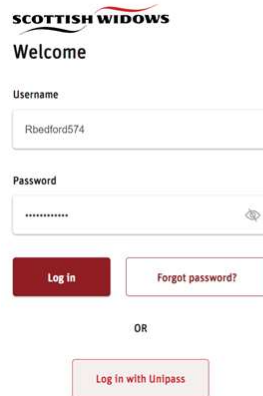


# Initial Setup of ATEB/Scottish Widows Platform Integration

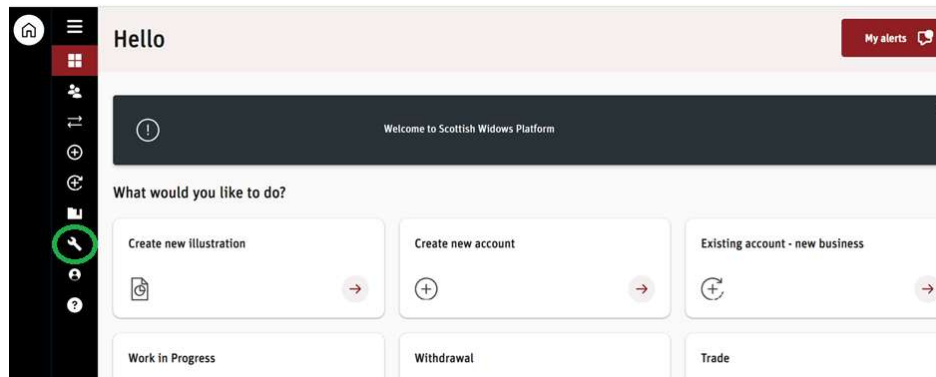
Modified on Wed, 25 Sep at 3:15 PM

To install the ATEB Suitability integration into the Scottish Widows Platform, please follow this step-by-step guide:

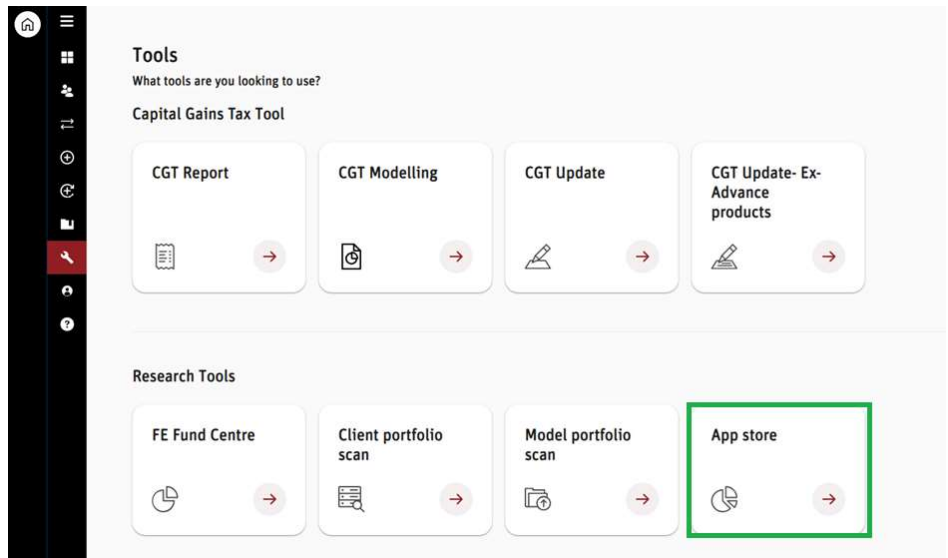
1. Log in to the Scottish Widows Platform - <https://www.scottishwidows-platform.com/login/>



2. Click on the spanner icon from the menu to the left

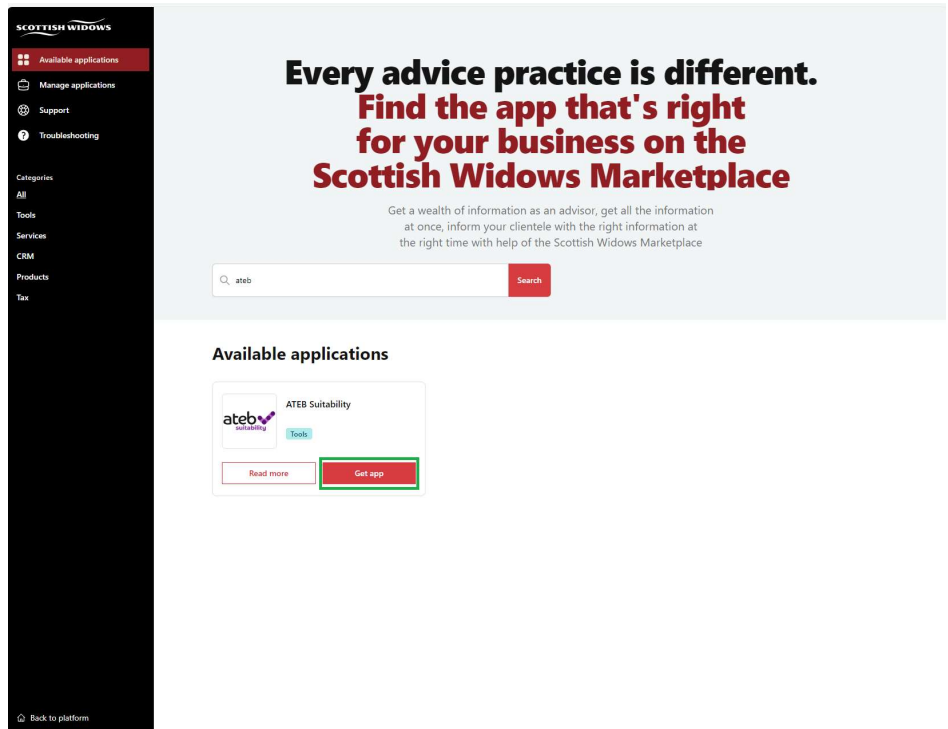


3. Click on the 'App Store' tile in the Research Tools section. This will take you to the marketplace where you either download the app (first time through) or select it from those you've installed.

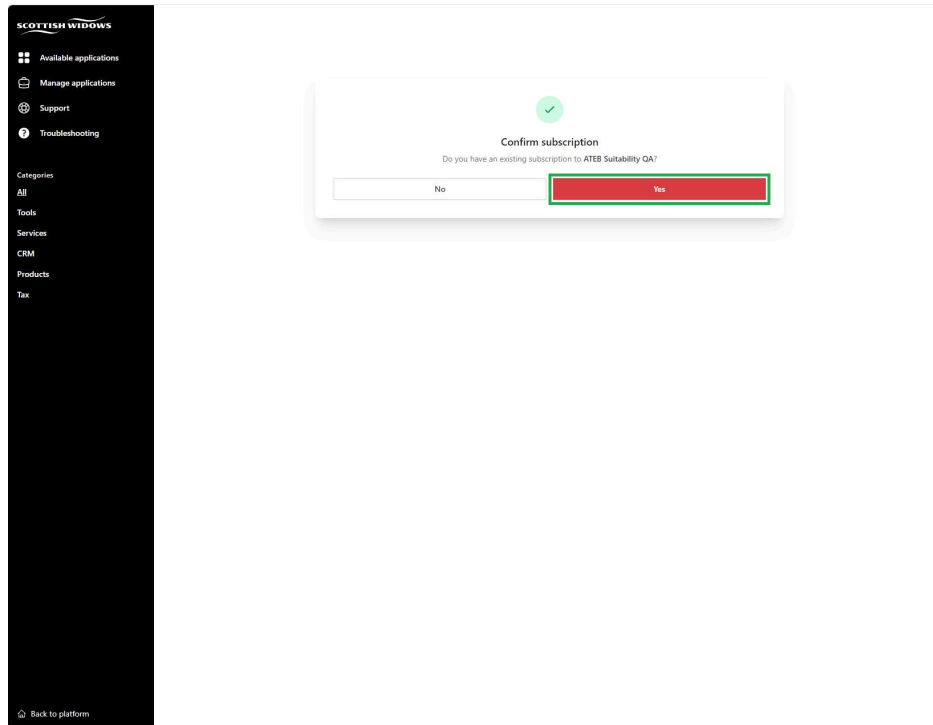


4. Search for ATEB Suitability

5. Click the 'Get App' button

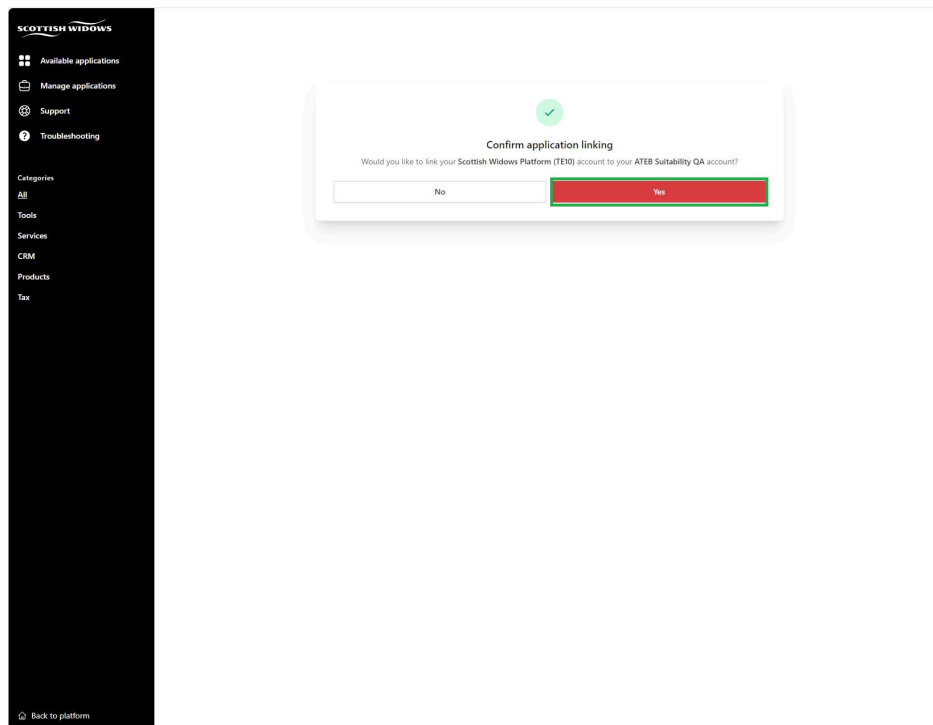


A new web page will open asking you to confirm if you have an existing subscription to ATEB Suitability:



**New User** - If you are a new user, you should select 'No'. This will begin the registration process (Details of the Registration in the following FAQ article: [What is the registration process for ATEB suitability?](#)).

**Existing User** - If you are an existing user, you should select 'Yes'. The following screen will then be displayed. Please select yes to continue.



This will lead you to the ATEB Suitability application log-in screen. Please note that your username can be different to that of the Scottish Widows Platform; you do not need to purchase a new license to use this facility.



ateb  
suitability

Username

Password

Please login using your ATEB suitability username and password.

LOGIN →

Now you have successfully logged in/registered for ATEB suitability, the screen asks for consent to access your Scottish Widows Platform data, and displays further information about what this means. You must select the button 'Yes, Allow' to continue the process. If you click on 'No, Do Not Allow', the process will be finished and you won't be able to progress further.



# ATEB Suitability

is requesting your permission to  
access

- Account names, numbers and types.
- Account balances and holdings.
- Contact details of individuals linked to an account as held by the account provider. Can include names, phone numbers, emails and physical addresses.
- External account information registered at the provider. Including external bank accounts that are the source or recipient of funds.
- Offline Access ⓘ  
Access to your applications and resources, even when you are offline

I confirm I act as agent for each of my clients and consent to the transfer of the information requested from the Scottish Widows Platform to the receiving Application for the purposes of providing financial services through the Application to my clients.

Yes, Allow

No, Do Not Allow

When 'Yes, Allow' is selected, you will see a confirmation that the integration has been successfully set up. The screen will automatically refresh and the ATEB Suitability dashboard will be displayed. The integration is now ready for use.