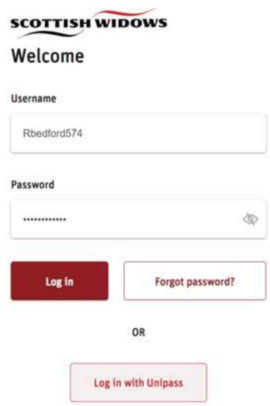
Scottish Widows Platform Integration User Guide

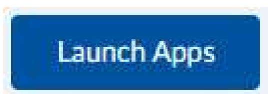
Modified on Wed, 25 Sep at 1:00 PM

Creating Suitability Reports using the ATEB / Scottish Widows Integration

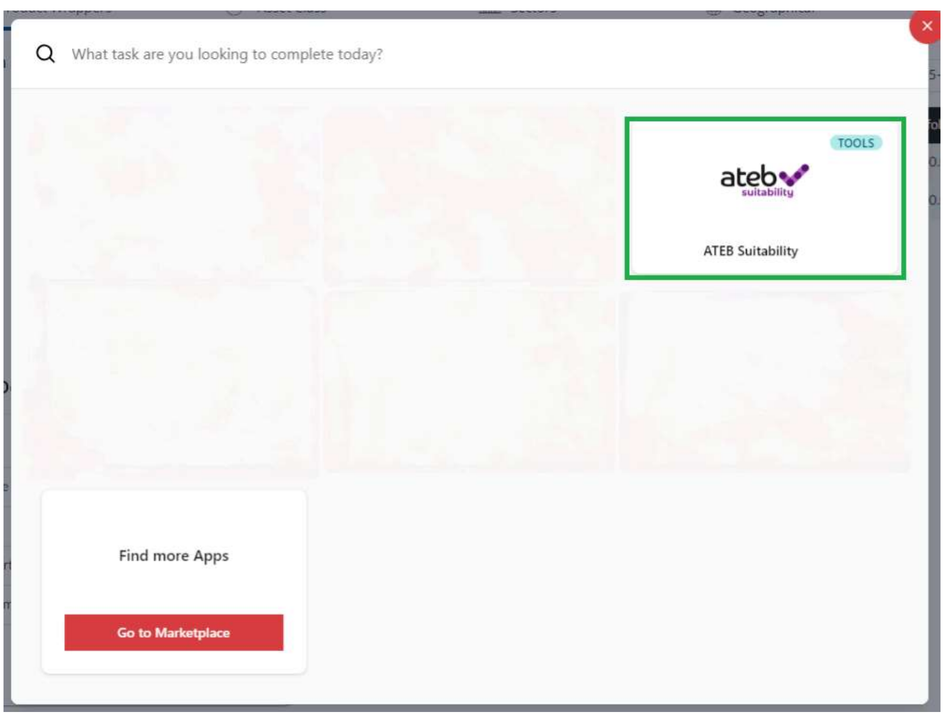
- Log into the Scottish Widows Platform



- 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:



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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
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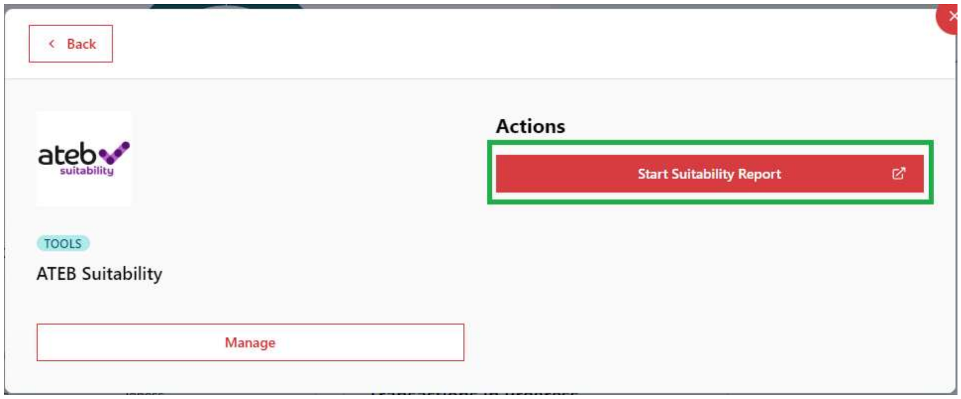
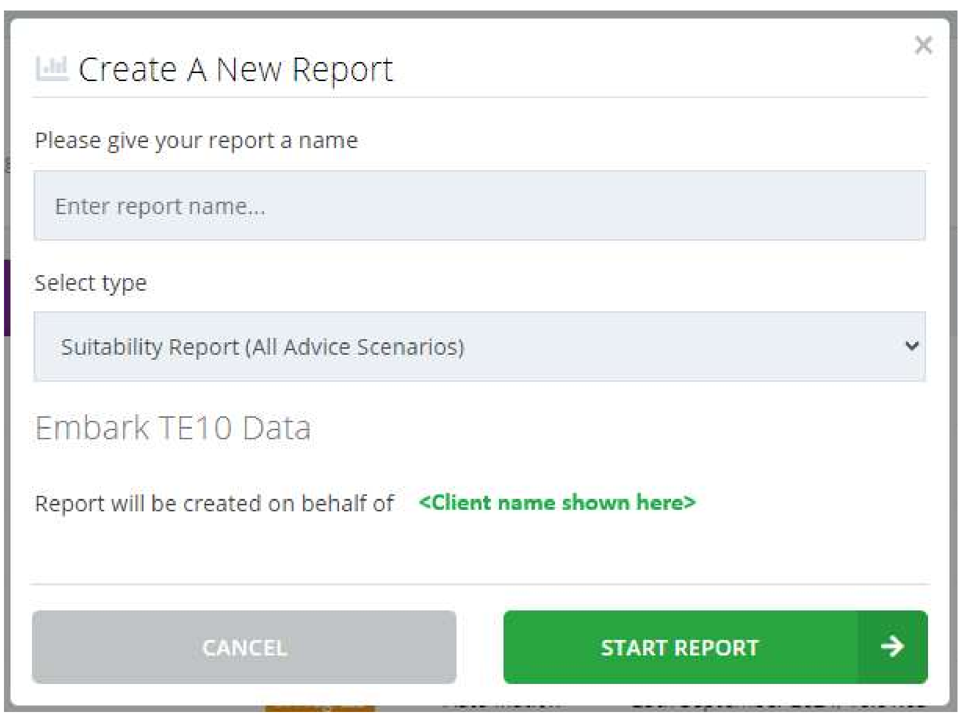
- On the next screen click "Start Suitability Report"



- 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



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