

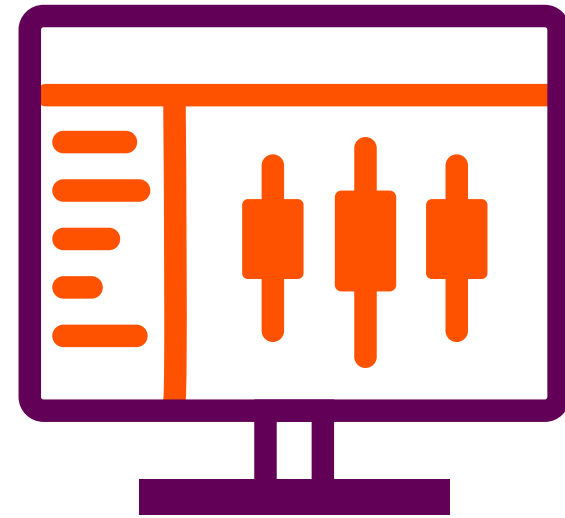
For advisers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to update user and security details

 2 minute read



## How to update user and security details

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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.

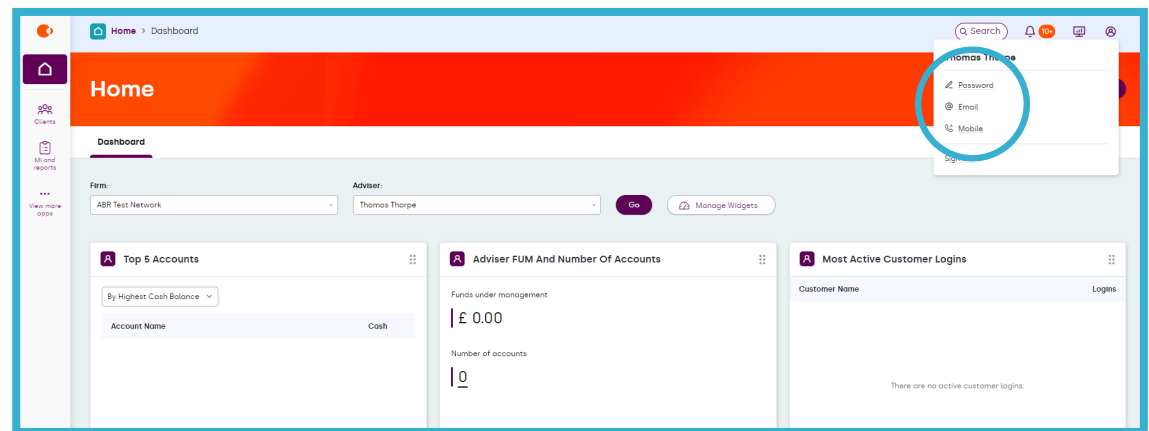
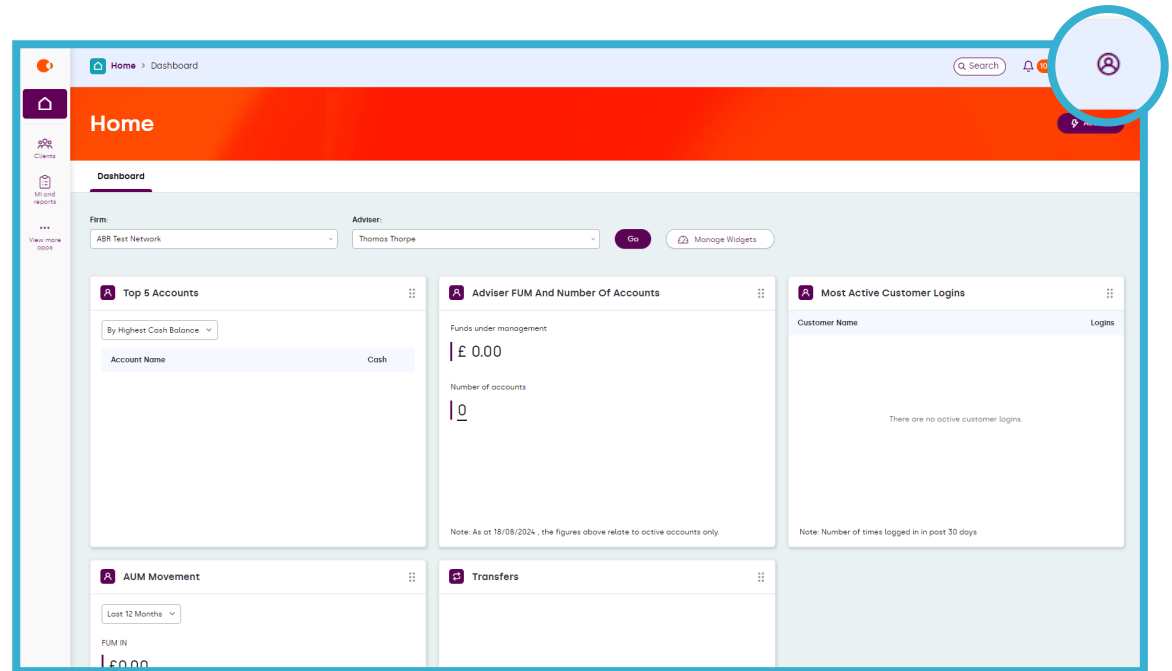
## How to update user and security details

To update your user details, select the 'profile icon' at the top on the page.

### Key message

You can update your user details at any time from most platform pages.

A list of options will appear. Select either 'Password', 'Email', or 'Mobile' to start updating your user details.



## Change password

Enter your current password.

Enter your new password.

Confirm your new password.



Both new password fields must match.

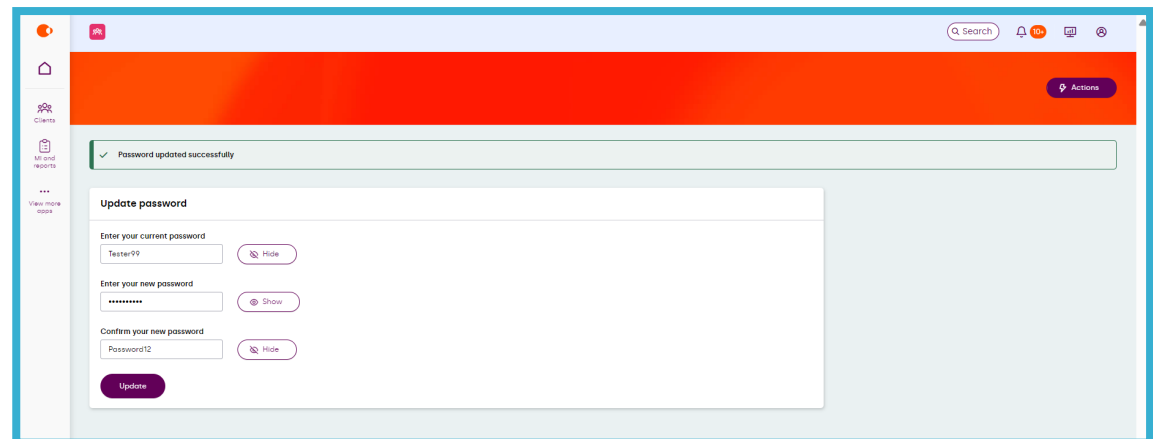
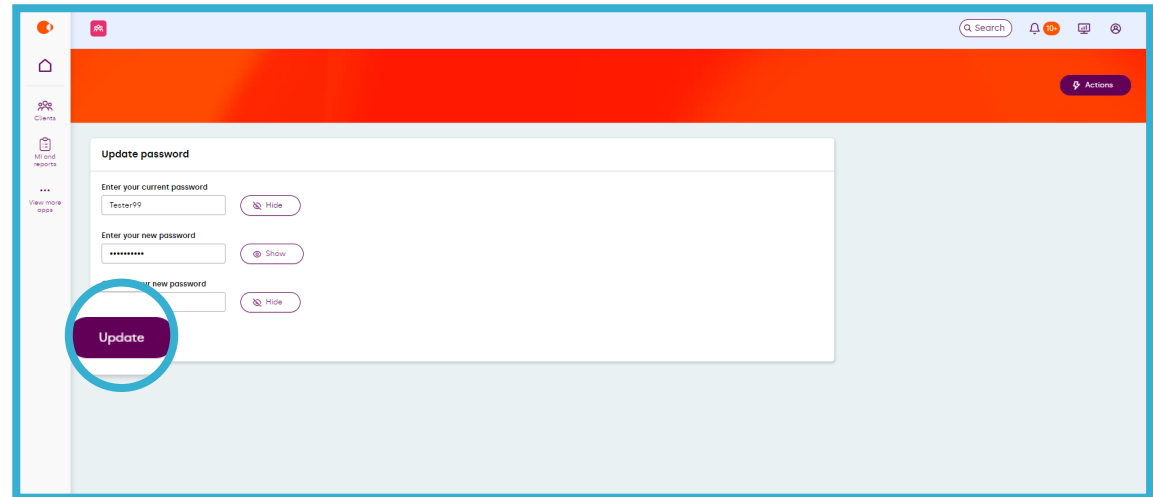


Your password:

- Must be at least eight characters long
- Must contain at least one upper case letter (A - Z)
- Must have a minimum of two numbers (0 - 9)
- Must not contain special characters
- Must not repeat the same character more than twice in succession
- Must not exceed 50 characters in length
- Must not be a previously used password

Select **'Update'**.

Your password will be updated and confirmed at the top of the page.



## Change email address

Enter your current password.

Enter your new email address.

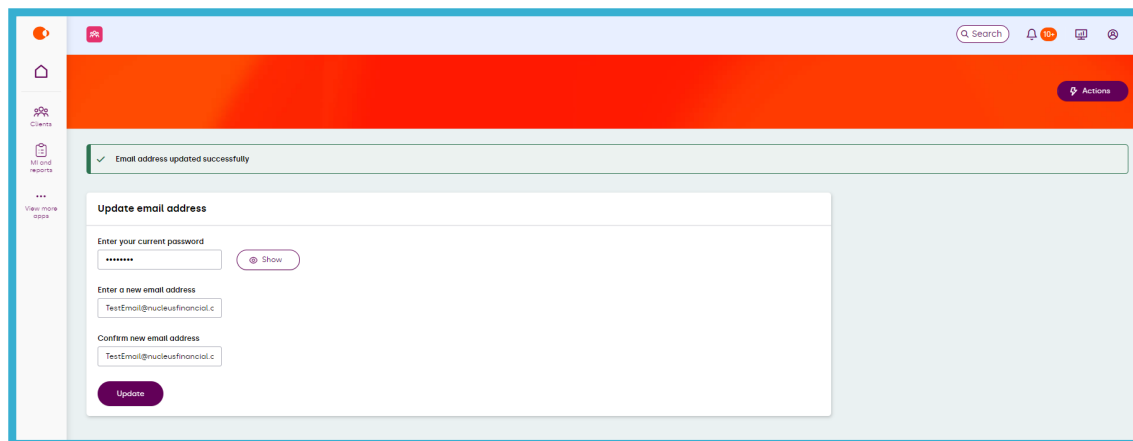
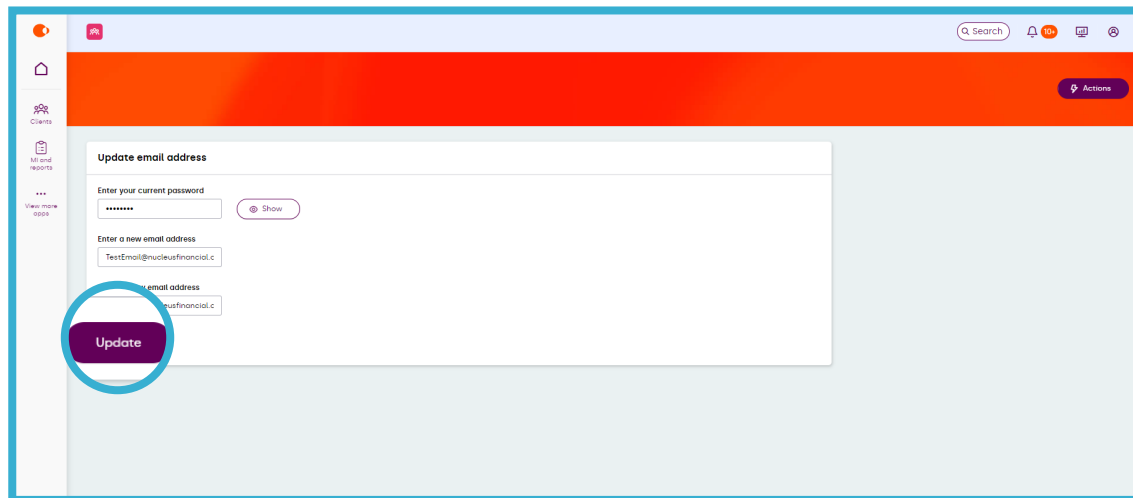
Confirm your new email address.

### Key message

Both email address fields must match.

Select **'Update'**.

Your email address will be updated and confirmed at the top of the page.



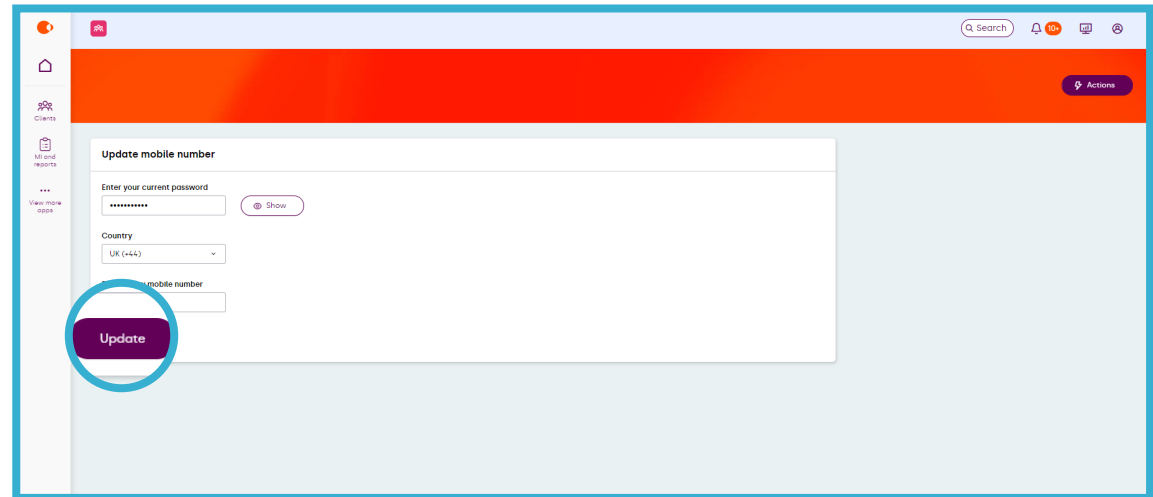
## Change mobile phone number

Enter your current password.

Select your mobile phone number's country code from the drop-down list.

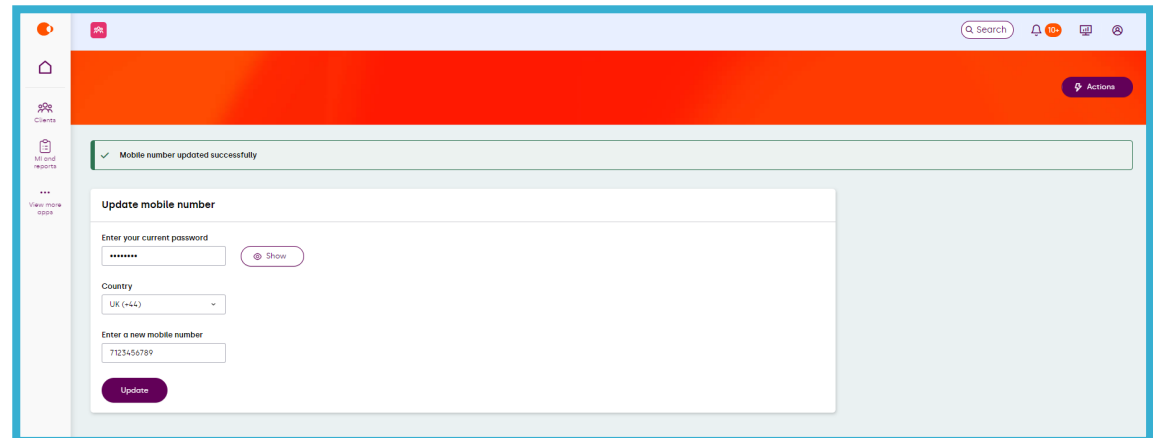
Enter your mobile phone number.

Select **'Update'**.



A screenshot of a web application interface showing the 'Update mobile number' form. The form is titled 'Update mobile number' and contains the following fields: 'Enter your current password' (with a 'Show' button), 'Country' (a dropdown menu showing 'UK (+44)'), and 'Enter a new mobile number'. A purple 'Update' button is located at the bottom of the form and is circled in blue. The interface includes a top navigation bar with a search bar, a notification bell, and an 'Actions' button. A sidebar on the left contains icons for 'Clients', 'MIS and reports', and 'View more apps'.

Your mobile phone number will be updated and confirmed at the top of the page.

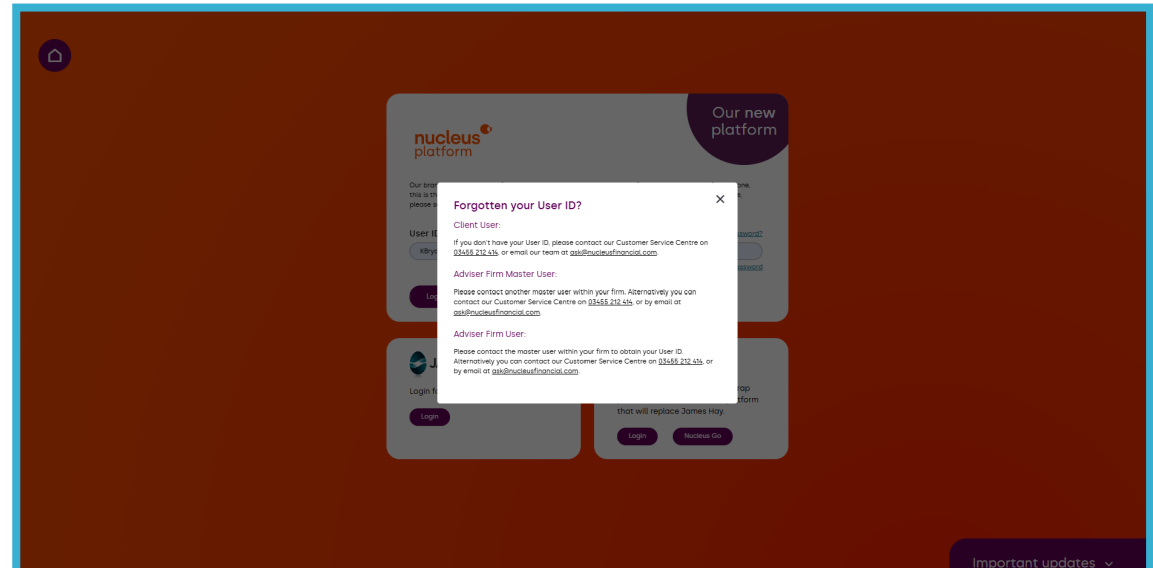
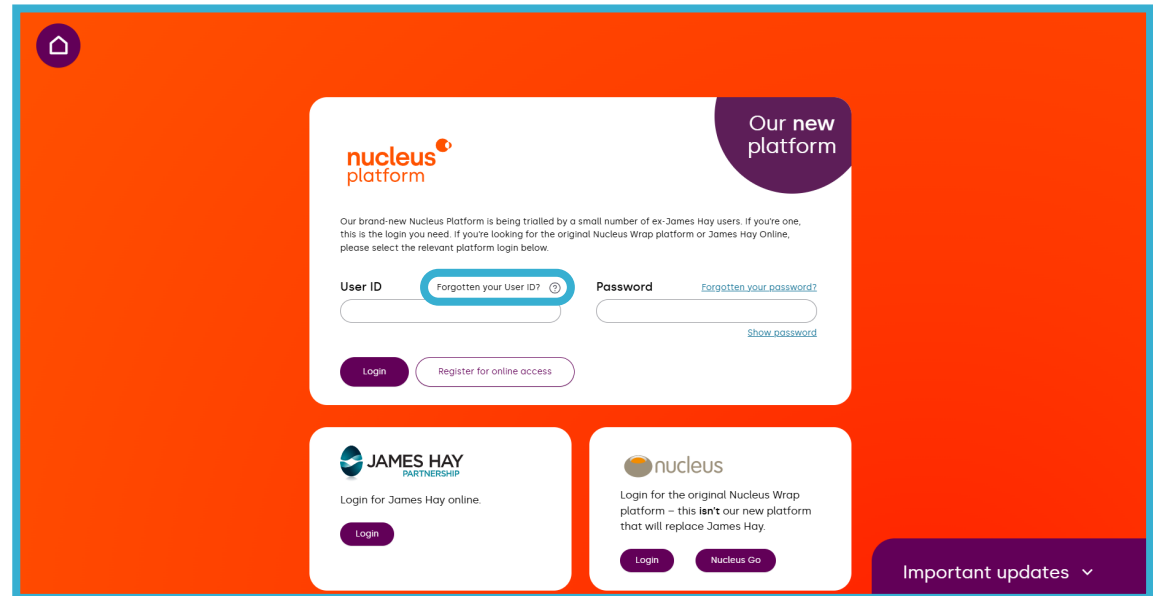


A screenshot of the same web application interface, showing the 'Update mobile number' form after a successful update. A green success message 'Mobile number updated successfully' is displayed at the top of the form area. The form fields are: 'Enter your current password' (with a 'Show' button), 'Country' (a dropdown menu showing 'UK (+44)'), and 'Enter a new mobile number' (with the value '7123456789'). A purple 'Update' button is at the bottom of the form. The top navigation bar and sidebar remain the same as in the previous screenshot.

## Forgotten user ID

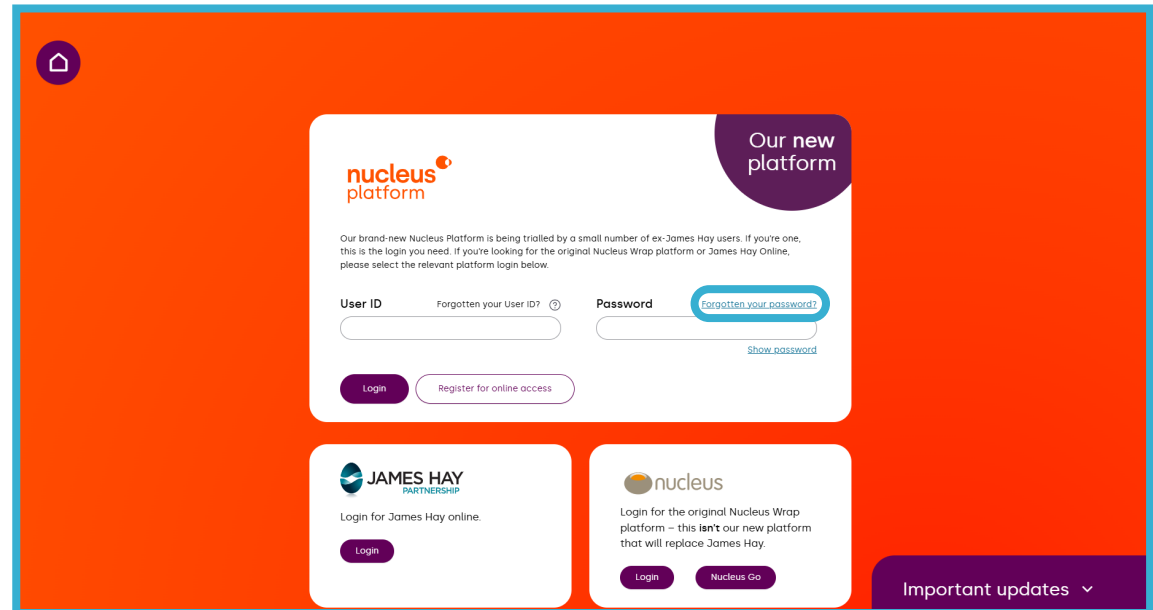
From the log in page select '**Forgotten your User ID?**'

Please contact the master user within your firm to obtain your User ID. Alternatively you can contact our Customer Service Centre on 03455 212 414, or by email at [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com).

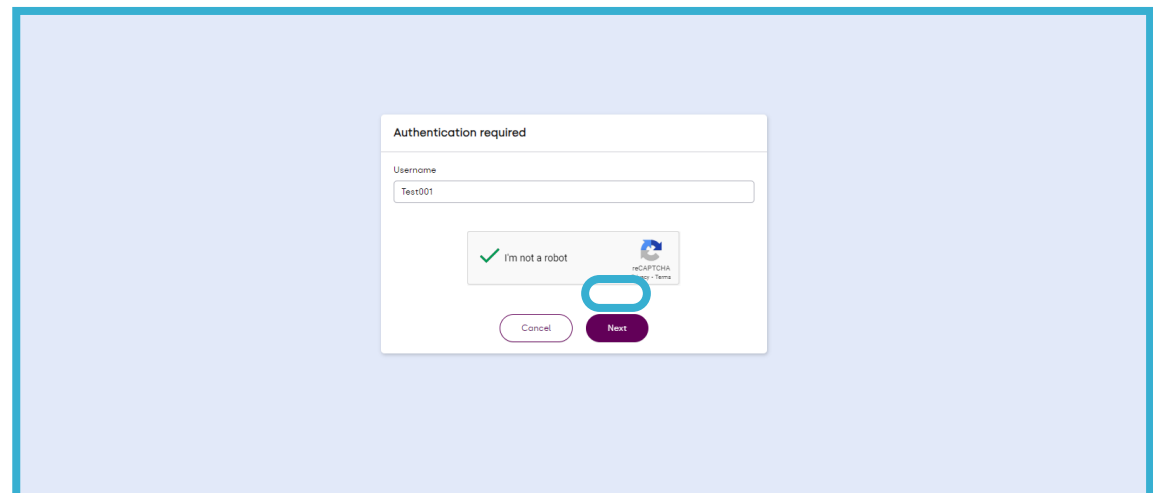


## Forgotten password

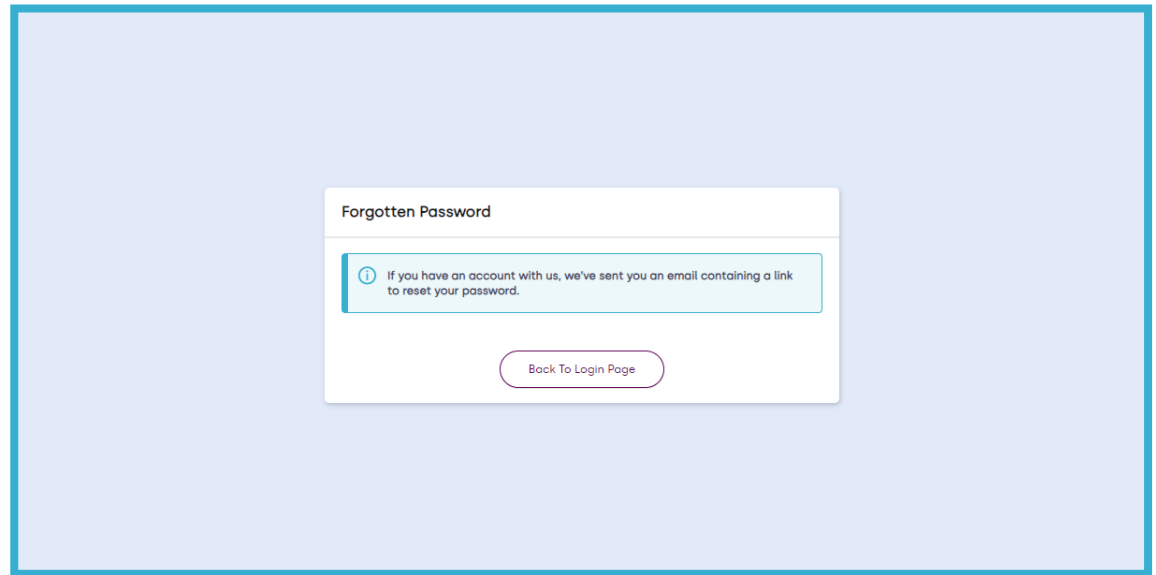
If you've forgotten your password, select '**Forgotten your password?**'.




Add 'Enter your user name and select '**Next**'.




An email will be sent to you with instructions for how to reset your password.



 03455 212 414

 [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

 [nucleusfinancial.com](https://nucleusfinancial.com)

**For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.**

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