

## How do I set up and use Enable CRM with the Elevate platform?

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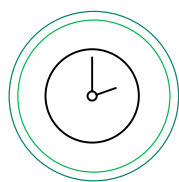
The Elevate platform provides bulk client valuation data which can be downloaded and uploaded into Enable. This guide describes how you can register for the service and how the Elevate data can be set up and accessed via Enable.

### Overview of the service

#### Bulk valuation file

The file is produced and made available on the Elevate platform containing valuation details for all of your company's Elevate accounts.

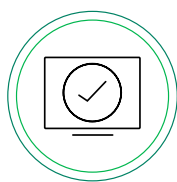
**This is produced at a frequency specified by you and is made available for collection from the Elevate platform.**



Elevate bulk valuation file generated daily at 8am



Download bulk valuation file from the Elevate platform



Upload the bulk valuation file directly into Enable CRM

#### Information contained within the file is as follows:

- Elevate headed account number
- Elevate product wrapper name (Elevate cash account, GIA, ISA, PIA)
- Contract status (Active, Submitted etc..)
- Valuation (aggregate value of all sub accounts)
- Full investment breakdown
- Sub account number (e.g. EL.....)
- Sub account name (Discretionary Manager, Model Portfolio etc..)
- Sub account status (e.g. Active, Closed etc..)
- Sub account full investment breakdown and valuations.



## How to register for this service

This can be set up when you first on-board with the Elevate platform. Your Business Development Manager or Platform Relationship Manager can arrange this.

### Already using Elevate and Enable?

You only have to request access once in two simple steps.

1. Complete the **Registration Form** available on our website
2. Email it to us at [elevate\\_enquiries@aberdeenplc.com](mailto:elevate_enquiries@aberdeenplc.com) or contact your Business Development Manager or Platform Relationship Manager with your request.

## How do I configure Enable CRM to access the bulk valuation file?

### Downloading Bulk client valuation files

The latest data file needs to be downloaded in order to import the current valuation details. To access the latest information you will need to login to:

- Have an Elevate platform user account with administrator permissions
- Log into the Elevate platform [ads.elevateplatform.co.uk/](https://ads.elevateplatform.co.uk/)
- Go to 'Business Management' and go to 'Valuations'
- Right click on 'Complete' and select 'Save as'
- Enter a name for the file, choose a location to save to document and select 'Save'.

### Plan number formats

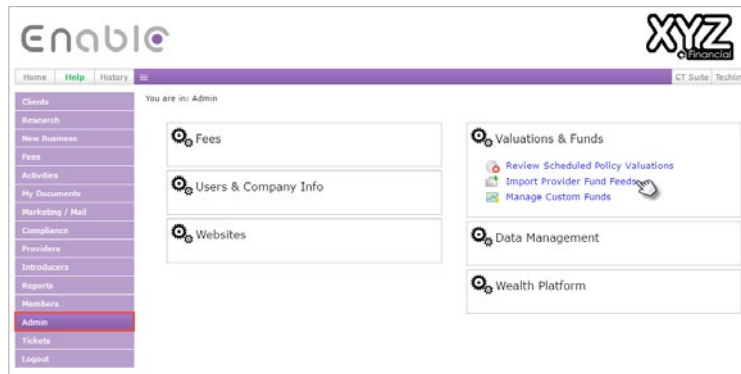
In order for Enable CRM to correctly create Plans, Elevate plans must be set up with the correct plan number format.

The following are the correct plan number formats which must be set up:

Scheme	External scheme name	External Scheme format
ISA	ElevateISA	ELnnnnnnnn-nnn
General Investment Account	ElevateGIA	ELnnnnnnnn-002
Cash Account	ElevateCashA/C	ELnnnnnnnn-001
Elevate PIA	ElevatePIA-Scheme 1	ELnnnnnnnn-Scheme 1
Elevate PIA – Protected Rights	ElevatePIA-Scheme 2	ELnnnnnnnn-Scheme 2

To process the Elevate bulk download file into Enable CRM System you must have the user level of **Firm Administrator**.

To start, navigate to the **Admin** button in the main menu, select the **Valuation & Funds** to expand the dropdown and click the **Import Provider Fund Feeds** button.



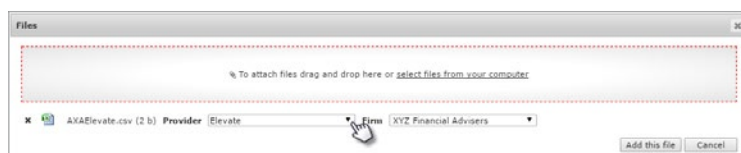
The following screen will display. To allocate the Elevate bulk download file click the **Upload file** button.



A window will appear. There is two ways to add the file; select the file from your computer or drag and drop the file into the window.

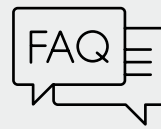


Once added, the file will display. Select **Elevate** from the **Provider** drop-down and if relevant, select your branch out of the **Firm** drop-down. Once done, click the **Add this file** button.



If the Elevate bulk download file has been successfully uploaded a tick will display, and the window will disappear.

If the Elevate bulk download file upload was unsuccessful and error message will display. If you are unable to correct this error, please raise a support ticket in Enable.



## Frequently asked questions

### 01

#### When is my bulk valuation file generated?

Your bulk valuation file is generated by the Elevate platform at 6am. This will be before the day's investment price feed (usually 8am). Therefore the bulk valuation file will use the last known price from 8am the previous working day.

### 02

#### How do I differentiate between tax years on my client's ISA?

Currently there is no way to differentiate between tax years through the bulk valuation function.

However, an ISA allowance report is available through the Elevate platform, which documents your client's ISA allowance usage for current and previous years.

### 03

#### Why don't my client valuations reflect today's prices?

The prices in Enable reflect the prices in the latest bulk valuation file that you have downloaded from Elevate. Check that you have downloaded today's file.

Also bear in mind that the bulk valuation file is generate by the Elevate platform at 6am. This will before the day's investment price feed (usually 8am).

# Contact Us

## Enable CRM

Creative Technologies Support Team

Call us on **01403 33 44 40**

Email us at [support@creative-technologies.co.uk](mailto:support@creative-technologies.co.uk)

[www.ctoneworld.com](http://www.ctoneworld.com)

To download files: [ads.elevateplatform.co.uk/ClientBase/Valuations/Valuations.aspx](http://ads.elevateplatform.co.uk/ClientBase/Valuations/Valuations.aspx)

## Elevate Customer Operations

Call us on **0345 600 2399**

Email us at [elevate\\_enquiries@aberdeenplc.com](mailto:elevate_enquiries@aberdeenplc.com)

For more information visit [aberdeenadviser.com](http://aberdeenadviser.com)

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