

For advisers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to edit and close an existing investment model

 4 minute read



## How to edit and close an existing investment model

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### How to use this document



Important information will look like this.

Key messages

Key messages will look like this.



Useful info will look like this.



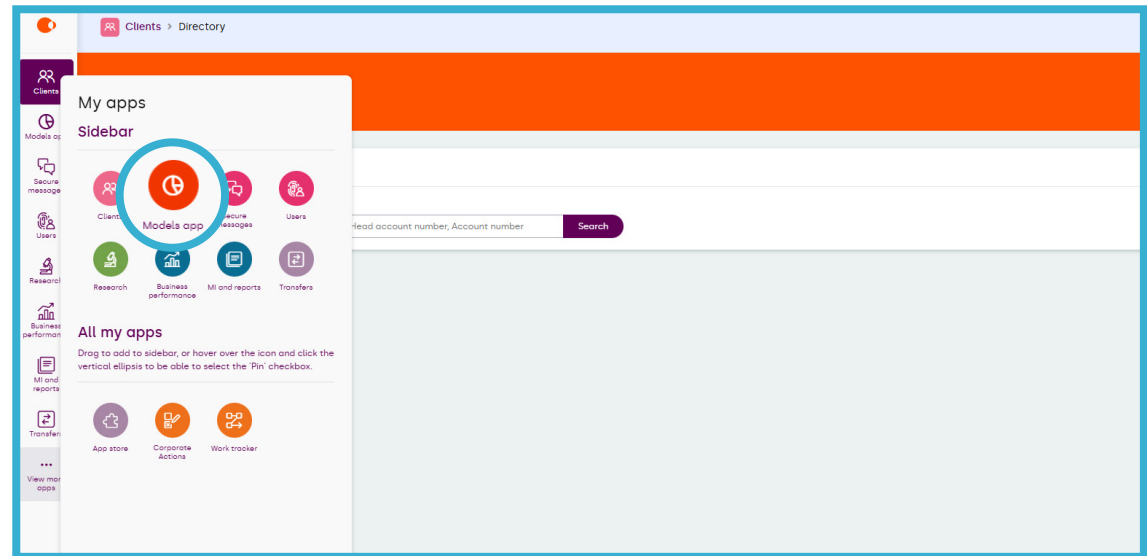
We recommend using the zoom function to view the details on the platform screens in this guide.

## How to edit and close an existing investment model

To start you'll need to locate for the model you wish to edit. To find the model from the dashboard, select '**View more apps**', and then select '**Models app**'.



The models application can be pinned to the side navigation bar, by hovering over the '**Models app**', select the vertical ellipsis (three dots), then select '**Pin**'.



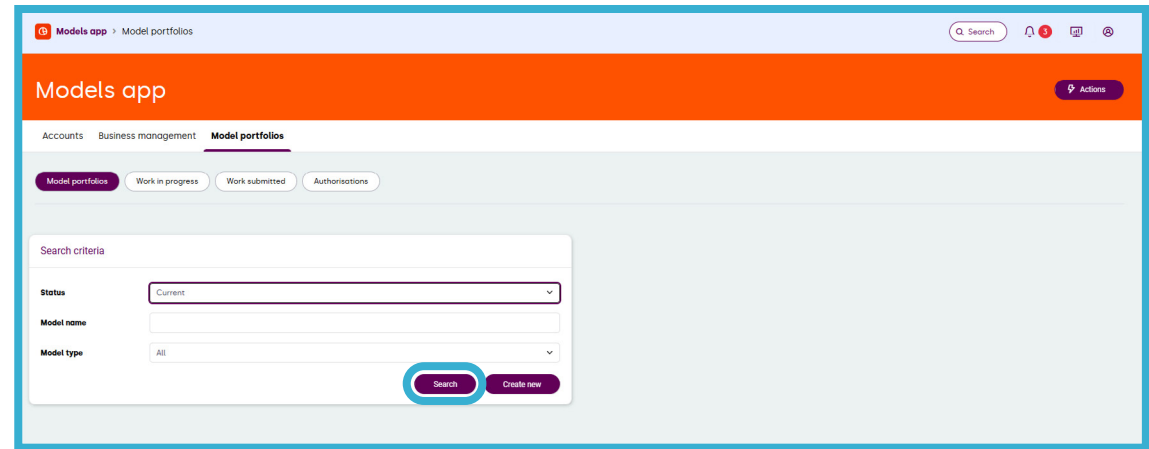
Select the status of the model from the drop-down list.

Enter the model name and select the model type from the drop-down list.

Then select '**Search**'.



Only users with the correct permissions will be able to edit and close the model.



Once you've found your model select the vertical ellipses (three dots) under the quick links column.

A list of actions will appear.

Select an option.



The available options are determined by the status of the model, for example, closed models will be view only.

The screenshot shows the 'Models app' interface. At the top, there's a navigation bar with 'Models app' and 'Model portfolios'. Below that, there are tabs for 'Model portfolios', 'Work in progress', 'Work submitted', and 'Authorisations'. A search criteria box is visible, with filters for 'Status' (Current), 'Model name', and 'Model type' (All). Below the search box, there's a table of models. The table has columns for Code, Portfolio code, Model name, Model type, Layer type, Status, Version Number, Total value, Total accounts linked to model, Date created, Last updated, and Quick Links. A dropdown menu is open for the 'Quick Links' column of the first row, showing options like 'View', 'Copy', 'Re-balance', 'Close', 'Edit Permissions Only', and 'Edit fully'.

Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick Links
539		ABR_Test_6	Adviser Model Portfolio	Default	Current	1	£45.06	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
535		ABR_Test_Model_4_V3	Adviser Model Portfolio	Default	Current	1	£0.00	0	28/Cec/2024 03:54	19	View
555		ABR_Test_Model_7	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24	Copy
556		ABR_Test_Model_8	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24	Re-balance
557		ABR_Test_Model_8a	Adviser Model Portfolio	Default	Current	1	£0.00	0	25/Mar/2025 10:48	25	Close
564		Cautious.Portfolio.Aaa	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 02:14	31	Edit Permissions Only
565		Don.Cautious	Adviser Model Portfolio	Default	Current	1	£0.00	0	01/Apr/2025 02:59	01	Edit fully
563		Don_Test_2	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 12:35	31/Mar/2025 12:35	⋮

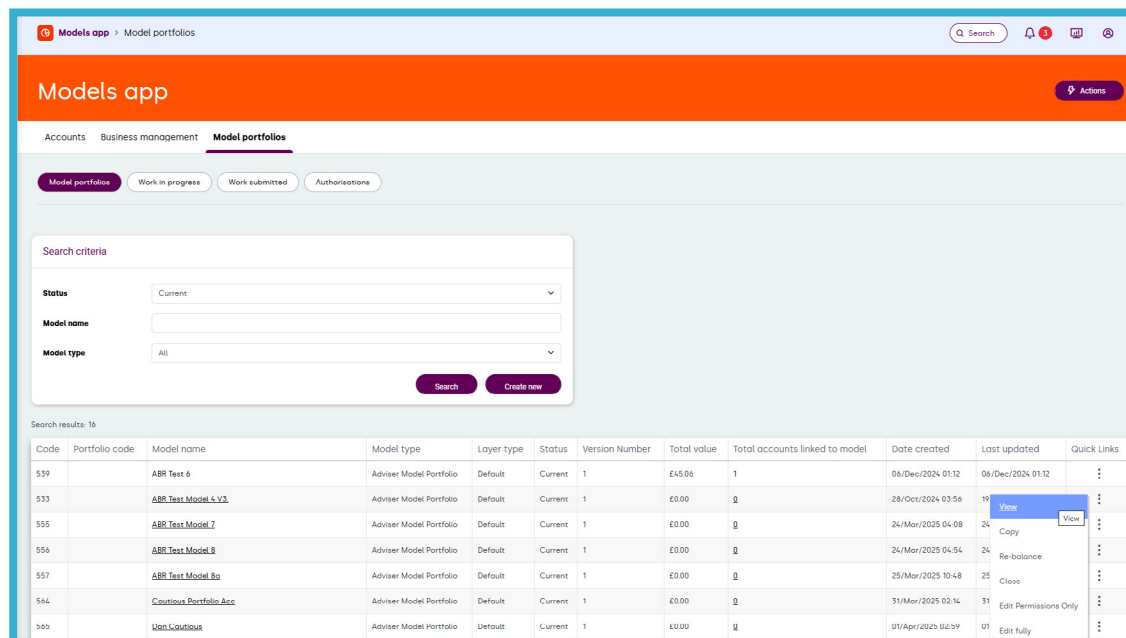
## View

### Key message

The view option allows the user to view all current information about the model. The model details can't be amended and are view only.

From this option you can view:

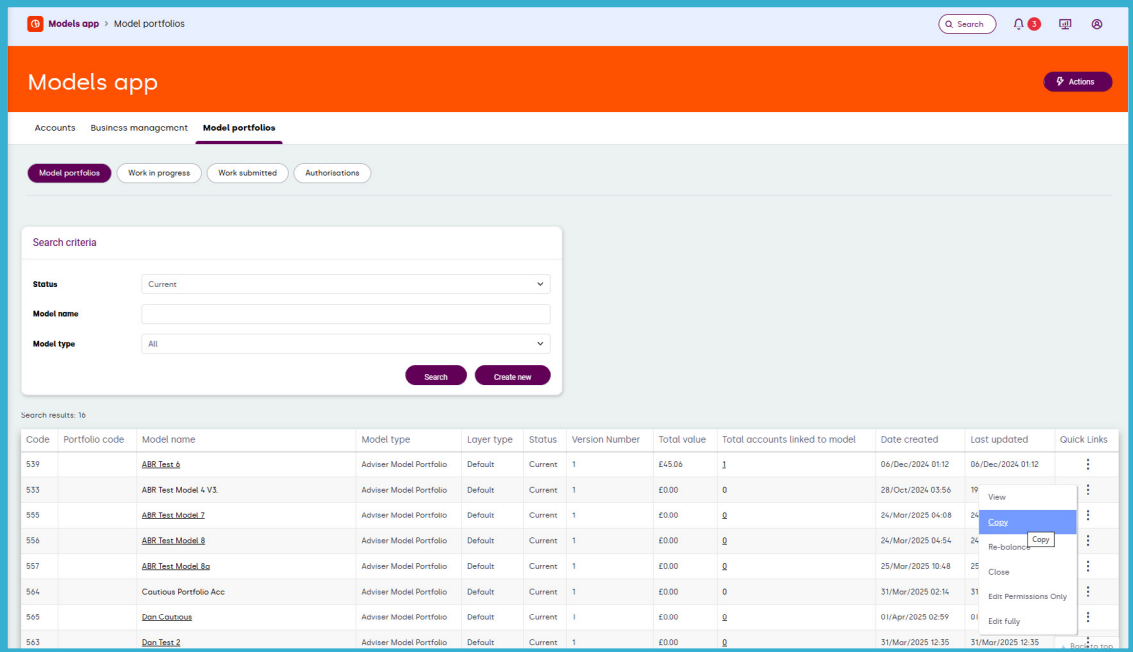
1. Model information
2. Investment choices
3. Rebalancing information
4. Current permissions
5. Product wrappers that are invested in the model
6. Review and submit



## Copy

### Key message

This option allows the user to create a copy, or an updated version of an existing model.



The screenshot displays the 'Models app' interface. At the top, there's a navigation bar with 'Models app' and 'Model portfolios'. Below this, there are tabs for 'Model portfolios', 'Work in progress', 'Work submitted', and 'Authorisations'. A search criteria box is visible, with fields for 'Status' (set to 'Current'), 'Model name', and 'Model type' (set to 'All'). Below the search box, a table lists investment models. The table has columns for Code, Portfolio code, Model name, Model type, Layer type, Status, Version Number, Total value, Total accounts linked to model, Date created, Last updated, and Quick Links. A dropdown menu is open over the 'Quick Links' column for the model 'ABR\_Test\_Model\_8', showing options like 'View', 'Copy', 'Re-balance', 'Close', and 'Edit Permissions Only'. The 'Copy' option is highlighted in blue.

Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick Links
539		<a href="#">ABR_Test_6</a>	Adviser Model Portfolio	Default	Current	1	£45.06	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
533		<a href="#">ABR_Test_Model_4_V3</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	28/Oct/2024 03:56	19	⋮
555		<a href="#">ABR_Test_Model_7</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24	View ⋮
556		<a href="#">ABR_Test_Model_8</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24	Copy Re-balance ⋮
557		<a href="#">ABR_Test_Model_8a</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	25/Mar/2025 10:48	25	Close ⋮
564		<a href="#">Cautious Portfolio Acc</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 02:14	31	Edit Permissions Only ⋮
565		<a href="#">Dan_Cautious</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	01/Apr/2025 02:59	01	Edit fully ⋮
563		<a href="#">Dan_Test_2</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 12:35	31/Mar/2025 12:35	⋮

## Model information

Enter the model portfolio name.



The model name should be different to previous versions of this model.

The remaining fields can't be amended.

Cashflow deposit is set to '**Target**' and cashflow withdrawals is set to '**Current**'.

Select '**Next**'.



You can exit the journey at any stage by selecting '**Exit without saving**'.

The screenshot shows the 'Models app' interface. At the top, there's a search bar and a 'New search' button. Below that, the breadcrumb navigation shows 'Accounts > Business management > Model portfolios'. The main heading is 'ABR Test Model 4 V3.' with a 'New search' button. A progress bar indicates the current step is '1. Model information', followed by '2. Investment choice', '3. Rebalancing', '4. Permissions', '5. Product wrappers', and '6. Review and submit'. The 'Model information' section contains an 'Info' box with the following fields: 'Model Portfolio Name' (text input with 'ABR Test Model 4 V3'), 'Cashflow deposits' (dropdown menu with 'Target' selected), 'Cashflow withdrawals' (dropdown menu with 'Current' selected), and 'Company' (dropdown menu with 'ABR Test App Rep' selected). At the bottom right of the form, there are two buttons: 'Exit without saving' and 'Next'. A blue circle highlights the 'Next' button.

## Investment choice



At any point you can switch between the tabs along the top of the page.

Amend the investment % allocation if required. The percentage allocation should total 100%.

To remove an investment, select the 'bin' icon.

You can upload new investment choices by selecting 'Choose file' and then 'Submit file'.

### Key message

You can select 'Download example file' for the required .csv file format.

1. Model information 2. Investment choice 3. Rebalancing 4. Permissions 5. Product wrappers 6. Review and submit

### Investment choice

Exit without saving Back Next

ABR Test Model 4 V4

Investment	Allocation	Code	Sedol	Exchange	ISIN	
7M AAP Balanced C Acc	45.00 %	BFB5.GB	B2PB379		GB00B2PB3794	
Baillie Gifford Global Income Growth B Inc	9.00 %	BGD4.GB	0577258		GB0005772584	
Baillie Gifford Japanese Income Growth B Inc	9.00 %	N3KA.GB	BYZJQ07		GB00BYZJQ071	
BlackRock UK Smaller Companies D Acc	9.00 %	D4RY.GB	B4LHD23	XXXX	GB00B4LHD230	
Invesco Asia Z Acc	9.00 %	GUVG.GB	B8N44G8	XXXX	GB00B8N44G86	
Invesco Corporate Bond Z Acc	9.00 %	GUVG.GB	B8N44Z7	XXXX	GB00B8N44Z77	
M&G Corporate Bond I Acc	9.00 %	ABF5.GB	B1YBRL5		GB00B1YBRL59	
<b>GBP Cash</b>	<b>1.00%</b>	<b>GBPCASH</b>				
<b>Total Amount Allocated:</b>	<b>100.00%</b>					

Upload investment choice by file [Download example file](#)

File:  Validation error:

No file chosen **Choose file** **Submit file**

New funds, stocks and shares can be added to the model by selecting the search type from the drop-down list, and then enter the investment details into the search fields.

Select **'Search'**.

Enter the percentage allocation for the chosen investment, and then click **'Select'**.

Once you're happy with your investment choices select **'Next'**.

The screenshot shows a search interface for investment funds. On the left, there are search criteria filters: 'Search type' (Investment funds), 'Name' (Blackrock), 'ISIN', 'SEDOL', and 'Fund manager' (All). The main area displays a table of search results with 70 items. The table columns are: Investment type, CityCode, Investment name, SEDOL, ISIN, Asset class, 3\_YR perf, 5\_YR perf, Morningstar analyst rating, and Allocate and select. A 'Search' button is highlighted in a blue circle at the bottom left of the search criteria section. A 'Next' button is highlighted in a blue circle at the bottom right of the results table. The table data is as follows:

Investment type	CityCode	Investment name	SEDOL	ISIN	Asset class	3_YR perf	5_YR perf	Morningstar analyst rating	Allocate and select
Managed Fund	00PB	BlackRock Cash D Acc	B4V7N1	GB00B4V7N18	Unknown	12.9009	12.8909		% <b>Select</b>
Managed Fund	00PP	BlackRock Cash D Inc	B4ZXL26	GB00B4ZXL268	Unknown	12.9051	12.8976		% <b>Select</b>
Managed Fund	00PA	BlackRock Continental European D Acc	B4VY989	GB00B4VY9893	N. America Equities	23.3009	71.0753		% <b>Select</b>
Managed Fund	00PB	BlackRock Corporate Bond D Acc	B4QC331	GB00B4QC3311	Unknown	4.2284	1.5914	Neutral	% <b>Select</b>
Managed Fund	00PC	BlackRock Corporate Bond D Inc	B4T5J77	GB00B4T5J779	Unknown	4.228	1.5858	Neutral	% <b>Select</b>
Managed Fund	00PD	BlackRock Emerging Markets D Acc	B4RF68	GB00B4RF681	Europe ex UK	-4.0913	7.7491		% <b>Select</b>
Managed Fund	00PE	BlackRock Developed Markets Sustainable Equity (UK) D Acc	B4LY53	GB00B4LY534	Japan	11.7317	35.3835		% <b>Select</b>
Managed Fund	00PG	BlackRock UK D Inc	B586CB9	GB00B586CB96	Unknown	17.2622	29.8515		% <b>Select</b>
Managed Fund	00PH	BlackRock UK Income D Acc	B67DW76	GB00B67DW767	Unknown	23.0726	62.3397		% <b>Select</b>
Managed Fund	00PI	BlackRock UK Special Situations D Inc	B3R25W6	GB00B3R25W66	Unknown	7.3521	33.2127		% <b>Select</b>
Managed Fund	04RY	BlackRock UK Smaller Companies D Acc	B4JH273	GB00B4JH2730	Unknown	-10.1929	20.6653	Silver	% <b>Select</b>

## Rebalancing

Select a rebalancing option from the drop down list.

Complete the required details for your chosen rebalancing option.



If you apply a default tolerance you can still amend the individual tolerances per investment by unticking the box.

Once you're happy with your rebalancing details, select '**Next**'.

Models app

Accounts Business management Model portfolios

1. Model information 2. Investment choice 3. Rebalancing 4. Permissions 5. Product wrappers 6. Review and submit

Rebalancing

ABR Test Model 4 V4

Rebalancing filters

Rebalancing triggers

Manual rebalancing

Manual rebalancing

By Tolerance

By Frequency

By Frequency & Tolerance

Asset	Allocation (%)
7M AAP Balanced C Acc	45.00%
Baillie Gifford Global Income Growth B Inc	9.00%
Baillie Gifford Japanese Income Growth B Inc	9.00%

1. Model information 2. Investment choice 3. Rebalancing 4. Permissions 5. Product wrappers 6. Review and submit

Rebalancing

ABR Test Model 4 V4

Rebalancing filters

Rebalancing triggers

By Frequency & Tolerance

Default tolerance

1.00

Default frequency

Monthly

Next rebalance date

9-May-2025

Asset	Allocation (%)	Tolerance (%)	Use same Tolerance <input type="checkbox"/>	Apply Default Tolerance <input type="checkbox"/>
7M AAP Balanced C Acc	45.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Baillie Gifford Global Income Growth B Inc	9.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Baillie Gifford Japanese Income Growth B Inc	9.00%	1.00	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock UK Smaller Companies D Acc	9.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GBP Cash	1.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Invesco Asian Z Acc	9.00%	1.00	<input type="checkbox"/>	<input type="checkbox"/>
Invesco Corporate Bond Z Acc	9.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
M&G Corporate Bond I Acc	9.00%	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Permissions



This tab will enable you to provide new users or firms with permission to access the model.

Tick the **'Platform selection'** box to select the platform.

Select the permission level (networks / firms / branches / advisers). The assigned permissions will determine the options available to select.

Click **'Select'**.

If an option has been selected in error, select **'Remove'**.

Once all permissions have been set, select **'Next'**.

1. Model information 2. Investment choice 3. Rebalancing 4. Permissions 5. Product wrappers 6. Review and submit

### Permissions

ABR Test Model 4 V4

Exit without saving Back Next

Permissions

Platform selection: Nucleus (TE92)

Nucleus (TE92) permissions Collapse

Assign permissions:  Assign networks  Assign firms  Assign branches  Assign advisers

Company to use - Nucleus (TE92)

Company code	Company name	Select company
9672	ABR Test App Rep	Select
5663	ABR Test Network	Select
13408	Notification Firm	Select
6880	Sams Network	Select
15615	veryfirm	Select

### Selected permissions - Nucleus (TE92)

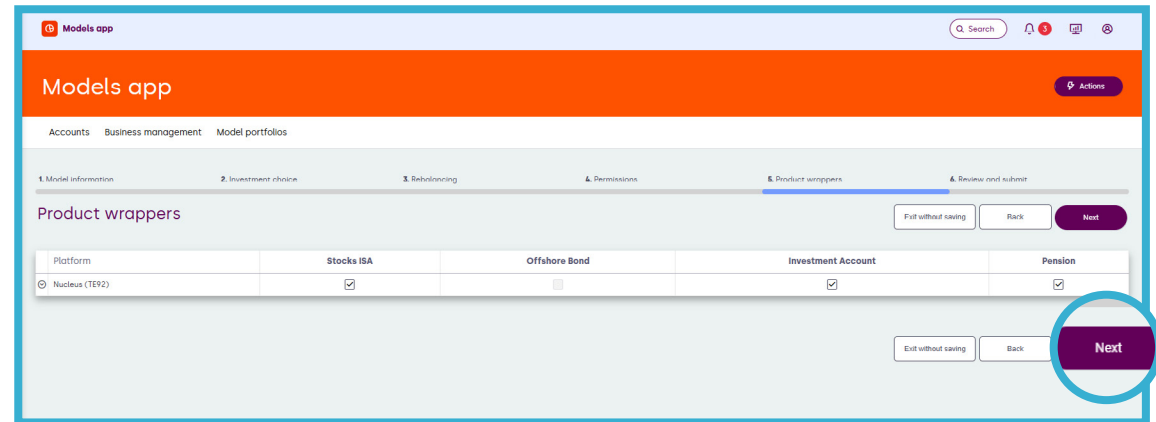
Company code	Company name	Action
5672	ABR Test App Rep	Remove

Exit without saving Back Next

## Product wrappers


Only available product wrappers can be amended.

select '**Next**'.



## Review and submit

Review the model detail for accuracy. Select the tabs to make any necessary changes.



The page can be filtered by **'Portfolio breakdown'** or **'Investments'**.

Once you're happy with the accuracy of the model, select **'Create model'**.

1. Model information    2. Investment choice    3. Rebalancing    4. Permissions    5. Product wrappers    6. Review and submit

**Review and submit** Exit without saving Back

ABR Test Model 4 V4

**Model information**

Model name: ABR Test Model 4 V4    Cashflow deposits: Target  
 Model manager: Loretta Flock    Cashflow withdrawals: Current

**Product wrapper permissioning**

Nucleus (TE92)	Stocks ISA	Yes	Offshore Bond	No	Investment Account	Yes	Pension	Yes
----------------	------------	-----	---------------	----	--------------------	-----	---------	-----

**Assets and rebalance details**

Rebalance triggers: Frequency tolerance:    Next rebalance date: 09/05/2025  
 Default tolerance: 1.00    Default frequency: Monthly  
 Shadow model details: As per rebalance trigger    Apply minimum number of days?: Yes

**Portfolio breakdown** | Investments

Investment name	Code	Investment type	Proposed allocation of overall portfolio	Proposed tolerance %	Asset Class
7IM AAP Balanced C Acc	BFB5.GB	Managed Fund	45.0000%	1.00%	
Bollie Gifford Global Income Growth B Inc	BG04.GB	Managed Fund	9.0000%	1.00%	
Bollie Gifford Japanese Income Growth B Inc	N3KA.GB	Managed Fund	9.0000%	0.00%	
BlackRock UK Smaller Companies D Acc	04RY.GB	Managed Fund	9.0000%	1.00%	
Invesco Asian Z Acc	GUVG.GB	Managed Fund	9.0000%	0.00%	
Invesco Corporate bond Z Acc	GUW2.GB	Managed Fund	9.0000%	1.00%	
M&G Corporate Bond I Acc	ABF5.GB	Managed Fund	9.0000%	1.00%	
GBP Cash	GBPC.ASH	Cash	1.0000%	1.00%	Cash/Money Markets
<b>Total</b>			<b>100.0000%</b>		

**Create model** Exit without saving Back to top

A banner will appear to confirm the model has now been successfully created.

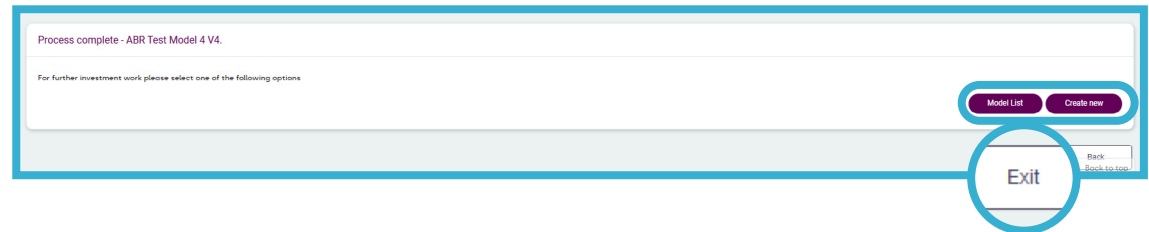
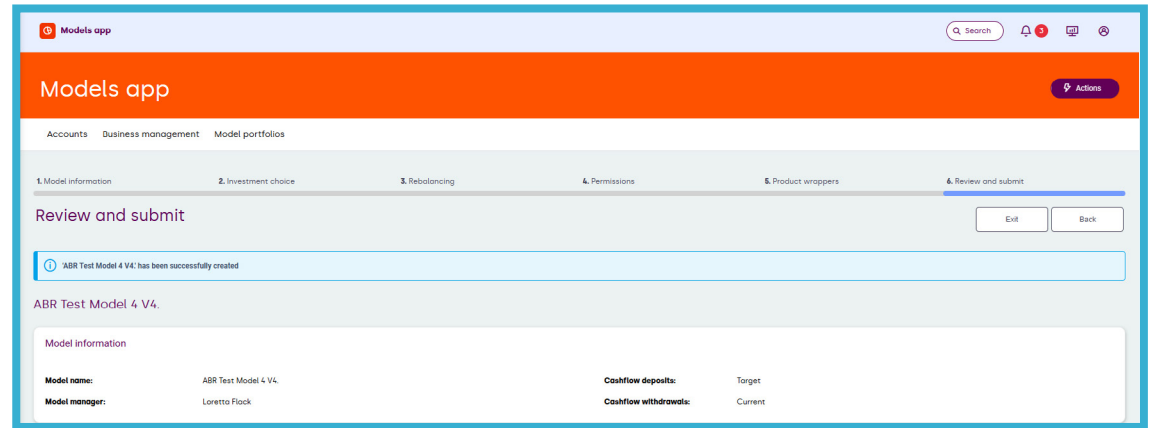


Depending on your permissions, the model may need to be authorised before becoming live.

Selecting '**Model list**' will take you back to the app page.

Selecting '**Create new**' will let you create a new model.

Select '**Exit**' to close the copying.



## Rebalance

### Key message

Using the rebalance option allows you to manually rebalance outside of any automatic rebalance settings already in place.

The screenshot shows the 'Models app' interface. At the top, there's a navigation bar with 'Accounts', 'Business management', and 'Model portfolios'. Below this, there are tabs for 'Model portfolios', 'Work in progress', 'Work submitted', and 'Authorisations'. A search criteria box is visible, with fields for 'Status' (set to 'Current'), 'Model name', and 'Model type' (set to 'All'). Below the search box, there's a table of search results. The table has columns for 'Code', 'Portfolio code', 'Model name', 'Model type', 'Layer type', 'Status', 'Version Number', 'Total value', 'Total accounts linked to model', 'Date created', 'Last updated', and 'Quick links'. The 'Quick links' column contains a dropdown menu with options: 'View', 'Copy', 'Re-balance', and 'Close'. The 'Re-balance' option is highlighted in blue.

Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick links
539		<a href="#">ABR_Test_6</a>	Adviser Model Portfolio	Default	Current	1	£45.06	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
533		<a href="#">ABR_Test_Model_4_V5</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	28/Oct/2024 03:56	19/	⋮
569		<a href="#">ABR_Test_Model_4_V6</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	08/May/2025 02:45	08	View ⋮
555		<a href="#">ABR_Test_Model_7</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24	Copy ⋮
556		<a href="#">ABR_Test_Model_8</a>	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24	Re-balance Close ⋮

## Accounts to rebalance



You can select **'Save and exit'** or **'Exit without saving'** at any stage of the rebalancing.

Enter the account name or client account into the search fields, and then select **'Search'**.

Select the client's accounts you wish to rebalance.

The **'Select all'** button can be used to select all clients within the search results.

The **'Deselect all'** button can be used to remove clients that have been selected.

Select **'Next'**.

The screenshot shows the 'Models app' interface for the 'JP Balanced' model. The current step is '1. Accounts to rebalance'. The interface displays the following information:

- Number of accounts in model portfolio: 3
- Number of accounts added to rebalance: 3
- Search fields for 'Account name' and 'Client account'.
- A table of search results:

Client account	Account name	Product	Model portfolio value	Adviser	Deferred	Select
NJ1002354-001	A Test	NPR	2,003.36 €	James Place	Yes	<input checked="" type="checkbox"/>
NJ1002344-001	D James	NPR	4,014.09 €	James Place	Yes	<input checked="" type="checkbox"/>
NJ1002348-001	J Davis	Stocks/Shares	8,004.14 €	James Place	Yes	<input checked="" type="checkbox"/>

Buttons for 'Select all', 'Deselect all', and 'Next' are visible. The 'Next' button is highlighted with a blue circle.

## Review and submit

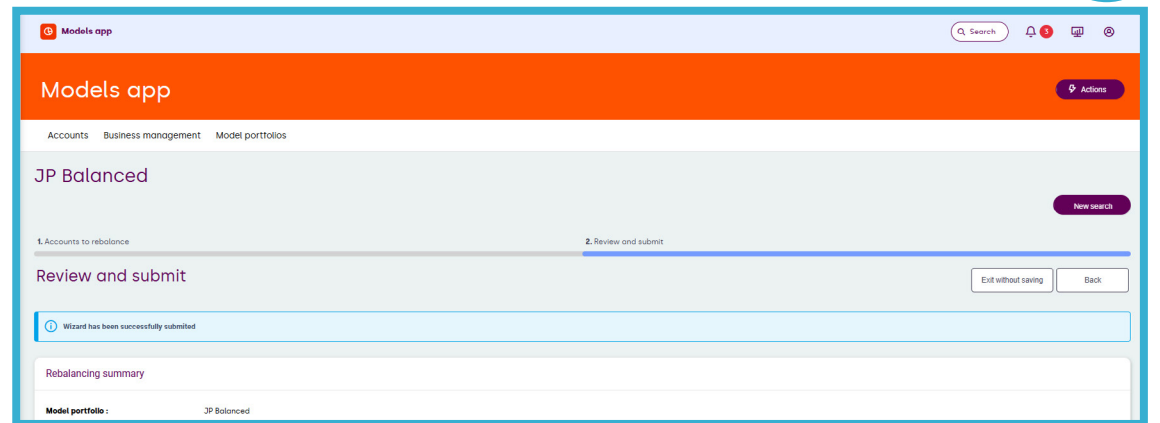
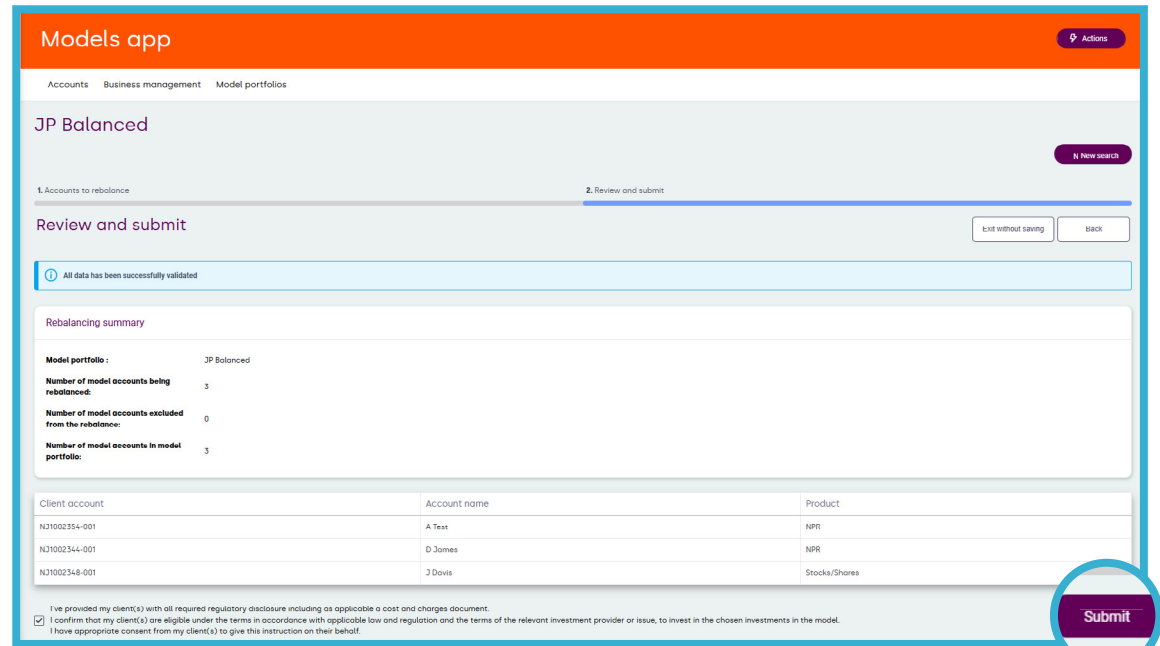
Review the rebalancing details for accuracy. Select the tabs to make any necessary changes.

Read through the declaration and tick to confirm completion.

Select **'Submit'**.

A banner will confirm the rebalance has been successfully updated.

Selecting **'New search'** will take you back to the models app page.



## Close

### Key message

Use this option to close a current model. This will be a hard close.



Please ensure that your clients don't have regular payments set up into this model before proceeding with the model closure.

Enter the reason for closing the model.

Selecting '**New search**' will enable you to return to the models app page.

Select '**Submit**' to close the model.

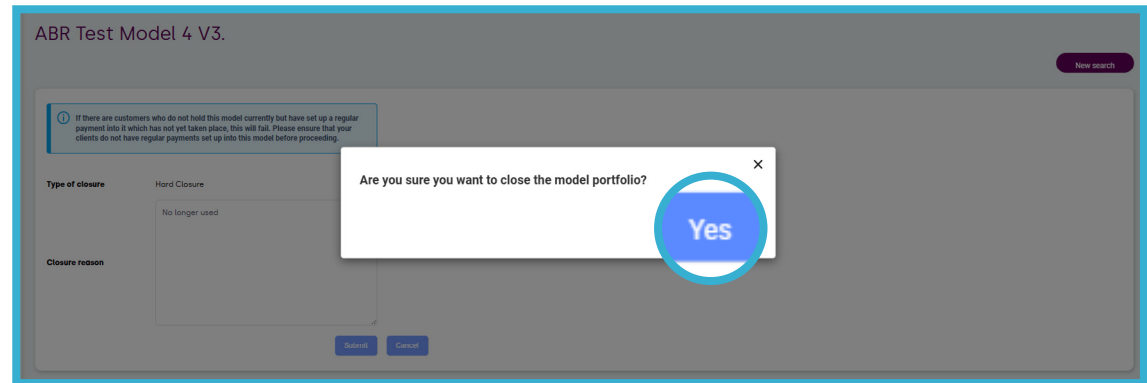
Select '**Cancel**' to return to return to the models app page.

The screenshot shows the 'Models app' interface with the 'Model portfolios' tab selected. A search criteria dialog is open, showing filters for Status (Current), Model name, and Model type (All). Below the dialog is a table with 17 search results. A context menu is open over the row for 'ABR Test Model 4 V3', with the 'Close' option highlighted.

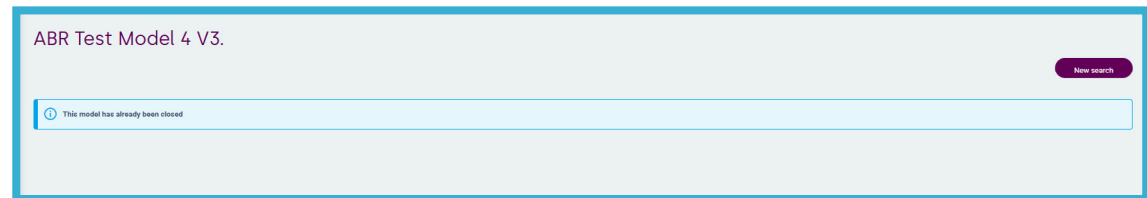
Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick Links
539		ABR Test 6	Adviser Model Portfolio	Default	Current	1	£5.06	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
533		ABR Test Model 4 V3	Adviser Model Portfolio	Default	Current	1	£0.00	0	28/Oct/2024 03:56	19/11/2024 08:58	View Copy ⋮
569		ABR Test Model 4 V4	Adviser Model Portfolio	Default	Current	1	£0.00	0	08/May/2025 02:45	08/05/2025 02:45	Re-balance ⋮
555		ABR Test Model 7	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24/03/2025 04:08	⋮
556		ABR Test Model 8	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24/03/2025 04:54	Close ⋮
557		ABR Test Model 8a	Adviser Model Portfolio	Default	Current	1	£0.00	0	25/Mar/2025 10:48	25/03/2025 10:48	Edit Permission Close ⋮

The screenshot shows the 'Models app' interface with the 'ABR Test Model 4 V3' closure form. A warning message is displayed: 'If there are customers who do not hold this model currently but have set up a regular payment into it which has not yet taken place, this will fail. Please ensure that your clients do not have regular payments set up into this model before proceeding.' The form has a 'Type of closure' section with 'Hard Closure' selected and a 'Closure reason' text area containing 'No longer used'. At the bottom, there are 'Submit' and 'Cancel' buttons. A 'New search' button is circled in the top right corner.

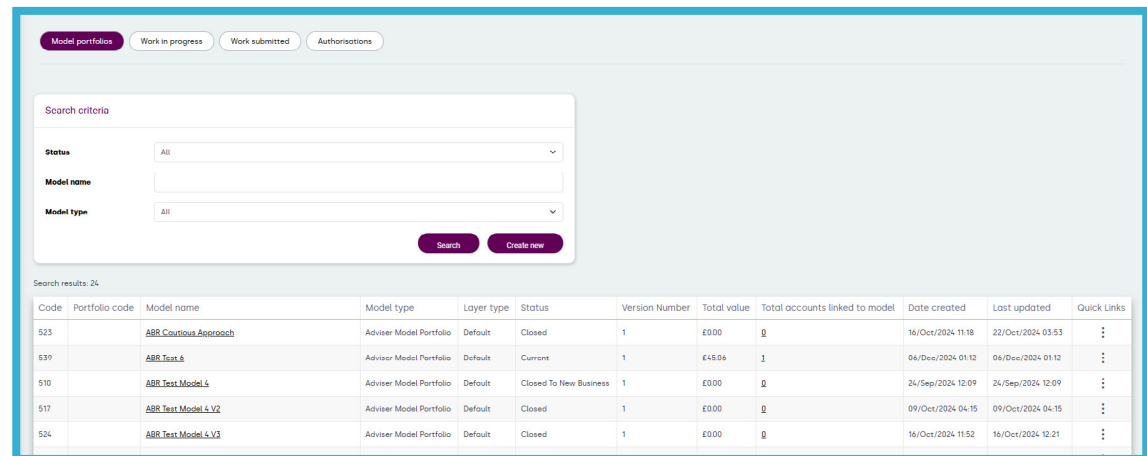
Select **'Yes'** to confirm that you wish to close the model.



A banner will confirm the close has been successfully updated.



To confirm the closure, search for the model. The status for the model will show as **'Closed'**.



## Edit permissions only

### Key message

This option will provide new users or firms with permission to access a model.



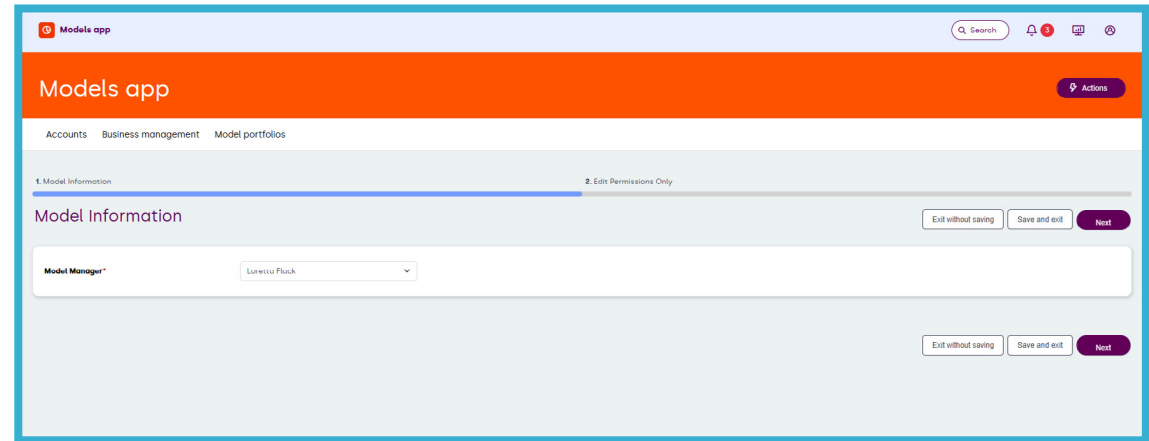
It's not possible to remove access for existing users and firms. This is to prevent access being removed accidentally or for users that already have clients invested in the model.

The screenshot shows the 'Models app' interface. At the top, there's a search bar and a notification icon. Below the header, there are tabs for 'Model portfolios', 'Work in progress', 'Work submitted', and 'Authorisations'. A search criteria form is visible, with fields for 'Status' (set to 'Current'), 'Model name', and 'Model type' (set to 'All'). Below the form, there's a table of search results with 16 items. The table columns are: Code, Portfolio code, Model name, Model type, Layer type, Status, Version Number, Total value, Total accounts linked to model, Date created, Last updated, and Quick Links. A context menu is open over the 'Quick Links' column for the row with Code 564, showing options like 'View', 'Copy', 'Re-balance', 'Close', 'Edit Permissions Only', and 'Edit Permissions'.

Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick Links
539		ABR_Test_6	Adviser Model Portfolio	Default	Current	1	£45.06	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
569		ABR_Test_Model 4_V4	Adviser Model Portfolio	Default	Current	1	£0.00	0	08/May/2025 02:45	08/May/2025 02:45	View
555		ABR_Test_Model 7	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24/Mar/2025 04:08	Copy
556		ABR_Test_Model 8	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24/Mar/2025 04:54	Re-balance
557		ABR_Test_Model 8a	Adviser Model Portfolio	Default	Current	1	£0.00	0	25/Mar/2025 10:48	25/Mar/2025 10:48	Close
564		Cautious_Portfolio_Acc	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 02:14	31/Mar/2025 02:14	Edit Permissions Only
565		Don_Cautious	Adviser Model Portfolio	Default	Current	1	£0.00	0	01/Apr/2025 02:59	01/Apr/2025 02:59	Edit fully
561		Don_Test_2	Adviser Model Portfolio	Default	Current	1	£0.00	0	11/Mar/2025 12:36	11/Mar/2025 12:36	⋮

## Model Information

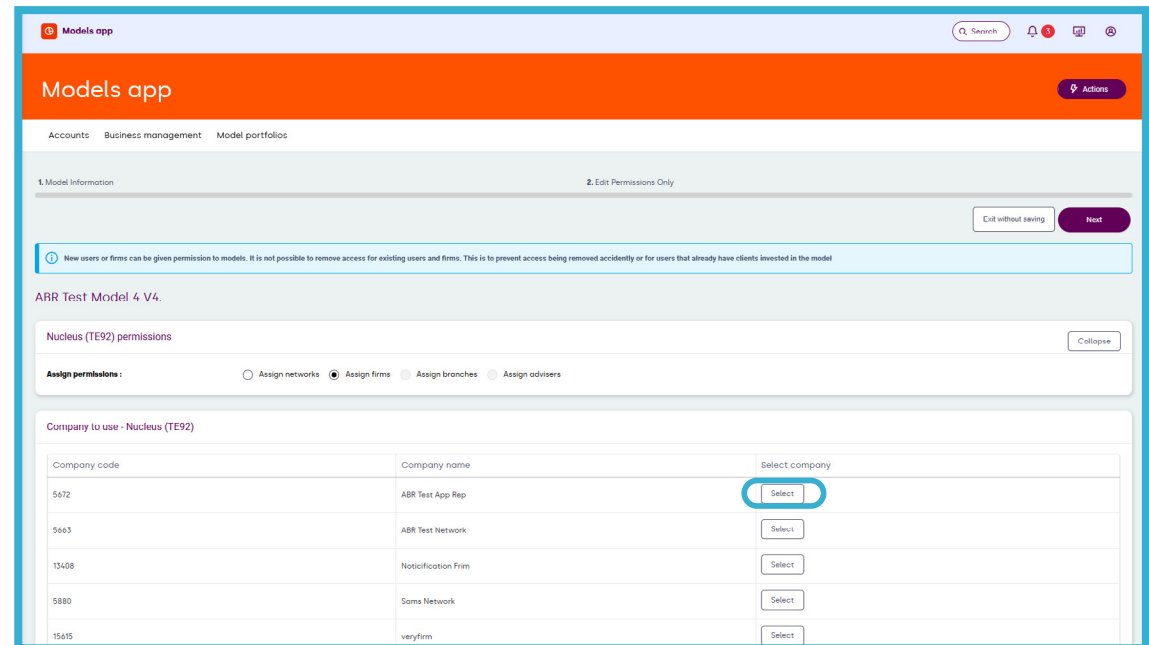
Select a model manager from the drop down list and click 'Next'.



Select the permission level (networks/ firms/branches or advisers). The assigned permissions will determine the options available to select.

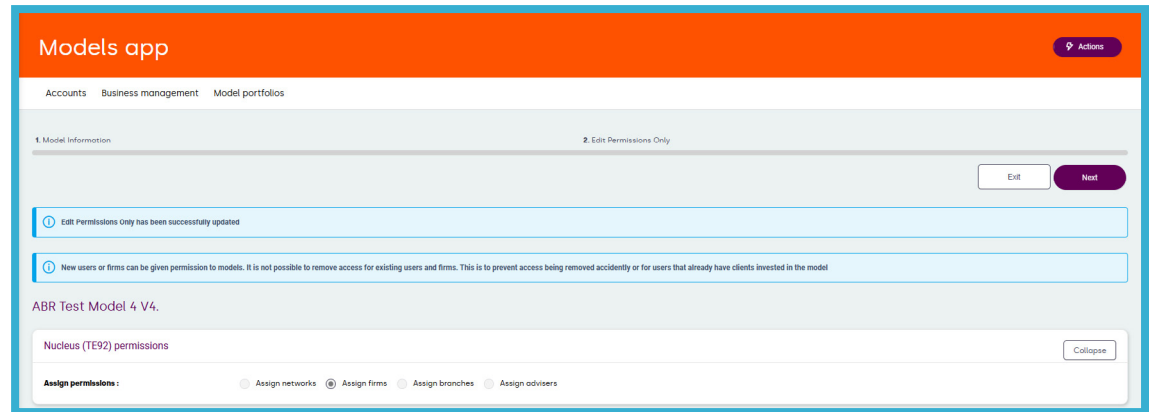
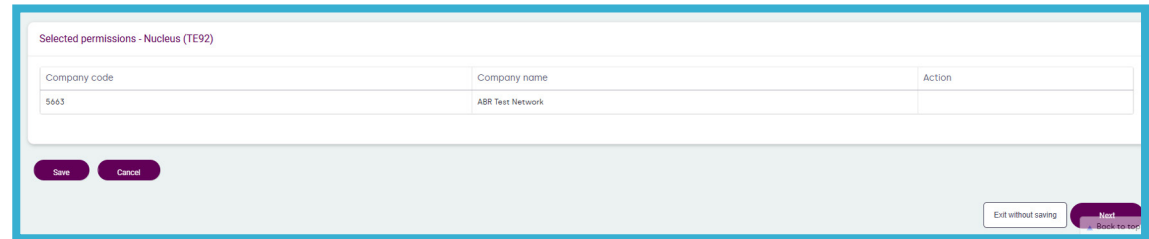
This guide demonstrates the 'Assign advisers' option.

Click 'Select' for your chosen option.



Select **'Save'** to confirm.

A banner will confirm the permission has been successfully updated.



## Edit fully


### Key message


This option will enable you update any changes required to the model.


The edit fully process follows the same journey as the 'copy' process shown in this this guide. Please refer to the 'copy' section of this guide for how to fully edit the model.

The screenshot shows the 'Models app' interface. At the top, there's a navigation bar with 'Accounts', 'Business management', and 'Model portfolios'. Below this, there are tabs for 'Model portfolios', 'Work in progress', 'Work submitted', and 'Authorisations'. A search criteria form is visible, with fields for 'Status' (set to 'Current'), 'Model name', and 'Model type' (set to 'All'). Below the form are 'Search' and 'Create new' buttons. The main area displays a table of search results with 16 items. The table columns are: Code, Portfolio code, Model name, Model type, Layer type, Status, Version Number, Total value, Total accounts linked to model, Date created, Last updated, and Quick Links. A dropdown menu is open for the 'Quick Links' of the last row, showing options like 'View', 'Copy', 'Re-balance', 'Close', 'Edit Permissions Only', and 'Edit fully'.

Code	Portfolio code	Model name	Model type	Layer type	Status	Version Number	Total value	Total accounts linked to model	Date created	Last updated	Quick Links
539		ABR_Test_6	Adviser Model Portfolio	Default	Current	1	£4506	1	06/Dec/2024 01:12	06/Dec/2024 01:12	⋮
569		ABR_Test_Model_4_V1	Adviser Model Portfolio	Default	Current	1	£0.00	0	08/May/2025 02:45	08	View
555		ABR_Test_Model_7	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:08	24	Copy
556		ABR_Test_Model_8	Adviser Model Portfolio	Default	Current	1	£0.00	0	24/Mar/2025 04:54	24	Re-balance
557		ABR_Test_Model_8a	Adviser Model Portfolio	Default	Current	1	£0.00	0	25/Mar/2025 10:48	25	Close
564		Cautious Portfolio Acc	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 02:14	31	Edit Permissions Only
565		Dan_Cautious	Adviser Model Portfolio	Default	Current	1	£0.00	0	01/Apr/2025 02:59	01	Edit fully
563		Dan_Test_2	Adviser Model Portfolio	Default	Current	1	£0.00	0	31/Mar/2025 12:35	31/Mar/2025 12:35	Edit fully

 03455 212 414

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