ROAD MAP OF IMPROVEMENTS

These are some of the changes we've introduced on Transact Online (TOL) in recent years. They've made a significant difference to the efficiency and effectiveness of hundreds of adviser businesses using Transact. **How about yours?**

JAN 2023 — GUIDED APPLICATIONS – FURTHER DEVELOPMENT

More instructions can be completed online. You can authorise the execution of one-off deposits/transfers through Guided Applications.

JAN 2023 — REGULAR UFPLS ONLINE

UFPLS is possible as a one-off or regular instruction. You can now set up a regular UFPLS online.

JAN 2023 — PEER REVIEW

You can notify a colleague that the Peer Review is ready to be checked – Transact will email your colleague on your behalf.

MAR 2023 — 'SUPER USER' ACCESS ADDED TO MANAGE STAFF TOL ACCESS

You can now manage your staff's online access rights and privileges as a 'super user'.

MAR 2023 — NEW REMUNERATION RECONCILIATION API AND AUTHENTICATION

We added a new Remuneration Reconciliation API and authentication mechanism to help you reconcile your fees via a back-office system.

APR 2023 — MOBILE TOL – INVESTORS

We added the Pickup Page to improve investors' access to documentation and experience of Mobile TOL.

APR 2023 — TRANSFERS-IN STATUS REPORT

We launched a Transfer Report to support you in monitoring the progress and status of transfers.

JUNE 2023 — WRAPPER AND TRANSFER FORMS

Wrapper application and transfer forms are now provided through Personalised Illustration/Guided Application.

SEPT 2023 — INVESTORS CAN ADD BANK ACCOUNT DETAILS ON TOL

We made it easier for you to keep client details up to date as investors can now add bank account details on TOL.

SEPT 2023 — TRANSFER PROVIDER SELECTION

We enhanced the transfer provider selection on TOL to help avoid delays and lead to faster transfers.

SEPT 2023 — UFPLS WITHDRAWALS TO A GIA

You can now instruct UFPLS withdrawals from your client's accrual pension to their GIA.

OCT 2023 — NOTES SECTION

You can now add details or notes to yourself in our new notes section on TOL under 'Upload Documents'.

DEC 2023 — PENSION BENEFICIARIES – RECONFIRM AN EXPRESSION OF WISHES

We enhanced your ability to manage your clients' expression of wishes by capturing the dates a client's pension beneficiary was last reviewed on TOL.

JAN 2024 — VALUATIONS API IMPROVEMENT

We improved our Valuation API with Personally Identifying Information (PII) to enable easier matching of new wrappers to your feed.

JAN 2024 — REGULAR WITHDRAWALS

To ensure your clients receive their regular income, we now reserve cash from regular sales for the next regular withdrawal.

FEB 2024 — CHANGE CLIENT ADDRESSES ONLINE – ADVISER

We made it easier to keep client details up to date: you can now change your clients' addresses online.

FEB 2024 — SECOND DAILY DEALING POINT

We have improved time to market by adding a second dealing point at 10.30am, in addition to our existing 2pm dealing point.

MAR 2024 — FAMILY VIEW FOR INVESTORS

Your clients can see their linked family's valuation (with permission) without having to log in to each member's portfolio.

MAR 2024 — APPOINT DIMS AND LINK TEMPLATES ONLINE

You can appoint a DIM and link the template online. With your client's consent, you can do this in seconds.

MAR 2024 — OPEN YOUR CLIENT'S ISA AND LISA WRAPPER ONLINE

You and your clients no longer need to fill out paper forms to open a Transact ISA. With your client's consent, you can do this online.

Don't forget your **Adviser Support Manager (ASM)** would be delighted to provide a face-to-face or online chat/training to help your business make the most of the Transact service.

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