



# Contract Enquiry Registration and User Guidelines

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Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

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## Contract Enquiry Registration and User Guidelines

### Contract Enquiry

To enable you to use JCS' EDI - Contract Enquiry services you must first register with each Product Provider. To help you with this process we have included a step-by-step guide. As each Contract Enquiry service differs, we have also detailed the types of services supported by JCS and the access codes that need to be entered into JCS for each provider to allow access to their valuation and holdings data.

### Data Quality

It is important that your data is up-to-date, accurate and in the right format to reduce potential errors and speed up online processing. New business should be entered bearing in mind that Contract Enquiry relies on the correct contract reference (or policy) numbers. Bulk data downloads can be used to help cleanse your data.

### Registration Details

You should have these typical registration details to hand before commencing the process:

- Personal Information
- Title, first and last name
- Desired login ID and password
- Role type (e.g. clerical, sales, managerial)
- Official Information
- Company name
- Country of regulation
- FSA reference number
- Agency postcode
- Agency number
- Contact Information
- Email address
- Telephone number
- Security Questions
- Mother's maiden name
- Date of birth
- Town of birth
- First school attended
- Last school attended

To find out the participating Unipass Providers, please visit:

<https://www.unipass.co.uk/Pages/Static/ProvidentLodos.aspx>

If you are intending to use a digital certificate to access Contract Enquiry, then the certificate will need to be attached to your user name, either at the time of initial registration or subsequent to registration. You will need to bear in mind where the certificate resides when attaching the certificate as, if you have an individual certificate, then the request to attach the certificate will need to be initiated from the PC on which the certificate resides. Alternatively, if a company certificate is used, then the certificate can be picked up from any PC as it resides on the server. For more information please refer to the Unipass® section of this guide.

## Contract Enquiry Registration and User Guidelines

### EDI Process Summary Notes

The following steps outline the process to import data into JCS via Product Providers' Contract Enquiry (CE) services. These are grouped into two main areas: 1) Registration & Acquiring Bulk Data File and 2) Data Mapping. Once these have been completed, it takes just a single click to update prices, by either of the CE services provided. The two common services currently provided are Bulk Data (all clients' data, usually accurate of that week) and RTV (Real Time Valuation), which is an instant request for a single client's data and is usually accurate as of the day.

### EDI Mapping Preferences

Before any mapping or matching records in JCS can commence, you must decide what level of information you wish to import into a Client policy record. JCS has three fixed options to allow you to define exactly how much or little data is imported, and this also limits the amount of work to do when mapping the records. To set one of the three options, go to 'Utilities', then 'EDI' and select the option that suits you prior to importing any data into JCS. These options are:

- Policy Values and Funds (the most common)
- Policy Values only
- Determined by Client Code Setting

### Step 1. How to Import the Bulk Import File to Start the Mapping Process

Once registration and mapping (as above) have been completed, there are two ways to import a bulk data file into JCS via the Utilities menu, EDI, Data Import window:

1. Click on the Binoculars to browse to the acquired downloaded bulk data file. Select the bulk file that you wish to import and either click on the Open button, or
2. Drag and drop the file directly into the Data Import window.

The file will open and display on the left-hand side of the window. The file name includes details on the location of your file, and the + sign to the left of the file name indicates that the JCS file contents will be displayed as a tree structure. Provider specific icons (where available) show when receiving Origo messages.

### Step 2. How to Start the Mapping or Matching Process

Once the file has been opened and displayed in the Data Import Window, the mapping or matching process can begin.

Within the tree structure mentioned above, where a + sign is shown, this indicates that the record can be expanded further to show a lower level of detail. To expand and minimise the results you can either:

- Highlight the main record and double-click to reveal or conceal the underlying detail, or
- Click on the + sign. The new detail will be displayed and the + icon changed to a - icon. To minimise the record, click on the - icon and the additional detail will be rolled back up into the main record.

### Step 3. Import Mapping

Import mapping allows you to map your imported data by reference to clients and cases (policies) and, if appropriate, funds. It is here that you can match those records that have not been automatically suggested as a map by the import process, as no exact match was found. When JCS is unable to successfully locate a match it will create an Exception Flag, which is displayed as a yellow circle with a red exclamation mark in the centre. For those records that have Exception flags next to

## Contract Enquiry Registration and User Guidelines

them you need to manually choose the corresponding records within JCS from the lists provided or, where no record exists, create new records. Once a match has been established the exception flag will disappear and the matched records can be saved by clicking the Save Mapping button. Any mappings that have been saved (even though the data from the import hasn't yet actually updated the JCS policy) will be saved as permanent links and used in all subsequent data imports and client-specific RTV and RTV All valuation and holding updates.

### Step 4. Deleting Import Mappings

If for some reason a mapping was wrong and was saved it is easy to remove the mapped record to allow re-mapping. To remove an erroneously mapped record go to the Utilities menu and select EDI, then open the Data Import Mapping window. Here, click the Select Map Picklist, select the relevant mapping type and a list will appear. Locate the relevant/erroneous record and click the Trash Can button to remove the mapping. The next time a data import is executed this record will have an exception flag against it to be re-mapped.

### Step 5. Importing the Data

Once any of the mappings have been saved the data can then be imported into JCS. Update the relevant records by clicking the OK button or, if the provider offers an RTV (Real Time Valuation) data feed, the records can now be updated either by clicking the RTV or RTV All buttons in the JCS Portfolio Summary window.

## Contract Enquiry Registration and User Guidelines

### Unipass

#### About Unipass

Unipass is used by thousands of financial intermediaries every day, making their lives easier and more efficient.

#### What is it?

Unipass is a service provided by Origo Secure Internet Services Ltd for the UK financial services industry. In simple terms, Unipass is a digital certificate - a small encrypted file on your PC used to uniquely identify you. It's like having your own electronic passport.

#### Benefits

One online identity - A Unipass puts an end to all those different passwords and PINS that you have to manage and reduces the possibility of losing them or worse still, leaving them around for someone to steal. One Unipass gives you easy access to relevant Internet resources within your industry.

It's free - The service is provided free to all end users.

It's simple - Although there is state of the art technology in the background, a Unipass is very easy to use. There's no need to add new hardware or software – all you need is an Internet browser. The process of applying for and obtaining a Unipass is simple, and it only takes a few minutes to apply. Once setup, JCS automatically picks up your Unipass, when the click "RTV".

Widely supported - Unipass is supported by some of the largest names in UK financial services and is seen as an essential component of e-commerce.

Improved security - Digital certificates enhance your online experience. With a Unipass, you can rest assured that your identity is kept safe and secure.

#### How do I get one?

Getting a Unipass is simple. All you need to do is complete a few simple steps.

When you apply you are asked to provide the following information via the secure web application form:

- first and last name
- direct dial telephone number
- email address
- security information (memorable date, secret Q&As)
- branch postcode

If you are the first applicant from your firm, you will also have to accept the Unipass Contract online. This contract is called the End User Organisation Contract for use of Individual Certificates; you can view it on Unipass' Legal Information page. You will also be asked to provide the company name, address, telephone number, as well as your job title and two agency references (one for tied agents).

#### What happens after I submit the application?

Unipass validate your application in accordance with their operations manual, known as the "Unipass Certificate Practice Statement" (CPS) - you can also view this on their Legal Information page. When they've done this, they send you a "Welcome" email, normally within two working days of submitting your application.

## Contract Enquiry Registration and User Guidelines

Think you're ready? Then go to:

[https://www.unipass.co.uk/Pages/Apply/Stage1\\_OrganisationSearch.aspx](https://www.unipass.co.uk/Pages/Apply/Stage1_OrganisationSearch.aspx)

### Collecting your individual Unipass

After you get the email, the next stage is to log into the My Toolbox area. You can do this by clicking on the link in the Welcome email and entering your email address, your memorable date and a code displayed on the login page.

Once you've logged in, you'll see a link "Collect my Unipass" in the left-hand bar of the page.

- click on Collect my Unipass
- tick the box on the next page to indicate your acceptance of the Unipass Data Protection Policy and the Unipass Certificate Rules of Use
- click on the Collect button and click to accept any warning messages that follow.

Your Unipass should now be loaded in your browser.

Once you have collected your Unipass, you will automatically be forwarded after a few seconds to the Test my Unipass page, which you can also use to test a Unipass that you have already collected.

### Where can I use it?

You can use your Unipass with any of these financial services websites:

- Aegon
- Aviva Wrap
- Canada Life
- Clerical Medical
- Friends Life
- Friends Provident
- Legal & General
- LV=
- MetLife
- Prudential
- Royal London
- Royal Skandia
- Standard Life
- Zurich

### Do I have to use a digital certificate?

It depends upon the security standards adopted by each individual Product Provider. For a small number of Product Providers Unipass® is now mandatory if you wish to use their E-Commerce services. For at least the time being, however, a large number of Product Providers still allow you to use a username and password if you want to or you can have both.

### About Origo

The Unipass team works closely with customers and suppliers to ensure a high quality service is always available.

Origo Secure Internet Services Ltd is a wholly owned subsidiary of Origo Services Ltd.

ORIGO SERVICES LIMITED (company number 115061) and ORIGO SECURE INTERNET SERVICES LIMITED, (company number SC201466) are both registered in Scotland at 4th floor, Saltire Court, 20 Castle Terrace, Edinburgh EH1 2EN. VAT Reg. No. 593 0614 38.

Origo Services Ltd was launched by 16 leading life assurance companies in June 1989 to facilitate the development of electronic trading between principals and agents for Life, Pensions and Collective Investment business.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

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### Help and Support

There is a Unipass Helpdesk normally available Monday to Friday, 09:00 to 17:00. It can be contacted on 0871 22 12345, or by email at [helpdesk@unipass.co.uk](mailto:helpdesk@unipass.co.uk).

There is a Frequently Asked Questions section on their website:

<https://www.unipass.co.uk/Pages/Static/Support/Identity.aspx>

If you have a problem using your Unipass on a third party website, such as that of a Provider, Lender or Portal, but it still seems to be working correctly on the Test my Unipass page, Unipass suggest that you contact the support desk of the third party for assistance in the first instance.

## Product Providers

- Aegon (Aegon-Cofunds)
- AJ Bell (InvestCentre)
- Amber
- Ascentric
- Aviva
- Canada Life
- Clerical Medical
- Fidelity Funds
- Friends Life
- Friends Provident
- Legal & General
- LV=
- MetLife
- Novia
- Nucleus
- Old Mutual
- Parmenion
- Prudential
- Quilter
- Royal London
- Royal Skandia
- Sanlam
- Scottish Life
- Scottish Widows
- Seven IM
- Standard Life
- Transact
- Zurich

## Contract Enquiry Registration and User Guidelines

### Aegon and Aegon Retirement Choices (ARC) Platform

#### Digital Certificate or Extranet Logon ID and Password?

AEGON offers automatic registration to holders of Unipass digital certificates. Registration occurs as soon as you start using the service and provides access to all Aegon UK and ARC policies including the One Retirement SIPP. There are no forms to complete and you can start using the service immediately. JCS will use your Unipass digital certificate to establish the secure connection with the site so User IDs and passwords are unnecessary.

#### Contact Details:

Principle Contact – 03456 100010 Helpdesk

Aegon Retirement Choices (ARC) Contact – 03456 081 680

Web Address – <http://www.aegon.co.uk/advisers.html>

### Products Currently Supported with Contract Enquiry

#### Pensions

- Individual Personal Pension
- Individual Stakeholder Personal Pension
- Flexible Pension Plan
- Executive Pension Plan
- Section 32 Buyout
- Phased Retirement
- Income Drawdown
- Retirement Control
- Group Personal Pension
- Group Stakeholder Personal Pension
- Group Money Purchase
- One Retirement
- Aegon Retirement Choices SIPP

#### Investments

- Investment Bond – Traditional With Profits
- Investment Bond – Unitised With Profits Bond
- Investment Bond – Unit Linked Bond
- Investment Bond – Distribution Bond
- Investment Bond – Hybrid Bond

#### Bulk Download

This function is available to assist with data cleansing exercises rather than for regular database updates. With this in mind its use is monitored and users are expected to use it within this guideline.

You can obtain a list of your clients invested in funds by sending your agency number and contact telephone number to [smartdata@aegon.co.uk](mailto:smartdata@aegon.co.uk)

### Aegon – Cofunds (deprecated)

*Note the 'Aegon – Cofunds (deprecated)' connection will stop working on Friday the 24<sup>th</sup> July 2020. Please move to the 'Aegon – Cofunds' connection.*

This service is available using the Cofunds Username and Password.

### Already Registered for the Cofunds Extranet Service

If you are already registered for the Cofunds Extranet service you will have a Cofunds IFA Authorisation code and password. This is not the username and password that is used for Real Time Valuation updates.

### Registering for the Cofunds Management Information Service

You will also need to register for the Cofunds Management Information Service to enable you to make and receive valuation updates from JCS. This service can be requested by calling the Cofunds Regional Sales Team on 0345 604 4001. Management information files are available both daily and weekly, but only weekly files are used by the JCS Contract Enquiry service. Weekly files are set up as the default. The files produced on a weekly basis will give a complete list of all holdings for all clients. During the registration telephone call, you will be given a Username (int\_id) and Password and this is the username and password required by JCS to access your daily Management Information files. From the initial telephone registration call, it can take 5-6 days for Cofunds to activate your username and password.

### Not Already Registered for the Cofunds Extranet Service

If you are a new Intermediary to Cofunds, registering couldn't be easier. In order to do business with Cofunds and access the online service you need to register using the link below, which takes you to the Cofunds secure Extranet site:

<http://www.cofunds.co.uk/web/index.aspx>

Click on 'Intermediaries', then 'Register' and follow the numbered instructions:

1. Download the Registration Pack - Download as a zipped folder or as single files;
2. Review the documentation - Complete, sign and return the Intermediary Data Requirements Form and the Authentication Form;
3. Welcome Pack - Once registered, we will send you a welcome pack with details of your registration and an authorisation code;
4. Start using Cofunds - A member of our dedicated support team will contact you to help you get started and introduce you to our award winning online service.

You will then need to register for the Cofunds Management Information Services following the steps outlined above.

## Contract Enquiry Registration and User Guidelines

### Management Information Services

For more information concerning the Management Information Services offered by Cofunds please call the Sales Team on 0345 604 4001.

### Using the Service with JCS Software

- Bulk Downloads – Immediate Response

Bulk data files will be imported automatically by JCS when performing a RTV/RTV All update from the portfolio summary page or uploaded through the External Connections menu which will automatically import the file into the EDI - Import Data screen. The bulk data files are generated and returned real time by Cofunds when a valuation request is made for either a single Cofunds policy (RTV), all Cofunds policies for a single client (RTV All) or all Cofunds policies for all clients (Bulk download – immediate response). The bulk data files are produced weekly as at close of business on a Friday by Cofunds so the relevant holding and valuation data returned by a valuation update request will always be as at the previous Friday's close of business position. The directory that is accessed by JCS will only contain the latest set of Management Information files and is cleared down to an archive directory at the start of each week.

Cofunds provide a valuation file for cash accounts separately to the holdings file. Not all users will require cash accounts to be valued. If you do wish to include cash accounts during the Bulk valuation or RTV process, you will need to select this option in the 'External Connections' configuration for Cofunds.

### JCS Configuration Settings

Your Cofunds Username (Int\_id) and Password will need to be entered into JCS.

Username	As supplied by Provider (number only excluding the int_ prefix)
Password	As supplied by Provider
Cash Accounts	If required: Select option to value cash accounts

### How to find the Cofunds Portfolio Reference

A number of Cofunds integrations match up investments against your back office records using the Cofunds Portfolio Reference.

Since the introduction of the Customer Dashboard functionality, finding your customer's portfolio reference couldn't be easier.

#### *Step 1: Open your client record on Cofunds*

You may need to scroll down so that you can see the list of the customer's portfolios.

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c.funds

Contact Us | Support | TCF | RDR | Blog | Site Map | Log Off

Home | Products & Funds | Client Servicing | Document Centre | My Information | How Do I? | Search

You are here: Client servicing > My Client Dashboard

Use old version | Help

New search | Back to search results

Cofunds Client Ref: [redacted] | Adviser: [redacted]

Total Valuation: £1,612.91 | Valuation breakdown | Segment: Standard Self Directed Segment (change)

Client Overview

Illustrations

Transaction History

Portfolio Planning

Take One-off Advice Fee

Back-dated Valuations

Transfer Tracker

CGT Report

**Investment Details**

Total value of investment(s)	£1,612.91
Total cleared cash	£0.00
Pending deals (0)	

**Correspondence History**

31/05/13	General: Valuation Statement
30/11/12	General: Valuation Statement
08/11/12	Collective: Lump Sum Confirmation Notice

**Valuation History**

**Products** | Buy new product | View client-level x-ray | Print client-level x-ray

**Cofunds Investment ISA - £1,612.91** as at 06/12/13

Remaining ISA allowance: £11,520.00  
Cash available to invest: £0.00

Top-up | Switch | Sell | Link to model portfolio

View portfolio x-ray | Print portfolio x-ray

Step 2: Click on the policy you need

Buy

Switch

Sell

Regular Investment Instruction

**Products** | Buy new product | View client-level x-ray | Print client-level x-ray

**Cofunds Investment ISA - £1,612.91** as at 06/12/13

Remaining ISA allowance: £11,520.00  
Cash available to invest: £0.00

Top-up | Switch | Sell | Link to model portfolio

View portfolio x-ray | Print portfolio x-ray

The screen will reload to see more detail on the selected product. Portfolio Reference is clearly marked.

Client Overview

Buy

Switch

Sell

Regular Investment Instruction

**Investments Details as at 06/12/13**

Cofunds Investment ISA

Total value of investment(s)	£1,612.91
Cash available to invest	£0.00
Remaining ISA allowance	£11,520.00

**Account Details**

Holders: [redacted] (Client)

Account Reference: [redacted]

**Portfolio reference: [redacted]**

**Cofunds Investment ISA**

Holding	Units	Price date	Price	Valuation
<input type="checkbox"/> ABG Optimal Income A Fund Inc	751.1455	06/12/13	£1.4026	£1,053.56
<input type="checkbox"/> ABG Recovery A Fund Acc	191.3949	06/12/13	£2.9225	£559.35

Tick the boxes next to the funds you wish to trade on and then select one of the options below.

Top-up | Switch | Sell | Link to model portfolio

Valuation: £1,612.91

### Help and Support

If you are already registered to place business with Cofunds and have a service enquiry, please log in and go to Cofunds online support section using the link below:

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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<https://secure.cofunds.co.uk/BUSINESSCENTRE/SUPPORT/SUPPORT.ASPX>

Or alternatively, registered intermediaries can call Cofunds' Contact Centre on 0345 604 4001.

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Aegon Platform (ex-Cofunds)

#### Registering for the Aegon Platform Bulk Data service

You will also need to register for the bulk data files to enable you to make and receive valuation updates from JCS. If you do not already have bulk data files set up for your firm, this service can be requested by contacting the Platform Consultancy Team [central.platformconsultants@aegon.co.uk](mailto:central.platformconsultants@aegon.co.uk).

Bulk data files for valuations are available daily. Once your firm has bulk data files set up, you need to register for the Bulk Data service to obtain a one-time token and Organisation ID (OUID) to provide to JCS. For instructions on how to set up your OUID and one-time token, please refer to “Your guide to Aegon Platform Bulk Data”.

#### Using the Bulk Data service with JCS

Bulk data files will be imported automatically by JCS when performing a RTV/RTV All update from the portfolio summary page or uploaded through the External Connections menu which will automatically import the file into the EDI - Import Data screen.

#### Setting up the Connection

Begin by following the steps in the Aegon’s “Your guide to Aegon Platform Bulk Data”, available here:

<https://www.cofunds.aegon.co.uk/content/dam/ukcpw/documents/guide-to-bulk-data.pdf>

#### Setting up a new Organisation ID (OUID)

Once you have followed the steps in the linked guide above:

1. add a new ‘Aegon Platform (ex-Cofunds)’ External Connection in JCS.
2. Select the Unipass certificate to use.
3. Enter the OUID.
4. Click the button to the right of ‘Token’.
5. Enter the ‘one-time token’ provided by Aegon Platform.

#### Setting up additional connections for the same OUID

If you use individual Unipass and want to allow additional users to value policies, you will need to setup an External Connection for each user.

All connections with the same OUID use the same one-time token. When you enter an OUID for a connection, if there is another connection with the same OUID that has had its one-time token setup, the one-time token will be shared automatically.

Note you will also have to setup the additional users Unipass on the Aegon Platform site, as documented in the linked guide above.

#### How to find the Aegon Platform Wrapper ID

The Aegon Platform Bulk Data integration matches up investments against your back office records using the Aegon Platform Wrapper ID. An example of this is highlighted on the screenshot below.

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## Contract Enquiry Registration and User Guidelines

Stocks & Shares ISA

£33,204.05

Includes cash of: £0.00

View and manage Top up Switch

Help with this product

Remaining ISA allowance: £20,000.00 - excluding any future regular contributions.  
This assumes your client hasn't contributed to an ISA with another provider in this tax year.

Aegon - 80940467

### Help and Support

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

For Aegon Platform support with Bulk Data service queries, please contact the Platform Consultancy Team at [central.platformconsultants@aegon.co.uk](mailto:central.platformconsultants@aegon.co.uk)

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### A J Bell Investcentre

#### Registering for the AJ Bell Investcentre Service

Investcentre offers a number of data services to their users, one of which is a bulk valuation file. These are automatically available within your online account. If not, please contact AJ Bell directly; <https://www.investcentre.co.uk>

#### Using the Service

Once you have logged into the Investcentre website, click on the 'download data' link and then click on the 'generate' button for valuations. Your valuations file will be generated in the background.

To access the file once generated, you will need to follow the link to 'online documents' and then 'data downloads', locate the relevant file and then click to 'open this document'.

If you are prompted to open or save file, it is recommended to save it as the file is then likely to be opened using Excel which may alter the formatting slightly.

Once the file has been downloaded, you will then need to open 'data import' in JCS, by pressing F4, and then search for the file.

#### Help and Support

If you require assistance with the registration process, please contact your usual AJ Bell Investcentre Client Services team on 08458 399 060, Mon-Fri between 09.00am and 17.00pm.

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Amber Financial Investment Limited

#### Registering for the Amber Financial Investment Limited Service

Amber offers a number of data services to their users, one of which is a Bulk Valuation file. This is available through your Amber extranet user account. If you do not currently have an extranet account, please contact Amber to get one set up.

#### Help and Support

If you require assistance with the registration process or use of Amber's e-services please call 0161 348 7867 or email; [support@amberfinancial.eu](mailto:support@amberfinancial.eu)

For help with configuring or using the JCS Contract Enquiry Services please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

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### Ascentric

#### Registering for Ascentric's Bulk Valuation Service

Ascentric provides a Bulk Valuation Extract comprising an Investment Holdings file (Custody positions) and a Cash Balances file. Bulk Valuation extract files are generated on a nightly basis and made available on the Ascentric hosted Secure FTP site.

To register for this service with Ascentric, please contact your usual Client Services team.

You will be asked to confirm the following information:

- Company Name
- FSA Number
- Static IP Address

*Nb: The Ascentric platform only allows access to its services from known sources. This requires you to provide them with a static IP address. Static IP addresses are generally available on most business ADSL connections. You should contact your ISP for details. If you already know that you are set up with a static IP address, you can determine it by opening a browser and visiting: <http://www.whatismyip.com>*

Once the application has been processed, Ascentric will then issue you with a User ID and Password which can then be entered into the Ascentric connection for JCS.

### Using the Service

#### Bulk Downloads

Bulk data files will be imported automatically by JCS when performing an RTV/RTV All update from the portfolio summary page or initiated from the 'Import Bulk Data Now' button within the External Connections page.

When performing an RTV of a single policy, it should be noted that the entire bulk file needs to be downloaded each time. This will affect the responsiveness or speed of an RTV.

Should you receive the following message "could not connect to the server" when trying to perform a download, you will need to check your IP address is correct as this indicates that it is not set up.

### Help and Support

If you require assistance with the registration process, please contact your usual Ascentric Client Services team.

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Aviva

This service is available as a direct, real time, contract enquiry service from the Aviva Platform.

Authentication and authorisation of this service is via Unipass certificate, which must be pre-registered with Aviva for Advisers website;

[www.aviva-for-advisers.co.uk/adviser](http://www.aviva-for-advisers.co.uk/adviser)

### Using the Service with JCS Software

#### Real Time Valuation Requests

From the Portfolio Summary page in JCS, Real Time Valuation requests can be made to update a single policy (RTV) or all policies for that client (RTV All).

### Help and Support

If you require assistance with the registration process or Aviva E-Business services please call the Aviva E-commerce Service Desk on 0800 056 4607 or email at [ecsd@aviva.com](mailto:ecsd@aviva.com).

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

### Products Currently Supported with Contract Enquiry

#### Pensions available for e-valuations

Policy/Account Type	Prefix	Format Required
98 Series Guernsey Personal Pension	GX	GX12345678
98 Series Jersey Personal Pension	JX	JX12345678
98 Series Personal Pension	TK or MX	TK12345678
MX12345678		
Designer Stakeholder @ Norwich Union	SP	SP12345678
Norwich Union Personal Pension	TK or MX	TK12345678
MX12345678		
Norwich Union Stakeholder Pension	SM	SM12345678
Your Pension Select @ N. U.	TL	TL12345678
Your Pension @ N. U. (Stakeholder)	SQ	SQ12345678

#### Bonds available for e-valuations

Norwich Union (post Sept 2000), ex-CGU and ex-GA Individual client bond products

Policy/Account Type	Format Required
Bond (Single Premium) – GA	nnnnnnnxx
Portfolio Bond – GA/CGU	nnnnnnnxx
Portfolio level option	nnnnnnnxx
Portfolio step down option 2 (on 2 Contract Engines)	nnnnnnnxx

## Contract Enquiry Registration and User Guidelines

### Aviva Wrap Platform

This service is available as a direct, real time, contract enquiry service from the Aviva Platform.

Authentication and authorisation of this service is via Unipass certificate, which must be pre-registered with Aviva for Advisers website;

[www.aviva-for-advisers.co.uk/adviser](http://www.aviva-for-advisers.co.uk/adviser)

Once registered, you will need to create a new Connection Profile in JCS, using the template for “Aviva Wrap Platform”.

If you have not registered, this can be done directly from the website.

At the time of writing, the following account types are supported:

- Investment Portfolio
- ISA Portfolio
- Pension Portfolio Pre Retirement
- Pension Portfolio Post Retirement

When attempting to value a policy, please ensure that both the Wrap reference and the Account sub reference are entered in Contract/Policy Number in JCS. For example: AV1234567-001

Please note that Aviva do not supply details, or a value of any property or external bank accounts held within any of the accounts in this service.

### Help and Support

If you require assistance with the registration process, please call the Aviva for Advisers Online Support team on 0800 056 4607.

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Canada Life

#### Registering for Canada Life UK IFA Zone

If you are not already registered with Canada Life and hold a valid Unipass certificate, the process for gaining access to the Canada Life secure portal is as follows;

When visiting the below URL, the Unipass certificate will be detected and the registration process will commence after clicking on Register New user with Unipass link;

<https://secureifazone.canadalife.co.uk/selfcare/ClukBrokerLoginSelfCare/>

Please note, once you have registered on this link you will have access to both the Canada Life Limited Onshore site and the Canada Life International Offshore site.

On subsequent visits please visit click on the Unipass Sign In button for instant access.

#### ADMINISTRATION USER SET UP

All users wanting to use the secure portal and its services will need to agree to the terms and conditions that are laid out. Select the I Agree button to proceed onto the IFA Zone home page.

If you are accessing the service as an Administrator, the Administration Zone tab will be visible. From here you can carry out administrative duties for registered colleagues within your company, such as allocating roles and assigning agency numbers. There are two types of administrators that can be set up by Canada Life, these being either central or local.

- Central Administrators are first set up by the Canada Life Service Support team, you can then decide to allocate this role to one or more members within the company.
- Local Administrators are usually set up by the central administrator when there is a Head Office environment with additional branches. This ensures that the role allocation will then be dealt with within each office.

*Please note that the Canada Life Service Support team is not authorised to allocate access roles to users, they can only assign Central Administrators.*

An Administration Guide is available on the website to download/view.

#### USING CONTRACT ENQUIRY

Canada Life uses Origo standards (version 2.0) and the Policy Number is used to identify which values are to be returned. Current and surrender values can be requested for bonds and endowments, and current and transfer values for pensions. The messaging service will be available during the hours of 07.00 and 24.00, Monday to Friday.

Products currently supported by the Canada Life portal are as follows;

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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- Bonds (unit linked)
- Pensions
- Endowments (unit linked)
- Canada Life International

### Help and Support

If you require assistance with the registration process, please call the IFA Zone Service Team on 0845 365 3456 or email, [ifazone@canadalife.co.uk](mailto:ifazone@canadalife.co.uk).

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Clerical Medical /Scottish Widows (unified)

#### Registering for Scottish Widows Extranet

Scottish Widows and Clerical Medical e-Services are now in a single unified website (under the Scottish Widows brand) that requires only one single extranet registration.

The registration process allows access to data at Firm level (ie at FSA Firm Reference Number level) and introduces concept of supervisors/controllers within the intermediary business.

Individual Unipass Digital Certificates remain the recommended method for accessing the website.

#### Before you register

Important information about Scottish Widows and Clerical Medical Agency Agreements;

Scottish Widows and Clerical Medical Investment Group Limited are separate legal entities, and to take advantage of our full combined range of eServices you'll need to make sure your agency is registered with both companies.

Onshore and Offshore Bonds are provided by Clerical Medical Investment Group Limited and CMI Insurance Company Limited. In order to carry out online transactions for these products you will need to secure an Agency Agreement with Clerical Medical Investment Group. All communications and information relating to your bond will come from Scottish Widows

If you are not already registered, there are two methods for registering with Scottish Widows, either with a Unipass Digital Certificate or a Username and Password.

To register, go to the Scottish Widows website: [www.scottishwidows.co.uk/extranet](http://www.scottishwidows.co.uk/extranet)

The registration process is made up of 5 distinct steps including;

- Regulatory Details
- User Details
- Creation of a Security Profile
- The level of Firm Access

Users are directed through these stages in a way that matches their validated user position within the firm. For eg; if they are the first registrant from their firm or a later addition to an existing on-line firm relationship.

The process introduces the role of first Registrant Access Controller / Supervisor.

Subsequent registrant access will be granted in accordance with the access levels selected by the first registrant (controller).

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

Appropriate methods of user authorisation are introduced, depending upon the access levels requested and in what way.

Unipass Digital Certificates users are provided with instant access to client data and secure services in accordance with their certificate credentials.

Non Unipass users are authorised by their Firm Principals/Access controllers before any access to client data is switched on.

### STEP 1 REGULATORY DETAILS

The screenshot shows the 'Register for eServices' form on the Adviser Extranet. The form is titled 'Register for eServices' and has a progress bar with four steps: 1. Regulatory Details (active), 2. Your Details, 3. Security, and 4. Finish. The 'Firm Details' section includes a dropdown for 'Regulatory body' (set to 'Financial Services Authority (UK)'), a text field for 'Registration number', and a note: '? If you are a member of a network please ensure you enter your FSA Appointed Representative Number (AR FRN) If you are not a network member please enter your Principal FSA Firm Reference'. A 'Cancel' button is visible at the bottom right.

#### Step 1

Validation is taking place against Scottish Widows Agency Records to ensure Terms of Business are in place.

At this stage the system recognises if the user is a first time registrant for the Firm reference number (FRN) entered.

### STEP 2 USER DETAILS

The screenshot shows the 'Register for eServices' form on the Adviser Extranet, now at Step 2: Your Details. The progress bar shows Step 2 is active. The 'Your Details' section includes text fields for 'First name' (Ann), 'Surname' (IFA), 'Postcode' (bs1 5lf), and 'Email address' (AnnIFA@FRNlevel.com). A dropdown for 'Business role' is set to 'Authorised IFA non Network'. Below this is a dropdown for 'Select the supervisor responsible for your part of the organisation:' (John Smith, email - gt@gt.com). A 'Help & Support' box is visible on the right, stating: 'If you are experiencing difficulties with your registration, please contact us on 0845 716 6747.' 'Cancel' and 'Next' buttons are at the bottom.

#### Step 2

User details are collected here and where applicable access controller/ supervisor selections are made.

## Contract Enquiry Registration and User Guidelines

### STEP 2 (CONT) FIRST REGISTRANT ACCESS CONTROLS

**Step 2 variation**  
When identified as the first registrant from a firm,

**Step 2**  
Subsequent registrants will need to select the access controller for the relevant part of their organisation. There may be more than one, so selecting the most appropriate is important

**Step 2 variation**  
Access levels are also set and explained here. See below

#### Set Access Levels

The access controller is required to determine the appropriate level of access for themselves and subsequent registrants for the firm. The choices are displayed below:

**Set Access level**

- All users can access all agencies/policies held within this organisation (firm level access)
- Users will be asked to specify an access level within this organisation \*(user defined access level)

#### *Firm Level Access (Default)*

This will be the regulatory reference number (FRN) contained within the Unipass Digital certificate, the principle agent Firm reference number (PAFRN) or the appointed representative firm reference number (ARFRN) as entered in step 1

#### *User Defined Access*

This will limit access levels to specified agencies within an organisation. Full FRN level access-default will be removed; users are required to specify the appropriate part of the organisation for which they will be authorised to access.

## Contract Enquiry Registration and User Guidelines

In all cases the relevant access controller or supervisor will be notified of subsequent users registering for access to eServices.

### STEP 3 CREATING A USER NAME AND PASSWORD (NON UNIPASS) AND SECURITY PROFILE

The screenshot shows the 'Register for eServices' form in the Adviser Extranet. The form is titled 'Register for eServices' and has a progress bar with five steps: 1. Regulatory Details, 2. Your Details, 3. Security, 4. Firm Access, and 5. Finish. The 'Security' step is currently active. The form is divided into two main sections: 'Create account' and 'Security questions'. The 'Create account' section has fields for Username, Password, and Confirm password. The 'Security questions' section has fields for Father's first name, Mother's first name, Place of birth, Name of first school, Your secret question, and Your secret answer. There are two informational boxes: one stating 'Your user name should be a minimum of 8 characters long. Your Password must also be a minimum of 8 characters and contain both letters and numbers.' and another stating 'We will only use this information to identify you should you need to contact us about your on-line account.' At the bottom of the form are 'Cancel' and 'Next' buttons. A red callout box on the right side of the form contains the text: 'Step 3 Non Unipass users Create their username and password here'.

Having completed step 3 the user is required to specify firm access level, this is managed in two slightly different ways for Clerical Medical agency structure and that of Scottish Widows.

This step only applies when the registrant is required to specify access levels in accordance with the controller instructions at outset. **Those registrants set with Full FRN level Access from step 2 will bypass this step. Agencies will be automatically applied.**

## Contract Enquiry Registration and User Guidelines

### STEP 4 SELECTING ACCESS LEVELS

The screenshot shows the 'Register for eServices' page on the Scottish Widows Adviser Extranet. The page is at Step 4 of a 5-step process: 1. Regulatory Details, 2. Your Details, 3. Security, 4. Firm Access, and 5. Finish. The 'Firm Access' section is active, and a list of firms is displayed for selection. A red callout box labeled 'Step 4' points to the list, stating: 'Selection of a Clerical Medical agency / access level is done within a hierarchy'. The list includes firms such as Sesame Limited, A S Green & Co (Financial Advrs) Ltd, A S L Financial Planning Ltd, About Financial Planning Ltd, Accredo Financial Services (checked), Active Asset Management, AJS IFA's (K473), Albany Financial Consultants Ltd, Allied Financial (W-Ton), Andromeda Associates Limited, APA Finance T/A, and Armstrong & Earl Financial Sys Ltd.

The screenshot shows the 'Thank You for Registering for eService' page on the Scottish Widows Adviser Extranet. The page is at Step 5 of the 5-step process. A red callout box labeled 'Step 5' points to the page, stating: 'Completed! The finish page is displayed and e-mailed to the user. It outlines:'. The page content includes: 'Thank You for Registering for eService', 'Your new username is "MYNewUsername". This is your single method of accessing eServices. You will receive an email confirming your registration details shortly. A letter has been sent to your firm access controller in order to approve the level of policy access required. Once you have received approval you will have access to your Clerical Medical heritage policies and online services only.', 'Next Steps' (with a warning icon): 'You don't have access to the full range of Scottish Widows products and services. Follow the steps below to enable this: You need to apply for a Scottish Widows agency via Adviser Wise. Once your agency numbers have been allocated you will be notified by our agency team. Input the agency numbers via your on-line "My Account" page.', and 'Services Available to You' (with checkmarks): 'Illustrations and Applications for Scottish Widows Investment Bonds', 'On-line Tools', and 'Contract Enquiry for clients and policies associated with the " Clerical Medical heritage" will be available 24 hours'. A red callout box at the bottom right of the page states: 'Upon selecting Access eServices the user can continue through to the logged in' rebranded'.

### Notifying firms of new users and gaining approval as appropriate.

Once the above steps have been completed, Unipass Digital Certificates holders are provided with instant access to client data and secure services. This essentially happens because Unipass is acknowledged to be sufficiently secure and the user has been pre- authorised by their firm controller at point of gaining their certificate.

## Contract Enquiry Registration and User Guidelines

An e-mail notification is generated notifying the firm access controller that the registrant has now been granted with access to eServices, the access controller need only respond to this in the event they want to remove access.

Non Unipass users will need to be authorised by their Firm Principles/Access controllers before any access to client data is switched on. A letter will be sent to the firm address which, is independently sourced. This letter should be returned to the web support team following the necessary approval. (Positive Affirmation)

It is important to remember that access to eServices will not be granted until written approval has been provided. In the case the letter is sent to the Firm Principle, this individual is asked to nominate an access controller from within their firm to whom future registrant approval can be addressed.

### Trouble Shooting: Digital Certificates

In certain instances you may encounter a digital certificate issue due to Internet Explorer (IE) security settings. To overcome this, follow the steps below:

1. Open Internet Options from Control Panel or I.E.
2. Click on the Security Tab
3. Select the Trusted sites zone from the list, and click the "Sites" button
4. Add the following website to the zone `https://*.secure.scottishwidows.co.uk`, click "Add", then "Close"
5. Click on "Custom Level..." button
6. Scroll down to the "Miscellaneous" section
7. Under the option "Access data sources across domains", select "Enable"
8. Ensure that you are using the latest version of I.E.

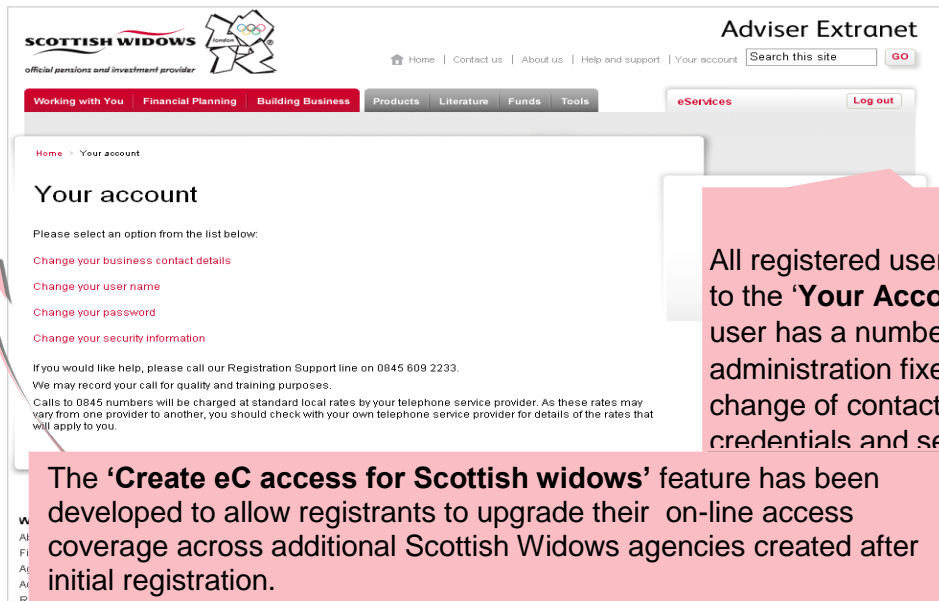
Following this procedure will then allow a full query of the Scottish Widows RTV service.

### My Account Feature

Once Logged on, Users can self-administer aspects of their account in the following ways via the 'Your Account' tab, having selected this, the system allows them to:

- Change business contact details (restricted changes)
- Change own user name
- Change own password
- Change own security information
- Create e-Services access for Scottish Widows Agency's (see below).

## Contract Enquiry Registration and User Guidelines



All registered users will have access to the 'Your Account Feature' The user has a number of self administration fixed features including change of contact details, access credentials and security information

The 'Create eC access for Scottish widows' feature has been developed to allow registrants to upgrade their on-line access coverage across additional Scottish Widows agencies created after initial registration.

The feature is dynamic and only appears where specified access levels are set as the control. Those registrants with full FRN level access will automatically acquire any additional agency access.

Also available to use where **no** Scottish widows terms of business was held at the point of registering or matching.

### Create User name and password access to work from a different PC

This feature allows **Unipass Digital Certificate Users** to also create a username and password for access to their account in situations where they don't have their **Unipass** loaded into the pc they are working from. i.e. home PC or remote laptop

If registered with a Unipass Digital Certificate, a user may create a username and password for access when working remotely. For example where the Digital Certificate isn't present on the PC being used i.e. laptop or home PC.

### Real Time Valuation Requests

Please note that this refers to Clerical Medical manufactured pensions and bonds only (including Scottish Widows branded bonds with the policy references BNSC, PA, PP, PQ, GA, GQ and CP). Scottish Widows manufactured policies will be available towards the end of 2011.

From the Portfolio Summary page in JCS, Real Time Valuation requests can be made to update a single policy (RTV) or all policies for that client (RTV All).

To allow RTVs for Clerical Medical / Scottish Widows, standard security settings will need to be altered in Internet Explorer. To do this, follow the steps below:

1. Open Internet Options from Control Panel or Internet Explorer
2. Click on the Security Tab

## Contract Enquiry Registration and User Guidelines

3. Select the Trusted sites zone from the list, and click the "Sites" button
4. Add the following website to the zone "https://\*.secure.scottishwidows.co.uk", click "Add", then "Close"
5. Click on the "Custom Level . . ." button
6. Scroll down to the "Miscellaneous" Section
7. Under the option "Access data sources across domains", select "Enable"

### Clerical Medical Bulk Downloads

#### Using the Service

Once you have logged in, you should click on the Existing Business link and then the Bulk Data Download link under "Clerical Medical Pensions and Investments" at the bottom of the page. The download will also include "Scottish Widows" branded bonds bought after the 6 December 2010.

There are various options available to determine the specifics of the extract you create, but it is recommended to select the default options to get the extract you require, then click Confirm.

Once you have clicked Confirm, you will be taken back to the Summary Extract screen. Warning; do not click Confirm Delete by mistake as this will remove the extract that you have just requested.

Your extract requests will then be processed. As a rule this will be done overnight (especially if the default options have been created).

#### Products covered Onshore Life and Pensions:

- Clerical Medical Buy-Out Plan
- Discounted Gift & Income Bond\*
- Distribution Bond
- Flexible Bond
- Flexible Growth Bond
- Free Standing AVC
- High Growth Bond
- Individual Buy-Out Plan
- Individual Pension Plan
- Individual Stakeholder Plan
- Investment Bond\*
- Investment Portfolio\*
- Pension Transfer Account
- Personal Pension Account
- Personal Pension Life Assurance
- Personal Pension Plan
- Retirement Enhancer Account
- Section 32 Plan
- With-Profits Bon

#### Products covered Offshore Life and Pensions:

- Global Investor\*
- Corporate Investor\*
- Portfolio Bond

Nb: Clerical Medical products marked (\*) were re-branded Scottish Widows in Dec 2010. From the date the changes took effect, only new business sold will be branded Scottish Widows.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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### Help and Support

If you require assistance with the registration process, please contact the Scottish Widows Web Support Team on 0845 769 7888 or email, [websupport@scottishwidows.co.uk](mailto:websupport@scottishwidows.co.uk)

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Fidelity FundsNetwork

This service is available using the FundsNetwork Adviser Login ID and PIN.

#### Already Registered for FundsNetwork Online Service

If you are already registered for the FundsNetwork online service, your login information for the Reporting Service is the same as your login information for the FundsNetwork Client Management Service for Advisers.

Therefore, as part of the authorisation for the Reporting Services, each user will require a FundsNetwork Adviser Login ID and PIN. On initial registration for the Client Management Service you will have nominated a Client Management Administrator (“CMA”) as being responsible for your organisation for issuing new FundsNetwork logins and making changes to access rights. Access to the Client Management Service is set up on FundsNetwork by the CMA and is accessed by going through the “Tools/User Admin” part of client management by selecting the “add user” option. The Administrator has full access to all of the tools available on FundsNetwork and must enable the Reporting Services functions so that users have access to this service.

#### Not Already Registered for FundsNetwork Online Service

If you are a new user to FundsNetwork online Client Management Service, registering couldn't be easier. In order to do business with FundsNetwork and access the online service you need to register using the link below which takes you to the FundsNetwork for Advisors site:

<http://www.fidelity.co.uk/adviser/fnw/index.html?adviser=true>

Click on ‘Register’ and accept in writing by signing and returning the Terms of Business Acceptance Form. As part of this process, a CMA must be nominated. The CMA is in effect a PIN warden who manages the set-up of other users within your firm. Following receipt of signed terms of business, the nominated CMA will then receive notification of their login ID and instructions for creating their own secure PIN.

The CMA can then create additional users of FundsNetwork online in “Client Management” under the “Tools/User Admin” tab by selecting “Add User”. Within the user admin function it is possible to maintain user privileges. The Administrator has full access to all of the tools available on FundsNetwork and must enable the Reporting Services functions so those users have access to this service.

For any queries concerning registration please contact the FundsNetwork Team on 0800 99 55 11.

#### Requesting FundsNetwork Report Download Service

For bulk data imports, to be able to automatically import bulk data files for Contract Enquiry into JCS you need to have set up the FundsNetwork Report Download service by calling the FundsNetwork Team on 0800 99 55 11. They will arrange for the FundsNetwork Sales Support Team to set up the report service. A number of different reports are available but, for bulk valuation updates, you will need to request the IFA Software Holdings Report, which allows bulk holdings updates to be performed for all the advisers clients. There are a number of reporting frequency options available including daily, weekly and monthly. You will need to choose the frequency most appropriate for

## Contract Enquiry Registration and User Guidelines

you. For the ability to perform real time bulk data downloads for any valuation point you need to request the daily download option.

### Reporting Services

For more information concerning the Reporting Services offered by FundsNetwork please refer to the Reporting Services menu within the “Tools” tab by clicking on the link below:

<https://www.clientmanagement.fidelity.co.uk/login/>

### Using the Service with JCS Software

Both Real Time Valuation and Bulk data files will be imported automatically by JCS on request for a single scheme or bulk valuation and holding updates.

### Real Time Valuation Requests

From the portfolio summary page within JCS a request can be performed for a single FundsNetwork scheme (RTV) or all FundsNetwork schemes for that client (RTV All).

### Bulk Downloads – Manually Requested

The FundsNetwork Report Download Service allows a user to download a suite of reports which can be requested to be run on a regular (e.g. daily, weekly, monthly, etc.) or adhoc basis. JCS uses the IFA Software Holdings Report, which allows bulk holdings updates to be performed for all of the adviser’s clients. To import the file into JCS you need to click on the following options after viewing your available reports from the Reporting Services window.

1. Select the option to “Download”
2. Click Save and then save the file or;
3. Click Open, select all of the data, copy it into a blank excel sheet and save as a csv file

*Nb. Step 3 is only to be followed if Step 2 does not work for any reason.*

Import the data into JCS through the EDI – Data Import screen. For the ability to perform real time bulk data downloads for any valuation point you need to request the reports to be produced daily. The reports are available for seven days and are then deleted.

For more information on how to set up the IFA Software Holdings Report to be run on a regular basis please refer to the Requesting FundsNetwork Report Download Service section detailed above.

### JCS Configuration Settings

Your FundsNetwork Login ID and PIN will need to be entered into JCS.

Adviser Login ID	As supplied by Provider
Adviser PIN	As supplied by Provider

### Product Consolidation

FundsNetwork offers the ability to consolidate some product data. This is because Unit Trusts are split into on-platform and off-platform schemes, and Offshore Holdings can be split into up to three separate schemes.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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By selecting the consolidated holdings file, Unit Trusts and Offshore Holdings will be consolidated into one product each. It will also consolidate ISA plan years into one product.

If you decide to use this option, you can no longer use individual RTV, only bulk valuation downloads. JCS does allow selective consolidation, whereby the Unit Trust and Offshore Holdings can be consolidated but will leave the ISA plan years separated, if you should so wish.

To enable this option, please contact JCS Technical Support.

### Help and Support

If you need help with the Registration Process or if there are any problems with the Reporting Service provided by FundsNetwork, then please call FundsNetwork Team on 0800 99 55 11.

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

### Financial Express

#### Datafeeds for Advisers

We offer a cost-effective feed of prices to IFAs. This data works with JCS and is very easy to use.

The data covered by the service includes: UK unit trusts & OEICs, UK unitised life and pension funds, UK equities and investment trusts, FSA recognised offshore funds, offshore insurance funds, regulated offshore funds, offshore broker funds, other offshore funds and a range of indices and currencies.

#### Product List

- Weekly Price Feed: UK equity and investment trust prices, a range of indices and currencies, UK unit trusts and OEICs, UK unitised life and pension funds as well as FSA recognised offshore funds and insurance funds.
- Daily Price Service: All the info provided through our weekly service daily!
- Daily Equities & Funds Code Service: Daily code tracking service for funds and equities, giving you daily details of all new, cancelled, merged and other code or name changes within the universe.

Subscribe by completing, printing, signing and addressing the online application form at <http://www.financialexpress.net/uk/datafeeds/ifapplicationcentre.htm> (with cheque enclosed) to:

Adviser Applications, Financial Express, 7 Chertsey Road, Woking, Surrey GU21 5AB

### Finstat – FT Interactive Data

To import files from Finstat, you must first sign up with FT Interactive Data for one of their price feeds. The most commonly used price feed with JCS is known as the UTS2 service. This contains Unit Trusts and OEICs, Insurance and Pension Funds and Offshore funds details within separate files.

These are:

- UTAX (unit trusts and OEICs)
- UTOX (offshore funds)
- UTIX (insurance and pensions)

You can also sign up to the SIS3 service, which provides the following file:

- SIS3 (shares and investment trusts)

There are other services available. However, JCS recommend the above files as they use the MEXID code system for identifying funds rather than the SEDOL system, which uses a licensed numbering system from the Stock Exchange and, therefore, has additional charges associated with them and, in some cases, over £100,000 worth.

### Importing Finstat Feeds

When importing a Finstat feed, files are provided by FT Interactive as above, along with a set of "Master List" files, which are as follows:

- UTAC (unit trusts and OEICs)
- UTOC (offshore funds)
- UTIC (insurance and pensions)
- SISS (shares and investment trusts)

To import the files, the following procedure applies:

1. Save the files to the root of the C: drive;
2. Add the relevant MEXID codes to the funds in JCS, within Global Data;
3. Log in to JCS;
4. Go into the Administration menu, select 'Fund Management' and then 'Update Fund Prices and Value Clients Funds';
5. Select the 'Finstat' button and then populate the following field: Price Date: This should reflect the date the funds information from Finstat;
6. Choose the drive letter C: and click on the disk icon to begin the import;
7. After a while a message will appear to confirm how many fund prices have been imported. There may also be a message to say that there were a number of funds not updated from Finstat, as automatic update codes were missing or incorrect, would you like to update manually 'Yes' or 'No' Choose 'No' (The missing one can be identified later by producing an 'Active Funds' report);
8. The next message to appear will say 'OK' to value clients funds now? 'Yes' or 'No'. Choose 'Yes'. The screen will then display information to say that it is updating Fund Value, Portfolio Values, Fund Values, Fund Yields'.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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### Post Process Removal of Used Finstat Files from the C Drive

To remove the used Finstat data file from the root of the C drive, double-click the desktop file called 'Delfinstat'. This is a batch file created by JCS that will automatically remove the now used Finstat files. The Delfinstat.bat file has been created and maintained by JCS Technical Support.

## Contract Enquiry Registration and User Guidelines

### Friends Life (was Axa SunLife)

For details about registration and product coverage, follow the link below to the Friends Life website:

<https://extranet.friendslife.co.uk>

[https://advisers.axa.co.uk/welcome\\_ifa.html](https://advisers.axa.co.uk/welcome_ifa.html)

Click on the "Contract Enquiry Service" tab at the left-hand side of the page and follow the on-screen instructions.

Friends Life Contract Enquiry Service is a system-to-system connectivity solution that allows you to receive up to date contract and valuation information electronically via JCS or using Portal access.

Friends Life Contract Enquiry message system is based upon the industry wide standards that have been developed by Origo Services Ltd. These standards define the process for requesting and responding to contract/valuation requests as well as the data that is exchanged.

### How Can I Get Access?

In order to access their Contract Enquiry Services via any Portal or JCS, you need to:

- be registered to use the Friends Life Adviser extranet
- have linked your Individual Digital Certificate
- provide your Contract Enquiry access requirements

### I don't currently have Advisers extranet access

Complete both the Advisers extranet and Contract Enquiry sections of the Registration form.

### I have Advisers extranet access, but have not yet linked my Individual Digital Certificate

Provide your Contract Enquiry access requirements and link your Individual Digital Certificate.

### I already have Advisers extranet access and have linked my Individual Digital Certificate

Provide your Contract Enquiry access requirements.

*Note: You will be required to hold a [Unipass individual digital certificate](#).*

From the above page there is also a link to the Contract Enquiry Product Coverage.

Contract Enquiry registration requests will be processed with in 24-48 hours.

Adviser Site registrations are processed with in 3-5 working days.

### Message Transmission Guidelines

FriendsLife Contract Enquiry Service is compatible with Message Transmission Guidelines 1.1 and 1.3.

### OSIS Digital Certificates

A Unipass Digital Certificate is required from OSIS and should be either a Company Digital Certificate installed on a designated server (Bulk Data Downloads) or an Individual Digital Certificate installed on your desktop (for Real-time).

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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### Help and Support

Telephone: 0845 300 1946 option 3

[ecommercehelpdesk.al@friendslife.co.uk](mailto:ecommercehelpdesk.al@friendslife.co.uk)

## Contract Enquiry Registration and User Guidelines

### Friends Provident

This service is available using either a Login ID and Password or holders of a Unipass® Digital Certificate. *Following upgrades to the provider's security system on 31st October 2010, Friends Provident have made some small changes to the login process for users.*

#### Existing Users of the Friends Provident IFA Extranet Service

Users with an existing login ID and password will now need to login to the UK Adviser site; <http://www.friendsprovident.com/ifa>. From the Adviser homepage, select "existing business", from here you will see new login and registration screens. Enter your current login ID and password. Please note that your existing passwords will become case sensitive from your first login e.g. upper and lower case characters will be remembered for future login attempts. Click "Submit". You will then be taken to a new screen and asked to set three new security questions and answers. These should be at least 4 characters in length. This is a one off process and once set you will be able to reset your own password using the "forgotten my password link".

#### Not Already Registered for Friends Provident IFA Extranet Service

In order to access the Contract Enquiry service you need to set up a Login ID and Password for the Friends Provident IFA Extranet service – the link below will take you to the Extranet site:

<http://www.friendsprovident.com/ifa/>

Click 'Register' in the top right-hand corner of the "Quick Links" section. You can then complete the registration form online (no need to sign or post). It only takes a few minutes and you can choose your own Login ID and Password.

The registration process takes approximately 48 hours from receipt of the application. You will receive confirmation of your login ID via e-mail. Whilst awaiting authorisation, you'll be able to run client quotes and illustrations as well as submit new business to us.

For an online demonstration of the registration process, visit the Friends Provident Online Services Demo at:

[http://www.friendsprovident.com/ifa/extranetdemo/gen\\_how\\_do\\_i\\_register.html](http://www.friendsprovident.com/ifa/extranetdemo/gen_how_do_i_register.html)

#### Not Sure if You Have Already Registered?

If you are not sure whether you have already registered you can easily check by using the "Forgotten your Login ID" facility on the Main Registration Page under "Options". If you have already registered but forgotten your password then you can use the "Forgotten Your Password" facility.

#### Using Unipass® Digital Certificates

Friends Provident allow the use of Unipass® digital certificates (individual and company) to log into their online services. For details on "how to register" for Unipass® please refer to the Unipass® Section of this guide.

## Contract Enquiry Registration and User Guidelines

You will need to associate your UNIPASS® certificate to your Login ID. Go to <https://www9.friendsprovident.co.uk/> enter your Login ID and Password, check the 'Associate UNIPASS Certificate' checkbox, then click 'submit'. You will then be asked to set your new security questions and answers.

### Contract Enquiry Services

For more information concerning the Contract Enquiry Services offered by Friends Provident please visit Friends Provident – eData Services, Contract Enquiry for existing business at:

<http://www.friendsprovident.co.uk/ifa/contractenquiry/>

### Using the Service with JCS Software

#### Real Time Valuation Requests

From the Portfolio summary page in JCS, Real Time Valuation requests can be made to update a single policy (RTV) or all policies for that client (RTV All).

#### Bulk Downloads – Manual Request

For Bulk data files, these files need to be requested on a manual basis (no scheduled basis is currently offered) and take 24 hours to be generated:

1. Login the to Adviser Extranet at <https://www15.friendsprovident.co.uk>
2. Select 'Existing Business' from the navigation bar, then select Data Downloads from the left-hand margin
3. Request an All Policies data file – click the arrow in the Request column. These files are processed overnight so you will only be able to request the file once a day.
4. Click 'confirm' to process the request
5. Confirmation of request is displayed
6. Notification that the file is ready for collection will be sent to the email address quoted on the confirmation page. Select the second option to collect the file from the download summary page. As the file is held securely on the Extranet you will need to login before you are able to collect the file. NB: If your email address has change you will still be able to collect the file by logging on to the Extranet and selecting Data Download.
7. Collect the data file from the Data Download page – right-click on the file link, this will open an options box.
8. Select the 'Save Target As' option – select an appropriate place to save the file and click the 'Save' button. Once the download is complete click the 'Close' button.

The file can then be imported into JCS through the EDI – Data Import menu. The file will remain available for collection for seven calendar days from the date the file becomes available for collection after which time it is deleted.

### JCS Configuration Settings

Your Friends Provident Login ID and Password will need to be entered into JCS.

Login ID	As supplied by Provider
Password	As supplied by Provider

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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### Help and Support

If you need help with the Registration Process or Friends Provident E-Business services please contact your Friends Provident IFA consultant or the Friends Provident Help Desk on 0845 6000 670 or email at [ebs.team@friendsprovident.co.uk](mailto:ebs.team@friendsprovident.co.uk).

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Legal & General

Legal & General currently support V2.0 of Origo messaging service. Users will require a username and password or a OSIS client digital certificate to use the service. The OSIS digital certificate needs to have been registered with Legal & General prior to use.

### HOW TO REGISTER

To access Contract Enquiry Valuations you will need to register for Adviser Centre at:

<http://www.legalandgeneral.com/advisercentre/>

Once registered, you will be automatically issued with a User ID and Password.

NB. If you are a new user you can register for the Adviser Centre and your UNIPASS certificate at the same time. Registration is straightforward; just follow the instructions on the Adviser Centre homepage:

<https://www10.landg.com/ExtranetRegistrationWeb/Start.do?portal=adviser>

### PRODUCTS SUPPORTED:

#### BONDS

- With Profits Income Bond
- With Profits Bond
- With Profits Growth Bond
- Investment Bond
- Money Market Bond
- Capital Investment Portfolio
- Capital Conversion Plan
- Inherit Protect & Income Plan
- Distribution Bond – Guarantee
- Single Premium Investment Plan

#### PENSIONS

- Personal Pension Plan
- Group Personal Pension
- Stakeholder Pension Plan
- Self Invested Personal Pension Plan
- Personal Investment Pension Plan
- Self Employed Plan
- Free Standing AVC
- Buy Out Plan (section 32)
- Company Pension Plan
- Group AVC

### POLICY FORMATS USED:

When requesting a Contract Enquiry from Legal & General it is important that the correct policy number is used. Legal & General apply the following formats for all of its Bond and Pension policies:

123456789 (10 digits)	Bonds & Pensions
US1234567 (US followed by 7 digits without any spaces)	Bonds Only
UP1234567 (UP followed by 7 digits without any spaces)	Pensions Only
U 123456 (U followed by 2 spaces and 6 digits)	Pensions Only

*Please use Uppercase*

### Help and Support

If you require assistance with the registration process or use of Legal & General e-services please call 0370 050 0274 option 2, Monday to Friday between the hours of 09.00am and 17.30pm

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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For help with configuring or using the JCS Contract Enquiry Services please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### LV=

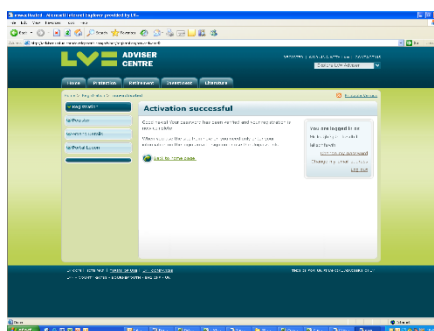
#### Registering for the LV= Service

To register for LV='s valuations service, users must be registered on LV='s extranet and hold a Unipass certificate which is linked to their account.

If you are not already registered to use LV='s extranet, you can do so by pressing the Register link on the LV= login page; [www.lv.com/adviser](http://www.lv.com/adviser).

You will then need to complete the Registration page by completing all mandatory fields. In the field "Product Types You Sell" please ensure you select "Retirement Services" otherwise LV= cannot provide valuations. Scroll down and select "Register with Unipass". Complete as required (and should you have more than one Unipass certificate, select the certificate that you wish to use). An email will then be sent confirming that your registration has been approved and requesting you to activate your account.

Once activation is complete, you will now be logged into the system and will receive an "activation successful" message. You can now request valuations via JCS.



### PRODUCTS SUPPORTED

#### Current (FTA/Retirement Account)

- Personal Pension
- Self-Invested Personal Pension
- Drawdown

#### Legacy

- Deferred Annuity
- Deferred Annuity Drawdown
- Section 32 Contract
- Rebate Only Contract
- ASP

#### Help and Support

If you require assistance with the registration process then please call the LV= RS Portals and Integration Team via email; [rsportalsandintegrat@lv.com](mailto:rsportalsandintegrat@lv.com).

For help with configuring or using JCS Contract Enquiry please contact our Technical Support Team on 03450 049 599 – Option 1 or via email; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Metlife

#### Registering for the MetLife Service

To register for MetLife's valuations service, users must be registered on MetLife's extranet and hold a Unipass certificate which is linked to their account.

If you are not already registered to use MetLife's extranet, you can do so by pressing the Register button on the MetLife login page; <https://metlife-eservices.com/adviser>.

You will then need to authenticate your account via the MetLife support email which you should receive moments after completing the registration.

You will need to ensure that you are authorised for Valuations. Once you have registered your account, your Super User will receive an email request to set you up with the ability to do valuations. Once your account has been created and you have been given permissions to undertake online valuations, you then need to login and associate your Unipass certificate with your account.

To link a Unipass Certificate to the MetLife extranet account:

1. Login to the MetLife extranet <https://metlife-eservices.com/adviser>
2. Click "Edit Account" on the homepage
3. Click on "Link Certificate" and follow the instructions

### Help and Support

If you require assistance with the registration process then please call the MetLife Online Services Team on 0800 917 2006 or via email; [onlineservices@metlife.com](mailto:onlineservices@metlife.com).

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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For help with configuring or using JCS Contract Enquiry please contact our Technical Support Team on 03450 049 599 – Option 1 or via email; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Novia

#### Registering for the Novia Service

Novia provides a range of Data Services to their users of which a daily Bulk Valuation service is included. To register for this service, please contact Novia Client Services to request access to the third party valuation service. Once the application has been processed, Novia will issue you with a Username and Password which can be entered into the Novia Financial connection for JCS and which can be found in Utilities>External Connections.

#### Using the Service

The service is primarily a Bulk Download valuation service, but it has been implemented in JCS so that it can be run in a Bulk Valuation mode, or as a single policy Real Time valuation. It should be noted that when valuing a single policy, the entire valuation file must still be downloaded and may affect the responsiveness or speed of an RTV.

Daily files are normally available by 08.30am.

#### Bulk Downloads

The Bulk Data file can be imported automatically by JCS from the External Connections page by clicking on "Import Bulk Data Now".

#### Real Time Valuation Requests

From the Portfolio Summary page in JCS, Real Time valuation requests can be made to update a single policy. To assist in correct mapping, the policy number entered into the case should be the Wrapper reference number.

#### Help and Support

If you require assistance with the registration process then please call Novia Client Services on 08456 808 000 or via email; [clientservices@novia-financial.co.uk](mailto:clientservices@novia-financial.co.uk)

For help with configuring or using JCS Contract Enquiry please contact our Technical Support Team on 03450 049 599 – Option 1 or via email; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Nucleus

#### Registering for the Nucleus Wrap Platform

To register your interest in becoming an IFA partner and therefore gain access to the wrap platform please visit the Nucleus website; [www.nucleusfinancial.com](http://www.nucleusfinancial.com).

Click on the Professional Advisers tab and complete the “Interested?” form to register. A Nucleus representative will contact you and will discuss with you how to sign up to become a Nucleus member.

#### Using the Service

Once you have registered and received your login and security password, please proceed to the following area to access the reporting section within the Nucleus Platform;

<https://www.nucleusfinancial.net/wrap/advisor/index.jsp>

- Select the Reports tab in the top-level navigation
- Select the report “Holdings for external systems” from the drop down list of reports available. This can then be downloaded as an XLSX or CSV file. However, only the CSV file format is compatible within JCS.
- The report will contain all client details for which the user has logged in permissions.

#### Product List

- General
- ISA
- Pension (SIPP)
- Onshore Bond
- Offshore Bond

#### Help and Support

If you require assistance with the registration process then please call the Nucleus

Implementation Support team on 0131 226 9800 or via email;

[martin.mcindoe@nucleusfinancial.com](mailto:martin.mcindoe@nucleusfinancial.com)

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or via email; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

### Old Mutual International

#### Download an Old Mutual International bulk data file

1. Logon to the Old Mutual International Insite website:  
<https://insite.oldmutualinternational.com/beacon/frameset/rsk/> with a username and password and click on the option for 'Logon and accept Conditions of Access';
2. From the menu, select the option for 'Valuation and Downloads';
3. Select the option to 'Request New' download and click 'Next';
4. On the Request Form, choose the option for XML, enter a filename and send the form;
5. An email will be sent to notify you when the download is ready.

#### To pickup a download from Old Mutual International

1. Logon to the Old Mutual International Insite website:  
<https://insite.oldmutualinternational.com/beacon/frameset/rsk/> with a username and password and click on the option for 'Logon and accept Conditions of Access';
2. From the menu, select the option for 'Valuation and Downloads';
3. Click on the option to download the file;
4. When shown an option to unzip the file, unzip it to a location that can be easily found (e.g. the Desktop);
5. Login to JCS, and select Utilities>EDI>Data Import from the menu;
6. Click on the binoculars, locate the previously saved file and double-click on it. JCS will then examine the file and import the details.

### Help and Support

If you have any questions about Old Mutual International's bulk download, please contact their Ecommerce Helpdesk on 01624 655 556.

For assistance with importing the file into JCS, please call 03450 049 599 option 1.

## Contract Enquiry Registration and User Guidelines

### Old Mutual Wealth Life Assurance Ltd – (ex-Skandia Life)

#### Registering for business with Old Mutual Life Assurance Ltd

If you are not registered for business with Old Mutual Wealth, you should contact the Old Mutual Wealth Broker administration helpdesk on 02380 729728, who will be able to help you the application process.

#### Signing up for the Old Mutual Wealth Policy Valuation Services:

The valuations service through Old Mutual Wealth requires an adviser to first be registered for the OM Wealth View. Registration for this service can be completed through the following internet link: <https://secure.oldmutualwealth.co.uk/beacon/frameset/uk/wrap.htm>

The Username required for OM Wealth policy valuations is the same as the logon name provided for the OM Wealth View, the Password required for OM Wealth policy valuations service is the 'Extranet Registration Reference Number', which can be found on the OM Wealth View homepage.

#### Old Mutual Wealth Life Assurance Ltd policy valuations with JCS Software

Real time individual policy valuation requests are processed through the JCS portfolio summary page.

For importing bulk policy data files, these files need to be requested from OM Wealth's Extranet through the Business services data download menu. Click on the 'Request Data Download' option and select the CSV (Origo 'Standard' Definition) format, complete the other options as required and click 'Submit'. When completed, the file can be imported directly into JCS through the data import menu.

#### JCS Configuration Settings

Your OM Wealth Username and Extranet Registration Reference Number will need to be entered into JCS.

Username	As supplied by Provider
Extranet Registration Reference Number	As supplied by Provider. Can be found on the OM Wealth View homepage (once you have logged in).

#### Help and Support

All online services related queries should be referred to the Old Mutual Wealth Contact Centre on 0808 171 2600 opt 2 (available Monday to Thursday 08.30am – 5.30pm and Friday 08.00am – 6.00pm) or alternatively via email at [esupport@oldmutual.com](mailto:esupport@oldmutual.com)

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Parmenion

Parmenion provides a range of Data Services to their users, of which, a daily policy valuation feed is included.

To register for this service you should initially contact Parmenion Client Services at [clientservices@parmenion.co.uk](mailto:clientservices@parmenion.co.uk) and request the daily valuation feed for use with JCS Back Office System. If you are interested in using electronic commission/charges from Parmenion in the future, you should also request the monthly charges feed to be setup.

Client Services will perform identity checks and once the request is processed, you will be supplied with login credentials for the daily valuation service.

These details should be entered in JCS External Connections by creating a new connection of type "Parmenion Valuations". You will be asked to enter the user and password provided to you from Parmenion. Policy valuations can be initiated in one of two ways:

### Using the Service

#### Bulk policy valuations

In External Connections, select the Parmenion connection and click on the "Import Bulk Data" button. This will download the details of all policies assigned to your adviser firm.

#### Single policy valuations

Click on the "Real Time Valuation" button within the Portfolio Summary page and select the Parmenion connection if prompted. This will value only the selected policy.

### Help and Support

If you require assistance with registration, please contact Parmenion Client Services at; [clientservices@parmenion.co.uk](mailto:clientservices@parmenion.co.uk).

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or via email; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Prudential

Prudential supports industry standard Contract Enquiry links, which allow you to have real time valuation data sent direct to JCS.

### Principle Contact

- eBusiness Helpdesk - 0808 234 5200 (8.30 a.m. to 6.00 p.m., Monday to Friday)
- E-mail - [pruadviser.helpdesk@prudential.co.uk](mailto:pruadviser.helpdesk@prudential.co.uk)
- Web Address – <http://www.pruadviser.co.uk>

Registration Page – For use of Contract Enquiry, there is no need to register to access pruadviser.co.uk but you will need a Unipass certificate.

The only exception to this is if your firm requires access to all policy records, for members of staff working from various post code locations, e.g. a typical Head Office/branch set-up. To achieve this, you must send us a list of the post code locations you wish to have multiple access. If this is not done then you will only get access to policy records assigned to each branch.

### Digital Certificate or Extranet Logon ID and Password?

Security is controlled by Unipass digital certificate only, both individual or company certificate.

We do not operate a user name and password security system.

### Products Currently Supported with Contract Enquiry

#### Investments

all onshore Prudential Bonds (previously referred to as PruBond and derivatives), including latest variants of Flexible Investment plan and Prufund Investment plan.

#### Pensions

all ex-Scottish Amicable Individual and Group Personal Pensions.

### Help and Support

Advisers based outside the UK cannot currently obtain a Unipass certificate unless they have a UK based parent company. Please contact our eBusiness Helpdesk on 0808 234 5200\* - or 00 44 1786 400021\* if calling from overseas - or email to [pruadviser.helpdesk@prudential.co.uk](mailto:pruadviser.helpdesk@prudential.co.uk), and they will help you access pruadviser.co.uk.

### Notes

The service will be available 24/7

## Contract Enquiry Registration and User Guidelines

### Quilter Investment Platform<sup>1</sup>

#### REGISTER

To register for the Bulk Valuation service you will need to complete the [Quilter registration request form<sup>2</sup>](#) and email it to [WorkflowBrokerAdmin@quilter.com](mailto:WorkflowBrokerAdmin@quilter.com)

Once the registration is complete, Quilter will provide you with a Username and Password for use in JCS.

#### JCS Configuration Settings

After registering as above your Username and Password will need to be entered into JCS.

Username	As supplied by Provider
Password	As supplied by Provider

#### Help and Support

All online services related queries should be referred to the Quilter Customer Support Centre on 0808 171 2626 opt 1 (available during normal office hours, Monday-Friday) or alternatively via email at [ask@quilter.com](mailto:ask@quilter.com). It is recommended that clients contact the Quilter Customer Support Centre in the first instance.

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

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<sup>1</sup> 12 June 2020 Old Mutual Wealth UK rebranded as Quilter Investment Platform

<sup>2</sup> <https://platform.quilter.com/siteassets/documents/forms/19951-adviser-back-office-software-registration-request.pdf>

## Contract Enquiry Registration and User Guidelines

### Royal London

You can access Royal London policy valuations for Pensions and Bonds. The information that is available from this service is detailed below;

- Current plan value
- Funds the plan is invested in
- Underlying fund values
- Number of units held in each fund
- Each fund's price and price date

### How to Register

To access your Royal London's client's policy details you must first register for the Royal London online service. This will also provide you with access to their secure extranet service with quotations, client details and policy servicing.

You will need a Unipass Certificate to register for this service (refer to page 8 of this document if you are not a Unipass user).

Click on the below URL to access Royal London's registration page:

<https://adviser.royallondon.com/eserviceifalogon/register.asp> and select the link to "simple online process". Please ensure that you connect your account to your Unipass Certificate at registration. The registration process normally takes up to 2 days to set up access to all of your clients policies. Once the process has been completed, you will be able to use your Unipass Certificate to access your client's details.

### Help and Support

If you have any queries about this service, please contact the Royal London Web Support team on 0845 60 50 401 or email, [websupport@royallondon.com](mailto:websupport@royallondon.com)

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Sanlam Investments and Pensions (formerly Merchant Investors)

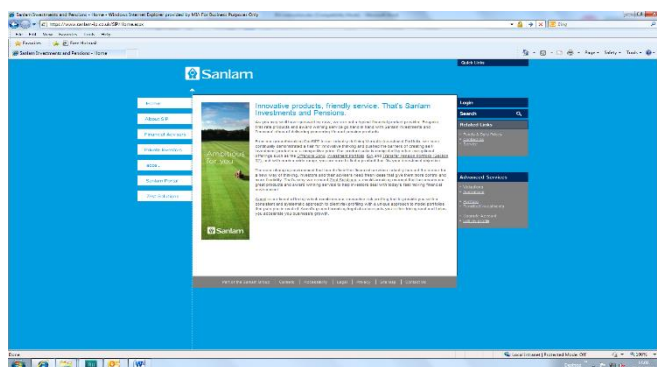
Sanlam Investment and Pensions website allows you to register to access their full range of services. You should have your individual FSA number (if you have one) and your firm's FSA number ready. Register at: <https://www.sanlam-ip.co.uk/sip/Register.aspx>

### How to register for the Sanlam Investment and Pensions Contract Enquiry Service

In order to be able to use the Sanlam Investments and Pensions (SIP) Contract Enquiry Service you need to have an approved account for online valuations.

Please follow the steps below to register for online valuations:

1. Register on the SIP website (if you haven't already done so) by following this going here, <https://www.sanlam-ip.co.uk/sip/Register.aspx> Registration is simple and once registered you have immediate access to the site. If you have any queries then you can call the SIP client support team on 0117 975 2355.
2. Unless you are automatically logged out then please log out of the SIP website and close your browser.
3. When you log back in then you will see the following screen:



4. Click on the "Valuations" link under the "Advanced Services". Further material and demonstration on online valuations is available as well as a link to upgrade your account.
5. Alternatively click on the "Upgrade Account" link under the "Advanced Services" to upgrade your account.

Once you are notified that your account has been approved you will be able to use your selected username and password to request valuations via the Contract Enquiry Service.

### Help and Support

If you have any questions about online services, then please contact the client support team on 0117 975 2355 or email: [ifapartners@sanlam.co.uk](mailto:ifapartners@sanlam.co.uk)

If you require assistance with importing the file into JCS, then please contact Technical Support on 03450 049 599 option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Scottish Widows

#### SCOTTISH WIDOWS REAL TIME VALUATION SERVICE

The Scottish Widows Real Time Contract Enquiry Valuation service is now supported by JCS but at the time of writing, JCS is unable to support The Retirement Account and Plans with multiple policies (OEIC's, Unit Trusts and ISA's). These can be valued in JCS as long as only a single policy is entered within the plan. These products will be supported by JCS in the future and as soon as support for them becomes available we will advise all users.

#### SCOTTISH WIDOWS BULK DOWNLOADS

The JCS Contract Enquiry service uses the pension bulk data download that is available from Scottish Widows Extranet and their bespoke data extract, which is available by telephone request.

##### By request from the Financial Adviser Extranet

This service currently covers all pension products. For more information concerning this download service offered by Scottish Widows please login to the Financial Adviser Extranet service using the link below;

[www.scottishwidows.co.uk/extranet](http://www.scottishwidows.co.uk/extranet)

Once you have logged in, you should click on 'Existing Business' link and then the Bulk Data Download link under 'Scottish Widows Individual & Corporate Pensions' at the bottom of the page. Please note this only includes policies post Sept 1994 and excludes The Retirement Account, bonds and pre September 1994 legacy products.

##### By telephone request to the Major Accounts Team

Please contact your normal Scottish Widows account manager, who can request this for you. The data extract uses policy valuations, which are performed on the last working Friday of the month. The data extracts are not automated and are requested on a needs basis.

### Using the Service with JCS Software

#### By request from the Financial Adviser Extranet

For importing bulk data for all pensions, these files need to be requested from Scottish Widows' Financial Adviser Extranet through the "Scottish Widows Individual & Corporate Pensions' bulk download option. Select the options as appropriate and click 'Submit'. A separate download file is created for each agency selected. You will be notified via e-mail as soon as the bulk data file is ready for downloading. This could take an hour or two and you will be notified by e-mail as soon as the report is ready. The download file is split by agency and there is a separate file for each agency requested.

To retrieve your download, log back into the Financial Adviser Extranet and click 'Retrieve an existing bulk data download'. Expand the 'Available Product Bulk Data Downloads' section and select the file you wish to download. Select the download type Rich Download (CSV) option and Fund Code type Both SEDOL and Scottish Widows Fund Codes option to be able to import the data into JCS and then download the file. On the Reports Download page follow the 'click here' option and save the file as appropriate. Import into JCS through the EDI – Data Import menu.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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NB: SEDOL uses a licensed numbering system from the London Stock Exchange and, therefore, has additional charges associated.

### By telephone request via your Scottish Widows contact

Once the file is received, open it, remove the password protection and save as a CSV. Import into JCS through the EDI – Data Import menu.

### Help and Support

If you have any queries about the downloads please contact the Scottish Widow's Web Support team on 0845 769 7888 or email, [websupport@scottishwidows.co.uk](mailto:websupport@scottishwidows.co.uk)

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Seven Investment Management (7IM)

#### Registering for the Service

7IM provides a range of Data Services to their users, of which a real time valuation service is included. To register for this service, please contact your Relationship Manager to request access to 7IM Data Services.

Once the application has been processed, 7IM will issue you with a username and a passcode which, can then be entered in the 7IM connection for JCS.

#### Using the Service

From the portfolio summary page in JCS, Real Time Valuation requests can be made to update a single policy (RTV) or all listed policies for that client (RTV All). The policy number that should be used in JCS to allow successful valuation of the case is referred to as the AccountID in any communication from 7IM, an example is given below.

Example:

Account ID - IMFOABCD

#### Notes

7IM provide a split of holdings into an earning portfolio and a dealing portfolio. The JCS valuation will update all holdings from all portfolios into the policy to provide an account level overall valuation. To differentiate between cash in either portfolio, all cash holdings will be prefixed with the portfolio name, for eg: Earning Portfolio – Cash.

#### Help and Support

If you require assistance with the registration process, please contact your usual 7IM relationship manager.

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email at; [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Standard Life

JCS can import Standard Life's bulk data downloads, which are available if you are registered for Standard Life's adviserzone extranet service (see <http://www.adviserzone.com> for details).

#### Registering for Standard Life's Adviserzone Extranet Service

If you are not already registered, then you can apply on-line for a User ID and Password or to use your Unipass certificate to access the adviserzone at:

<https://online.standardlife.com/intermediaryaccess/servlet/RegistrationServlet>

If you forget your password, then you can have it reset by entering your User ID (case sensitive) and Email address at:

[https://online.standardlife.com/intermediaryaccess/servlet/IntermediaryAuthenticationServlet?RequestID=AUTHENTICATION\\_RESET\\_PASSWORD&action=initial&redirectUrl=IFAZone](https://online.standardlife.com/intermediaryaccess/servlet/IntermediaryAuthenticationServlet?RequestID=AUTHENTICATION_RESET_PASSWORD&action=initial&redirectUrl=IFAZone)

If you require assistance with the registration process then please call the Standard Life helpdesk on 08450 60 60 036.

### Contract Enquiry Services

Although JCS supports Standard Life's bulk download facility, it does not yet support real-time valuations. This will be added in a future release of Contract Enquiry.

### Using the Service with JCS Software

#### Bulk Downloads – Manually Requested

1. Go to the adviserzone Logon at:  
<https://online.standardlife.com/intermediaryaccess/servlet/IntermediaryAuthenticationServlet>
2. Logon according to whether you wish to use your User ID and Password, Unipass, or to associate your Unipass with your existing registration;
3. In the Select Your File Format area, select the radio button for either XML or CSV;
4. In the Select File Content area, select the radio button for either Basic Download or Full Download;
5. In the Select Your Download area, select your required download;
6. Make selections from the following screen/s as you require, then click Submit (bottom right-hand);
7. The Confirmation of Bulk Data Download Request(s) area will display your email address, as held by Standard Life, to which notification that your download is ready will be sent (the file will be ready within 24 hours and available for 7 days);
8. Once you receive your email, use the link provided to return to the Bulk Data Download area, then click Retrieve Downloads (left-hand margin);
9. In the Retrieve Downloads area, double-click your file's Ref No;
10. When asked "Do you want to Open or Save this file?", select Save;
11. Once "Download is Complete" appears, click Close.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

To import the downloaded file, within JCS, navigate to: Utilities > EDI (Electronic Data Interchange) > Data Import, select the binoculars to locate the file, then select it and import.

*Nb. Standard Life's file format will always be xls. To save and import as a .csv file, simply open the excel file and "save as" a .csv file.*

### Products covered by Bulk Data Download:

- Group personal pensions
- Group stakeholder pensions
- Individual personal pensions
- Individual stakeholder pension
- Free standing AVC
- Occupational schemes - Defined Contribution
- Investment bonds
- S226 Retirement Annuity
- Executive Pension
- Endowments
- Guaranteed bond

*Please note that Standard Life do not offer valuations on their tailored bond products.*

### Help and Support

If you need help with the registration process, or if there are any problems with the data or download service, then please call the Standard Life E-commerce Helpdesk on 0845 60 60 036.

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Standard Life Wrap Platform

Platform bulk valuation files are available from the Standard Life Wrap Adviser's website;

[www.wrapadviser.co.uk](http://www.wrapadviser.co.uk)

If you do not have login details for this site, then you will need to register first.

Once registered and logged in, you can access the bulk valuation file from "Adviser Management Info Reports".



The screenshot shows the 'Adviser Management Info Reports' interface. The 'Reports' dropdown menu is open, displaying a list of report types. The 'Total Holdings Report' is highlighted with a green box. The 'Create' button is visible at the bottom right of the form.

Field	Value
Reports:	Adviser Dealing Report
Adviser:	
User:	
Order Type:	
Order Status:	
From:	
To:	

Report List:

- Adviser Dealing Report
- Adviser Remuneration Report
- Asset Allocation Report
- Cash Balances Report
- Cash Transactions Report
- Client Listing Report
- Commission Paying Accounts report
- Customer Terms report
- Failed and Cancelled Adviser Charges Report
- ISA Subscriptions Report
- MyFolio Fund Holdings Report
- Outstanding Adviser Charges Report
- Paid Adviser Charges Report
- Pending Adviser Charges Report
- SIFF Detail Report
- Total Holdings Report

Create ▶

You should select the "Total Holdings" report, this should be a XLS format file with headers.

Once you have downloaded the file, open JCS and press F4 to open the Data Import window and either click on the magnifying glass to locate the file, or drag and drop the window into the Data Import screen. The file should be recognised as a Standard Life Wrap bulk file.

### Help and Support

If you need help with the registration process, or if there are any problems with the data or download service, then please call the Standard Life E-commerce Helpdesk on 0845 60 60036.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

## Contract Enquiry Registration and User Guidelines

### Standard Life Elevate (Formerly known as Axa Elevate)

#### Registering for the Service

If you are a new user to the Elevate service, your Business Development Manager or Platform Consultant can set you up for this service.

If you are an existing user, you will need to email [elevate@axa.co.uk](mailto:elevate@axa.co.uk) with the subject 'Request for JCS export set up' and providing the following information:

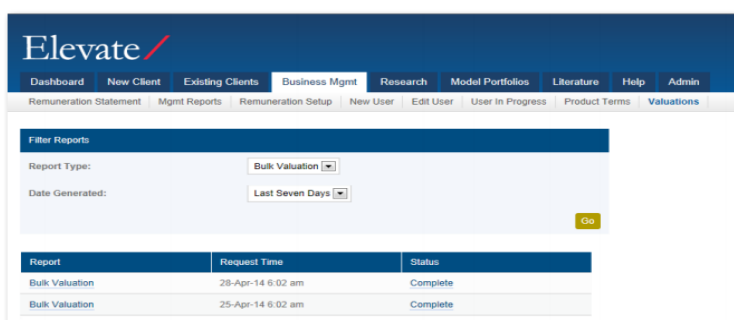
FIRM NAME	
FCA NUMBER	
FIRM CONTACT	
TELEPHONE NUMBER	
EMAIL ADDRESS	
CONTRACT ENQUIRY ACCESS REQUIRED	Yes
SOFTWARE PROVIDER	JCS

Should you wish to change any of your settings in the future, this can be arranged in the same way.

#### How do I Configure JCS to Access the Bulk Valuation File?

The latest data file needs to be downloaded in order to import the current valuation details. To access the latest information you will need to have an Elevate platform user account with administrator permissions.

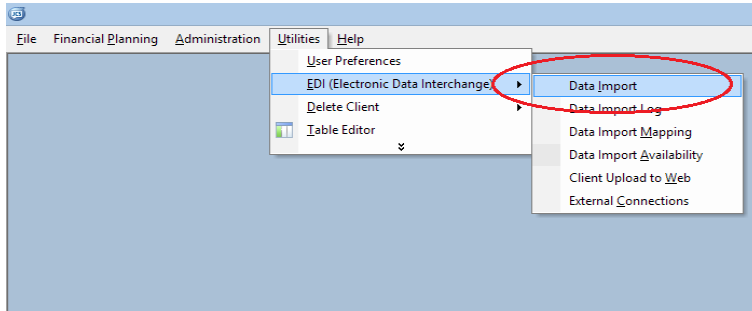
- Log into the Elevate platform <https://ads.elevateplatform.co.uk/>
- Go to 'Business Management' and go to 'Valuations'
- Right click on 'Complete' for the file you want to import into JCS and select "Save Target As ..."
- Press Ctrl + A to select all the text, then press Ctrl + C to copy the text



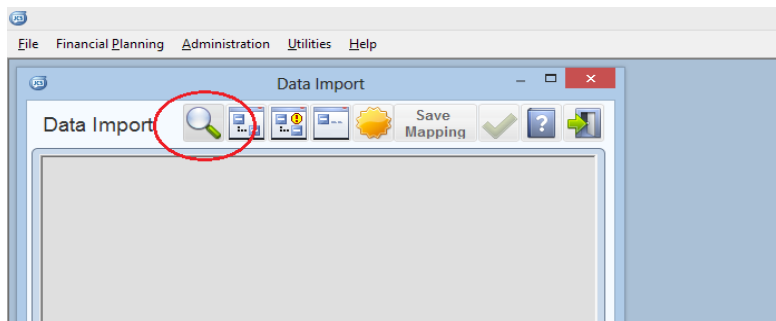
Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

Log into JCS and either click on Utilities -> EDI -> Data Import or press the shortcut key F4



Click on the magnifying glass button to "Find File to Import"



Locate the file downloaded from the Elevate platform



From here, ensure that all clients (and funds if required) are mapped correctly and then click on the tick button to value all mapped policies.

Note: These guidelines are no longer updated. As of JCS version 34.000.07 released 10 Jul 2024 the latest guidelines can be found in the JCS help under Utilities > Electronic Data Interchange (EDI) > Contract Enquiry > Set Up

## Contract Enquiry Registration and User Guidelines

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### Download Files

Please use the following URL to download files:

<https://ads.elevateplatform.co.uk/ClientBase/Valuations/Valuations.aspx>

### Help and Support

If you require assistance with the registration process, please call Elevate Customer Operations on 0845 600 2399 or email, [enquiries@axawealth.co.uk](mailto:enquiries@axawealth.co.uk).

For help with configuring or using JCS Contract Enquiry please contact our Technical Support team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).

### Transact

This service is available using the Transact Number (access code) and PIN.

#### Already Registered for Transact-Online (TOL) Service

If you are already registered for the Transact-Online service you will need the following:

- your Transact Number (9 digits) and two passwords
- a TRDS Password – for access to Transact valuations
- a TOL Password – for access to the Transact website
- Complete and return sections 2 and 3 of Form A004 “Remote Data Service Access Details” which is available via <https://www.transact-online.co.uk>

#### Not Already Registered for Transact-Online (TOL) Service

If you are a new Intermediary to Transact you need to register to do business with Transact and access the online service by completing the Transact Application Forms, which are available using the link below:

<https://www.transact-online.co.uk/>

Expand ‘Transact Information’ and click ‘Transact Forms’.

- To apply for Transact Registration - Print, complete and sign the Adviser Firm Application and send to the address supplied on the form.
- To apply and register an adviser with Transact - Print, complete and sign the Adviser Application and send to the address supplied on the form.

On receipt of the Forms, Transact will send you details of how to obtain your Transact Number.

If you are a Transact Investor or Adviser and do not have a Transact Number and/or Passwords, please Email Transact by clicking on the link below:

[https://www.transact-online.co.uk/Custom/TOL\\_Email\\_Transact-Online\\_Form.cfm?CTSUBJECT=Admin%3A%20No%20Transact%20Number%20and%20For%20PIN&CIDT=6366C8A1A194020E8B58C29-8F16-8C3F-CAD9E462-5d6ca45b06d85f2c107&20060323090934](https://www.transact-online.co.uk/Custom/TOL_Email_Transact-Online_Form.cfm?CTSUBJECT=Admin%3A%20No%20Transact%20Number%20and%20For%20PIN&CIDT=6366C8A1A194020E8B58C29-8F16-8C3F-CAD9E462-5d6ca45b06d85f2c107&20060323090934)

If you have any questions about the registration process, please call the Transact Client Services Managers Team on 020 7608 4900.

### Online Services

For more information concerning the Online Services offered by Transact please visit:

<https://www.transact-online.co.uk/> and login to Transact On-line. An online Portfolio Valuation demonstration is available.

If you have any questions about the automated valuation process, please call the Transact Client Services Managers Team on 020 7608 4900.

## Contract Enquiry Registration and User Guidelines

### Using the Service with JCS Software

#### Bulk Downloads – Immediate Response

Bulk data files will be imported automatically by JCS when performing a RTV/RTV All update from the portfolio summary page or uploaded through 'Upload Files Now' within the External Connections menu (which will automatically open the file into EDI - Import Data ready for import into JCS). The bulk data files are generated and returned real time by Transact when a valuation request is made for either a single Transact policy (RTV), all Transact policies for a single client (RTV All) or all Transact policies for all clients (Bulk download – immediate response).

Transact do not permit us to store your Transact Number and Passwords so you will be prompted to enter this each time you make a RTV/RTV All request or upload your Transact file via external connections.

#### JCS Configuration Settings

The Access code and Passwords are not permitted by Transact to be stored and will need to be entered by the client each time a RTV/RTV All valuation request is made or the Transact data is uploaded via the external connections menu.

Access code	As supplied by Provider
Passwords	As supplied by Provider

#### Help and Support

If you need help with any aspects of Transacts service please email Transact using the link below:

[https://www.transact-online.co.uk/Customer/TOL\\_Email\\_Transact-Online\\_Form.cfm?CIDT=4063D2F2F1D4426BD70CC68-248C-A6A9-7A008662-58019ee77dae0ba9107&20060323092300](https://www.transact-online.co.uk/Customer/TOL_Email_Transact-Online_Form.cfm?CIDT=4063D2F2F1D4426BD70CC68-248C-A6A9-7A008662-58019ee77dae0ba9107&20060323092300)

Or alternatively you can telephone during business hours on (020) 7608 4900.

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com)

## Contract Enquiry Registration and User Guidelines

### Zurich

To use the Zurich update link you must first register with the Zurich Intermediary Group using a [UNIPASS certificate](#). To do so follow the instructions below:

Once your UNIPASS certificate is registered you can also access [www.zurichintermediary.co.uk](http://www.zurichintermediary.co.uk) to use their other online services including Quotations, Fund Centre, Online Portfolio Builder and Document Library.

### Registering Your UNIPASS Certificate

Go to <https://www.zurich.co.uk/zurichintermediary/whitelabel/B2BUnipass.htm> and click on the Register button at the bottom left-hand side of the page. This will allow you to check your existing Zurich Intermediary website account or register your UNIPASS certificate for the first time. Once you can access the Zurich Intermediary website homepage you can close the window and return to your back office software.

If registering please ensure you select the Contract Enquiry checkbox and enter a valid agency code.

Please note it may take up to 30 minutes for new registrations to be activated, allowing you to use the service.

### Help and Support

If you experience any technical issues please contact the Zurich helpdesk on 01793 406304.

For help with configuring or using the JCS Contract Enquiry Suite please contact our Technical Support Team on 03450 049 599 – Option 1 or email us at [techsupport@talkjcs.com](mailto:techsupport@talkjcs.com).