

To set up a new export job for selected advisers

1. From the **Data Exchange** menu, click **Integration Centre**.

On the **Adviser Export** tab, the **Adviser export list** screen shows a list of the exports you have set up for selected advisers.

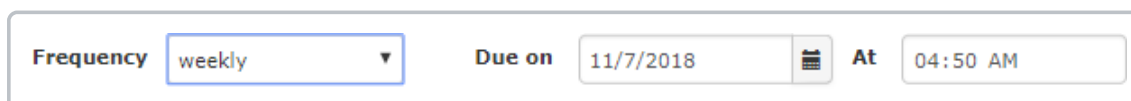
2. Click **Add new**.

3. Type a name for the export and select the type of export you want to set up from the **Recipient** dropdown list.

If you choose **EPI file sent via Email**, then the EPI export file will be sent to your email address (as specified on the My User Details screen).

4. Select the transaction types you want to export using the **Data to send** check boxes.

5. Select the frequency you want the export to run. If you select an option other than **Adhoc**, new fields will display allowing you to define the export start date and time.



Frequency: weekly (dropdown) Due on: 11/7/2018 (calendar icon) At: 04:50 AM (input field)

6. Use the filters to find and select the adviser(s) for which you want to export transactions.

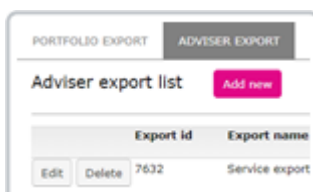
Selected	Adviser code	Adviser name	Adviser id	Service	Location	Team
<input type="checkbox"/>	<input type="text"/>	Matt	<input type="text"/>	<input type="text"/>	(All) (dropdown)	(All) (dropdown)
<input checked="" type="checkbox"/>	CHANCELLOR	Matt Walsh	122115	Praemium Test	Default	Default
<input checked="" type="checkbox"/>	Matthews@nextstepgroup.com.au	Matthew Matthew	121005	Praemium Test	Default	Default
<input checked="" type="checkbox"/>	adamsm	Matt Adams	112111	Praemium Test	Default	Default

You can select as many portfolios as you require in the export. If you click the checkbox beneath the **Selected** column heading, it will select all the displayed portfolios.

7. Click **Create**.

The new export displays on the Adviser export list screen.

8. The export will need to be registered with the third party software by providing the **Export id**.



PORTFOLIO EXPORT | ADVISER EXPORT

Adviser export list **Add new**

Export id	Export name
<input type="button" value="Edit"/> <input type="button" value="Delete"/> 7632	Service export