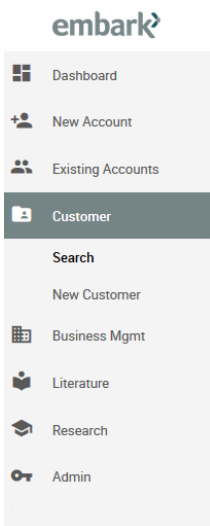


How to Guide: Adding/Amending Address Details

1. Log on using your credentials ensuring you are logged on as a user who has "Read/Write" permissions.
2. You need to search for the client, this is done on the left-hand menu under customer and search.



3. Add the search criteria, this can be account number, surname, or date of birth etc. and select "Search".

Customers

Search by customer type

Customer Type:

Advanced search criteria

Customer ID: External Customer ID:

Customer Status: First Name:

Surname: Date Of Birth:

National Insurance Number: Account Number:

Account Role:

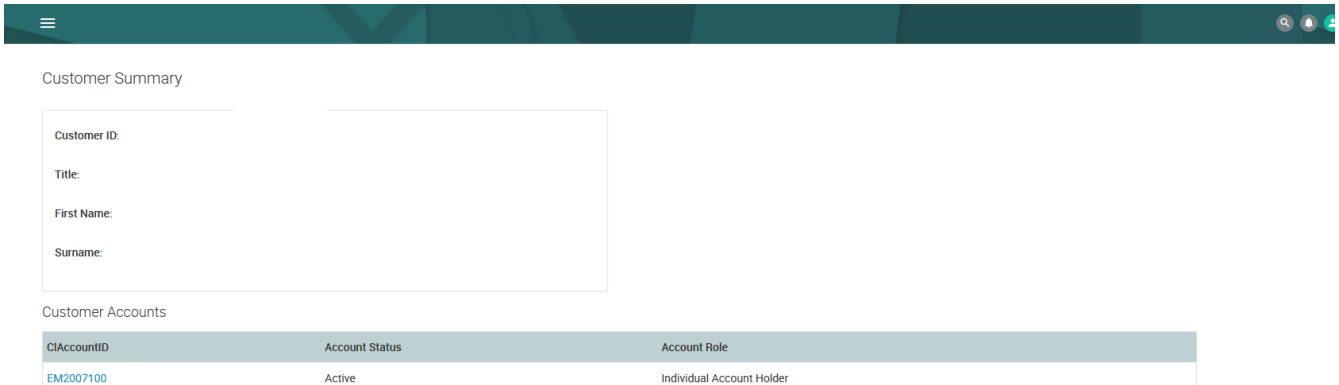
Customer ID	Customer Status	External Customer ID	Customer Name
5763	Active		Meyrick Alexander

4. This returns a list of clients matching the criteria, select the customer ID in blue.

Customer ID	Customer Status	External Customer ID	Customer Name
	Active		

How to Guide: Adding/Amending Address Details

5. This gives you the customer summary page.



Customer Summary

Customer ID:
Title:
First Name:
Surname:

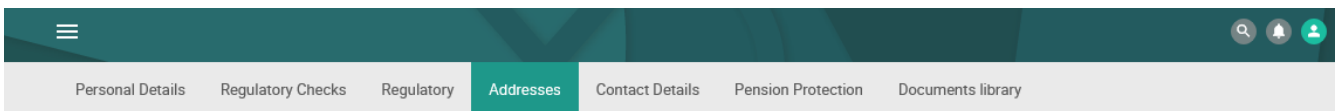
Customer Accounts

CIAccountID	Account Status	Account Role
EM2007100	Active	Individual Account Holder

6. Now select the customer ID in blue.

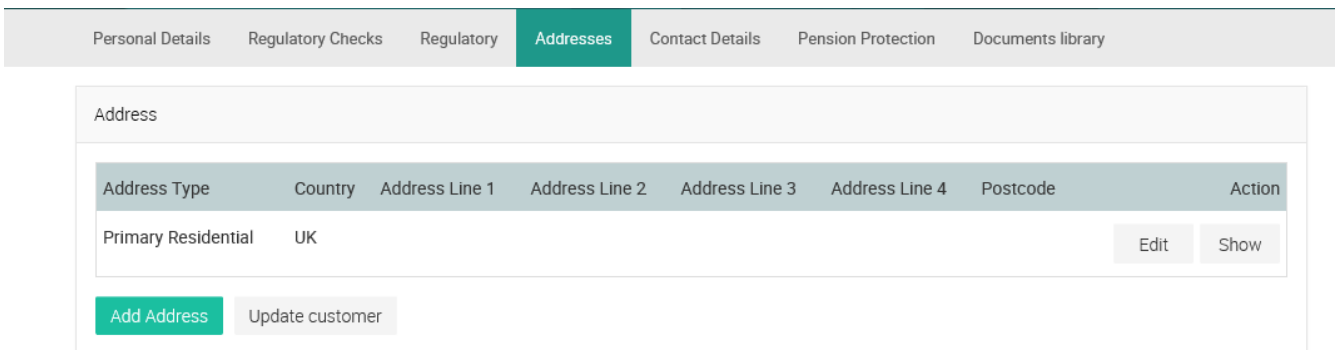
Customer ID:

7. You are now in the customer personal screen, now click on the “Addresses” tab at the top of the screen.



Personal Details Regulatory Checks Regulatory **Addresses** Contact Details Pension Protection Documents library

8. To amend select “Edit” and select “Add Address”.



Address

Address Type	Country	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Postcode	Action
Primary Residential	UK						Edit Show

Add Address Update customer

9. Enter the new Postcode and select “Find”.

Address Line 3
Address Line 4
Postcode NP8 Find

How to Guide: Adding/Amending Address Details

10. Select the correct address from the drop-down list.

11. The address can be overtyped or edited as required. If the postcode cannot be found the address can be manually completed.

12. Save the updated address.

13. Now select "Update Customer"

14. The platform will display a message confirming the 'Customer was successfully updated and/are additions are saved'.



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