Welcome new adviser

To help get you started here are some steps you can take that will help with your onboarding and future use of Transact.

Spending a little time now will help you gain the efficiencies from your new platform.

1. Access the support available to you:

- Browse through our training videos on Transact Online
- Speak to your adviser support manager or your Client Service Team
- Live Chat or co-browse with our friendly team
- Contact us at *salessupport@integrafin.co.uk*

2. Log in to Transact Online

3. Set up a two-step verification – a second layer of protection – Google or Microsoft Authenticator

4. Check out the dashboard and the functions available: buy, sell, valuations, transaction listing, cash report

5. Set up your advice payment defaults

6. Check out the Transfer Report

7. Create Personalised Illustrations

8. Create your Favourites and Model Portfolios

9. Submit applications using Guided Applications

10. Learn best practice about:

- auto sell
- setting up client bank accounts
- anti-money laundering

11. Learn how to send money using Expected Deposits

12. Understand when periodic reports will be sent:

As at January, July and October

- Portfolio valuation.

As at April

- Portfolio valuation
- Statement of income
- Cash summary
- Income Tax voucher (if applicable).

Remember at the outset your **Business Development Manager (BDM)** is here to help with support from your **Adviser Support Manager (ASM)**. They will support you during your first 5 cases and your ASM will provide you with ongoing support and training.

For adviser use only | M340 Version (3) September 2025

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