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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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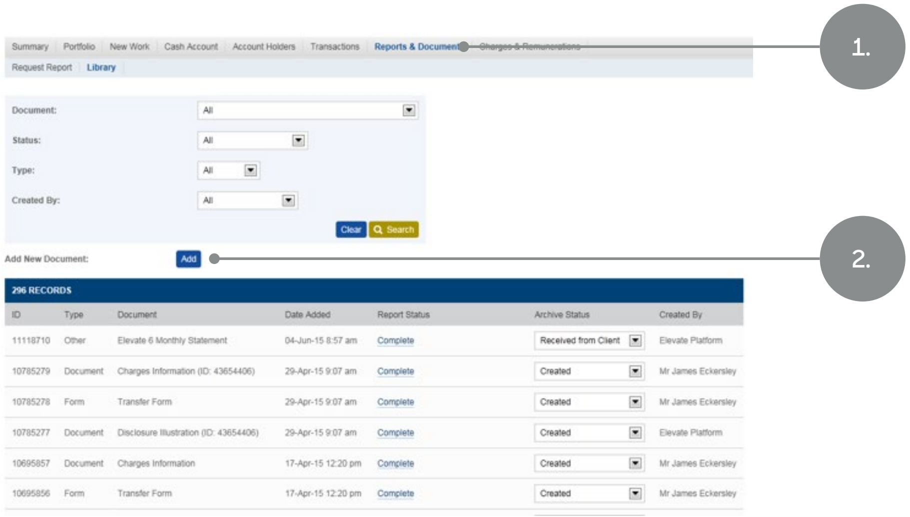
Uploading documents

What you will see



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

What you will need to do

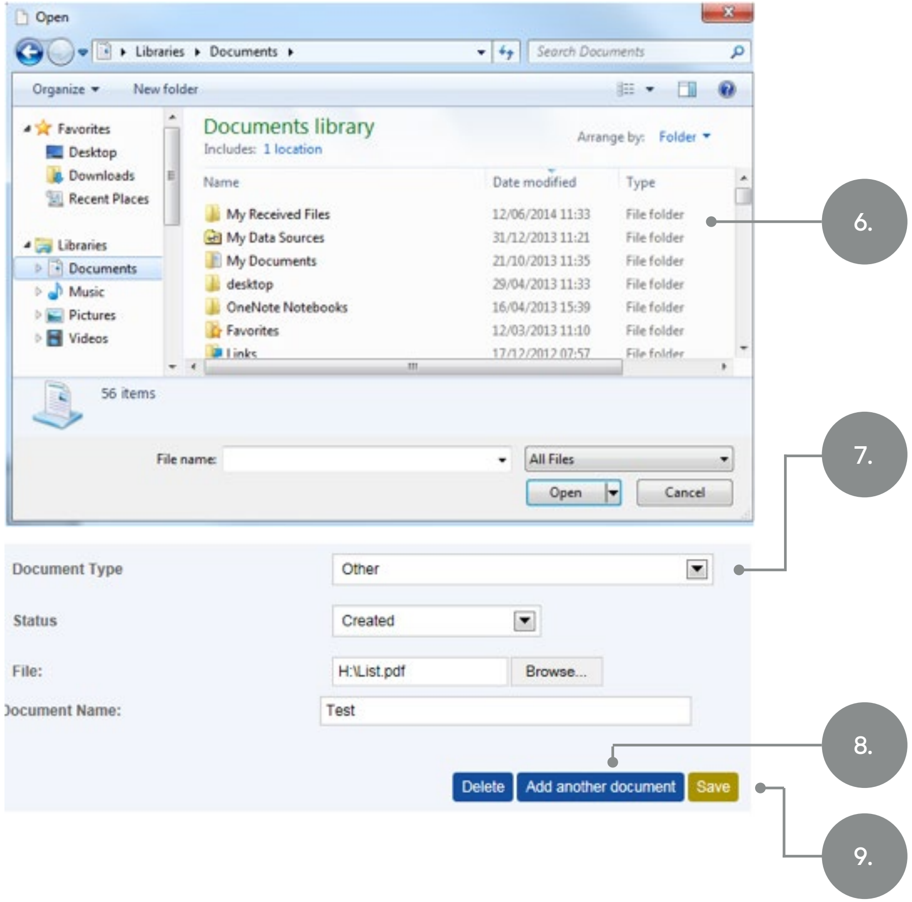
3. In **Document Type**, select from the list of available documents or select **Other** to name you own.
4. In **Status**, select the status you want to apply to your document.
5. You can choose from:
   - Created
   - Sent to client
   - Received from client
   - Sent to Customer Services
   - Archived
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

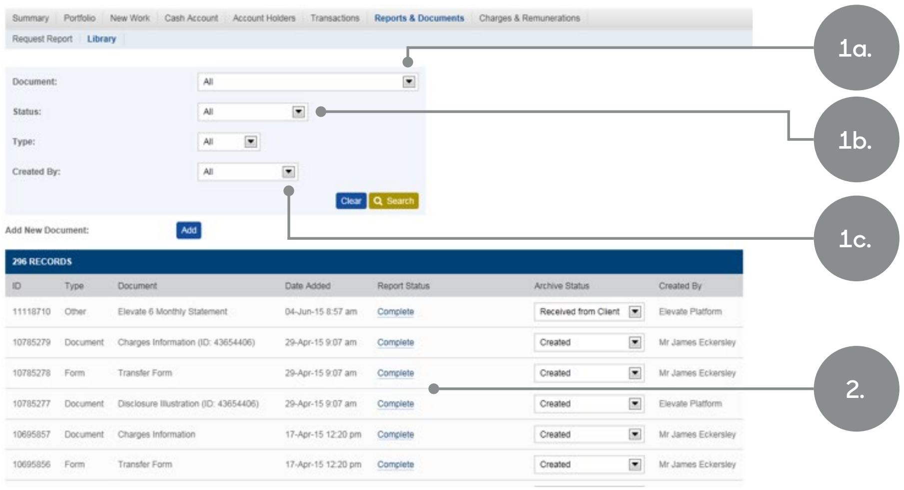
7. This option is not available if you selected one of our pre-determined document types. Once you upload the document you will not be able to change the document name.

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



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 you desktop.

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@aberdeenplc.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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