

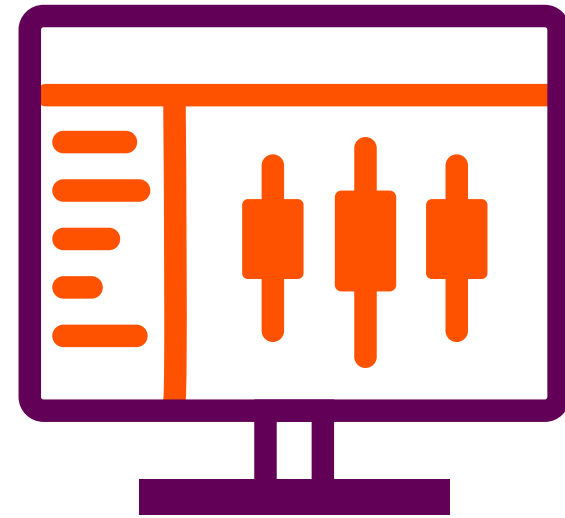
For advisers

Our new
platform

nucleus^o platform

How to edit
an adviser,
non-adviser and
client user

 4 minute read



How to edit an adviser, non-adviser and client user

How to edit adviser users	5
How to edit a non-adviser user	12
How to edit a client user	18

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 an adviser, non-adviser and client user

Key information

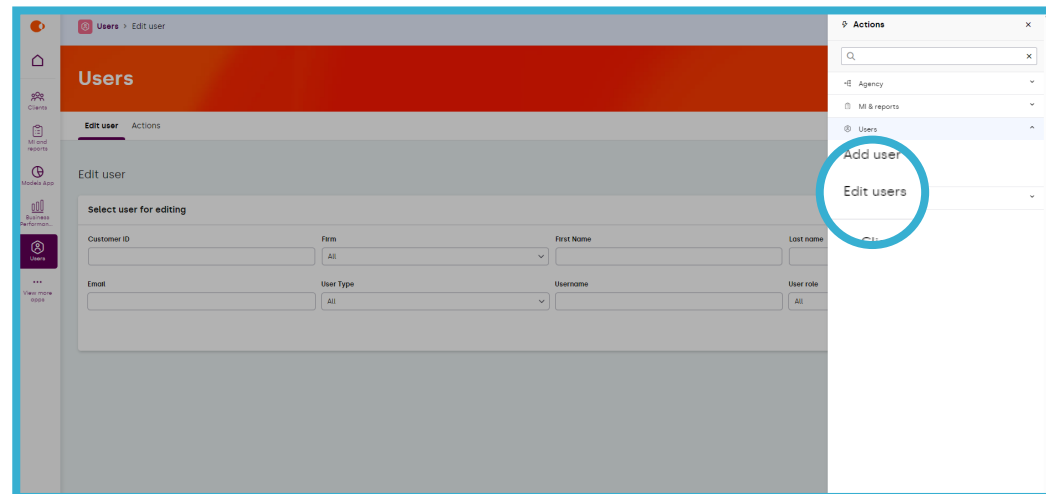
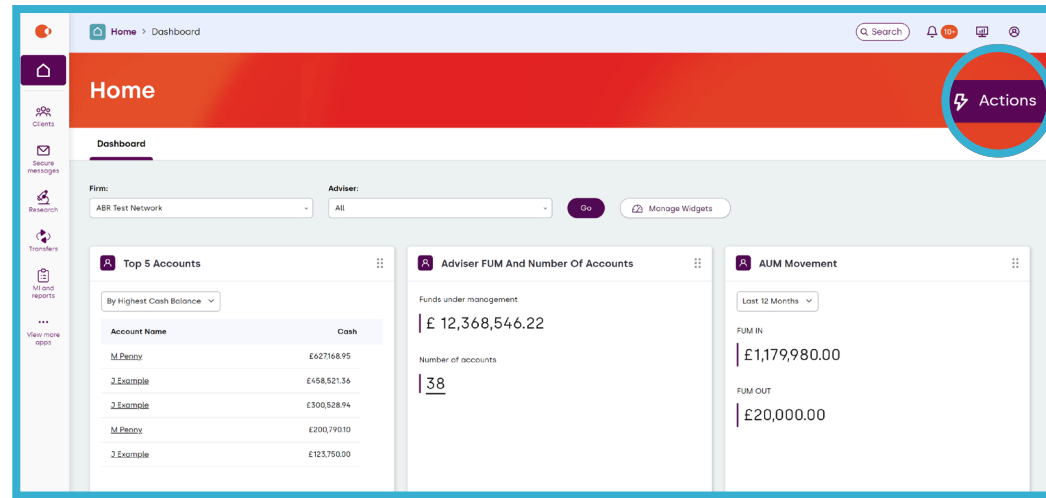
Please note adviser users can only be created by individuals with either the "Master User" or "User Maintenance" role.

you'll need to be either of these roles to perform this action. If your firm does not have a user with either of these roles, please contact us

Please also note you can't amend your own user account.

From the home page select the '**Actions**' button.

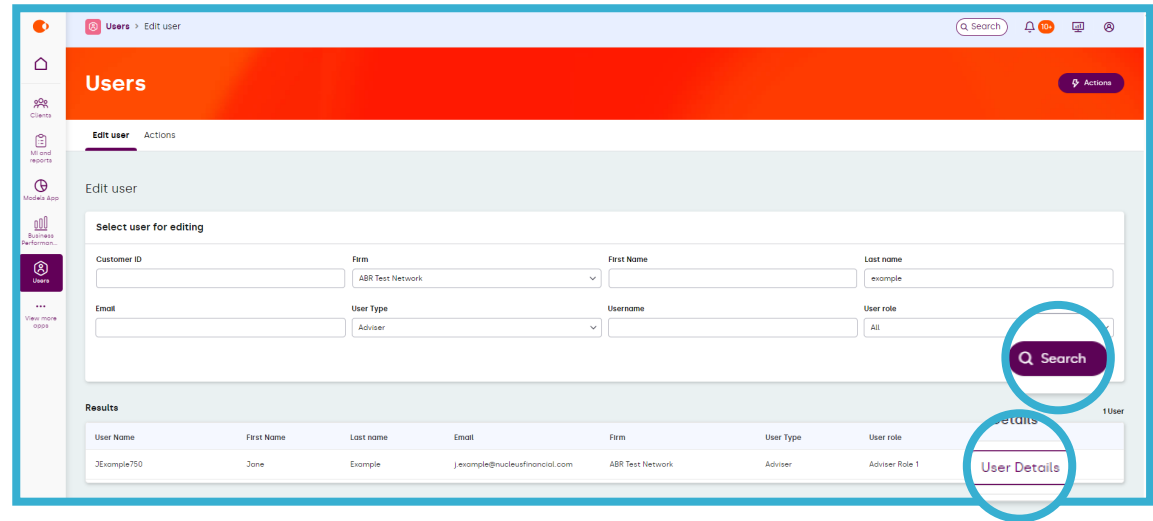
A list of actions will appear. To edit a user select '**Users**' and then select '**Edit users**'.



Enter any of the user's details into the search fields – then select **'Search'**.

The search results will appear at the bottom of the page.

Select **'User Details'** for the user you wish to edit.



How to edit adviser users

User details

The firm will be automatically selected and can't be amended.

You can amend the user's branch by selecting the branch from the drop-down list.




You can select the question mark icon next to 'Access level' for further details about the six adviser user roles.

User Details

Access Information

Firm*
ABR Test Network

Branch*
[Dropdown]

Access level*  *What does this mean for the user to do?*

User Type
Adviser

Username
JExample750

User can access bulk switching functionality:
Yes

User can access to Remuneration Statement:
Yes

External user ID:
E12346

Edit Adviser

- User Details
- User Account Access
- Account Control
- Validate and Execute

Exit And Cancel Save And Resume

Next Step

Select the user access details that require editing.


You can change the user role here, but not the user type. In order to change a user's type between adviser and non-adviser you will need to contact us.

Contact Information

Email*
j.example@nucleusfinancial.com

Confirm email*
j.example@nucleusfinancial.com

Country* Phone number
UK +44 [Input]

Country* Mobile phone number (OTP only - Please do not use to contact adviser) 
UK +44 [Input] 07500123456

Preferred contact method*
Business Phone

Payment Points

Bank account reference	Bank name	Bank account number	Bank sort code	Entity name	Entity type	Payment point
Another Test Account	Not a real bank	12345678		ABR Test Network	Firm	<input type="checkbox"/>
Test Bank	Not a real bank	12345678		ABR Test Network	Network	<input checked="" type="checkbox"/>

Edit adviser

- User details
- User account access
- Account control
- Validate and execute

Exit and cancel Save and resume

Next step

Select and amend the adviser user's contact information that requires editing.

Select a new payment point, if the payment point requires editing.

Enter a new FCA code if the FCA number requires editing.

Update the user's personal information that requires editing.

Once the necessary amendments have been made, select '**Next step**' to move onto the user account access page.

The screenshot shows a web form for editing an adviser. It is divided into two main sections: 'FCA details' and 'Personal information'. The 'FCA details' section includes a text input for 'FCA code' containing '45611886', a 'Registration number' input, and a 'Trading status' dropdown. The 'Personal information' section includes a 'Title' dropdown (set to 'Miss'), 'First name' (Jane), 'Surname' (Example), and 'Date of Birth' (15-Nov-1990). On the right, the 'Edit adviser' sidebar shows a progress list with four steps: '1. User details', '2. User account access', '3. Account control', and '4. Validate and execute'. Below this list are buttons for 'Exit and cancel', 'Save and resume', and a prominent purple 'Next step' button. Red circles highlight the 'FCA code' input and the 'Next step' button.

User account access

Confirm if DIM Portal access is required for the adviser user.



The access level selected will determine which clients the adviser user is able to view.

nucleus[®]
Edit adviser

User account access

Level of access to accounts

DIM portal access
Not required

Network

Network name	Read only access	Read / write access	Remove
ABR Test Network	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

Firm

Branch

Adviser

Edit adviser

1. User details
2. User account access
3. Account control
4. Validate and execute

Exit and cancel Save and resume

Next step

Choose the user access at either, network, firm or branch level.

Network level access

Confirm the adviser user's access level.



An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

nucleus[®]
Edit adviser

User account access

Level of access to accounts

DIM portal access
Not required

Network

Network name	Read only access	Read / write access	Remove
ABR Test Network	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

Firm

Branch

Adviser

Duplicate from existing user (same user group)

Edit adviser

1. User details
2. User account access
3. Account control
4. Validate and execute

Exit and cancel Save and resume

Next step

Firm level access

Confirm the adviser user's access level.



An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

The screenshot shows the 'Edit adviser' interface with the 'User account access' section active. The 'Level of access to accounts' is set to 'Not required'. Under 'Firm', the 'ABR Test Network' is selected with 'Read / write access'. The 'Edit adviser' sidebar on the right shows step 2 'User account access' as the current step.

Branch level access

Confirm the adviser user's access level.

Select if you wish to add permissions from the 'Available Branch Permission' box.



An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

The screenshot shows the 'Edit adviser' interface with the 'User account access' section active. The 'Level of access to accounts' is set to 'Not required'. Under 'Branch', the 'Available Branch Permission' box is expanded, showing two entries: 'this is not a sensitive branch (Branchid 7)' and 'this is a sensitive branch (Branchid 8)'. The 'Branch of ABR Firm (Branchid 4)' is selected with 'Read / write access'. The 'Edit adviser' sidebar on the right shows step 2 'User account access' as the current step.

Adviser level access

Select the existing user to duplicate settings by selecting the user whose settings you wish to duplicate.



An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

Once you're happy with your user details, select **'Next Step'** to move on to the review and submit page.

Available Adviser Permission

- ABR Training (3HPDAAAAC0000008)
- Admin Role Two (3HPDAAAAC0000018)
- Craig McTest (3HPDAAAAC0000018)
- Emily Frenchie Test (3HPDAAAAC0000009)
- Test ZM Adviser (3HPDAAAAC0000002)
- Tom Cornfield (3HPDAAAAC0000014)

Adviser Level Access:

Adviser Name	Read Only Access	Read / Write Access	Remove
Amy Hanna (3HPDAAAAC0000016)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Example Adviser (3HPDAAAAC0000004)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Jane Example (3HPDAAAAC0000019)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
ZM Test Adviser (3HPDAAAAC0000001)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Karl Bryant (3HPDAAAAC0000023)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Loretta Flack (3HPDAAAAC0000013)	<input checked="" type="radio"/>	<input type="radio"/>	Remove
Mitchell Pursell (3HPDAAAAC0000015)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Raymond James (3HPDAAAAC0000006)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Sam Burns (3HPDAAAAC0000002)	<input checked="" type="radio"/>	<input type="radio"/>	Remove
Thomas Thorpe (3HPDAAAAC0000020)	<input type="radio"/>	<input checked="" type="radio"/>	Remove
Zi Movindize (3HPDAAAAC0000011)	<input type="radio"/>	<input checked="" type="radio"/>	Remove

Edit Adviser

1. User Details ✓
2. User Account Access
3. Account Control
4. Validate and Execute

Exit And Continue | Cancel And Return

Next Step

Account control



The account control page will show details about the user's current access, such as whether their account is locked or the date they last logged in.

Select the access you wish to edit.

Expired password

Will prompt the user to select a new password when they next log in.

Locked account

Will suspend the user's account and online access. The user will receive an email to notify them.

Reset password

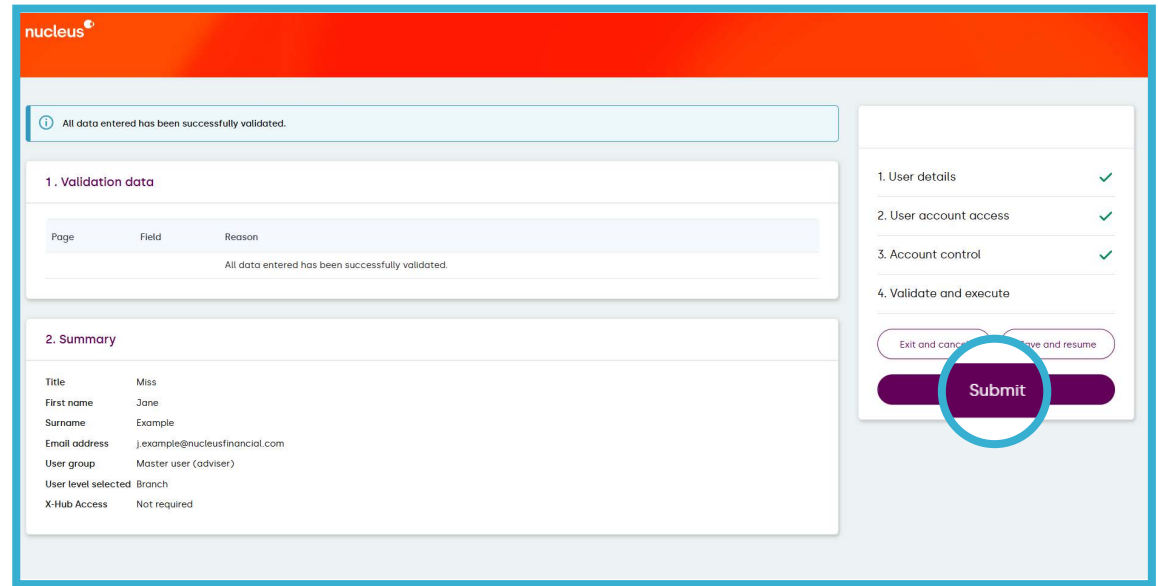
Will send the user an email that contains a link to reset their password.

Once the necessary amendments have been made, select '**Next Step**' to move onto the validate and execute page.

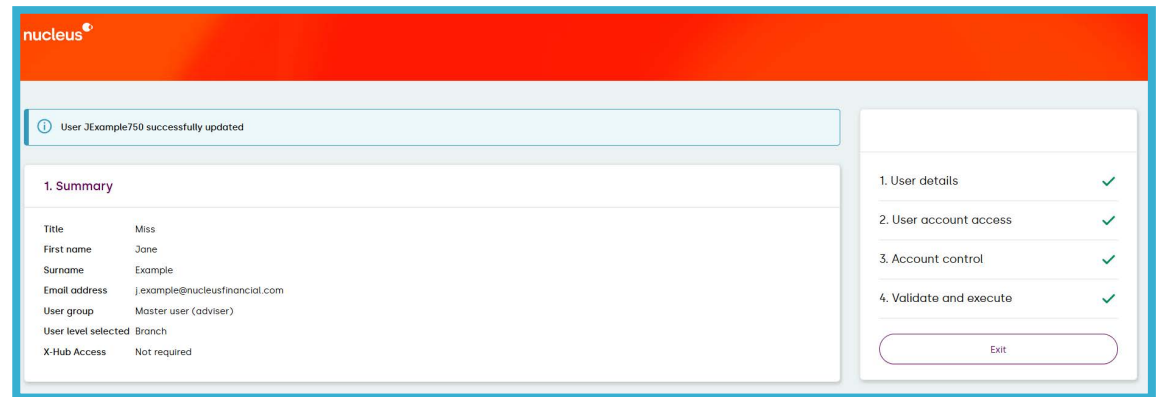
Validate and execute

The screen will confirm that the data entered has been validated and provide a summary of the user's details.

Once you're happy with the amendments select '**Submit**'.



The changes have been successfully updated. This is confirmed at the top of the page.



How to edit a non-adviser user

User details

The user's firm can be amended to another firm within the same network. Enter the firms details into the search bars, and then select 'Search'.

If the user's branch requires amendment select the branch from the drop-down list.



You can select the question mark icon next to 'Access level' for further details about the six adviser user roles.

User Details

Access information

Search firm name

Search firm FCA/trading reference

Search firm postcode

Search

Firm*
ABR Test Network

Branch
▼

Access level ⓘ
Non-Adviser ▼

Username

Edit Non-Adviser User

1. User Details

- Access information
- Personal information
- Contact information

2. User Account Access

3. Account Control

4. Validate and Execute

Exit And Cancel Save And Resume

Next Step

Personal information

Title*
Mr ▼

First name*
John

Surname*
Example

Date of birth
01-Jan-1990

Contact information

Email*
john.example@nucleusfinancial.com

Edit Non-Adviser User

1. User Details

- Access information
- Personal information
- Contact information

2. User Account Access

3. Account Control

4. Validate and Execute

Exit And Cancel Save And Resume

Next Step

Select the user access details that require editing.

Select and amend the non-adviser user's personal and contact information that requires editing.

Once the necessary amendments have been made select **'Next step'**.

The screenshot shows the 'Personal information' section of the 'Edit Non-Adviser User' form. It includes the following fields:

- Title: A dropdown menu with 'Mr' selected.
- First name: A text input field containing 'John'.
- Surname: A text input field containing 'Example'.
- Date of birth: A date picker showing '01-Jan-1990'.

On the right side, the 'Edit Non-Adviser User' sidebar shows a progress list with four steps: '1. User details', '2. User account access', '3. Account control', and '4. Validate and execute'. At the bottom of the sidebar are 'Exit and cancel' and 'Save and resume' buttons, and a large purple 'Next step' button at the bottom of the main form area.

The screenshot shows the 'Contact information' section of the 'Edit Non-Adviser User' form. It includes the following fields:

- Email: A text input field containing 'john.example@nucleusfinancial.com'.
- Confirm email: A text input field containing 'john.example@nucleusfinancial.com'.
- Business phone section:
 - Country: A dropdown menu with 'UK +44' selected.
 - Phone number: A text input field containing '01234567891'.
- Mobile phone section:
 - Country: A dropdown menu with 'UK +44' selected.
 - Mobile phone number (OTP only): A text input field containing '07986319426'.

On the right side, the 'Edit Non-Adviser User' sidebar shows the same progress list as the previous screenshot. The 'Next step' button at the bottom of the main form area is circled in blue, indicating it is the next action to take.

User account access

Confirm if DIM Portal access is required for the user.

nucleus®
Edit Non-Adviser User

User account access

Level of access to accounts

DIM portal access
Not required

Edit Non-Adviser User

1. User details ✓
2. User account access

Choose the user access at either, network, firm or branch level.

Network level access

Confirm the non-adviser user's access level.

nucleus®
Edit Non-Adviser User

User account access

Level of access to accounts

DIM portal access
Not required

Network

Network name	Read only access	Read / write access	Remove
ABR Test Network	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

Firm

Adviser

Duplicate from existing user (same user group)

Edit Non-Adviser User

1. User details ✓
2. User account access
3. Account control
4. Validate and execute

Exit and cancel Save and resume

Next step



A non-adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

Firm and branch level access

Confirm the non-adviser user's access level.



A non-adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

nucleus[®]
Edit Non-Adviser User

User account access

Level of access to accounts

DIM portal access
Not required

Network

Firm

Firm Name	Read only access	Read / write access	Remove
ABR Test Network	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

Adviser

Duplicate from existing user (same user group)

Edit Non-Adviser User

1. User details
2. **User account access**
3. Account control
4. Validate and execute

Exit and cancel Save and resume

Next step

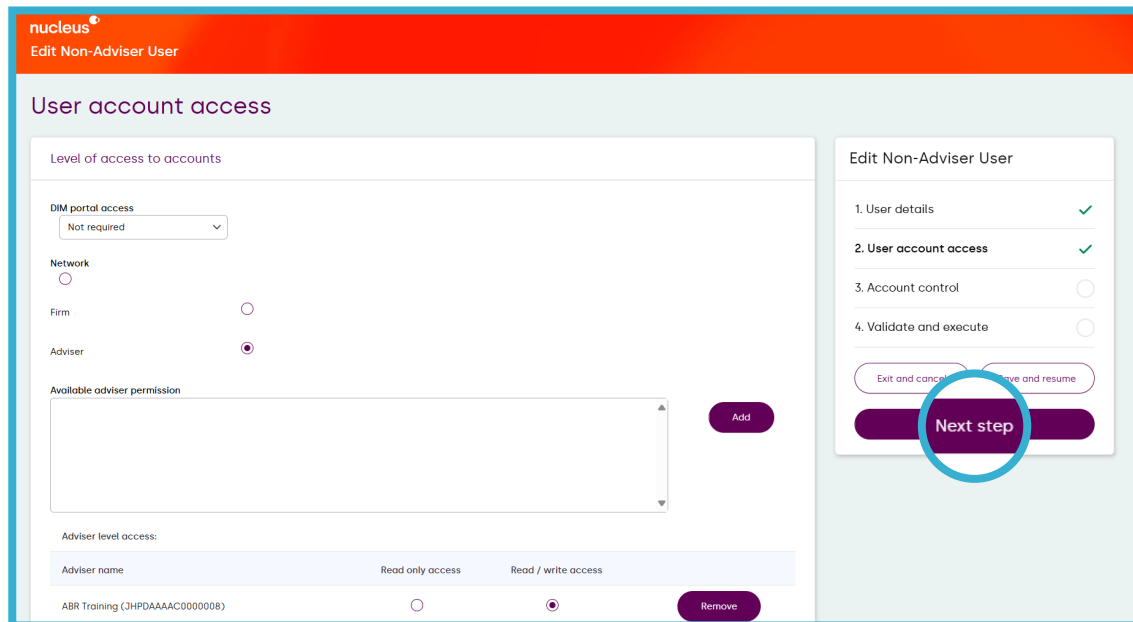
Adviser level access

Select the user the permissions should reflect.



A non-adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

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



Duplicate from existing user (same user group)

To duplicate an existing user, add the adviser name into the search box and make your selection from the list.

Once complete, select '**Next step**'.

The screenshot displays the 'User account access' configuration page. On the left, under 'Level of access to accounts', the 'DIM portal access' is set to 'Not required'. Under 'Network', 'Firm', 'Branch', and 'Adviser', the radio buttons are unselected. The 'Duplicate from existing user (same user group)' option is selected. Below this, there is a section for 'Select user permissions to duplicate' with an 'Adviser name' search box and a 'Selected user ID' field. On the right, the 'Edit adviser' sidebar shows a progress list: '1. User details' (checked), '2. User account access' (checked), '3. Account control' (checked), and '4. Validate and execute' (unchecked). At the bottom of the sidebar, there are 'Exit and cancel' and 'Save and resume' buttons, and a large purple 'Next step' button which is circled in blue.



The account control page will show details about the user's current access, such as whether their account is locked or the date they last logged in.

Select the access you wish to edit.

Expired password

Will prompt the user to select a new password when they next log in.

Locked account

Will suspend the user's account and online access. The user will receive an email to notify them.

Reset password

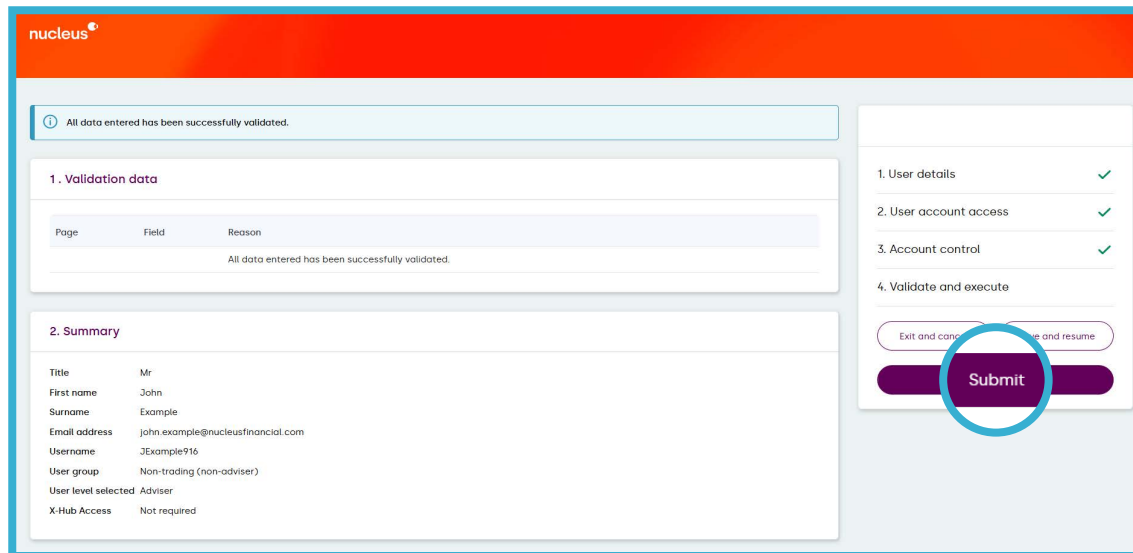
Will send the user an email that contains a link to reset their password.

Once the necessary amendments have been made select '**Next step**'.

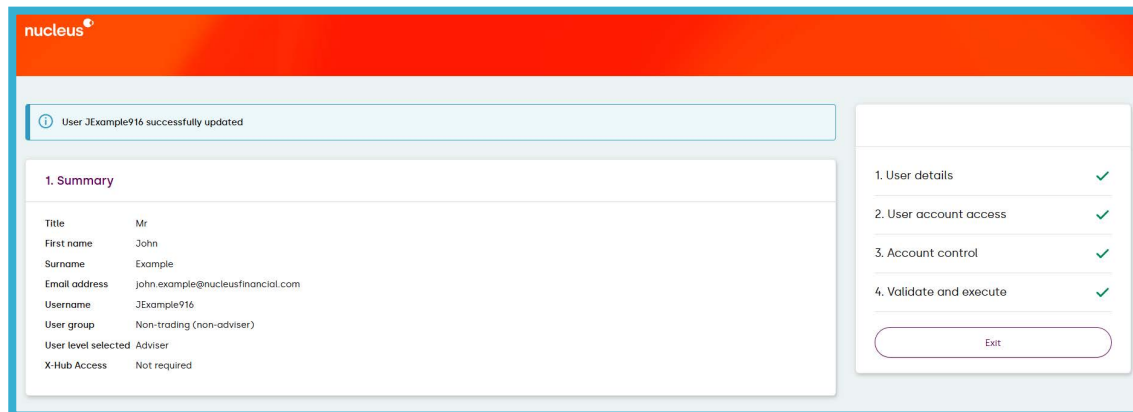
Validate and execute

The screen will confirm that the data entered has been validated and provide a summary of the user's details.

Once you're happy with the amendments select '**Submit**'.



The changes have been successfully updated. This is confirmed at the top of the page.



How to edit a client user

User details

Key information

The firm and access level for a client user can't be amended.

The only client details that can be amended is the phone number.

Select and amend the user's contact phone number if required.

Select '**Next step**'.

nucleus
Edit client

User details

Access information

Firm*
ABR Test Network

Access level*
Client user

Username
JExample580

User ID

User type
Client

Customer ID
119

Edit client

1. User details
2. Account control
3. Validate and execute

Exit and cancel Save and resume

Next step

Contact information

Email
Jessica.example@gmail.com

Mobile phone

Country
UK +44

Mobile phone number (OTP only) ⓘ
07923456789

Account control



The account control page will show details about the user's current access, such as whether their account is locked or the date they last logged in.

Select the access you wish to edit.

Current access	
Password status:	Unlocked
Expiry date:	
Memorable phrase:	
Account status:	Disabled
Last logon date:	User has never logged in

Edit access	
Expire password:	<input type="checkbox"/>
Lock account:	<input checked="" type="checkbox"/>
Reset password:	<input type="checkbox"/>
Account number(s):	N31000126 N31002510 N31000110

Expired password

Will prompt the user to select a new password when they next log in.

Locked account

Will suspend the user's account and online access. The user will receive an email to notify them.

Reset password

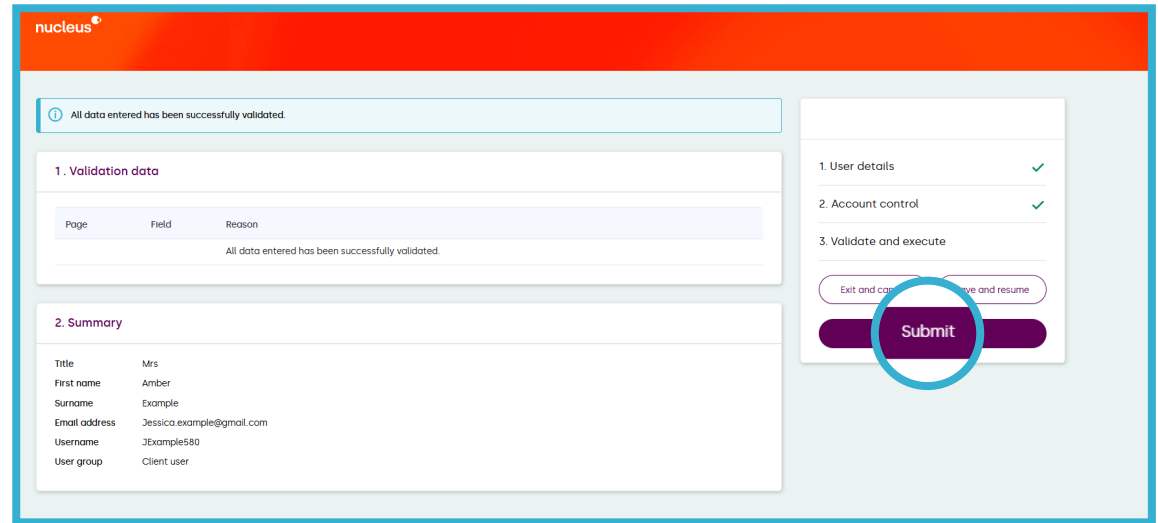
Will send the user an email that contains a link to reset their password.

Once the necessary amendments have been made select '**Next step**'.

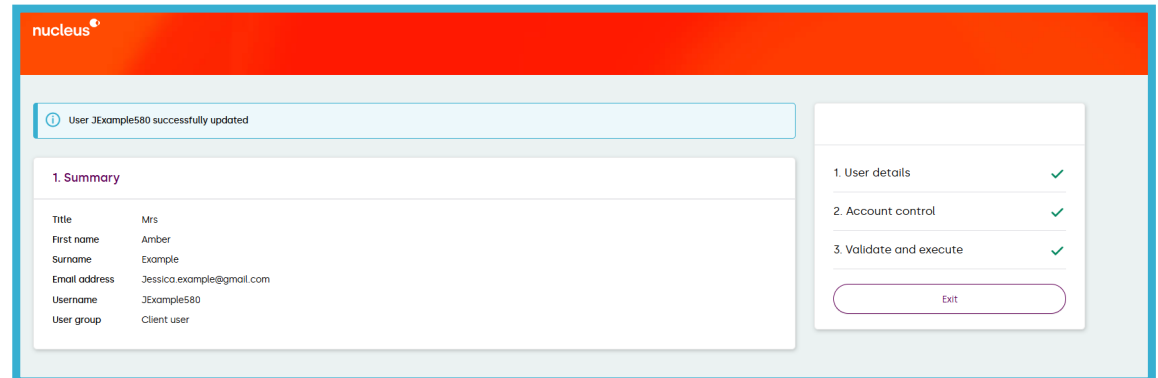
Validate and execute


The screen will confirm that the data entered has been validated and provide a summary of the user's details.

Once you're happy with the amendments select '**Submit**'.




The changes have been successfully updated. This is confirmed at the top of the page.



 03455 212 414

 ask@nucleusfinancial.com

 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.

"Nucleus" is the trading name for Nucleus Financial Platforms Limited (NFPL) (registered in England, number 06033126), Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); Nucleus Financial Services Limited (NFS) (registered in England, number 05629686). NFPL, NFS, NGSL, JHAC, JHPT, JHWM, JHWNC have their registered office at Suite B & C, First Floor, Milford House, 43 55 Milford Street, Salisbury, SP1 2BP. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0GH. JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority. NFPL, NGSL, NFS, JHWM, JHPT, JHAC and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of NFPL. Further details of the Nucleus Group can be found at nucleusfinancial.com. (12/25)