'User Logon', 'Email', 'Company', 'User Type', and 'FCA Authorisation Number'. The table contains two rows of data. The first row has '424746', 'Adrian Customer', 'acustomer813', 'adrian@googlemail.com', 'Demo Financial Planning', and 'Client'. The second row has '424745', 'Alan Client', 'aclien443', 'alan.client@hotmail.co.uk', 'Demo Financial Planning', and 'Client'. A callout '3.' points to the 'Adrian Customer' name in the first row. Below the table is a 'Contact Information' form with fields for 'Work Phone:', 'Mobile Phone:', 'Fax:', 'Email:', and 'Confirm Email:'. The 'Email:' field contains 'Example@axawealth.co.uk' and is highlighted with a callout '4.'. The 'Confirm Email:' field also contains 'Example@axawealth.co.uk'.

What you will need to do

1. Go to **Business Mgmt > Edit User**.

2. Fill in any of the fields to find the user and click **Search**.

3. Click on their name when you've found them.

4. In the next screen, scroll down the page and check their email address is correct.

Notes

4. This is the email address we'll send the temporary password to.

If your password is locked – cont.

What you will see

Current Access:	
Password Status:	Locked
Password Expiry Date:	26/11/2013 15:28:35
Account Status:	Enabled
Terms and Conditions Version:	9
Last Logon Date:	14/11/2013 10:29:45

Edit Access:	
Lock Password:	<input checked="" type="checkbox"/>
Expire Password:	<input type="checkbox"/>
Lock Account:	<input type="checkbox"/>
Reset Password:	<input type="checkbox"/>

Edit Access:	
Lock Password:	<input type="checkbox"/>
Expire Password:	<input checked="" type="checkbox"/>
Lock Account:	<input type="checkbox"/>
Reset Password:	<input checked="" type="checkbox"/>

[Exit without saving](#) [Save and exit](#) [← Back](#) [Next →](#)

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](#)

6.

7.

8.

9.

10.

What you will need to do

5. Click **Next** and then click **Next** again to move to **Account Control**.

6. Scroll down to **Edit Access** at the bottom of the page.

7. Untick **Lock Password**.

8. Tick **Expire Password** and **Reset Password**.

9. Click **Next**.

10. Click **Submit**.

You've now successfully unlocked the account and reset the password. Click **Exit** and continue using the platform.

Notes

5. In **Current Access** the password status will be Locked.

6. You'll see a tick next to **Lock Password**.

9. You should see **All data entered has been successfully validated**. If you don't then click back through the steps to correct any errors.

10. You will see **User successfully updated**.

We'll send the user an email with a temporary password, which they need to change when they next log in.

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.

SLE0102 1222

abrdn.com

STA1122328322-001