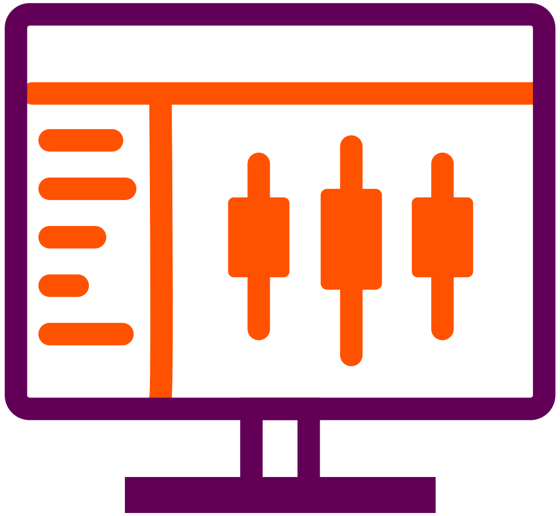
For advisers

Our new platform

nucleus 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 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

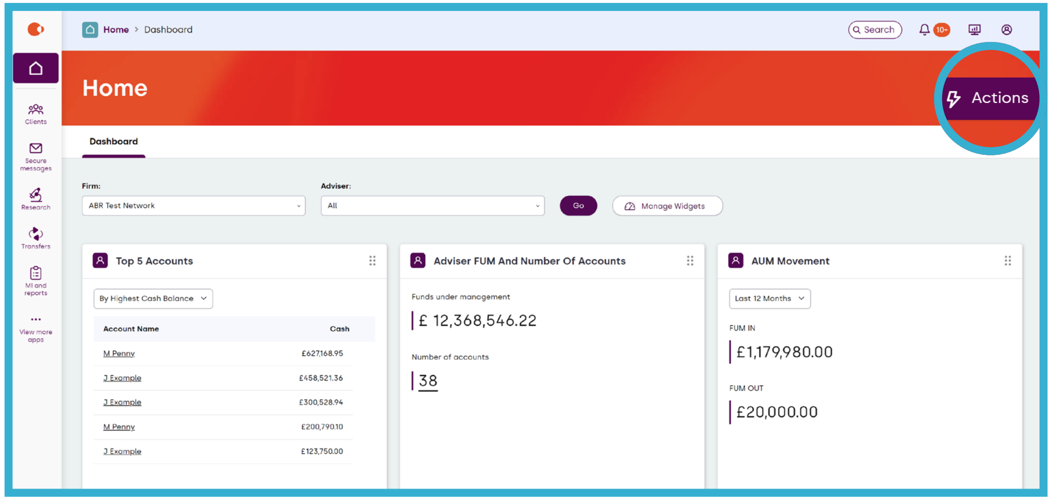
Please note adviser users can only be created by individuals with either the “Master User” or “User Maintenance” role.

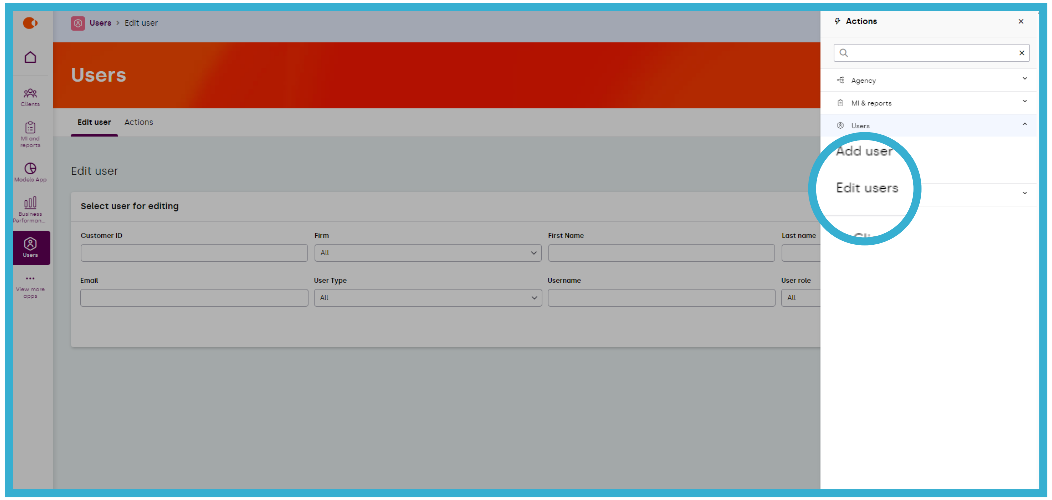
you’ll need to be either of these roles to perform this action. If your firm does not have a user with either of these roles, please contact us

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**’.

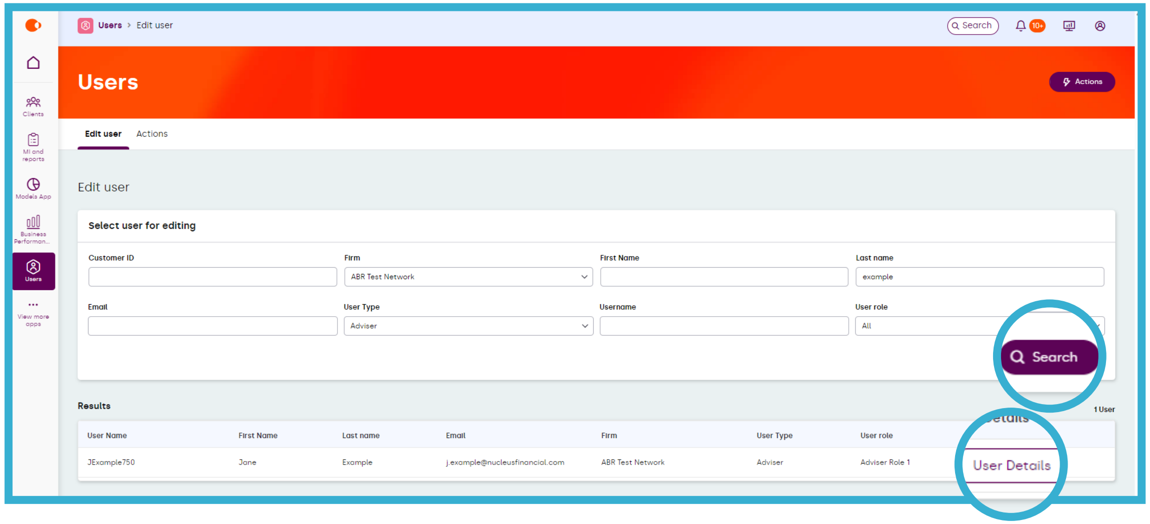




Enter any of the user's details into the search fields – then select '**Search**'.

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

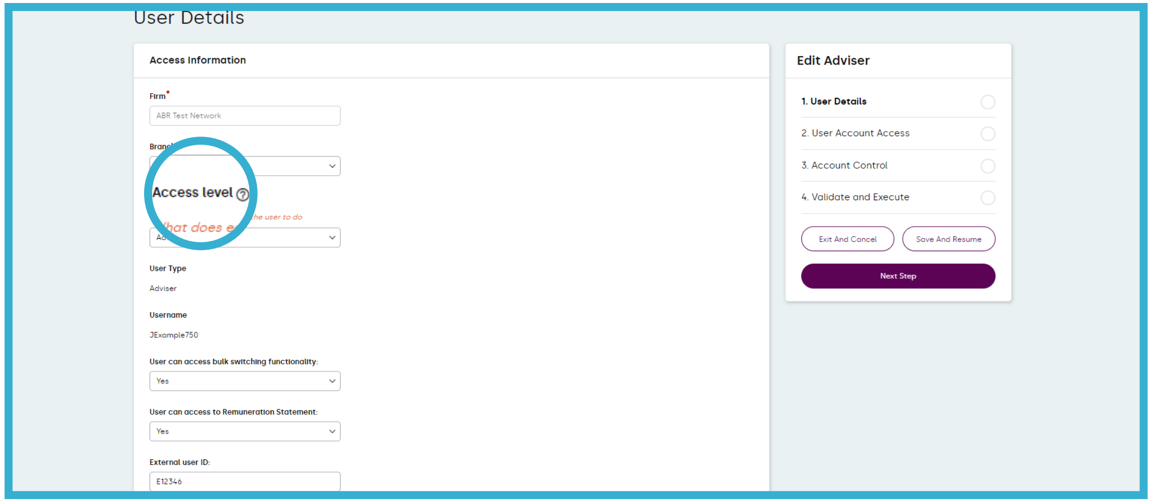
The firm will be automatically selected and can't be amended.

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.

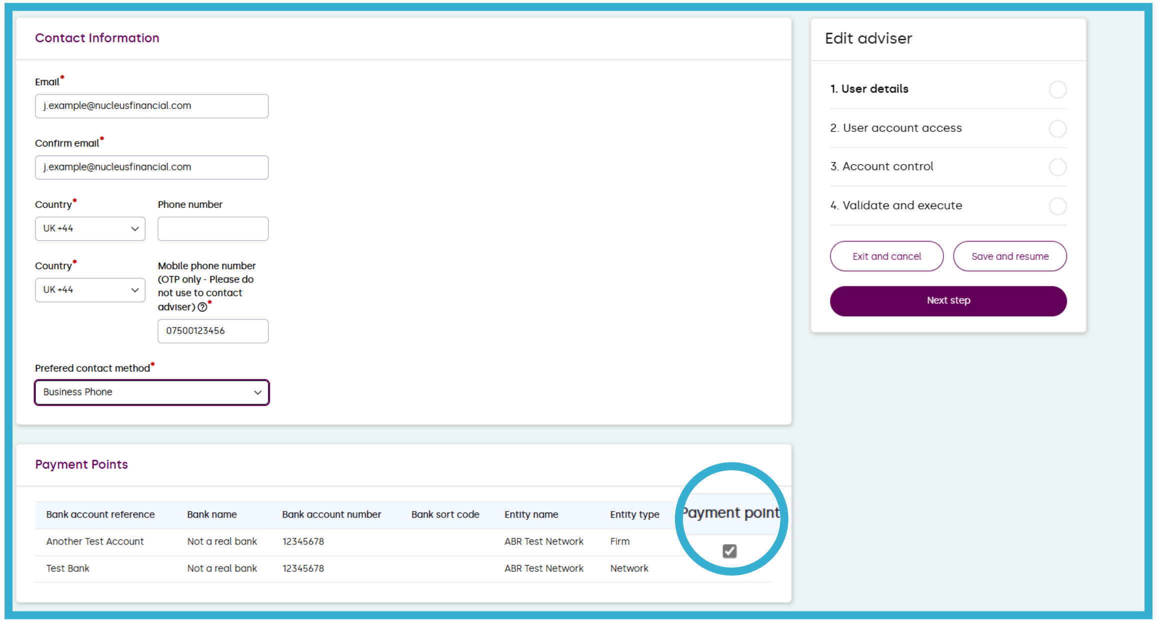
Select the user access details that require editing.

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.



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

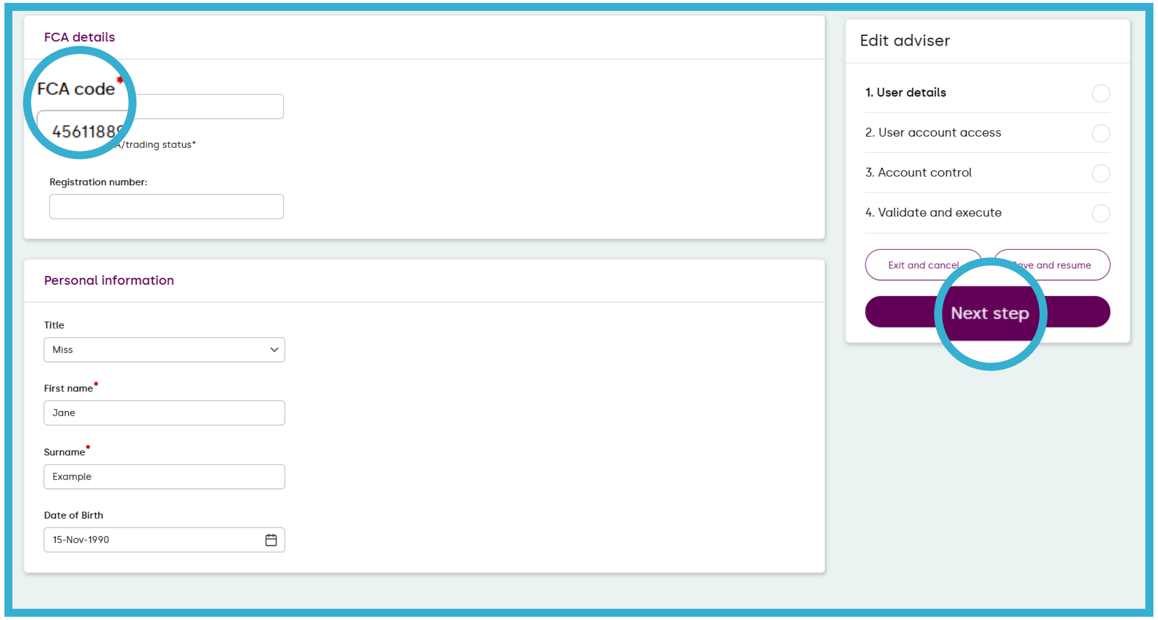
Select a new payment point, if the payment point requires editing.



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

Update the user's personal information that requires editing.

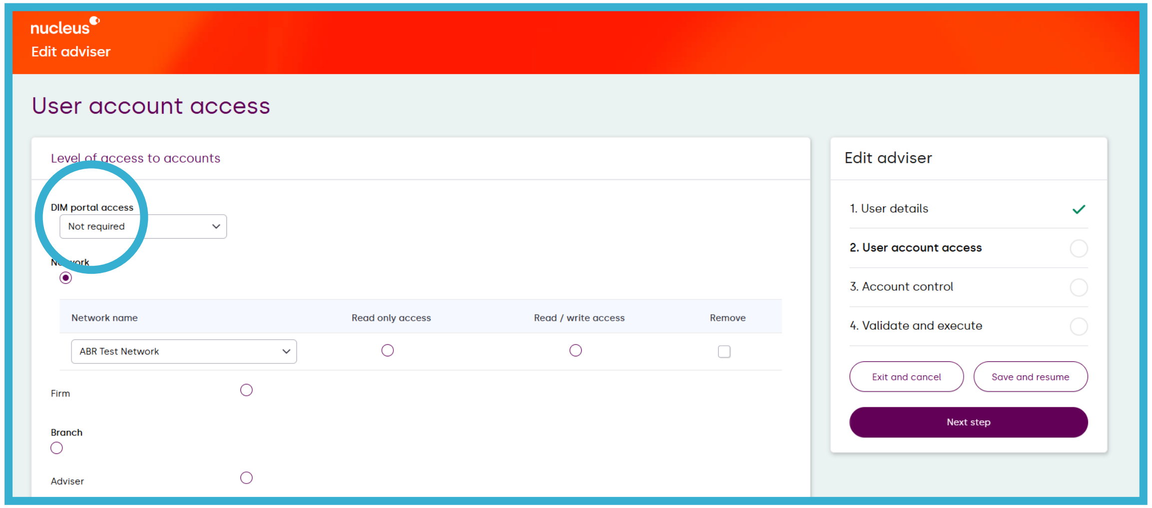
Once the necessary amendments have been made, select '**Next step**' to move onto the user account access page.



User account access

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

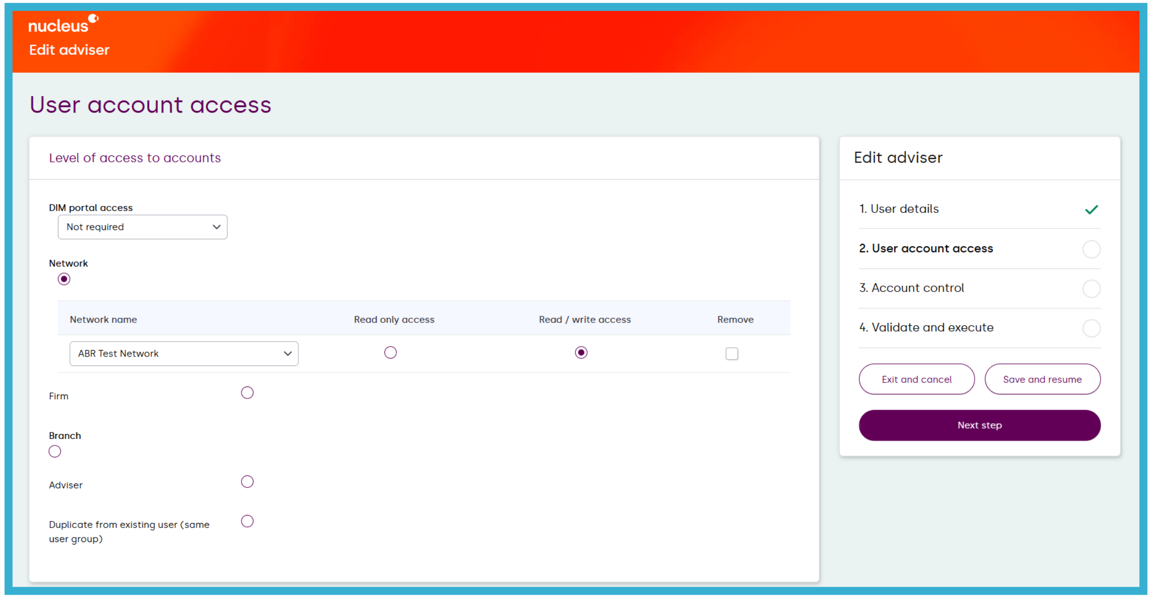
> ! The access level selected will determine which clients the adviser user is able to view.



Network level access

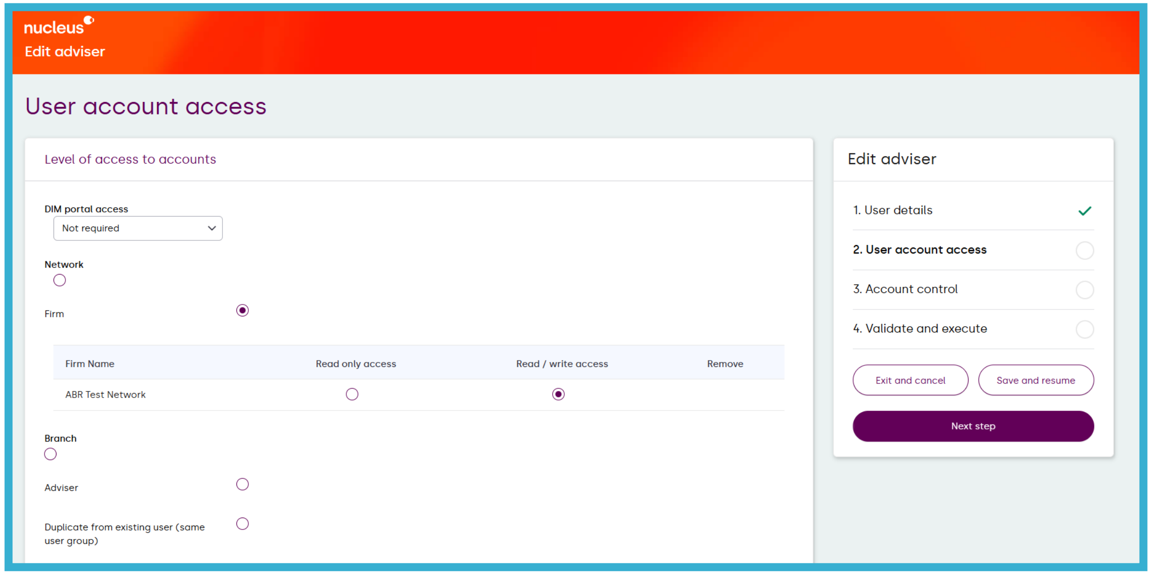
Confirm the adviser user's access level.

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



Firm level access

Confirm the adviser user's access level.

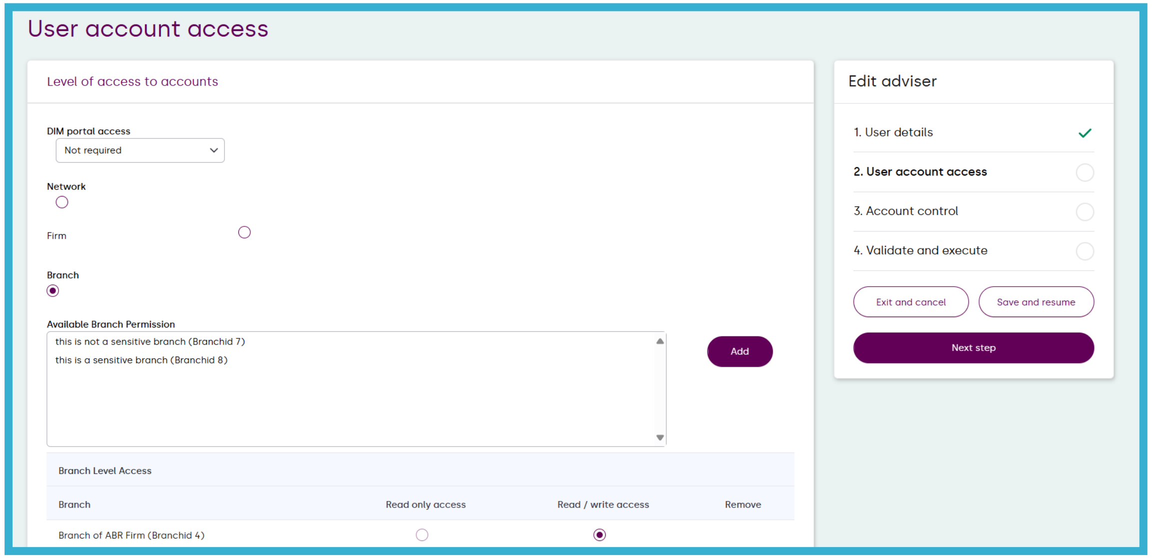


! An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

Branch level access

Confirm the adviser user's access level.

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



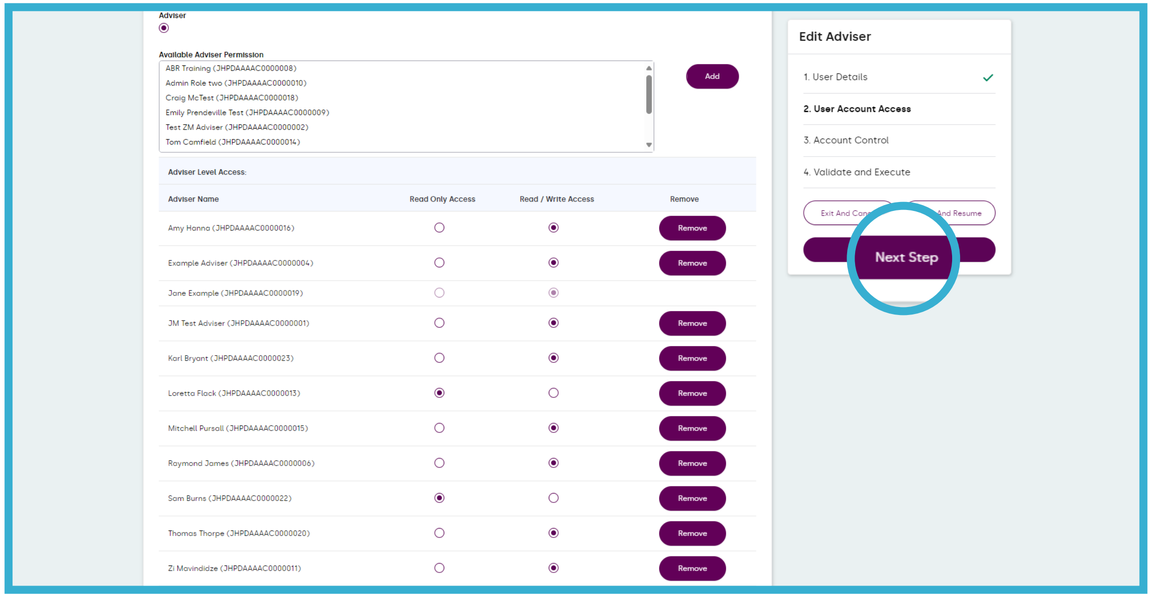
! An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

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.

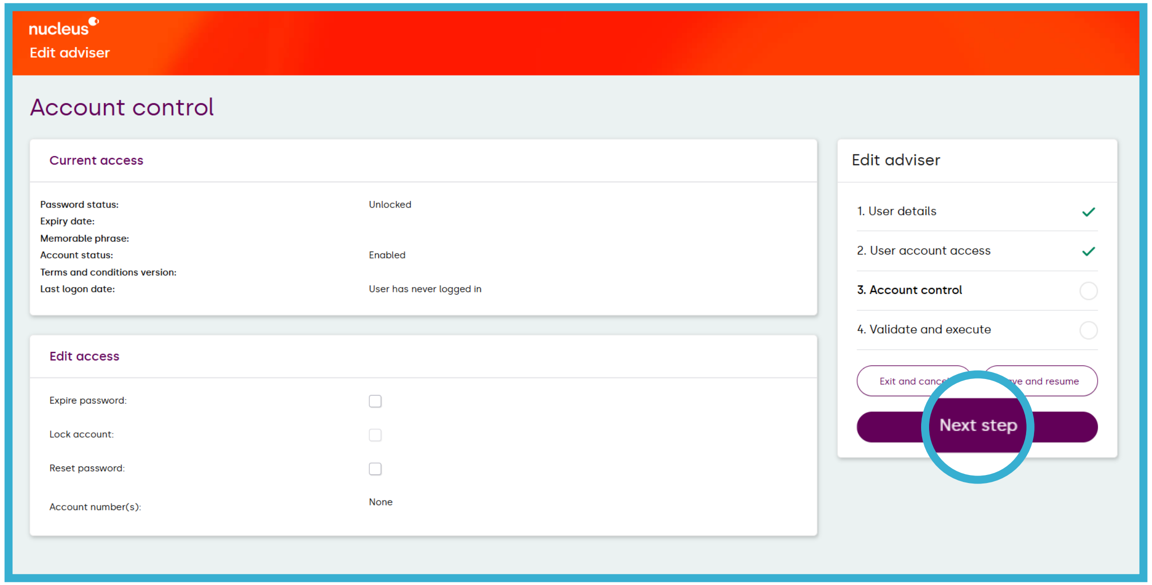
Once you're happy with your user details, select '**Next Step**' to move on to the review and submit page.



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

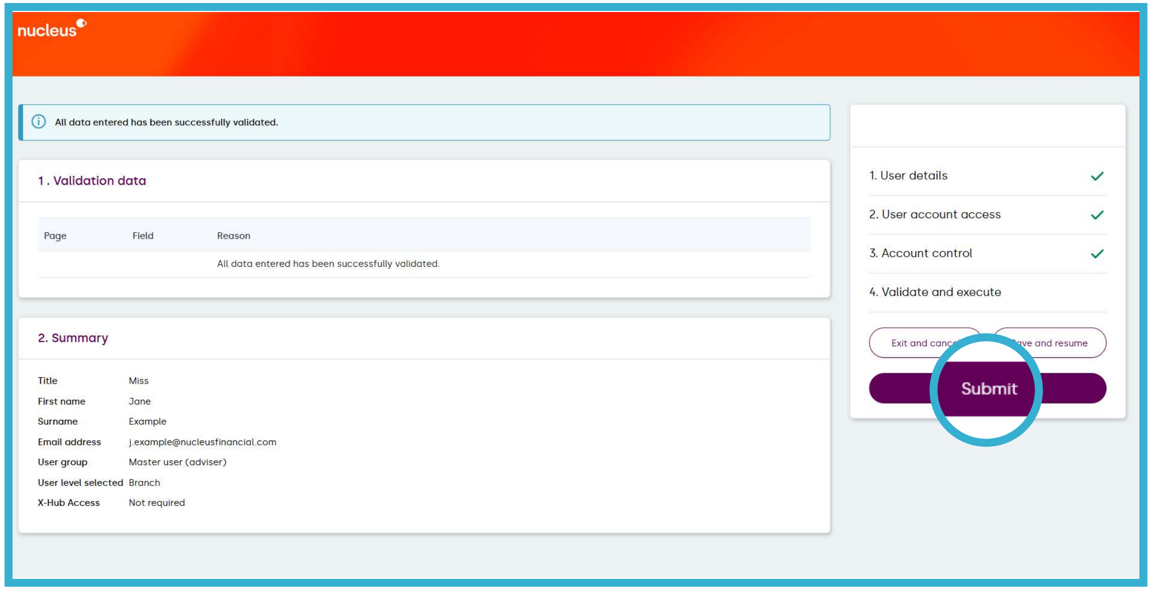
Will send the user an email that contains a link to reset their password.

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

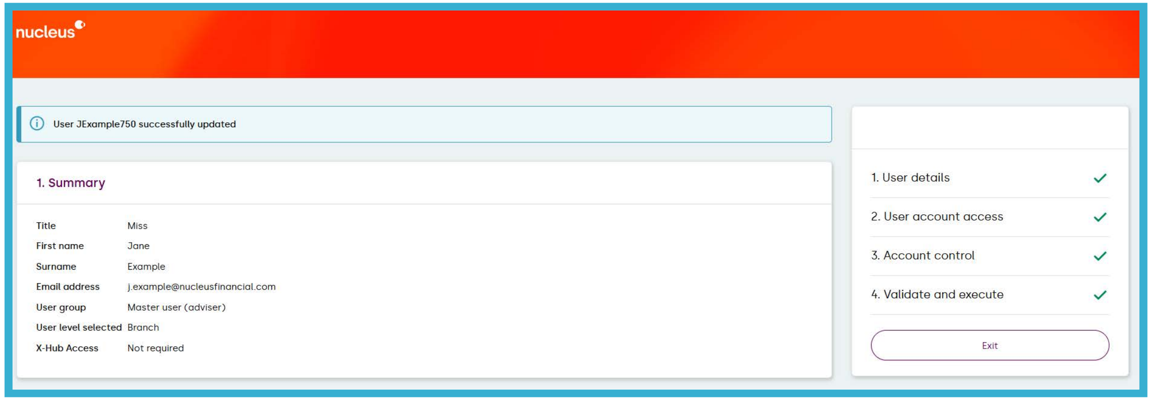
Validate and execute

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.



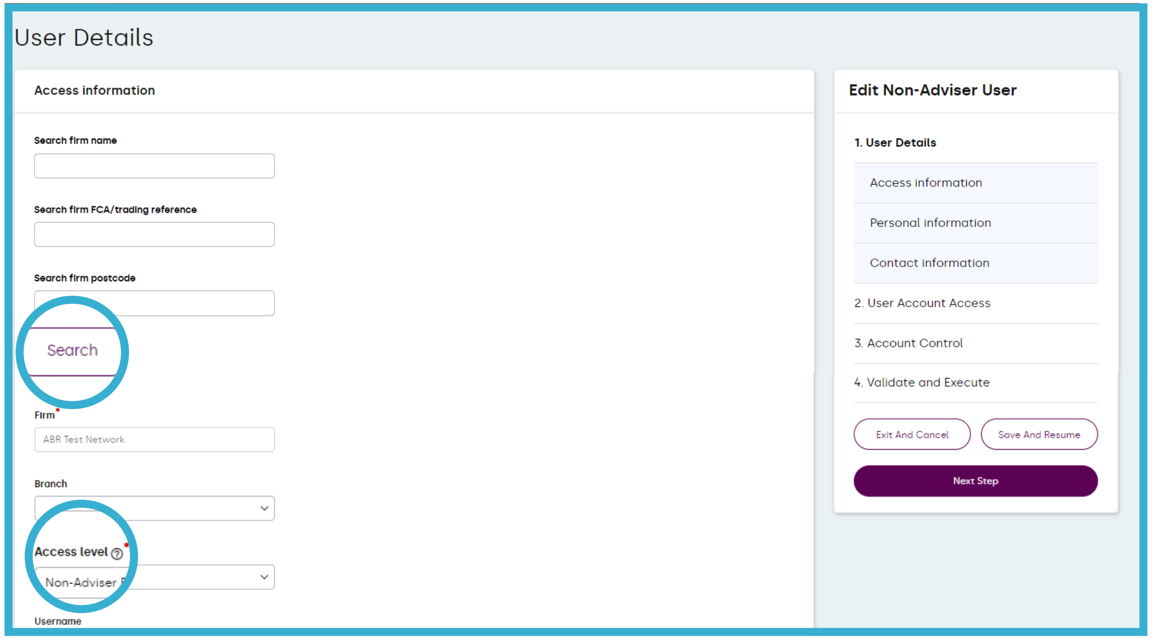
How to edit a non-adviser user

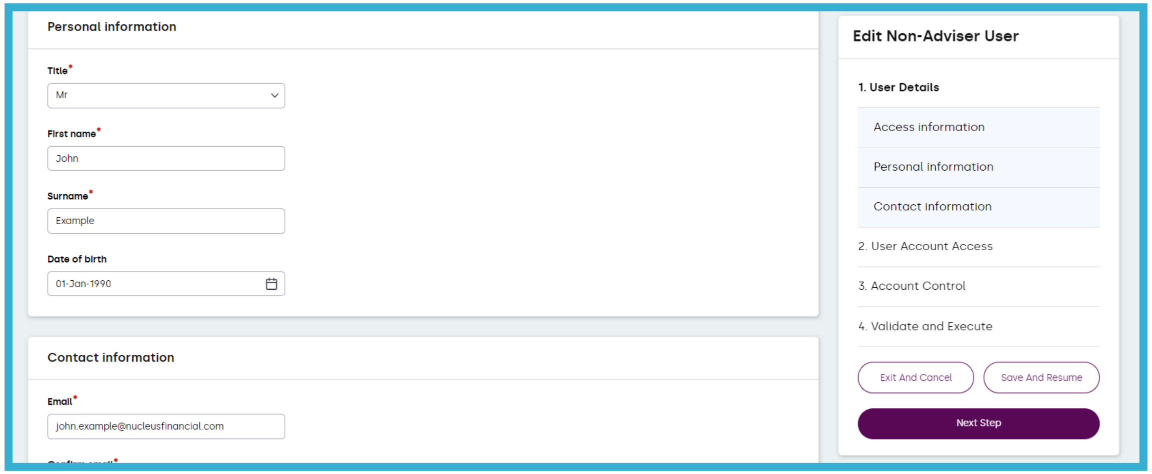
User details

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.

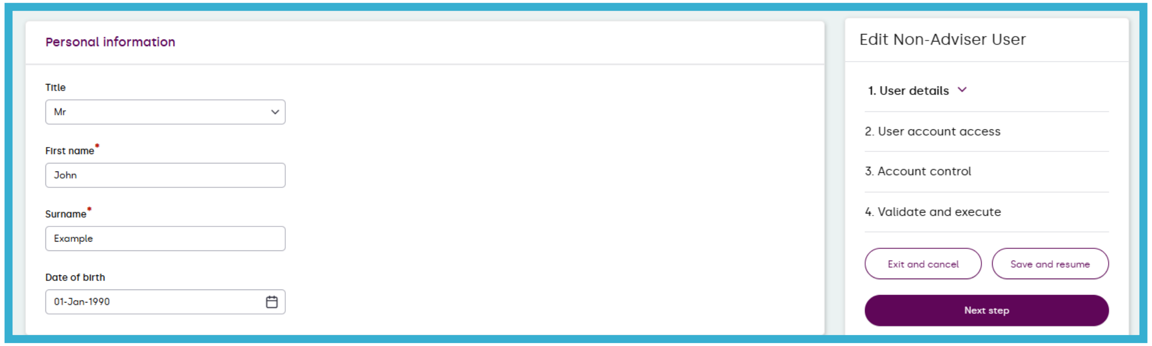


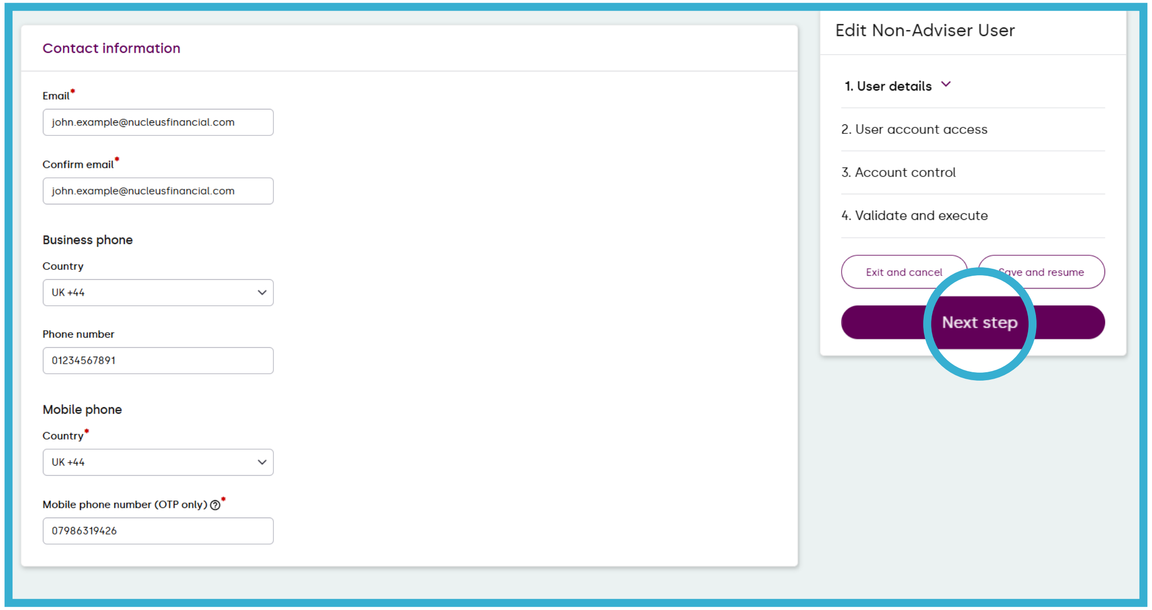


Select the user access details that require editing.

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

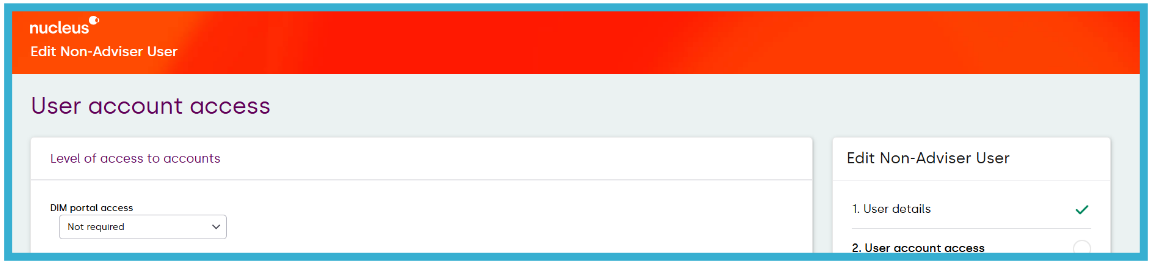
Once the necessary amendments have been made select '**Next step**'.





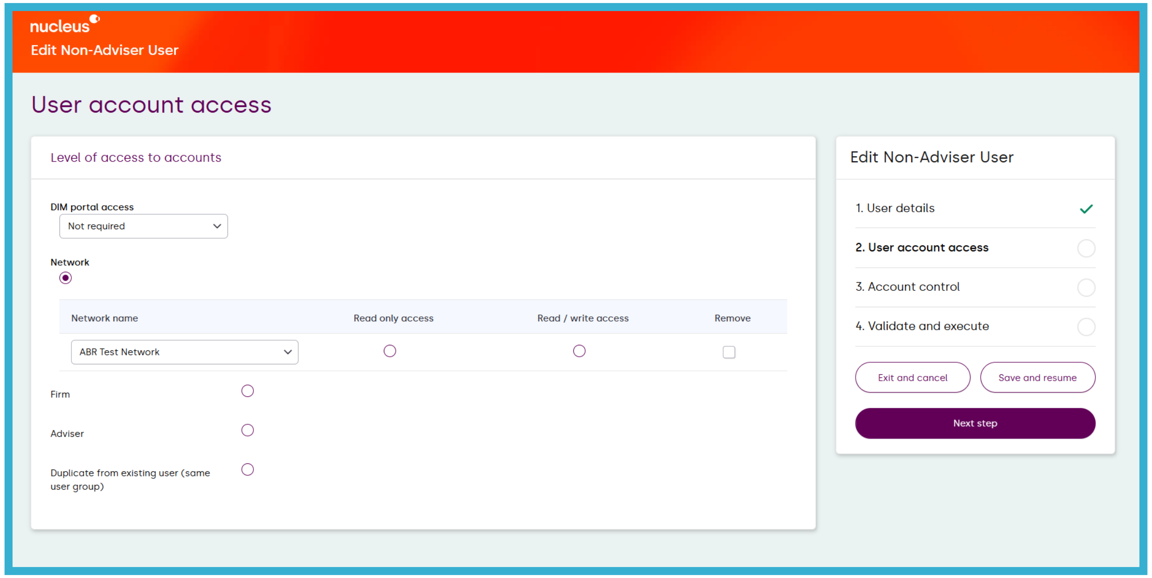
User account access

Confirm if DIM Portal access is required for the user.



Network level access

Confirm the non-adviser user's access level.

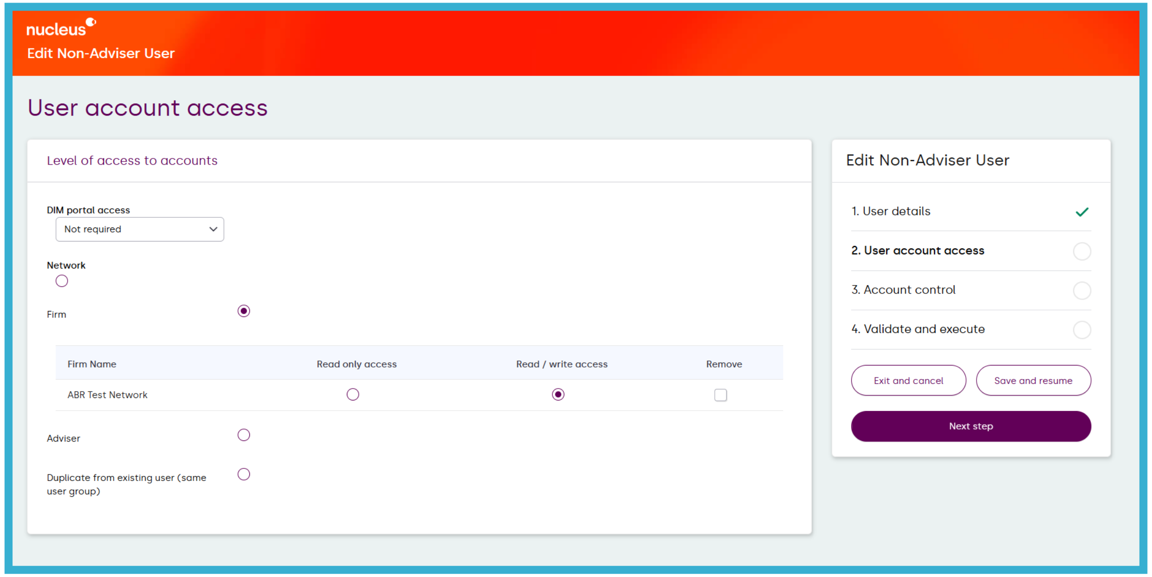


A non-adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

Firm and branch level access

Confirm the non-adviser user's access level.

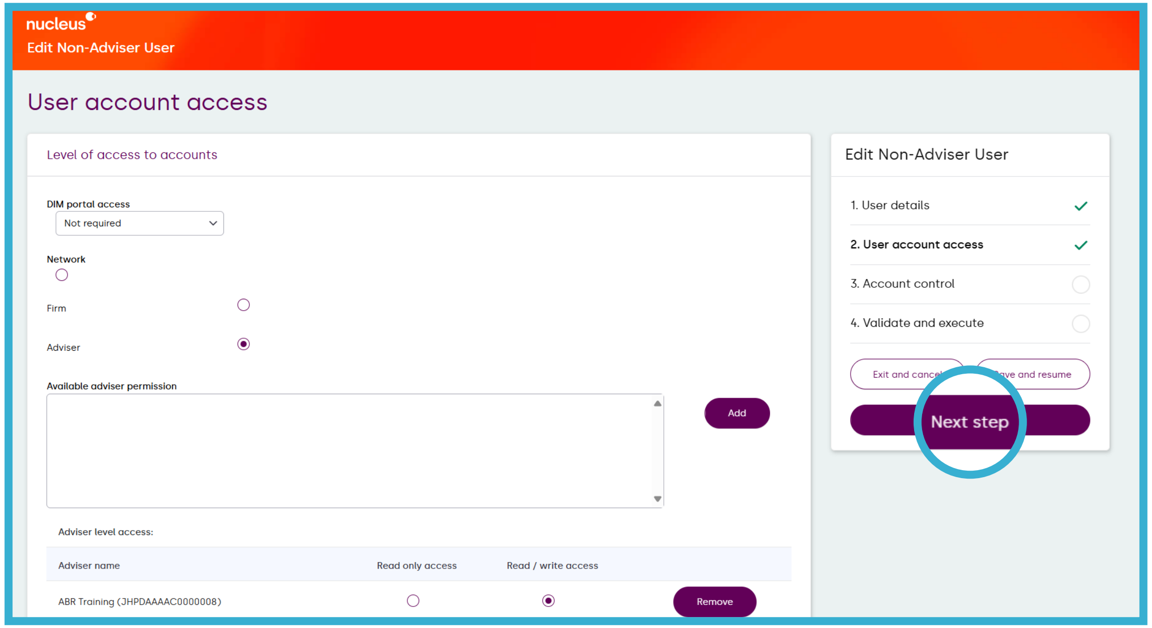
A non-adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.



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.

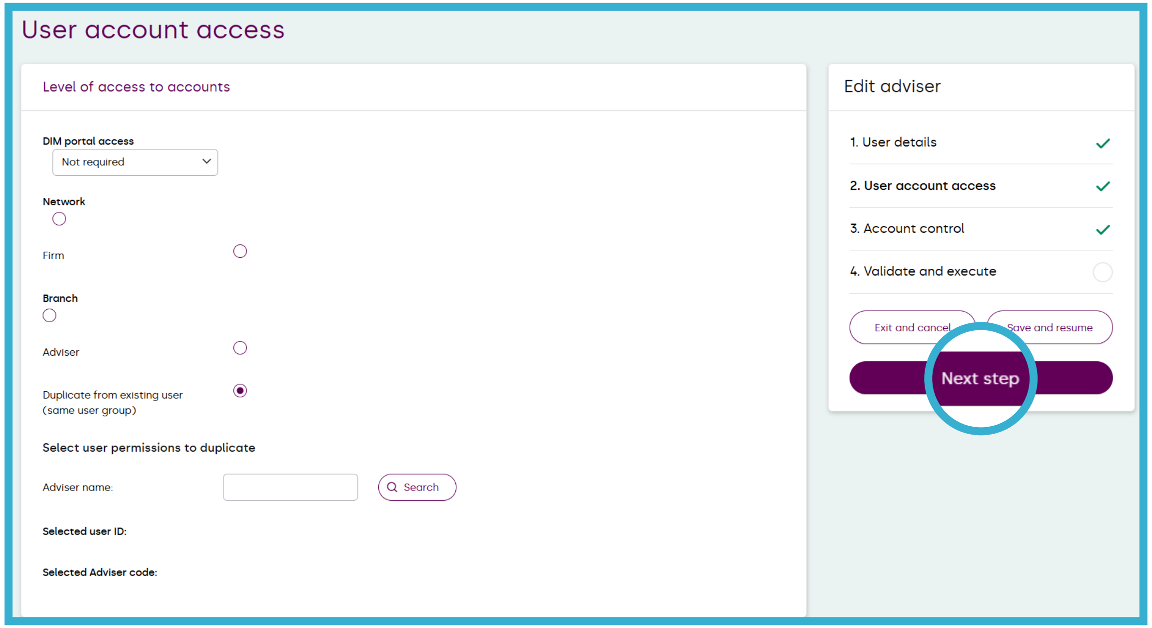


Once you're happy with your user details, select '**Next Step**'.

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**'.



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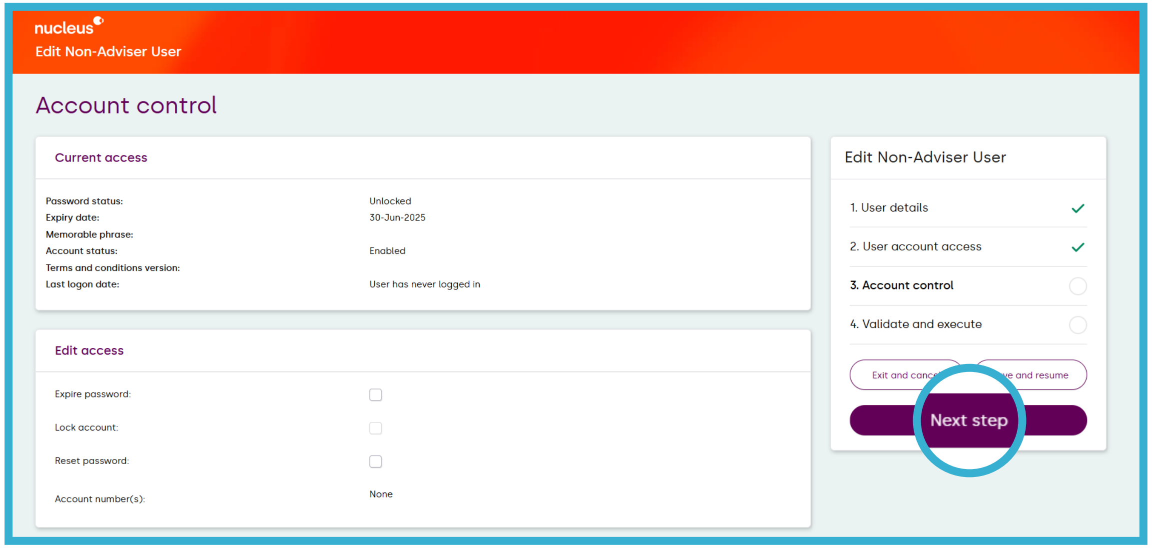
Select the access you wish to edit.



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

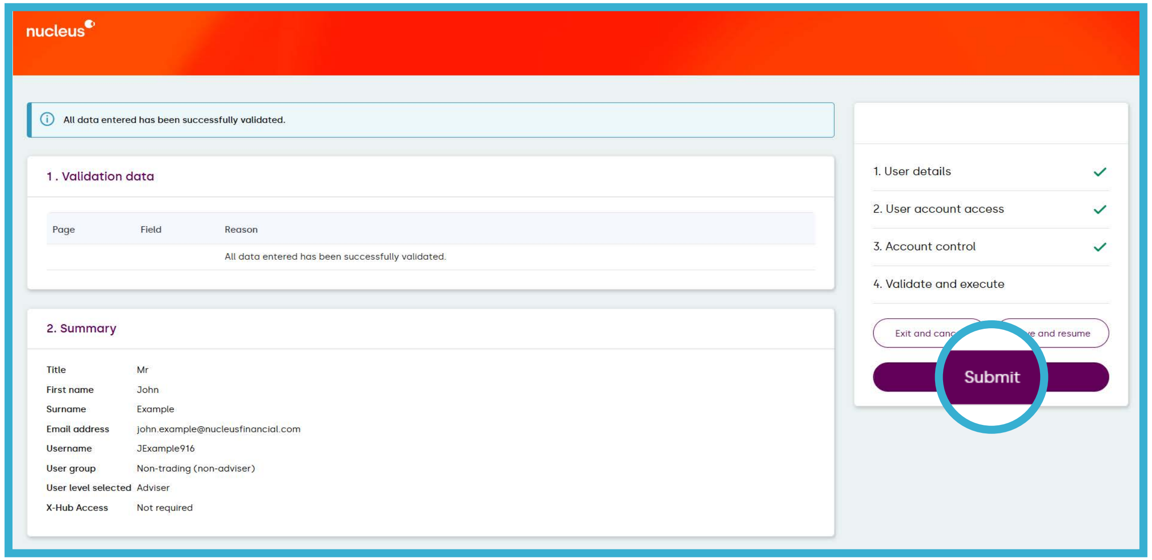
Will send the user an email that contains a link to reset their password.

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**'.



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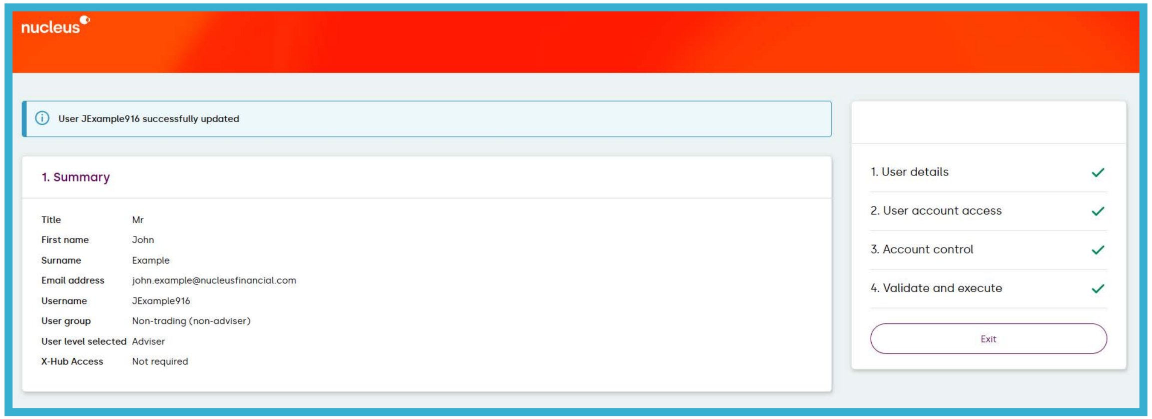


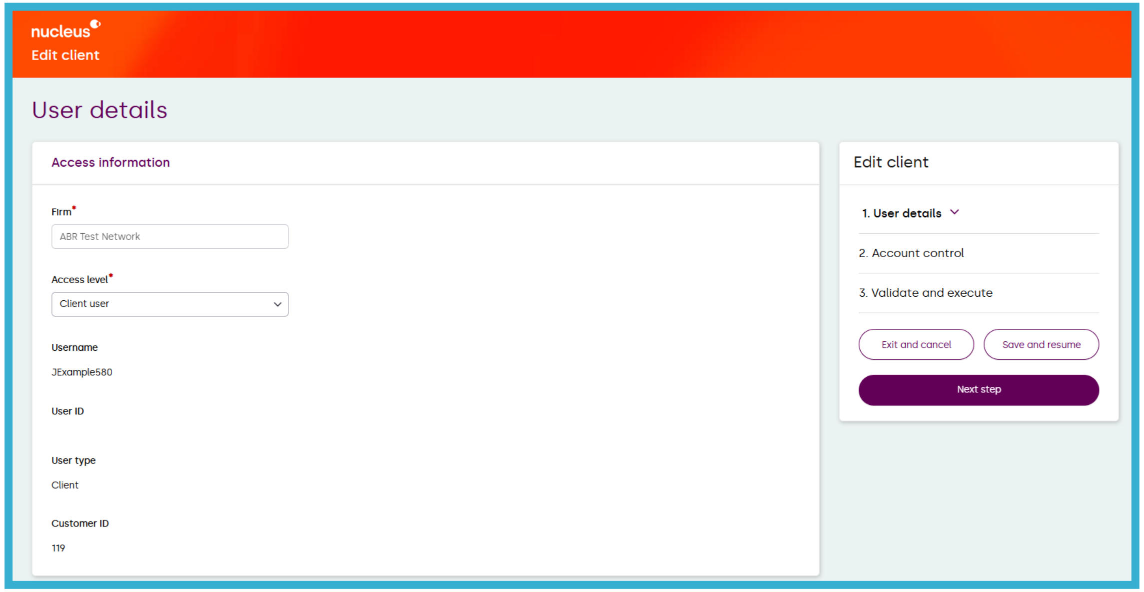
How to edit a client user

User details

Key information

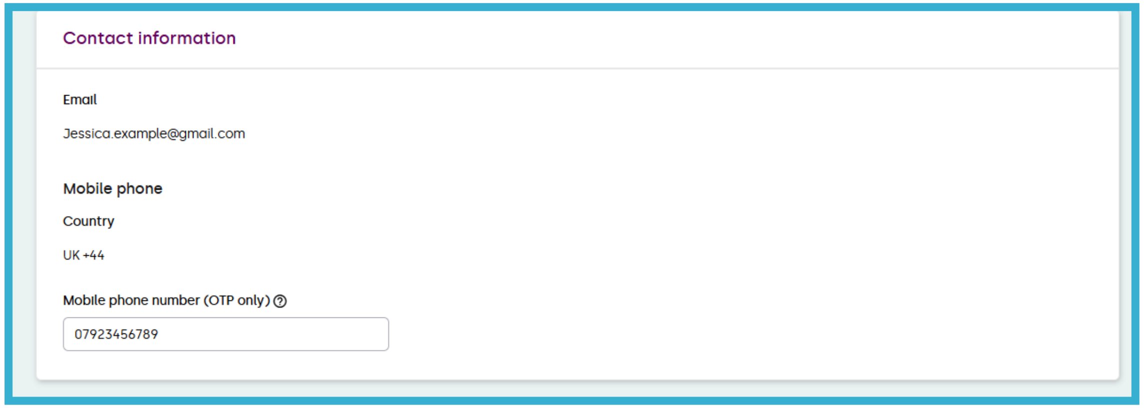
The firm and access level for a client user can't be amended.

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**'.



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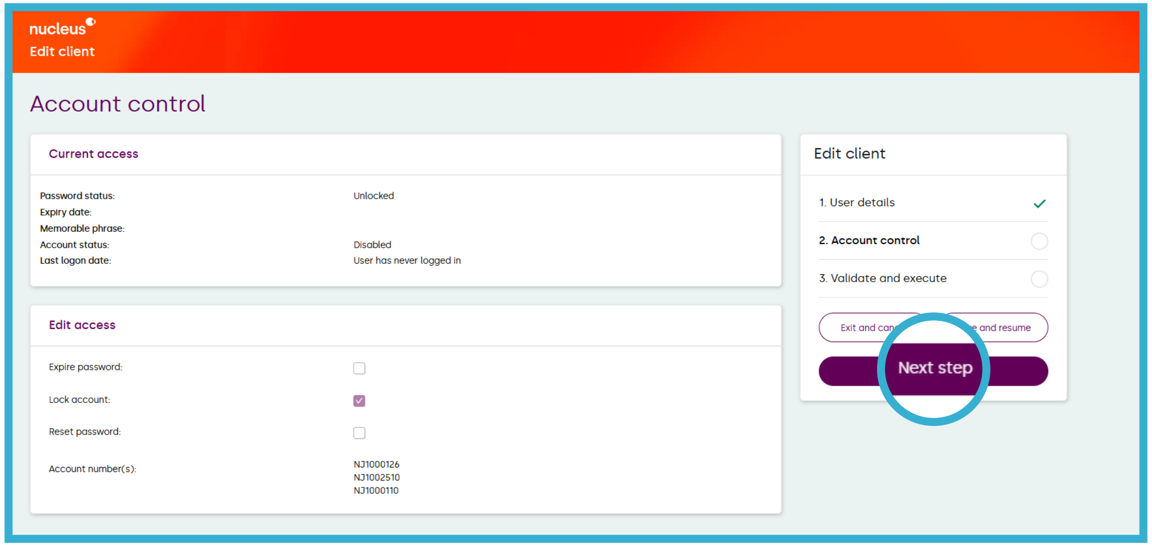

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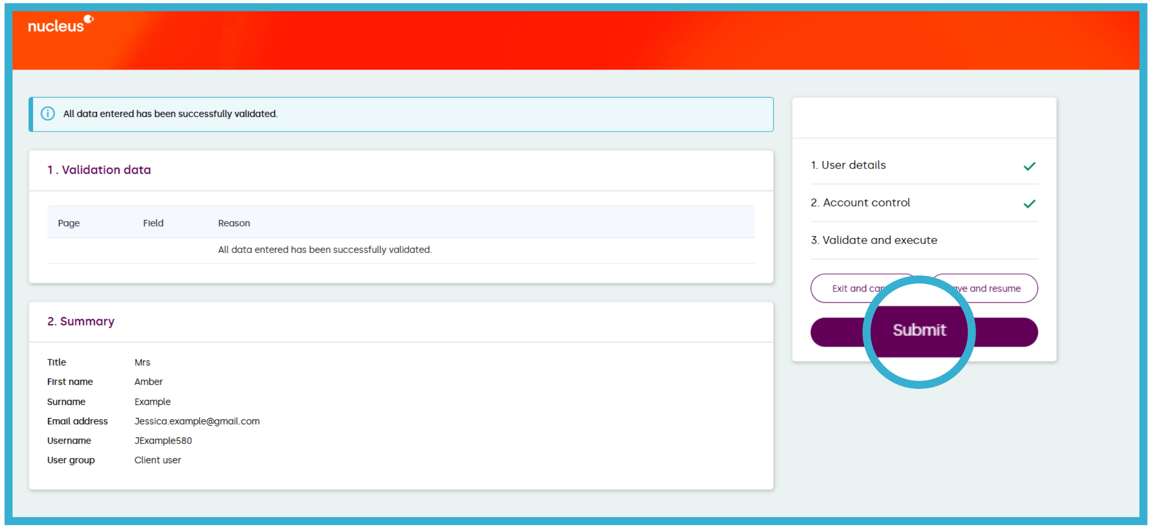

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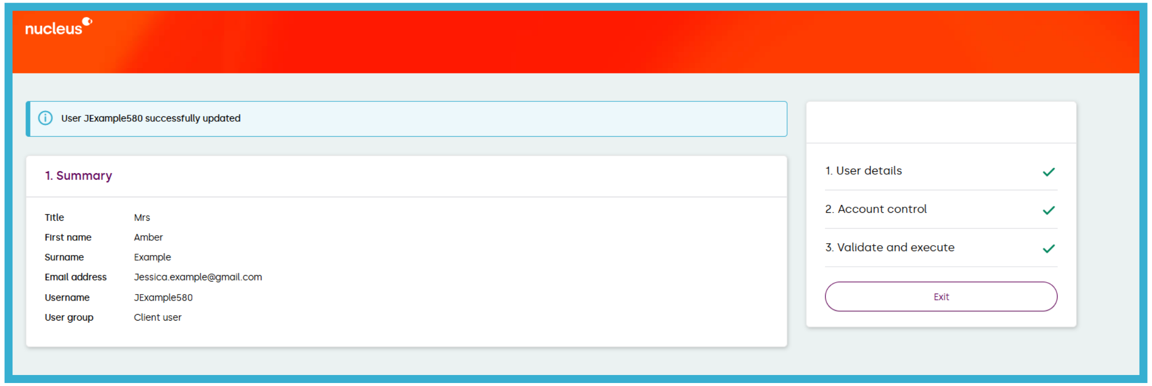

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