



For financial adviser use only.

# Elevate help guide Setting up valuations with IRESS XPLAN

# Introduction

This guide will give you an overview of the valuation integration between IRESS XPLAN and Elevate and how you can easily access this service.

These days, it's more important than ever to spend time with your clients. Our integrated valuation service makes your day-to-day administration easier – giving you more time to focus on your clients. This simple guide will get you started with Elevate and XPLAN valuations and the benefits they can bring your business.

## What are the key benefits?

The integration between Elevate and XPLAN offers a flexible, easy to use solution you can:

- save time on day-to-day admin
- reduce your firm's costs and operation overheads
- make it even simpler for you to do business using Elevate.

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# The integration services available to you

## Valuations

Elevate valuations are automatically updated in XPLAN on a daily basis.

## Remuneration Statements

Elevate provides remuneration statements in an electronic format to enable you to view and manage your remuneration using XPLAN.

## Which product wrappers are supported?

Product	Valuations	Remuneration
Elevate Pension Investment Account (Elevate PIA)	✓	✓
Elevate Stocks and Shares ISA (Elevate ISA)	✓	✓
Elevate General Investment Account (Elevate GIA)	✓	✓
Elevate Cash Account	✓	✓

# How to set up Elevate to access the XPLAN integration services

## Already using Elevate and XPLAN?

The XPLAN integration services are set up and configured specifically for your firm. You only have to request access once.

Email **elevate\_enquiries@aberdeenplc.com** with the subject 'Request for IRESS XPLAN set up'. Please include in the email:

- Firm name
- FCA number
- Firm contact
- Telephone number
- Email address
- Valuations required? Yes / No
- Renumeration file required? Yes / No

You'll receive a confirmation email from us when the Elevate part of the set up is complete.

Any changes you need to make in the future can be made in the same way.

## Not on Elevate?

If your firm uses XPLAN but not Elevate, you can access this new service when your firm signs up to the Elevate platform.

If you would like to find out more, please call 0345 600 2399 (open Monday to Friday 9am-5pm) or email **elevate\_enquiries@aberdeenplc.com**

# How to set up XPLAN to access the Elevate integration services

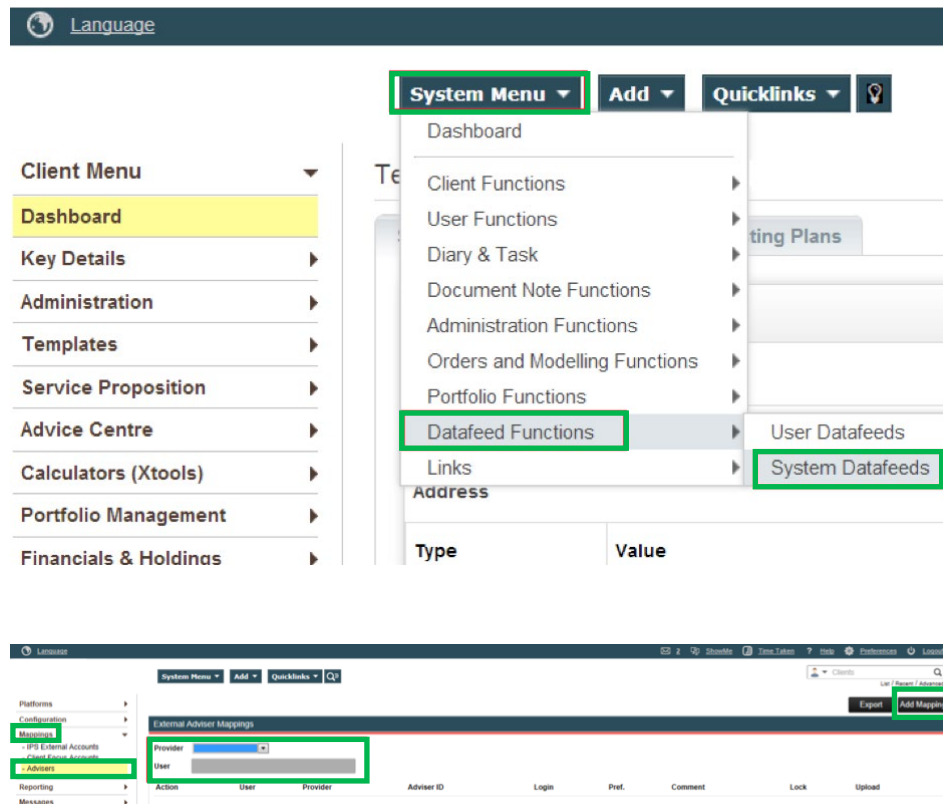
Your firm's XPLAN administrator must carry out a few simple steps in XPLAN before your firm's advisers and other users can use the Elevate integration services. The IRESS Support Team (0845 068 3000 or [clientsupport@iress.co.uk](mailto:clientsupport@iress.co.uk)) will be able to help you with this.

Full details of how to set up XPLAN, its features and services are available to download from the IRESS Client Extranet.

# XPLAN – Set-up

(Adviser Mappings)

## What you will see



## Notes

Setting up Adviser Mappings from Elevate is a one off task. Once set up has been completed other advisers can use this and it only remains to set up the plans themselves for Valuations. The data held for an Elevate policy must exactly match the details input into XPLAN otherwise, a valuation will be unsuccessful

1. Select **System Menu > Datafeed Functions > System Datafeeds**
2. In the left hand navigation menu, select **Mappings > Advisers**. Select **Elevate** from the dropdown option. Then click **Add Mapping** in the top right hand corner.

## XPLAN – Set-up – cont.

### What you will see

#### Add External Adviser ID

Provider	<input type="text" value="Elevate"/>
Description	The adviser details for Elevate
FCA Reference	<input type="text"/> Normally 6 numeric digits
Comment	<input type="text"/>
<input type="checkbox"/>	Add more

#### Get Token for Elevate

Username:	<input type="text"/>
Password:	<input type="password"/>

Ok

Cancel

### Notes

The Adviser Mapping is required to access online services from Elevate such as valuations.

To setup access please enter your FCA Firm Reference Number. If you have more than one you will need to add multiple Adviser Mappings.

Please note this is a bulk feed which will provide an automatic daily download of all Elevate held investment and cash positions. You will only need to add one Adviser Mapping (not one for each Adviser) the feed will then download all the data for the whole firm.

There is an additional level of security in place for this feed that will need to be performed by IRESS. Once you have set up the Adviser Mappings you will need to contact IRESS support on 0845 068 3000 or email [clientsupport@iress.co.uk](mailto:clientsupport@iress.co.uk) so that they can validate your Adviser Mappings.

## 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@aberdeeenplc.com](mailto:elevate_enquiries@aberdeeenplc.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 [aberdeeenadviser.com](http://aberdeeenadviser.com)

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