

For advisers

Our new
platform

nucleus^o platform

How to search for a client

🕒 2 minute read



How to search for a client

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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.

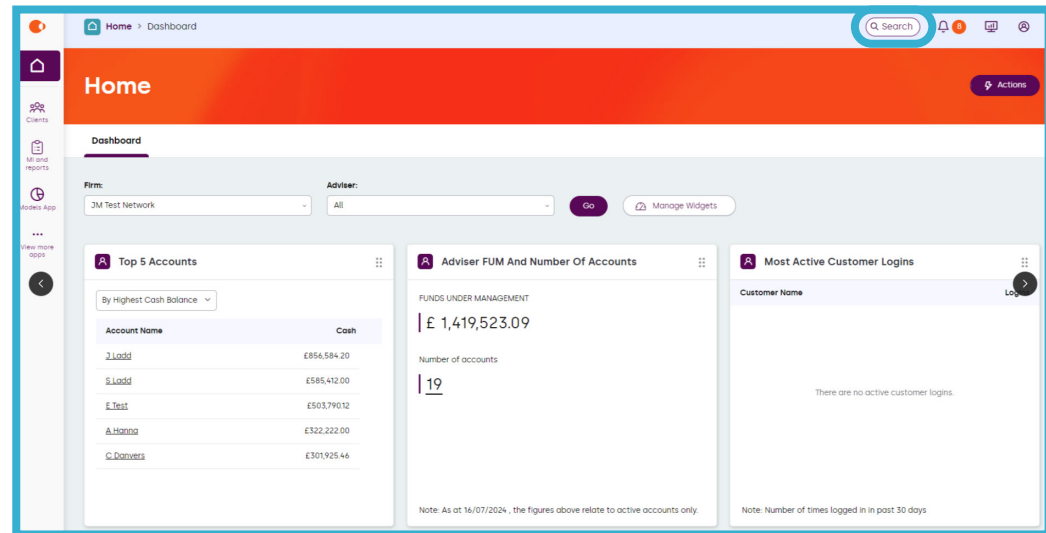


We recommend using the zoom function to view the details on the platform screens in this guide.

How to search for a client

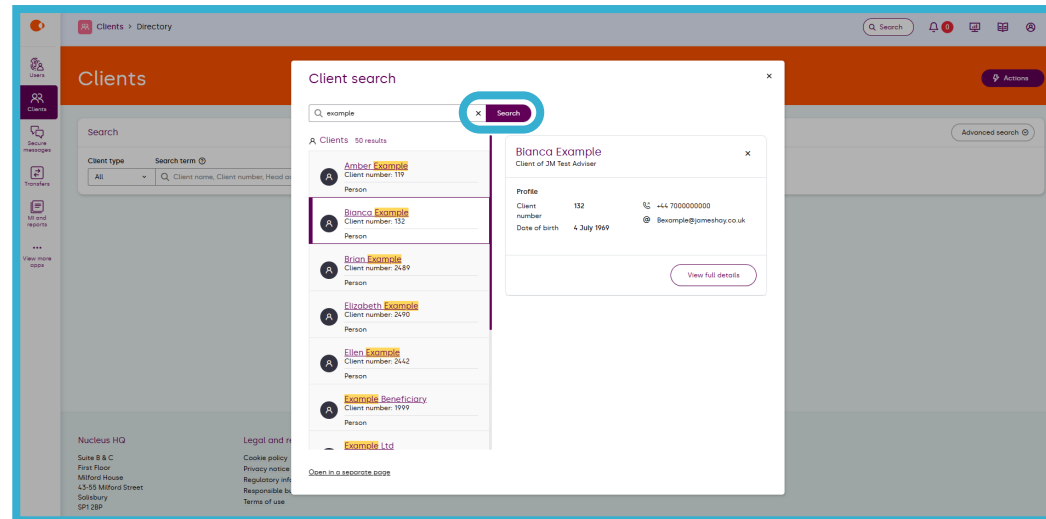
Using the search bar

Select **'Search'** in the top right corner.



Enter the client's name or client ID into the search bar, and then select **'Search'**.

A list of clients will appear. Select your client.



The search functionality lets you preview the client's details to ensure you're selecting the correct one.

How to search for a client

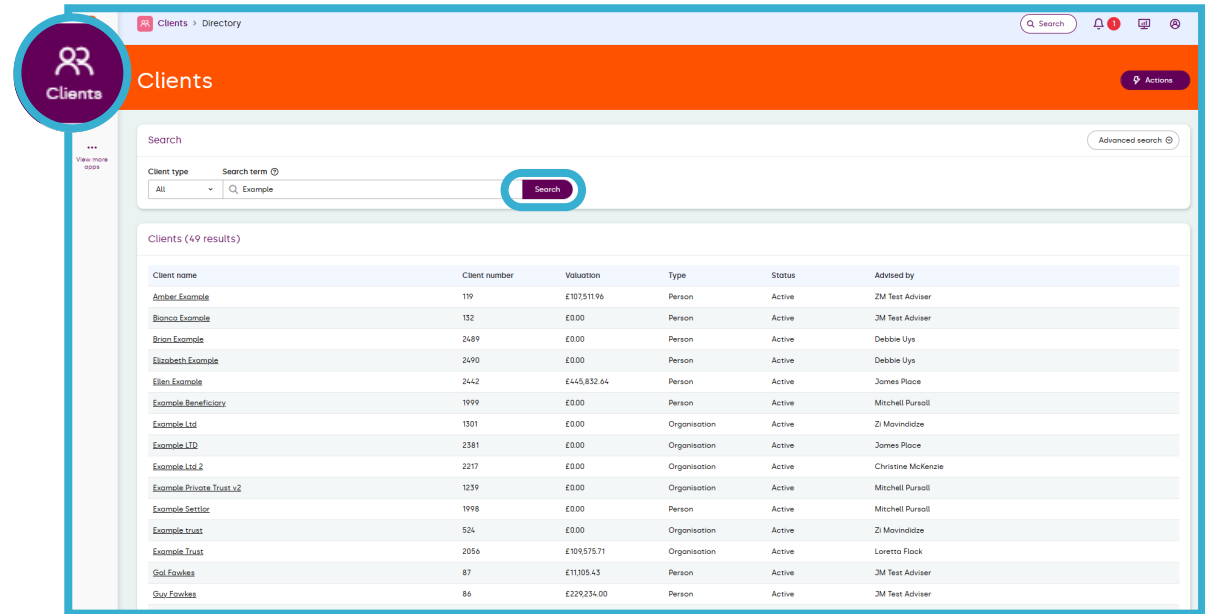
Using the client app

From the home page select the **'Clients'** app.

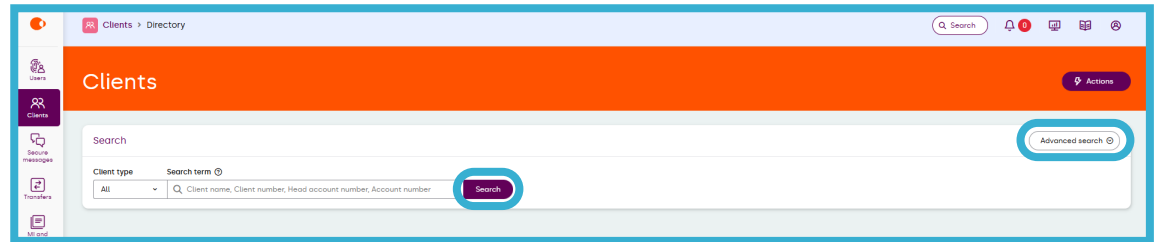
A list of clients will appear.

To search for your client, enter the customer's name or account number e.g. NJ1000162 into the search bar.

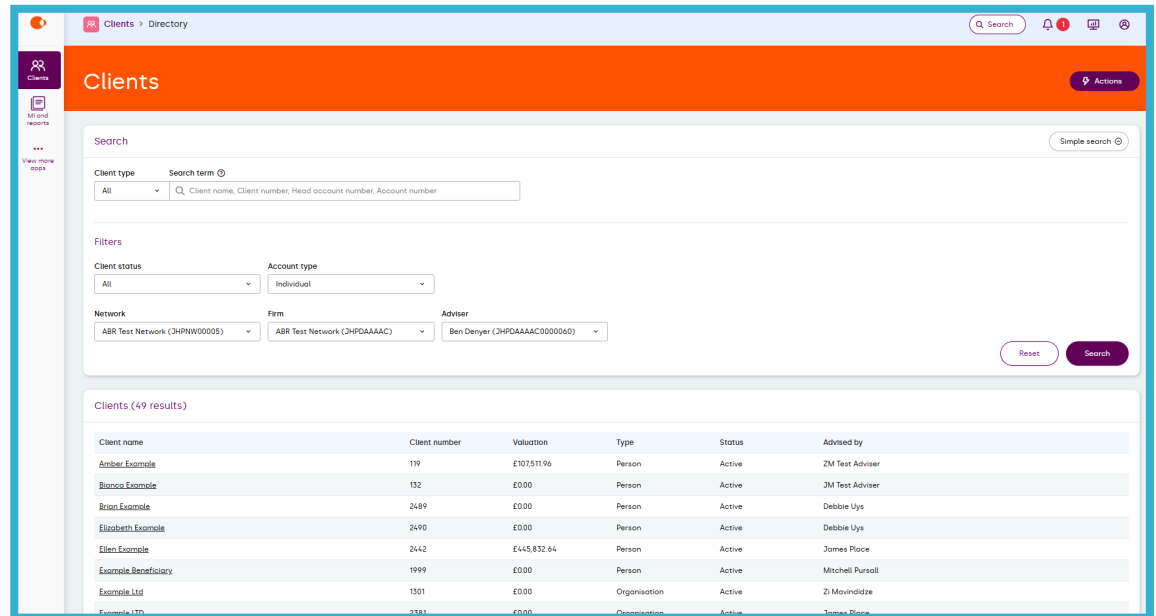
Select **'Search'** to search for your client.




To refine the search results, select **'Advanced search'**.
Select **'Search'**, to search for your client.




The client search results will then appear.
You can refine the results by selecting client type, account status and account type from the drop down lists.



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