

7IM PLATFORM - SWITCHING OFF PAPER STATEMENTS

PLATFORM // SEPTEMBER 2017

Step 1: Ensure 7IM have an email address for that client (ask 7IM if you're not sure).

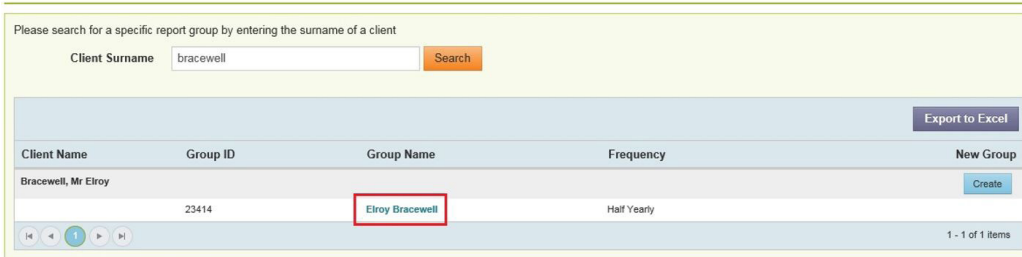
Step 2: Go online and tick the electronic only reporting box for that client (see instructions below).

1. Go to **Reports > Client Valuation Reports > Manage Report Groups:**



2. Search for client by surname. Then click on client's **Group Name:**

MANAGE REPORT GROUPS



3. Go to **Report Pack Contents** tab and tick the Electronic Only option. Scroll to bottom of page then click Save. The process is now complete

REPORT GROUP

