



How do I link my 1st Software Accounts to 7IM?

Overview of Registration Process:

- Open up the '**Client Management Module**'
- Select the '**Update Links**' option from the '**Maintenance**' menu
- In the popup window that appears press the '**Register**' button

This will send a message to the 7IM advisors with your contact details. The 7IM advisor will then contact you to discuss the client you wish to introduce to 7IM. Once introduced, 7IM will issue the 7IM Client Identification number and password pack etc. The 7IM Helpdesk will set up the access rights for the Introducer and Client so that details can be downloaded from the 1st Software Interface.

Initially setting up the Download facility for a user:

- Open up the '**Database Administration Module**'
- From the menu select '**Display**' and then '**User Monitor**'
- Double click on the appropriate username and from the resultant popup window, select the '**Update Links**' tab
- Select the '**7IM**' tick box and press '**OK**'

Once this has been done, exit the database Administration Module.

Configuring the Download link for a Client:

- Open up the '**Client Management Module**'
- Select the appropriate client
 - Go to the '**File**' menu then select the '**Open Existing Clients**' option
 - Double click on the appropriate client
- Select the '**Compliance Details**' option from the '**Factfind Details**' menu in the navigation bar
- In the '**Compliance Details screen**', double click within the box that has the headings '**Third Party**' and '**Reference**'
- In the popup dialog box that appears, select '**7IM**' from the dropdown list
- In the '**Reference Box**', enter the 7IM Client Identification number (for example: IMA0001) and then press '**OK**'.
- Repeat this process until all of the appropriate 7IM Client Identification numbers have been entered for the 1st client.

Downloading data from 7IM:

- Once all of the 7IM clients have been associated with the clients in the 1st Interface, select the '**7IM Policies**' download option from the '**Tools**' menu.
- At the bottom left hand side of the screen, a message should display saying:
 - Update Link contacting 7IM
 - Update Link completed
- The information held at 7IM should now have been downloaded into the 1st Interface.

If you require any further assistance, please contact the 7IM Helpdesk.

Telephone: 020 7760 8777

Email: helpdesk@7im.co.uk

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