For advisers

Our new platform

nucleus platform



How to amend a client's address, contact details and contact preferences

2 minute read

How to amend a client's address, contact details and contact preferences

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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.

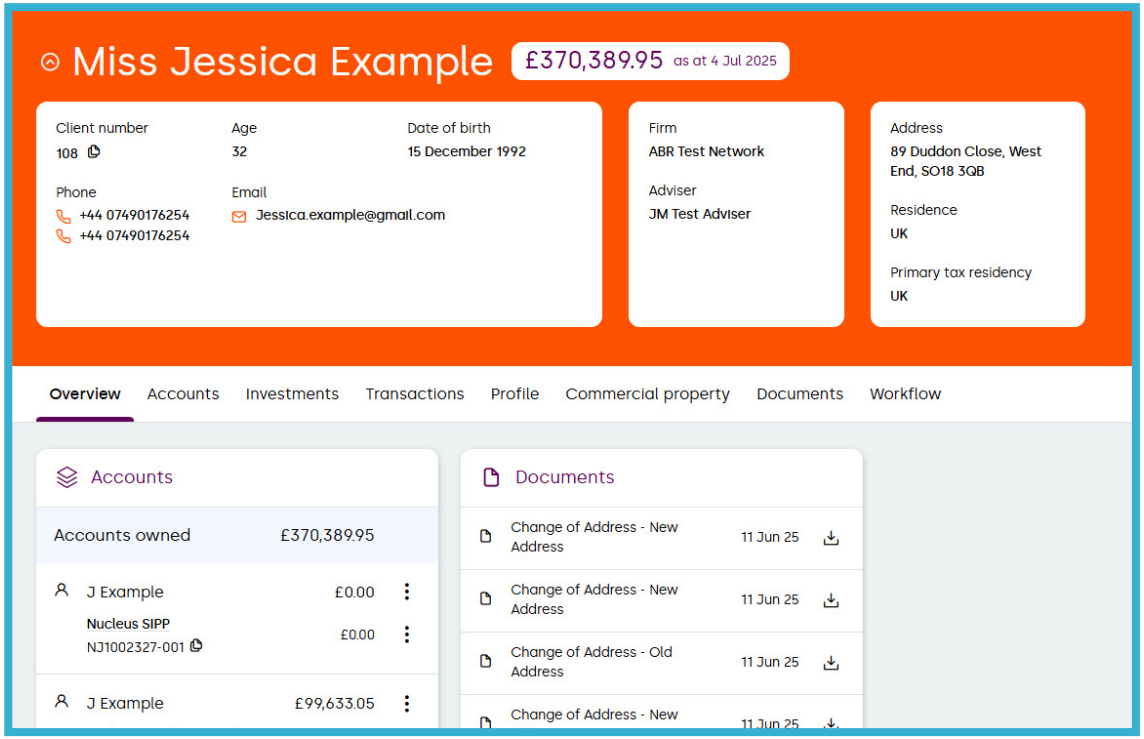
This guide contains instructions for amending your client's:

- Address
- Contact details
- Contact preferences

Key message

If you require changes to any other client details, please refer to the guides on our website. Alternatively, you can get in contact with us.

To change your client's address and contact details, you first need to find your client. You can refer to the guide to search for your client on our website.

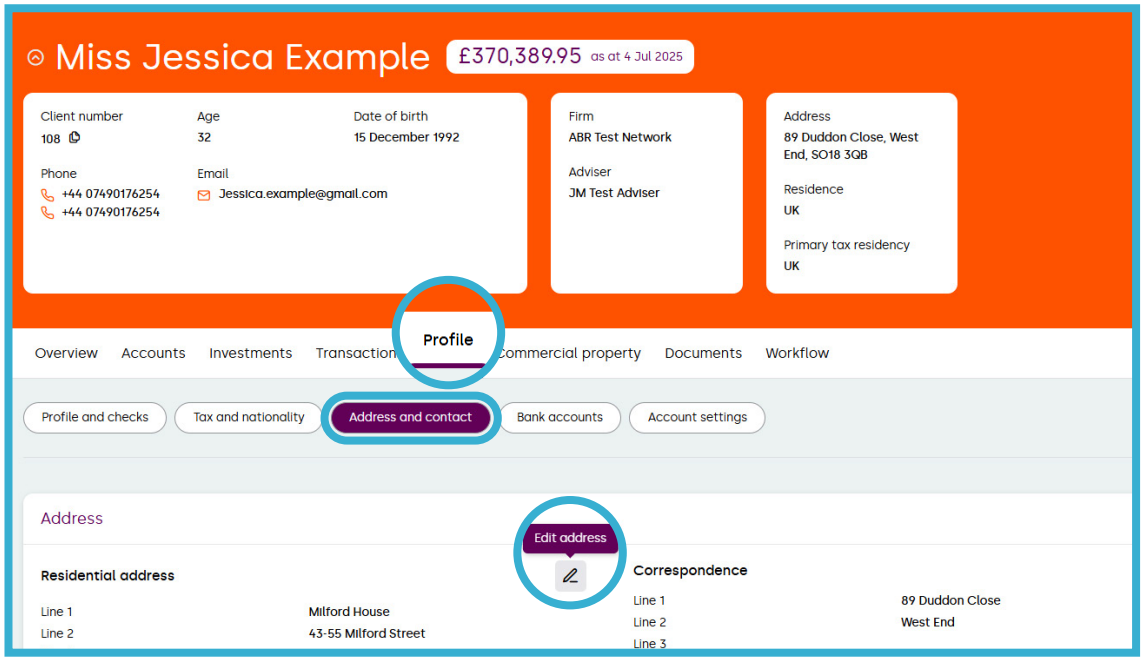


Change of address

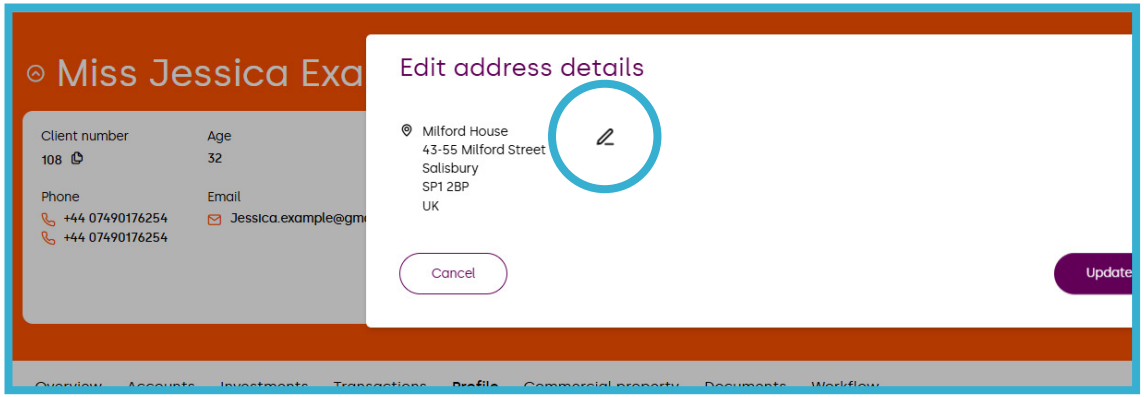
From the client's home page, select the **'Profile'** tab.

Select **'Address and contact'**.

Select the **'pencil'** icon to edit the address.



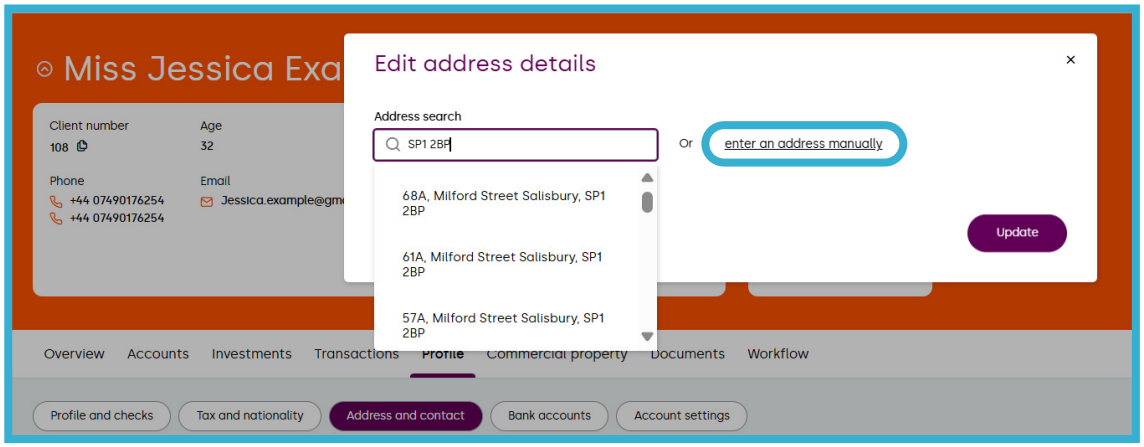
Select the **'pencil'** icon next to the address to edit the details.



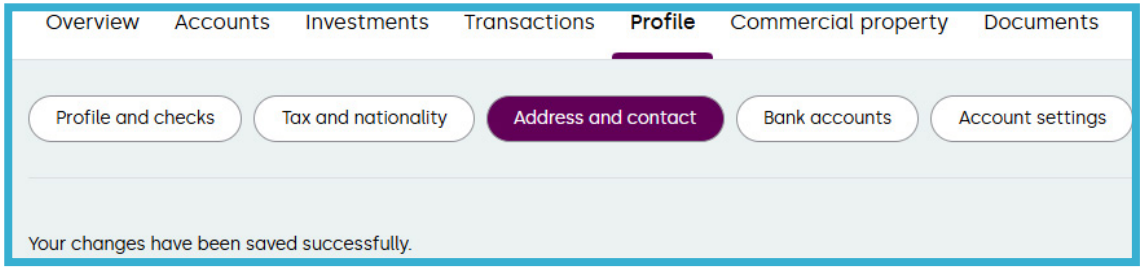
Enter your client's address or postcode into the search bar. If the address can't be found, select **'enter an address manually'.**

Review the address details for accuracy. Use the pencil icon to make any necessary changes.

Once you're happy with the accuracy of the address details, select **'Update'** to save your amendments.



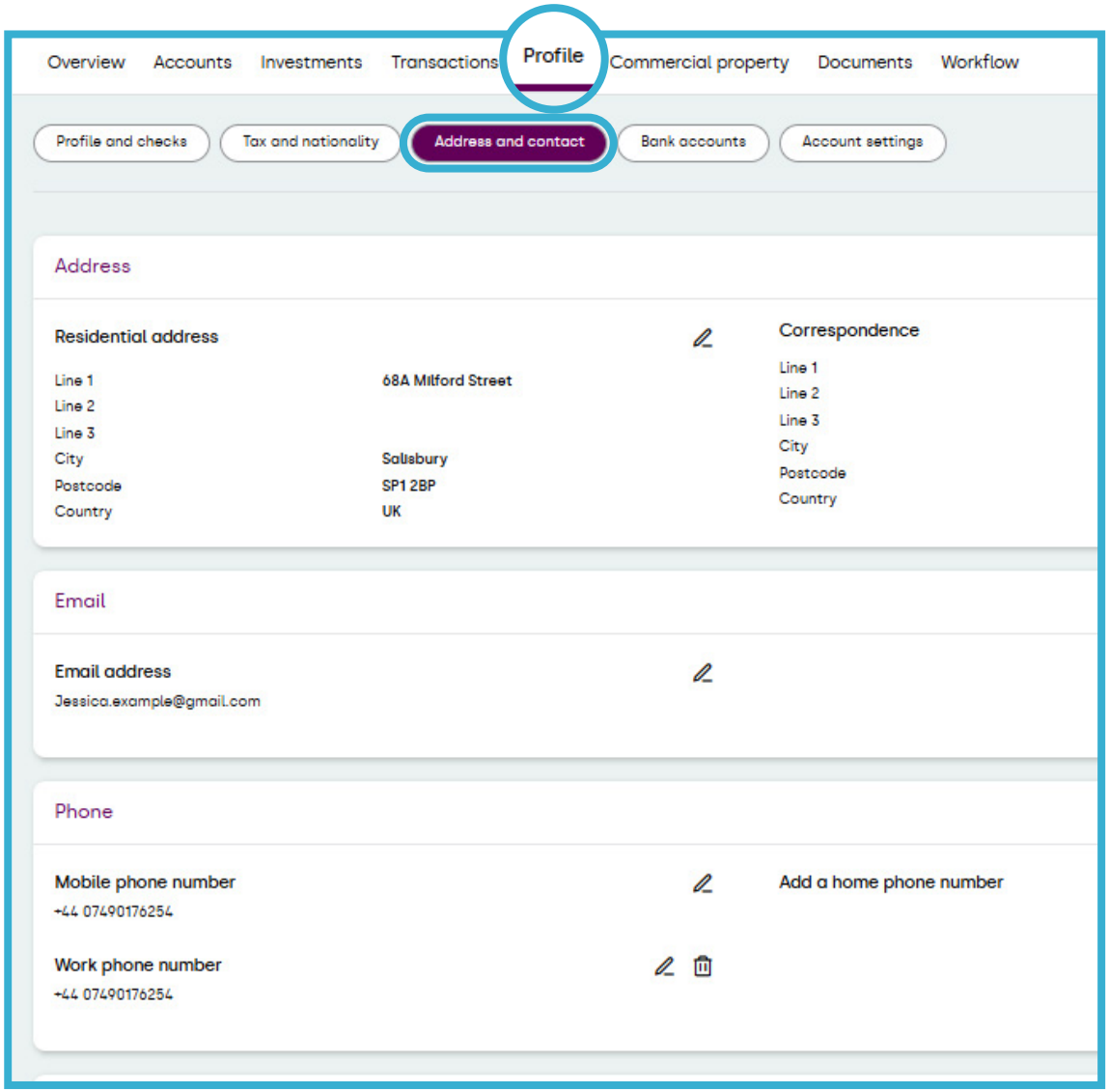
A notification confirms your client's address has been successfully updated.



Change of contact details

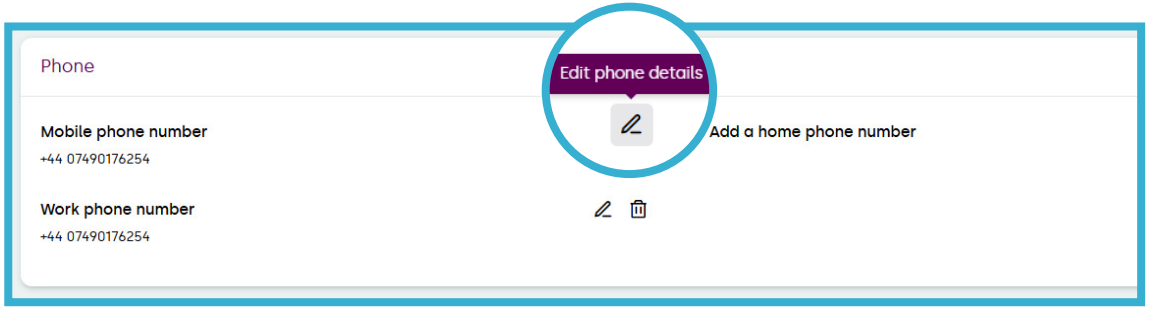
From the client's landing page, select the **'Profile'** tab.

Select **'Address and contact'**.



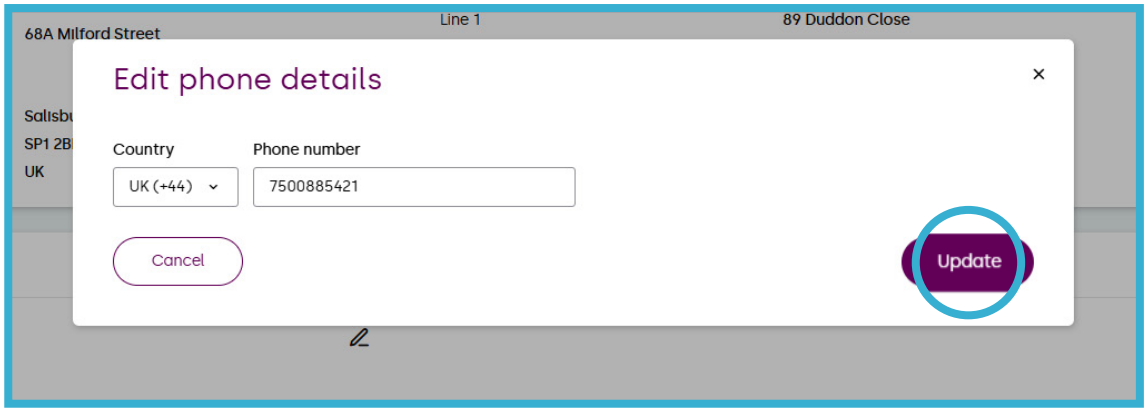
Edit phone number

Select the pencil icon next to the phone number that needs updating.

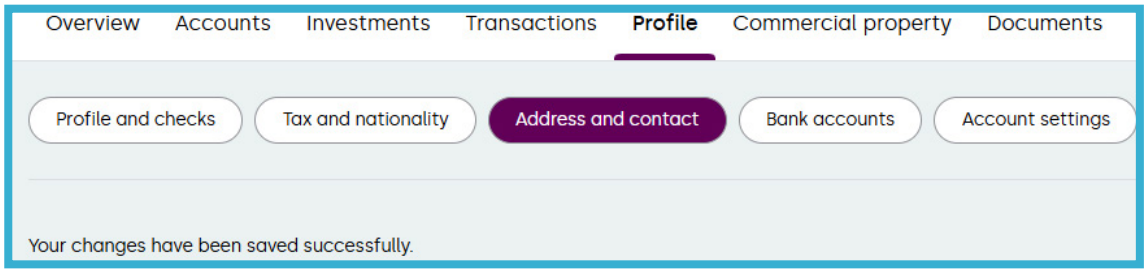


Select the country code. The UK country code will be automatically selected.

Enter your client's phone number and then select **'Update'**.

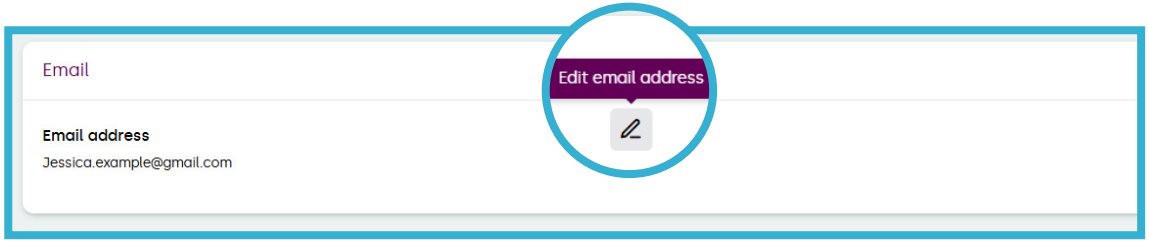


A notification confirms your client's phone number has been successfully updated.

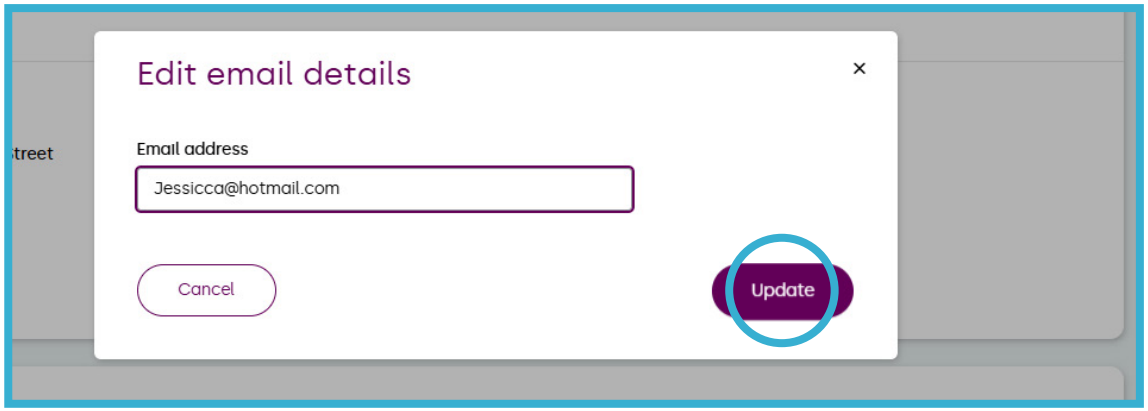


Edit email address

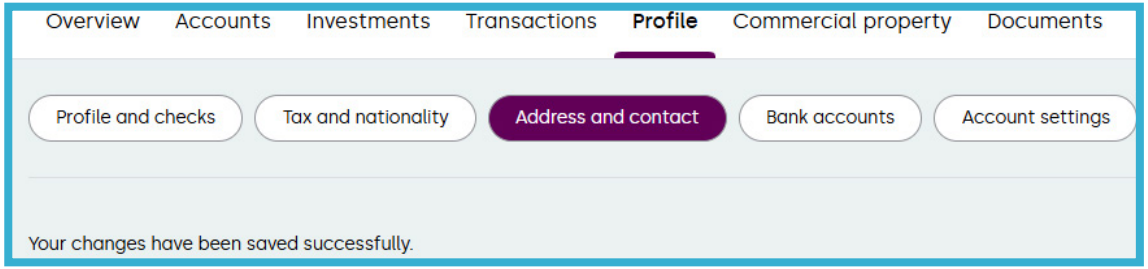
Select the **'pencil'** icon next to the email address that needs updating.



Enter your client's new email address and then select **'Update'**.



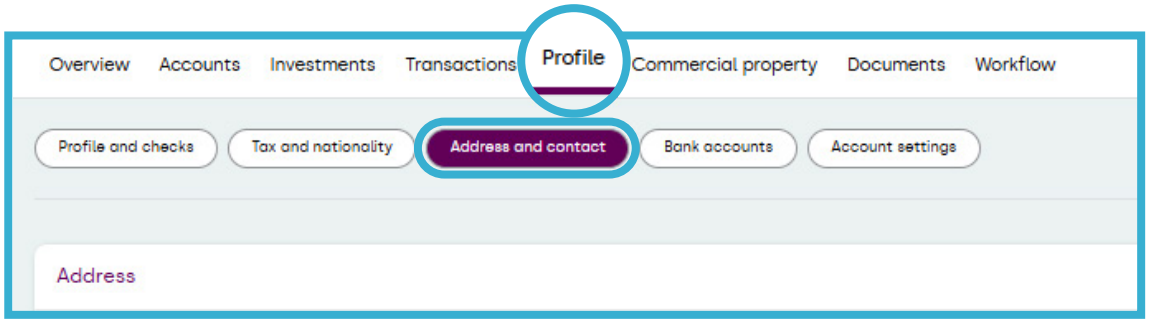
A notification confirms your client's email address has been successfully updated.



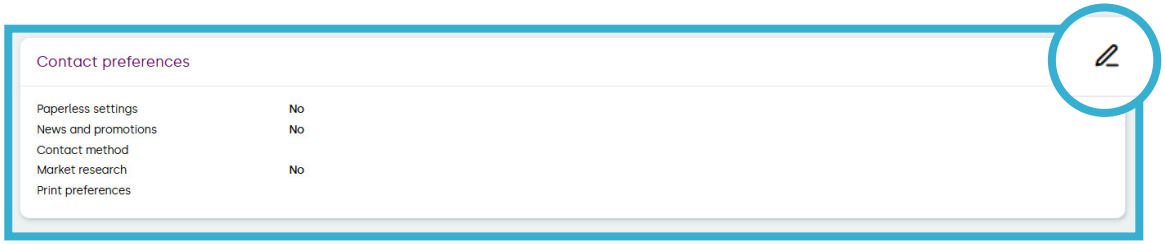
Contact Preferences

From the client landing page, select the **'Profile'** tab.

Select **'Address and contact'**.



Select the '**pencil'** icon next to contact preferences to edit the details.



Key message

The client will require existing customer portal access to set preferences.

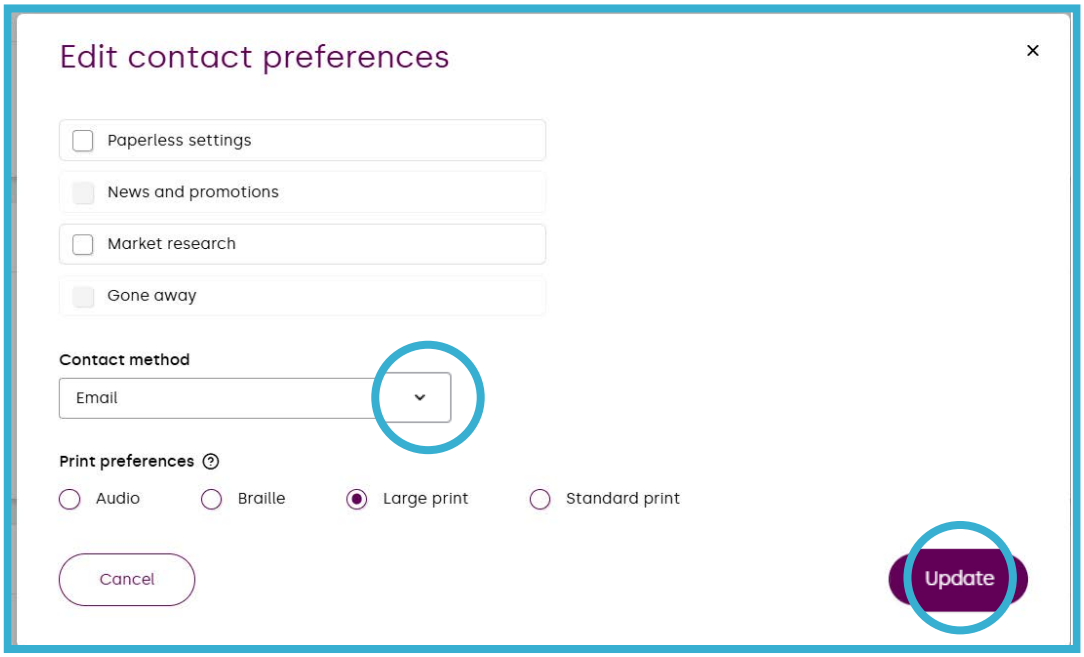
The **News and promotions** preference can't be amended.

Select the type of contact.

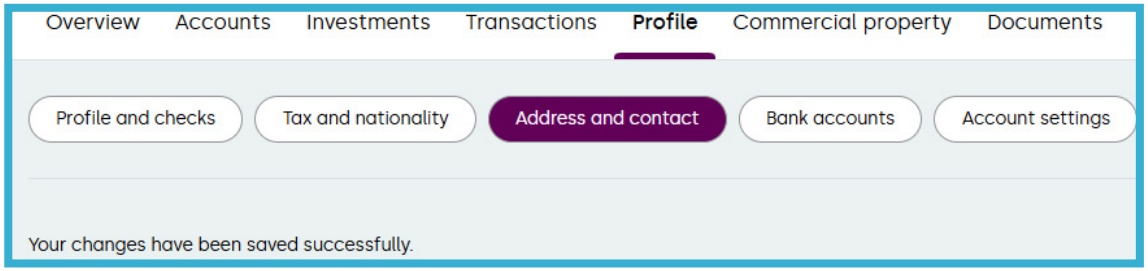
Confirm the contact method from the drop-down list.

Confirm print preferences.

Select **'Update'.**



A notification confirms your client's contact preferences have been successfully updated.



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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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