

# eData Services: Bulk Data Download

For advisers only. Not for use with customers.

## A guide to FRIENDS® eServices

If you would like up-to-date information about all your clients' Friends Provident policies, we can send you a bulk file of these records for you to import into your back office system.

### how

#### How does it work?

There are seven reports available. These are:

- Group pensions
- All policies
- Client
- All policies without unit details
- Unit linked life policies
- Unit linked pension policies
- Protection policies.

By logging into the 'Existing Business' area of our adviser extranet, you can select 'Data Downloads' from the left-hand menu. You can choose which reports you'd like to request from a table list. The reports are run overnight and we will email you when your files are ready to collect.

The reports are supplied in csv format that is easily converted in Excel. The Group Pensions report is supplied as an XML (Extensible Mark-Up Language) file and requires your back office system provider to import the data for you. If you use Adviser Office, you can use the Group Scheme Import wizard to upload the information yourself.

#### How can I use the data?

The bulk data reports can be used to either populate or clean your client records. Having this information in place means that your system is ready to receive real-time valuations.

#### What are the benefits?

- Update your records in a single action.
- Pick and choose which information you wish to update.
- Your data will be up to date and clean.
- Your database will be primed to receive real-time valuations.
- You can reduce error rates on contract enquiry messages by having the Friends Provident policy reference seeded in your database.

### benefits



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start

## How do I get started?

To start taking advantage of our eData services, you'll firstly need to be a registered user of Friends Provident's online services.

- Visit our website at [www.friendsprovident.com/adviser/register](http://www.friendsprovident.com/adviser/register). You can either choose to register with Unipass, if you currently hold a Unipass certificate, or register without Unipass by completing our online registration form and choosing a login ID and password.
- Log into 'Existing Business' on our adviser extranet and click on 'Data Downloads'.
- Once requested, your report will be prepared overnight and we will email you to let you know that it is available to collect.
- Once you have collected your files, you can either open them with MS Excel or load them into your back office system. Most system providers can help with this process and we have guides available on our website where applicable.

more

If you'd like to find out more about the eServices that Friends Provident offers, you can contact our eAdoption team at [eadoption@friendsprovident.co.uk](mailto:eadoption@friendsprovident.co.uk).

The team can also offer you an eBusiness Review, where they'll work with you to make sure you're getting the most out of your eBusiness systems.

Friends Provident Life and Pensions Limited

Registered and Head Office: Pixham End, Dorking, Surrey RH4 1QA  
Incorporated company limited by shares and registered in England number 4096141

[www.friendsprovident.com](http://www.friendsprovident.com) Telephone 0870 608 3678

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