

# Setting up your new login

How to access your new platform

ascentric

# Contents

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<b>Before you begin</b>	<b>3</b>
<b>Accessing the new platform</b>	<b>4</b>
<b>Activation reminder message</b>	<b>5</b>
<b>Activating your account</b>	<b>6</b>
<b>Switching between the old and new platform</b>	<b>8</b>
<b>FAQ</b>	<b>10</b>

# Before you begin

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Make sure you have:

- Been notified that you are in our first phase release**
- Your old platform username** \_\_\_\_\_
- Your old platform password** \_\_\_\_\_
- Your old platform PIN** \_\_\_\_\_
- Used your login credentials to access the old platform before the move to the new platform.**



If you have forgotten your login credentials you will need to ring our customer services team.

 You can contact them on  
**0345 076 6140**

# Accessing the new platform



## Access old platform as usual

There will be a link to take you to the new platform

OR

## To access your new platform login page

[Click here](#)



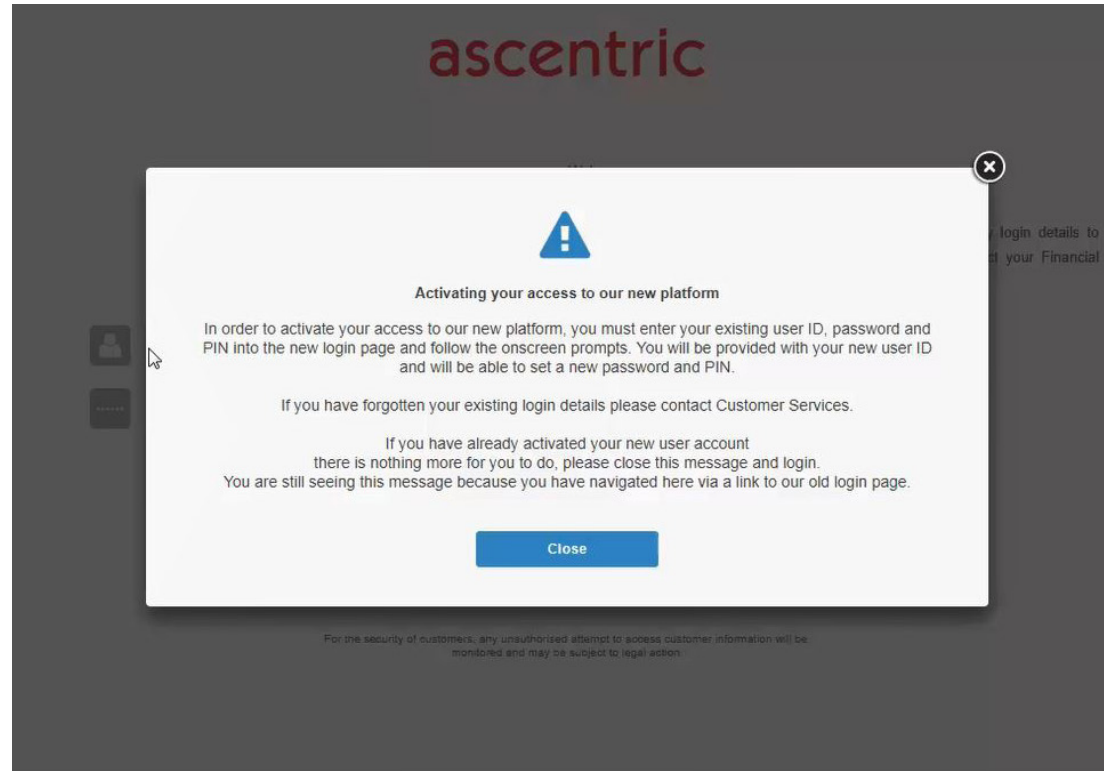
Once you are on the new platform login page, activate your access using the steps in this guide

# Activation reminder message

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- You may receive a reminder when you first visit the new platform login page that you need to activate your account.



**Once you've read the message,  
click the close button.**

# Activating your account

1.

Enter your old login details into the new platform

Link to the old platform' and '• Access [support](#) for using both systems'. At the bottom left, there is a link: 'Forgotten your details?'. At the bottom center, there is a small disclaimer: 'For the security of customers, any unauthorised attempt to access customer information will be monitored and may be subject to legal action.'"/>

- The new platform will recognise you and provide your new username.
- Your new username is eight digits long and is made up of numbers.
- Keep your new username in a safe place.
- This username cannot be changed.

2.

Confirm your email address

- At the same time as providing you with a new username the platform will ask you to provide a valid email address used only by you.
- Either confirm it is correct or use the link to update your email address.
- If we do not hold an email address for you then you will be prompted to provide one.

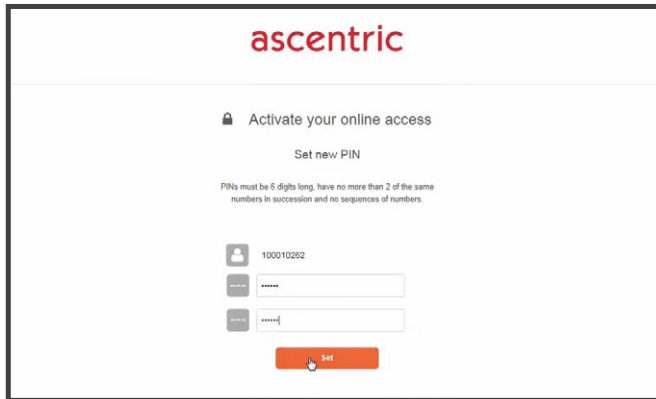
3.

Set your new password

- You can set your own password.
- It is case sensitive.
- It must:
  - ➔ Be at least eight characters
  - ➔ Contain at least one capital letter and one lower case letter
  - ➔ Include a number or a special character e.g. £\$!

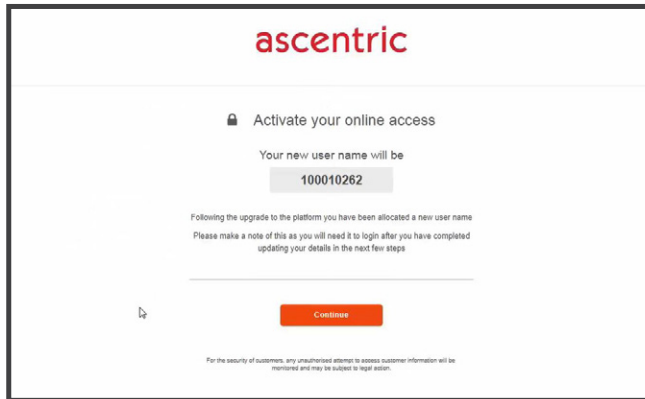
# Activating your account

## 4. Set your new PIN



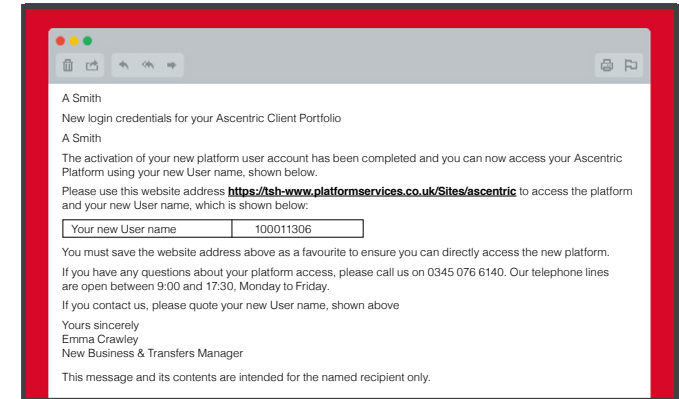
- The new PIN:
  - ➔ Must be six digits long
  - ➔ Must have no more than two numbers repeated in succession
  - ➔ Must not include a sequence of numbers.

## 5. You can now login



- Your new username will then be shown again. **Please keep it safe.**
- Click the button to log in to the new platform.
- If you receive an error message then the platform will redirect you to the beginning of the process.

## 6. Confirmation email



- Once you've successfully completed the activation, you will receive a confirmation email. The email may take a little while to come through.
- This email will confirm your new username.
- **It will also have the URL for the new platform.** Save this in your favourites on your web browser.

# Switching between the old and new platform



- Remember we are taking a controlled and phased rollout approach to moving clients and for a short while, it means you will be using two versions of the platform until all your clients have moved to the new platform.
- Make sure you add the old and new platform login page URLs to your favourites.
- A summary is provided on the next page to help you to locate your clients and confirm which platform to use to place new business.
- You will now have two sets of login details. Be careful and ensure you use the right credentials for the right platform.

[Click here for the Old platform](#)

[Click here for the New platform](#)



# Switching between the old and new platform



## Old Platform

- Existing clients or family groups with Ascentric SIPP and/or corporate, charity or trust accounts are on the old platform.
- New clients who are applying for SIPP and/or corporate, charity and trust accounts will be added to the old platform.
- Old terms and literature apply to these clients and are available on the old platform or [ascentric.co.uk](https://www.ascentric.co.uk)
- Our old platform will continue to work best in Internet Explorer 8 or in compatibility mode of newer versions.
- Keep the old platform link in your favourites for the time that you are using both platforms.

## New Platform

- Existing clients or family groups with ISA / GIA and third party products only are on the new platform.
- New clients who are applying for ISA / GIA and third party products only will be set up on the new platform.
- New terms and literature will apply to these clients and will be found on the new platform.
- Our new platform will work best using the latest versions of Chrome, Firefox, Microsoft Edge and Safari.
- Don't forget to add the new platform link to your favourites!



# Frequently asked questions

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## > What if I can't find my old username, PIN and password?

You can't log in to the new platform without all your old security credentials (username, password and PIN). If you have mislaid these you need to contact our customer services team before the move to the new platform on **0345 076 6140**.

## > What do I do if I have lost my new platform username?

For a lost username or PIN and password you need to ring our customer services team on **0345 076 6140**. If it's either your password or PIN you have lost then you can reset them yourself.

## > Do I need to tell my online clients how to activate the new platform?

You can advise your clients that they will shortly be moving to an upgraded platform. The first time they log in after we have moved them, they will be redirected to the new platform ready to go through an activation process.

## > Will you confirm my new platform account is activated?

Yes. You will receive a confirmation email. This will contain your new username and login page URL - both of which you should keep safe.

# Frequently asked questions

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## > Will I be sent my new username and password for the new platform in the post?

No. You will receive confirmation of your username by email once you have completed the activation process. All you need to activate your new platform details is your old, active username, password and PIN.

## > What if I forget some of my training - how will I know what to do?

Don't worry, we have thought of that. If you look on [www.ascentric.co.uk/mynewplatform](http://www.ascentric.co.uk/mynewplatform) there will be a number of videos on how to navigate the new platform. If you are really stuck then email [bdc@ascentric.co.uk](mailto:bdc@ascentric.co.uk) and we'll be glad to help.

## > My client has already successfully activated their new platform login. How do they get to the new login page?

It's best if they save the new platform URL on the device, or devices, that they use to access the platform. The link can be found in the confirmation email that they received after completing the activation process. There is also a link to the new platform on the login page of the old platform.

# Important information

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## For professional adviser use only

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