Platform access – adviser firm user

WRAP Quick Guide

For adviser use only.

Setting up adviser firm user access

Step One

Before an adviser firm user can be added to the platform, they must first register for a Unipass Identity.

To register for Unipass, you will need to go to **www.unipass.co.uk**

- Once registered you can collect a Unipass Certificate and use it to access the platform.
- Alternatively, you can use the Unipass User ID/ Passphrase to access the platform.
- Log into your platform via the link on your welcome email.

Step Two

How do I add new users?

- Go to **Menu System > Users and access > User Management > New User.** Set up as **'an adviser'.**
- Complete all primary fields marked with a*.
- Ensure you enter the correct email address for the adviser.
- Save account, this will create a new user.

How do I permission the user to see each adviser's clients?

- Go to **Menu System > Users and access > Access management > Edit adviser access to permission accounts.**
- This will bring up a list of advisers within the firm. Please choose read only or read/write access for the required advisers, save and confirm your changes. This will allow the user to see all clients associated with these advisers.
- Alternatively, you can permission the user to see ALL advisers and their associated clients by using the **'Edit Company Access'** hyperlink at the top of the screen.

How do I add a new business writer?

When a new adviser joins the firm, they have to be added as a Business Writer. To do this, please email **Wrap_servicing@abrdn.com** with:

- Adviser Name.
- Company Name, Agency Code.
- Add Business Writer in Subject Heading.

Once we have received the request, it can take up to 10 working days for us to add on to the platform.

Remember – you may now need to update existing users permissions to see any newly added adviser's Clients.

What level of access do I need?

	View Wrap Info	Enter and Edit Data	Set Up and Edit Users	Set up AC and Model Portfolios	Access Client Base Reports
Read only	✖				
Transact	✖	✖			
Management	✖	✖			✖
Administrator	✖	✖	✖	✖	
Administrator MI	✖	✖	✖	✖	✖

Where do I...?

- Edit Users – **Menu System > Users and access > Access management > Edit existing account access.** Search for the adviser to update any details.
- Check what accounts the user can view – **Menu System > Users and access > Access management > Edit existing account access.**
- Permission users to all Business Writers – **Menu System > Users and access > Access management > Edit existing account access.**
- See what access users have – **Menu System > Users and access > User Management > Users by group.**

Hints and tips

- If you get an error message stating 'Access Denied', please make sure you are logging on through your own dedicated web page and not abrdn.
- If you get an error message stating 'no clients or company found', you have not been permissioned to view any accounts (please see step 2 – how do I permission the user to see each adviser's clients).
- If the system does not format properly, please make sure you are going in through a computer or laptop rather than a tablet or phone, as this may distort the web page.
- You can go in and reset your passphrase yourselves through the Unipass website.
- An administrator can search to see if you have an account set up under **Menu System > Users and access > User management > Find user**, if nothing pulls up they will need to set you up with a Wrap Account (step one).

For more information visit abrdn.com/adviser

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STA0523448564-001