



Elevate help guide: Reset your password

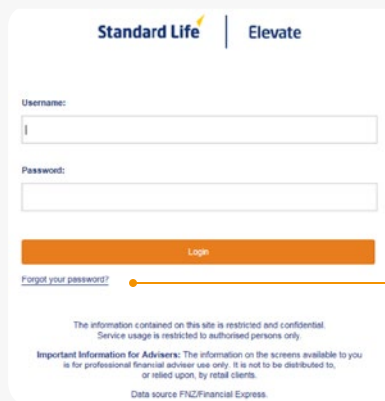
Standard Life 



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.



1

Reset password



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 (continued)

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.

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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 8am to 6pm, 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. At the top, there is a navigation menu with tabs: Dashboard, New Client, Existing Clients, Business Mgmt, Research, Model Portfolios, Literature, Help, and Admin. Below this is a sub-menu with tabs: Remuneration Statement, Mgmt Reports, Remuneration Setup, New User, Edit User, User In Progress, Valuations, and Upload Firm Logo. The 'Business Mgmt' and 'Edit User' tabs are highlighted. Below the navigation is a form titled 'Select user for editing:'. The form contains fields for User Name, User Logon, Email Address, User Type (a dropdown menu), and Adviser FCA Number. A 'Search' button is located at the bottom right of the form. Below the form is a table titled '7 USERS'. The table has columns: User ID, User Name, User Logon, Email, Company, User Type, and FCA Authorisation Number. The table contains two rows of data. Below the table is a section titled 'Contact Information' with fields for Work Phone, Mobile Phone, Fax, Email, and Confirm Email. The 'Email' field contains the text 'Example@axawealth.co.uk'. Numbered callouts (1-4) are placed over the interface: 1 points to the 'Edit User' tab, 2 points to the 'Search' button, 3 points to the 'User Name' column header in the table, and 4 points to the 'Email' field in the contact information section.

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.

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 (continued)

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:

Expire Password:

Lock Account:

Reset Password:



Edit Access:

Lock Password:

Expire Password:

Lock Account:

Reset Password:

[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](#)

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 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@standardlife.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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