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Using two versions of the Ascentric platform

What happens if some of your clients don't move to the new platform in the next transition? Well, most importantly, don't worry. It means you will be using two versions of the Ascentric platform for a while, until the next sweep takes place. If this applies to you, please take some time to read our top tips below.

1 How do I know if I have to access two platforms?

After the move, run the 'all client wrappers report' in the admin reporting part of the old platform. You will be able to check which clients have not moved. Or alternatively, run the 'all client accounts report' in the reports hub on the new platform to see which clients have moved.

2 Why did my clients not move to the new platform?

Clients who are transferring off the platform and accounts where a client is deceased and we are due to pay out death benefits shortly will not move. Accounts where the cash balance is overdrawn will not move.

3 How do I switch between the new and existing platforms?

The URL, username, password and PIN number is unique for each platform; you'll need to save the URL for each platform. The sessions are also unique: you can be logged into both platforms at the same time, enabling you to work between both.

4 How do I know what literature to use for a new client?

All new clients should be placed on the new platform using the new literature suite and terms.

5 How do I know what literature to use for an existing client?

Check which platform the client is currently on, if they remain on the old platform, use the old platform literature. If they have moved to the new platform, use the new platform literature.

6 How do I access the illustration tool?

The illustration tool is accessible on both the old platform and the new platform. Access the illustration tool from the platform where the client account is or where it will be set-up. There is single sign-on from both platforms, so you won't need to log in to the illustration tool regardless of whether you are accessing it from the old or new platform.

7 How do I find the Wrap Charges Calculator?

The Wrap Charges Calculator is available on both the old and new platforms.

8 How do I access transaction history?

When a client moves to the new platform, the transaction history also moves. The historical transaction data can be accessed by clicking the 'Legacy Systems Transactions' icon on the client card.

9 Which platform do I action my client-facing reports on?

Action client-facing reports from the platform where the client account is. If the client has moved to the new platform, the reports will be accessible from the new platform. These reports will include historical data which has been moved from the old platform.

10 Where and how do I rebalance and trade?

You can rebalance from the Model Portfolio icon or place single trades from the Account Card within either platform. If you make changes to, or rebalance a model, this will need to always be completed on both the old and the new platform.

If you have any questions or require further information call us on 0345 076 6140 or email BDC@ascentric.co.uk