

Log in details for Report Integrations

To set up integration of reports to a back-office system, advisers will need their:

- **Consultant ID** – 8 digits long starting with 10 e.g. 10xxxxxx.
- **PIN** – 6-8 digits long set up by the adviser when completing their online registration.

Since the introduction of multi-factor authentication, advisers now use a username and password to access the Fidelity Adviser Solutions platform. As a result, the credentials used to log in to our platform, are different from the Consultant ID and PIN required to set up integrations with back offices.

Adviser Solutions

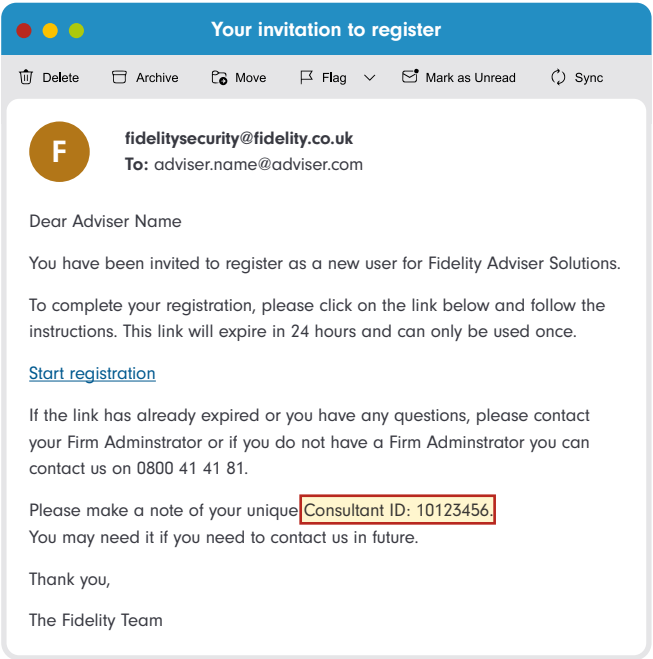


If you cannot remember your Consultant ID or PIN, they can be found following these steps:

Consultant ID

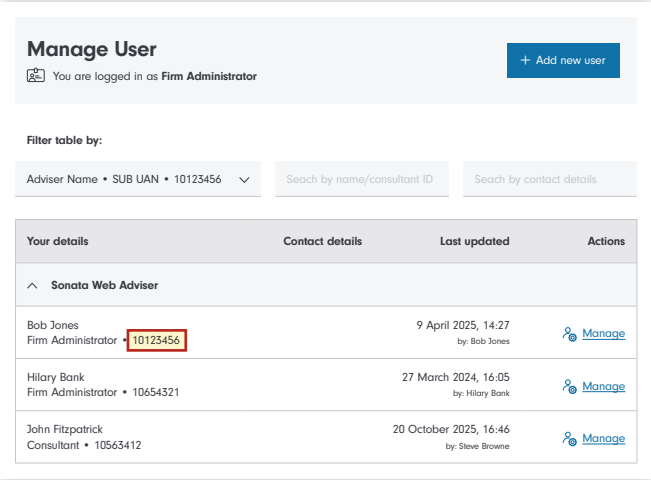
You can find your Consultant ID in one of three ways:

1



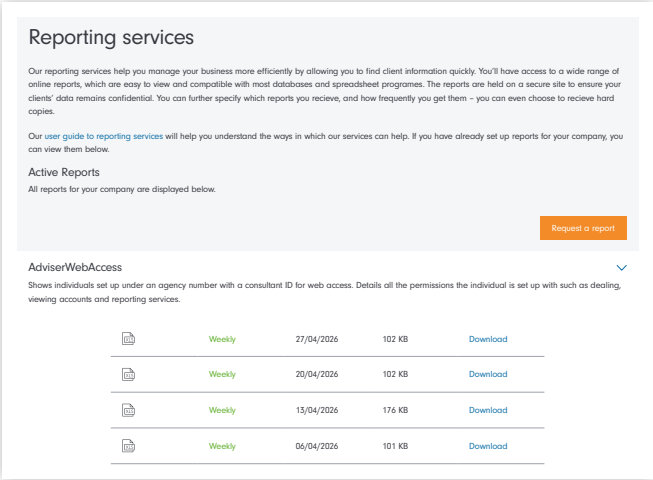
In the welcome email they received when they first registered for online access titled 'Your invitation to register'.

2



A firm administrator can view all users' Consultant IDs when they login to the Adviser Solutions Platform – just click 'Firm' on left hand side then 'Manage Users'.

3



If the 'Web Access' report has been scheduled for the firm, then this can be downloaded where Consultant IDs are listed:

- Click on 'Firm' on left hand side then 'Reporting Services'.
- Click on 'Download report'.

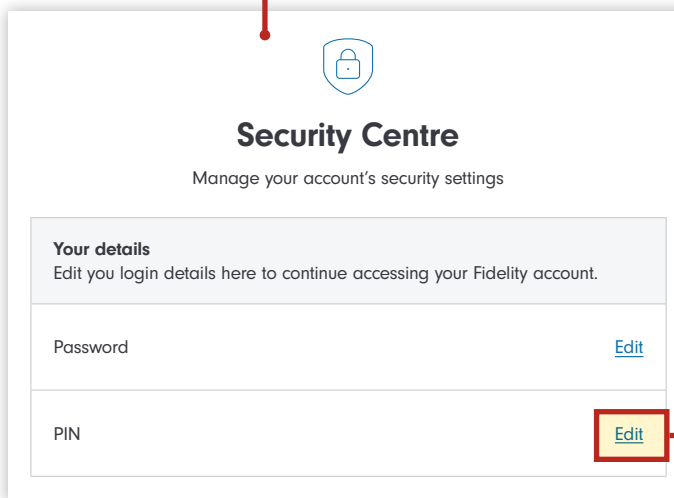
PIN

The PIN is created by the adviser during the online registration process. If an adviser cannot remember their PIN, they can reset it by:

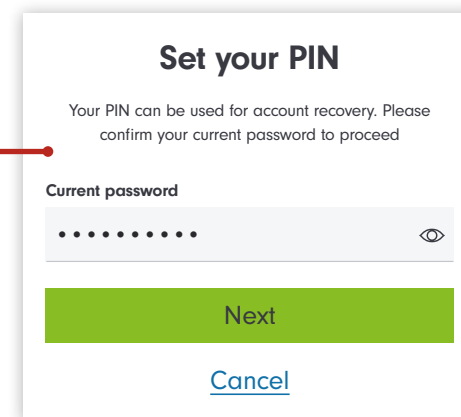
- Logging into the Fidelity Adviser Solution Platform.
- Click '**Security Centre**' at the top.
- Reset PIN by entering your password.

PIN Criteria

- Between 6-8 digits.
- Do not use sequence (e.g. 123456).
- Do not use repeated digits (e.g. 999999).



The Security Centre interface is titled "Security Centre" with the subtitle "Manage your account's security settings". It features a shield icon. Below the title is a section "Your details" with the instruction "Edit you login details here to continue accessing your Fidelity account." This section contains two input fields: "Password" and "PIN". Each field has an "Edit" link to its right. A red line connects the "Security centre" link in the top navigation bar to the "Security Centre" title, and another red line connects the "Edit" link next to the "PIN" field to the "Set your PIN" dialog box.



The "Set your PIN" dialog box has the title "Set your PIN" and the instruction "Your PIN can be used for account recovery. Please confirm your current password to proceed". It contains a "Current password" label above a password input field with a toggle eye icon. Below the input field is a green "Next" button and a "Cancel" link.

Alternatively, if you still require some assistance please our adviser line on **0800 41 41 81**