

PRESS RELEASE

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Transact enhances adviser service even further with co-browse

Transact has added adviser co-browsing to its adviser support service. By combining real-time screen display with a phone call Transact can help with illustration queries and help advisers establish Transact Online best practice. This new co-browse service follows the recent successful introduction of Live Chat on the Transact website.

In a co-browsing session Transact Sales Support staff can, with the advisers' permission, access the advisers' view of Transact Online. Transact can then see and discuss exactly what the adviser sees within the secure, confidential co-browse session.

Transact has introduced co-browsing to give advisers another method of support with online functionality. Transact has established adviser support through regional Adviser Support Managers who make hundreds of visits to advisers' offices all over the UK.

These new methods of support are designed to complement, rather than replace, the current ways advisers contact Transact. Sometimes a Live Chat or quick call and Co-browse is all that is required for immediate support.

Jonathan Gunby, Chief Development Officer at Transact, says,

"We have been introducing co-browse as a supplementary form of contact for some time. We took a measured approach to establish best practice, train staff and ensure we could meet demand. We have been very pleased with this approach and have over the past 6 months, established another useful service for advisers."

Notes For Editors

- Transact has been chosen by more than 5,900 financial advisers and helps them to manage over £27 billion on behalf of more than 146,000 investors (correct as at 25 September 2017).
- Transact was voted the Best Overall UK Platform for 8 consecutive years in 2017 in both Investment Trends and CoreData Independent Platform Research Studies.

For further comment:

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