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

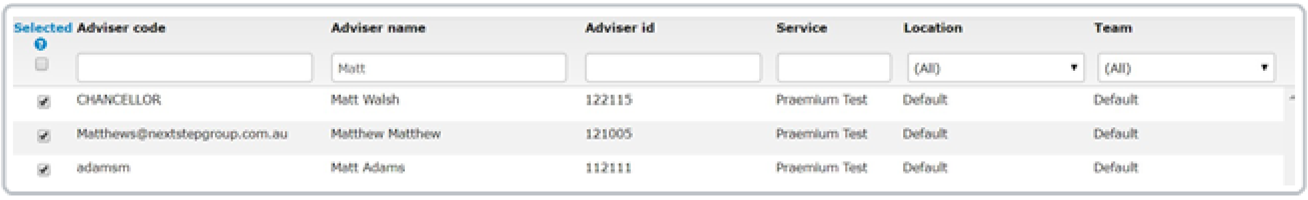
Recipient dropdown list.

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.

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



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**.