

INTEGRATION SERVICES

HOW TO ACCESS 7IM VALUATIONS

SEVEN ^{VIM}
Investment Management

SUPPORT // APRIL 2017

HOW DO I ACCESS 7IM VALUATIONS VIA BACK OFFICE SOFTWARE?

Please follow the steps below:

- Request Data Services credentials from your 7IM Relationship Manager. These will give you access to 7IM client data through your back office software.
- We will send your credentials in the post in two separate letters; one with your username, the other with a password.
- When you have received both letters you can either contact your back office software provider or follow the steps provided in the Live Providers section of this document.

If your back office software provider is not listed in this document please speak to your 7IM Relationship Manager.

SUPPORT PROCESS

7IM do not provide direct support for third party software. If you do encounter a problem please contact your back office software provider support desk in the first instance.

Your provider should then endeavor to resolve the matter. If they are unable to resolve it in the first instance they are likely to need 7IM support. *Please ensure your provider contacts 7IM directly to discuss resolution and does not pass the problem back to you.*

Contact details for the 7IM technical support team are below should your provider need them.

Email: technical@7im.co.uk

Phone: 020 7760 8790

LIVE PROVIDERS

Assyst Software: client-Assyst

Once you have your 7IM login details, using the Assyst System Manager to set up Contract Enquiry access to 7IM via Client List / Contract Enquiries / General, select 7IM, and click New. Follow the screens and enter the 7IM user name and password then keep clicking Next and then Finish. (This is all detailed in the User's Guide chapter CA-17).

In client-Assyst itself the Policy Number field needs to contain the 7IM Portfolio ID, then click the Contract Enquiry tab and click Default Settings.

For more information on integrating with 7IM or if you have any queries contact the Assyst Help Team,
Tel: 01793 845511
Email: support@assyst-software.co.uk.

Best Practice

Register with Enable:

Once you have your login details please go to:

Enable -> Providers -> Provider Logins.

You should enter your 7IM username and password here, and tick the box marked 'Use For Contract Enquiry'.

If you have any issues with the registration process please contact support using the details below.

Email: support@bestpractice.co.uk

Bluecoat Software: FinPlan

Register with FinPlan:

Once you have your login details access the Valuation Services configuration via the View/>Advanced/>Options menu option.

The screenshot shows the 'Options' menu in Bluecoat Software. The 'Valuation Services' tab is selected. A dialog box titled '7IM Login for: Brian Wilson' is open. The dialog box contains the Seven Investment Management logo and contact information: information@7im.co.uk, 0207 760 8777, and www.7im.co.uk. Below this, it states 'IFA's must have a 7IM Data Services username and password'. There are two radio buttons: 'Use a login ID and password to access the valuation service' (selected) and 'Use a Unipass certificate to access the valuation service'. Under the first option, there are fields for 'Valuation Service Login ID' (containing 'SML_ADFLOP') and 'Valuation Service Password' (masked with asterisks). There is also a checkbox for 'Disable Contract Enquiry' which is unchecked. 'OK' and 'Cancel' buttons are at the bottom.

Here you can enter the details to be used for Policy Valuations within FinPlan.

For further assistance search the knowledgebase at:
<http://help.bluecoatsoftware.com>

Email: support@bluecoatsoftware.com

Durell Software Ltd

Register with Durell:

To set up the service navigate to Setup > Online Contract Enquiries > Seven Investment Management and enter your 7IM Data Services account user name and password. See 'Online Contract Enquiry for Investment Valuations' section of the Durell online manual for further details.

If you have any further questions please contact Durell.

Tel: 01823 326324

Email: enquiries@durell.co.uk

Existing Customer Support: www.support.durell.co.uk

Dynamic Planner

Register with Dynamic Planner:

Once you have your login details from 7IM, login to Dynamic Planner and click on the 7IM logo on the Home screen. The link will direct you to the right area of the system where you should enter your credential details to use the valuations service.

To get your client's valuations set up, go to the client record; under the Valuations area click on 'Add new platform reference', choose 7IM and enter the client's Account number, then request the valuation on the next tab.

You will be able to find a helpful user guide within each page, which will tell you exactly which steps to take to get your 7IM account linked with Dynamic Planner.

If you need any further assistance, please contact the DT support team on:

Email: support@distribution-technology.com

Phone: 0844 850 1790

Intelliflo: Intelligent Office (iO)

Register with Intelliflo:

To set up the service navigate to Administration > Automation > Schedule Bulk Valuation and enter your 7IM Data Services account user name and password.

A 7IM Bulk Valuation User Guide is available in the Bulk Valuation Provider Registration section which can be accessed through the 'Help' link in the top right 'Logged in as' nested list.

If you have any further questions please contact Intelliflo Support.

Tel: 0845 230 3700

Email: iosupport@intelliflo.com

IRESS

Register with IRESS:

Please go to our extranet page for the 7IM User Guide, this is found under e-Business -> e-Services -> 7IM.

If you have any further queries then please contact the Support team on:

Tel : 08450 683000

Email : clientsupport@iress.co.uk

JCS

Register with JCS:

Once you have our login details they can then be entered in the 7IM connection for JCS. From the portfolio summary page in JCS, Real Time Valuation requests can be made to update a single policy (RTV) or all listed policies for that client (RTV All).

The policy number that should be used in JCS to allow successful valuation of the case, is referred to as the AccountID in any communication from 7IM, an example is given below.

Example:

Account ID - IMF0ABCD

Tel : 08450 049 599 Option 1

Email: techsupport@talkjcs.com

Website: http://www.talkjcs.com/

Momentum Financial Technology Ltd – Moneyhub

When in receipt of your 7IM Username and Password login to Moneyhub for Business/Moneyhub Connect. Go to the Provider tab and select the New Platform Connection for 7IM. Enter your 7IM Username and Password and hit 'Save'. You will then see 7IM in the Connected Platforms list and will be able to utilise the Update Client Data tab. Following the initial set up, information will then be automatically downloaded on a daily basis.

Any queries or to obtain additional information, please contact Moneyhub Client Support:

Tel: 0117 280 5131

Email: connect@moneyhub.com

Morningstar

Register with Morningstar:

Once you have our login details please login to Advisor Workstation.

You will be presented with two portfolio types in Advisor Workstation.

Portfolio Name	Created Date	Last Updated	Account Type
Nucleus - Positions(XLS)	15/12/2009	15/12/2009	Custodian
7IM - Positions With History			Custodian
7IM - Quick Accounts			Custodian
Cofunds eData Service - Positions With History			Custodian

Clicking on one of these will launch a username and password dialog.

This will retrieve the data from 7IM and when the data is retrieved launch the integration staging area (blotter) for users to check that Morningstar have interpreted the data correctly.

If you have any issues with the registration process please contact the Morningstar support team using the details below.

Tel: +44 (0) 20 3107 0050

Email: adviser@morningstar.co.uk

Plum Software Ltd

Register with Plum:

Once you have your login details please refer to the Plum Software 'Provider Link Registering with Providers' document to complete the registration. This document is provided with your software. If you have any issues with the registration process please contact support using the details below.

Email: support@plumsoftware.co.uk

Prestwood Software

Register with Prestwood Software:

Go to the Import Wrap Feeds screen, select Seven Investment Management then click on Web Site Settings. Enter your 7IM username and password then click "OK". Once you have logged in please reference the Prestwood help files for guidance on initial set up and mapping.

If you have any questions or need assistance please contact the Prestwood support team from 9am to 5:15 Monday to Friday.

Tel: 01384 273736

Email: support@prestwood-group.co.uk

Sammedia Limited (Moneyinfo)

Register with Sammedia:

In the Moneyinfo Manager application please follow the steps below to complete registration.

- Select the 'Import Client Data' tab.
- Click on the 'Manage Data Sources' button and double click on 7IM in the options available.
- Click on 'Add New' and input your login credentials provided by 7IM. You can enter further login credentials by clicking the Add button.
- Once you have entered your login credentials and closed the dialog box, select 7IM from the options available under 'Select Data Source' and click on 'Get Clients'
- This client data import can be filtered by using the options available.

For more information on downloading your client's data to Moneyinfo or if you have any queries please contact the Moneyinfo support team using the details provided.

Tel: 0845 456 0304

Email: support@sammedia.com

Sprint Enterprise Technology Ltd (Fastrak)

Register with Sprint:

Once you have your login details please contact Sprint Support to arrange for the 7IM data feeds to be enabled on your Fastrak account.

Tel: 0845 612 5752

Email: support@sprintenterprise.co.uk

Time4Advice (CURO)

Register with Time4Advice:

Once you have your 7IM login details, please contact the Time 4 Advice Support team who will configure CURO to receive the 7IM data feeds. A member of the team will hand-hold you through your first download and will also assist in setting up an automated schedule to keep your data updated.

Tel : 0800 032 3774

Email : support@time4advice.co.uk

Website : <http://www.time4advice.co.uk/>

True Potential

Register with True Potential:

Once you have our login details you will need to raise a support ticket on the True Potential Support Site

<https://support.tpinside.com/login.aspx> advising True Potential that you wish to set up the link with 7IM and entering the username and password supplied on the ticket. The support representative will be able to set the linkage up and as this is real time, valuations should begin working as soon as the details are entered onto the live system.

Tel: 01255 5846589

Email: info@tpllp.com

Voyant

Register with Voyant:

Please contact Voyant to enable the 7IM integration extension. For more information on integrating with 7IM or if you have any queries please contact the Voyant support team using the details provided.

Tel: (0)20 3286 0482

Email: support@planwithvoyant.co.uk

Website: <http://www.planwithvoyant.co.uk>