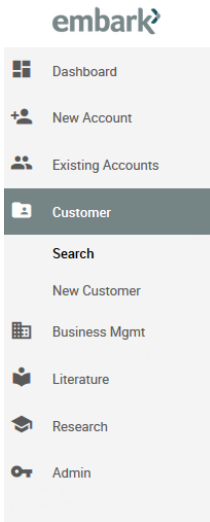


Step by step guide: Adding and amending address details

1. Log on using your credentials ensuring you are logged on as a user who has "Read/Write" permissions. If you do not have the correct permissions, please contact your Embark platform Super User.
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		



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Step by step guide: Adding and amending address details

5. This gives you the customer summary page.

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.

8. To amend select "Edit" and select "Add 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 Find

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

Postcode Find
Select
Clear Save address

Step by step guide: Adding and amending address details

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.

The screenshot shows the 'Existing Accounts' interface. On the left is a navigation menu with options: Existing Accounts, Customer, Search, New Customer, Business Mgmt, Literature, Research, and Admin. The main area displays a table of address details for a customer. The table has columns: Address Type, Country, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Postcode, and Action. A single row is visible with 'Primary Residential' and 'UK'. Below the table are buttons for 'Add Address' and 'Update customer'. Below these are input fields for 'Address Type' (set to 'Primary Residential'), 'Country' (set to 'UK'), and four 'Address Line' fields. A 'Postcode' field and a 'Find' button are also present. At the bottom are 'Clear' and 'Save address' buttons.

13. Now select "Update Customer"

The screenshot shows the 'Addresses' section of a customer profile. The top navigation bar includes: Personal Details, Regulatory Checks, Regulatory, Addresses (highlighted), Contact Details, Pension Protection, and Documents library. Below this is a table with the same columns as in the previous screenshot, showing 'Primary Residential' and 'UK'. Below the table are buttons for 'Add Address' and 'Update customer'.

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