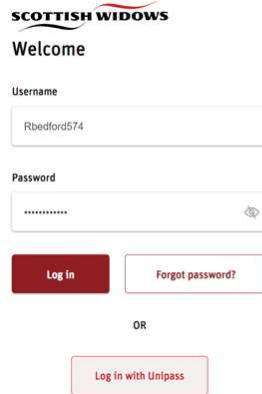


# Scottish Widows Platform Integration User Guide

Modified on Wed, 25 Sep at 1:00 PM

## Creating Suitability Reports using the ATEB / Scottish Widows Integration

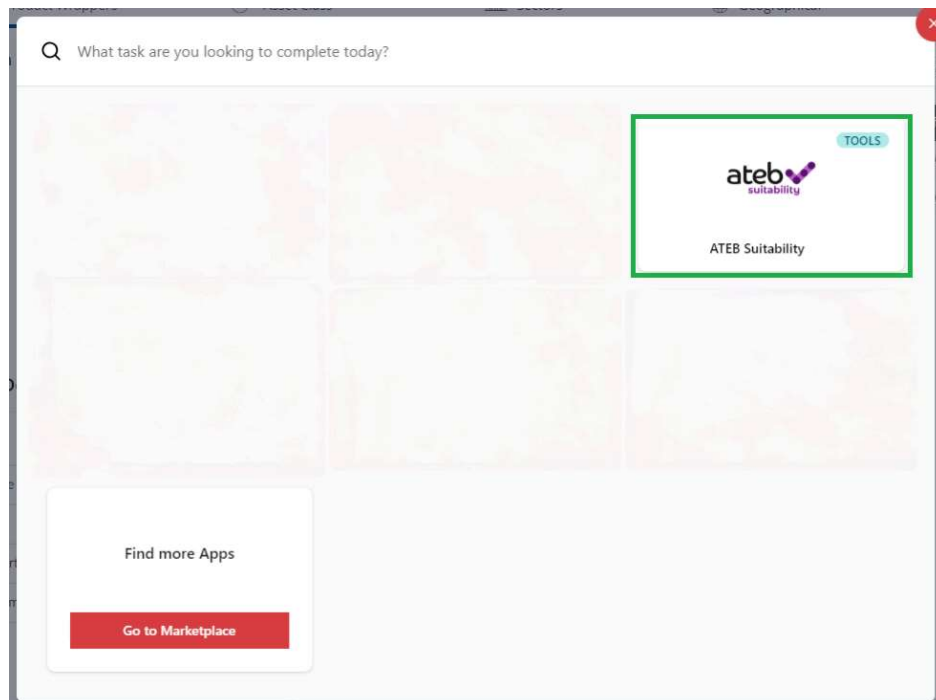
- Log into the Scottish Widows Platform



- From your chosen customer or account record, select the Launch Apps button:

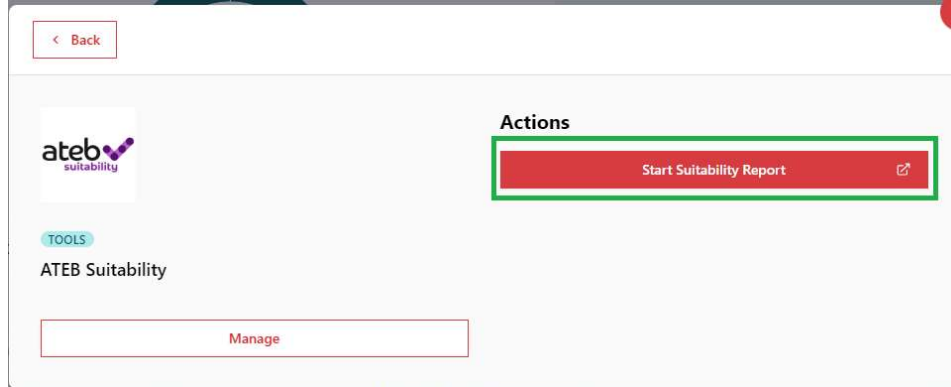


This will present you with a new pop up asking "What task are you looking to complete today?". Click the ATEB Suitability tile:

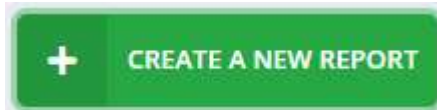


If you don't see the "ATEB Suitability" tile, please ensure that you have successfully completed the steps in the Scottish Widows Platform/ATEB Suitability Integration Initial set up guide

- On the next screen click "Start Suitability Report"



- You will be redirected to your ATEB Suitability dashboard. Click:



and your Scottish Widows Platform client will be visible, along with any joint client options for selection

 A screenshot of a 'Create A New Report' form. The title is 'Create A New Report'. Below the title is a text input field with the placeholder 'Enter report name...'. Underneath is a dropdown menu labeled 'Select type' with the selected option 'Suitability Report (All Advice Scenarios)'. Below the dropdown is the text 'Embark TE10 Data'. At the bottom, it says 'Report will be created on behalf of <Client name shown here>'. At the very bottom, there are two buttons: a grey 'CANCEL' button and a green 'START REPORT' button with a right-pointing arrow.

- Click Start Report. Your report will be populated with supported data from your client's Scottish Widows Platform record. Complete your report as usual.

