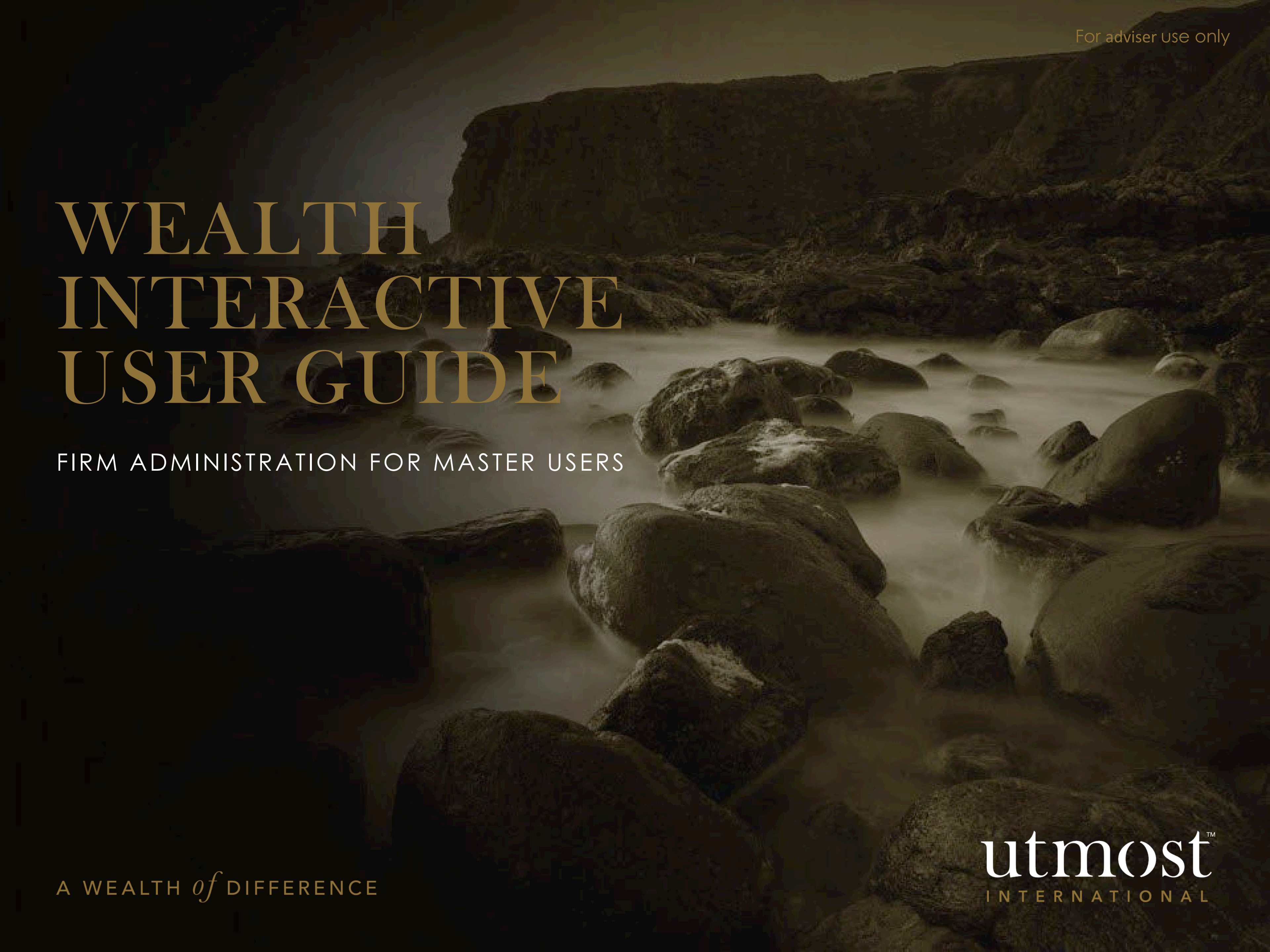

For adviser use only

WEALTH INTERACTIVE USER GUIDE

FIRM ADMINISTRATION FOR MASTER USERS

A WEALTH *of* DIFFERENCE

utmost™
INTERNATIONAL

CONTENTS

This guide covers:

utmost™ WEALTH SOLUTIONS

1

MANAGE INDIVIDUAL USERS

CREATING NEW USER(S)

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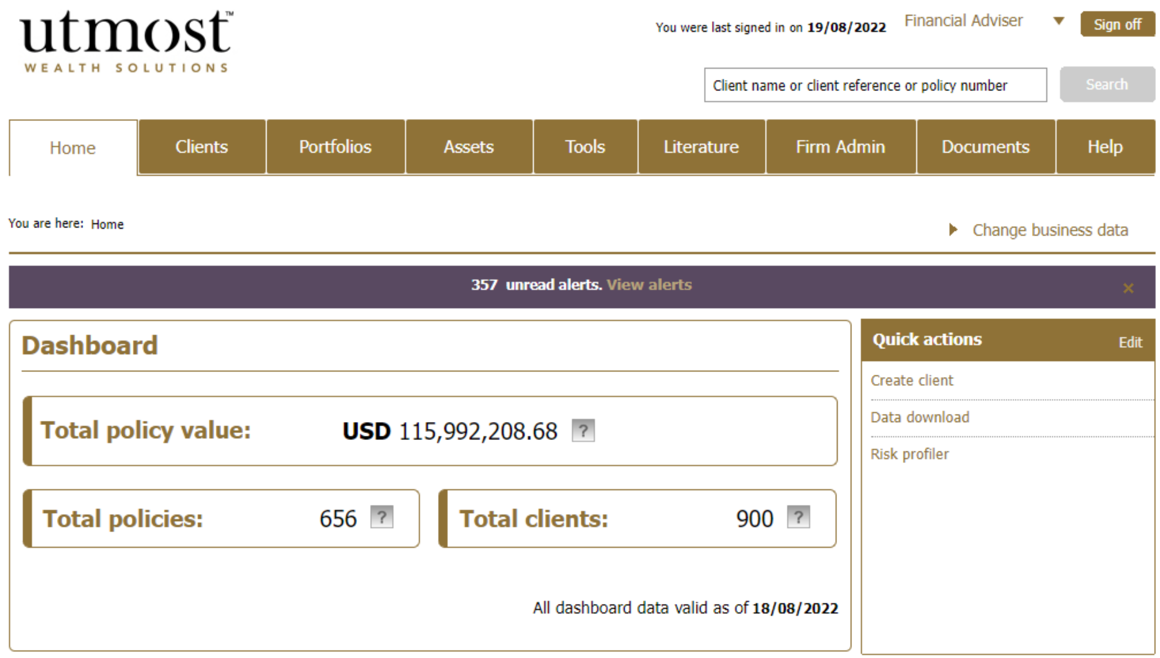
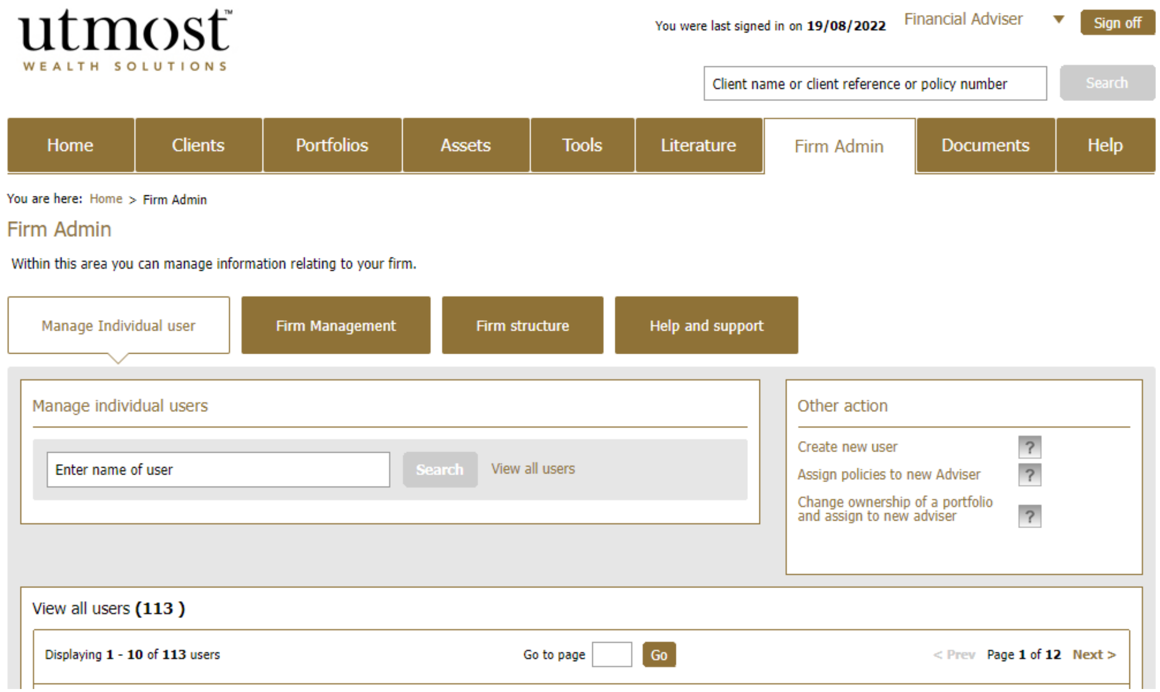
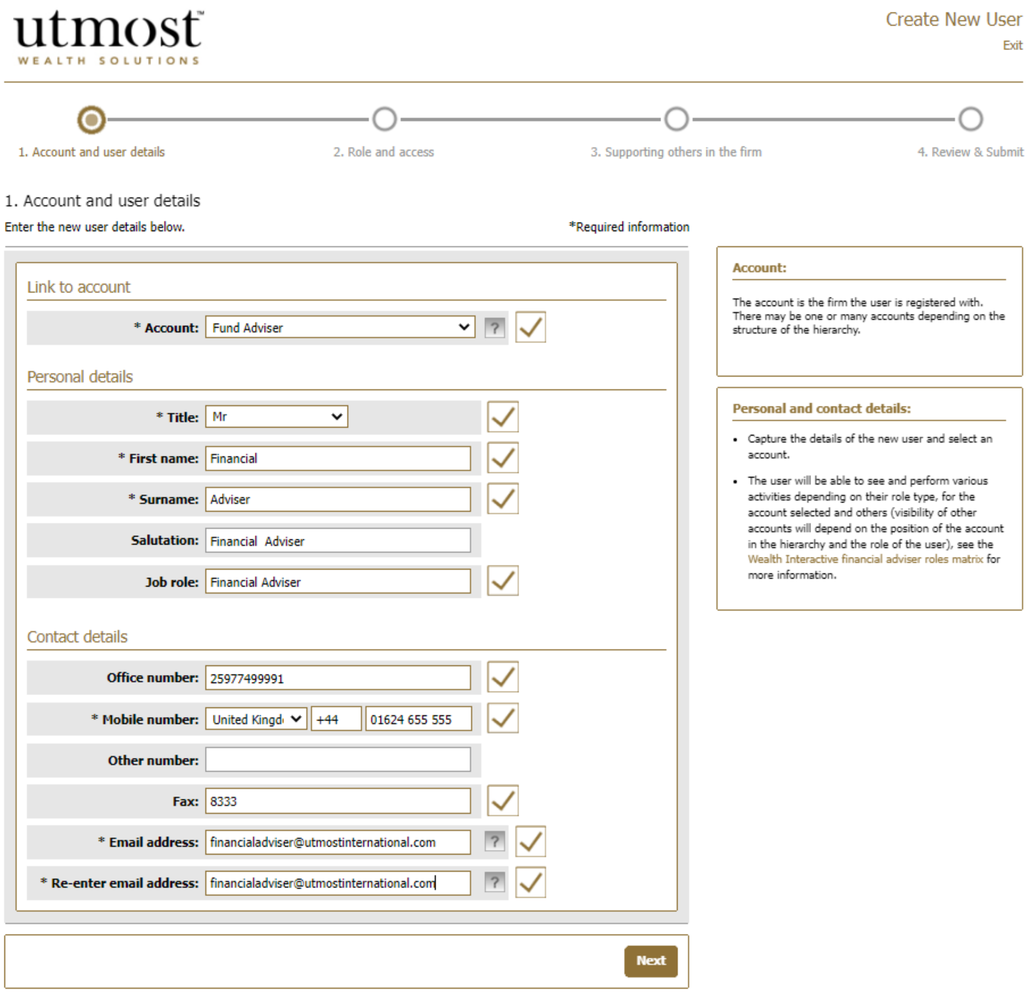
From the Wealth Interactive homepage, select ‘**Firm Admin**’.



Within the ‘**Other action**’ section on the right, select ‘**Create new user**’.



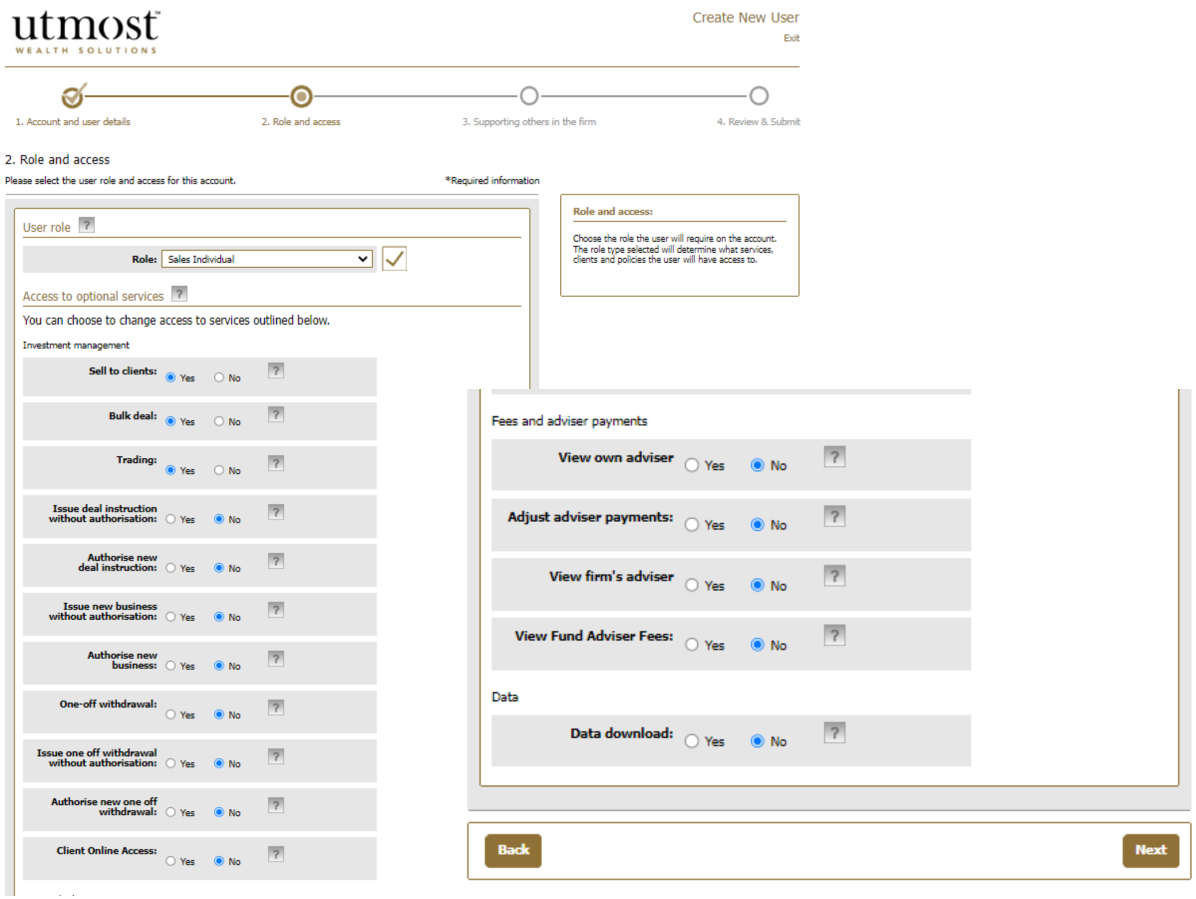
- A tube map is now displayed along the top of the page. This confirms the steps needed to fully create a new user.
- Within '**Account and user details**', select the adviser account this user should be linked to and complete all mandatory information marked by *.



- Select the user role from the ‘Role’ dropdown. For further information on the roles and default permissions, please see our Roles Matrix.

- Although permissions are defaulted, you can amend these accordingly.

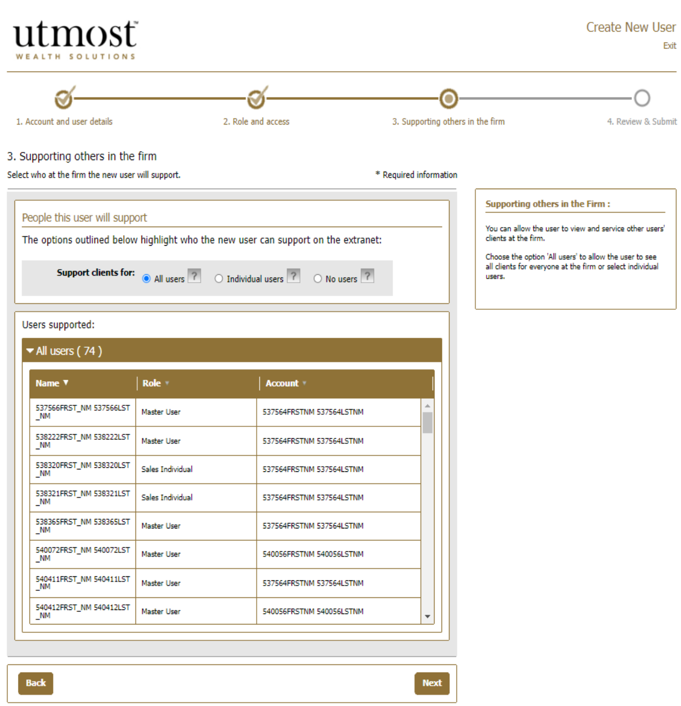
- When you’re ready click ‘**Next**’.

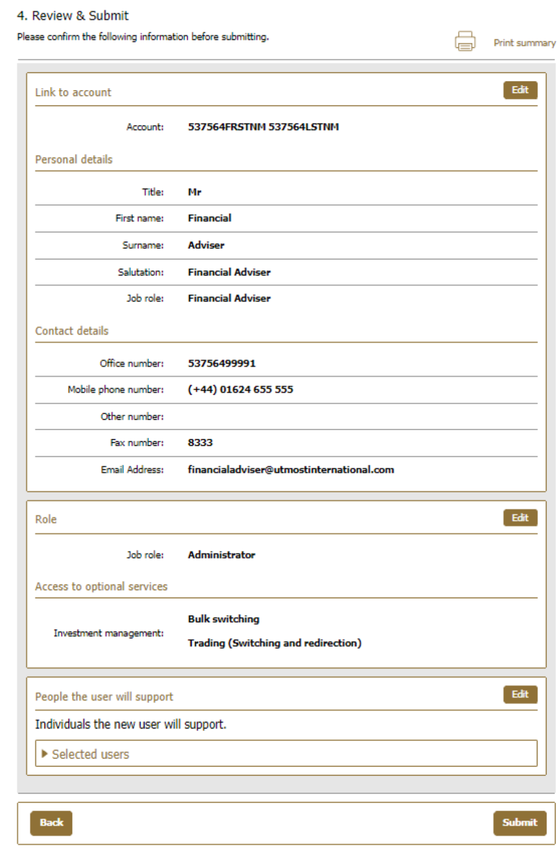


- Dependent on the role selected for the new user, you can choose if they should support specific staff or all. This may be useful where there is a dedicated para-planner per adviser.

- Once all sections of the journey are complete, you can review all details and submit.

- On submission, a registration email will be sent to the email address specified.





2

MANAGE INDIVIDUAL USERS

AMENDING EXISTING ACCESS

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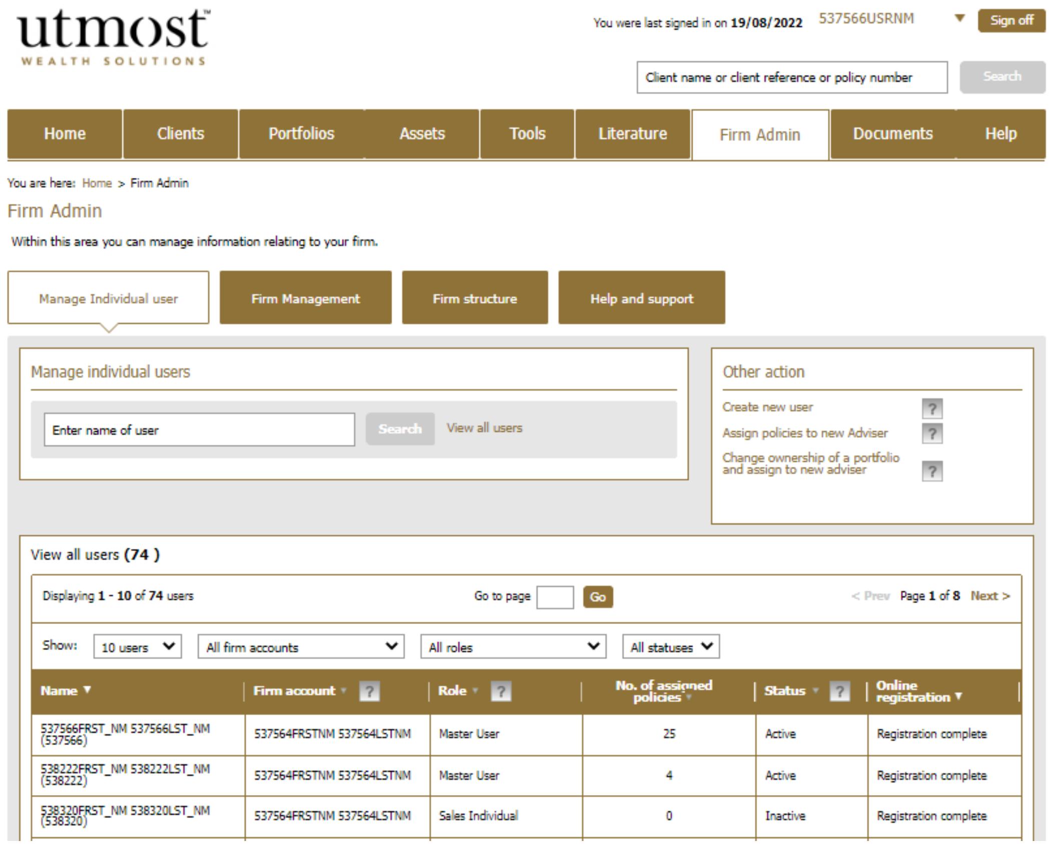
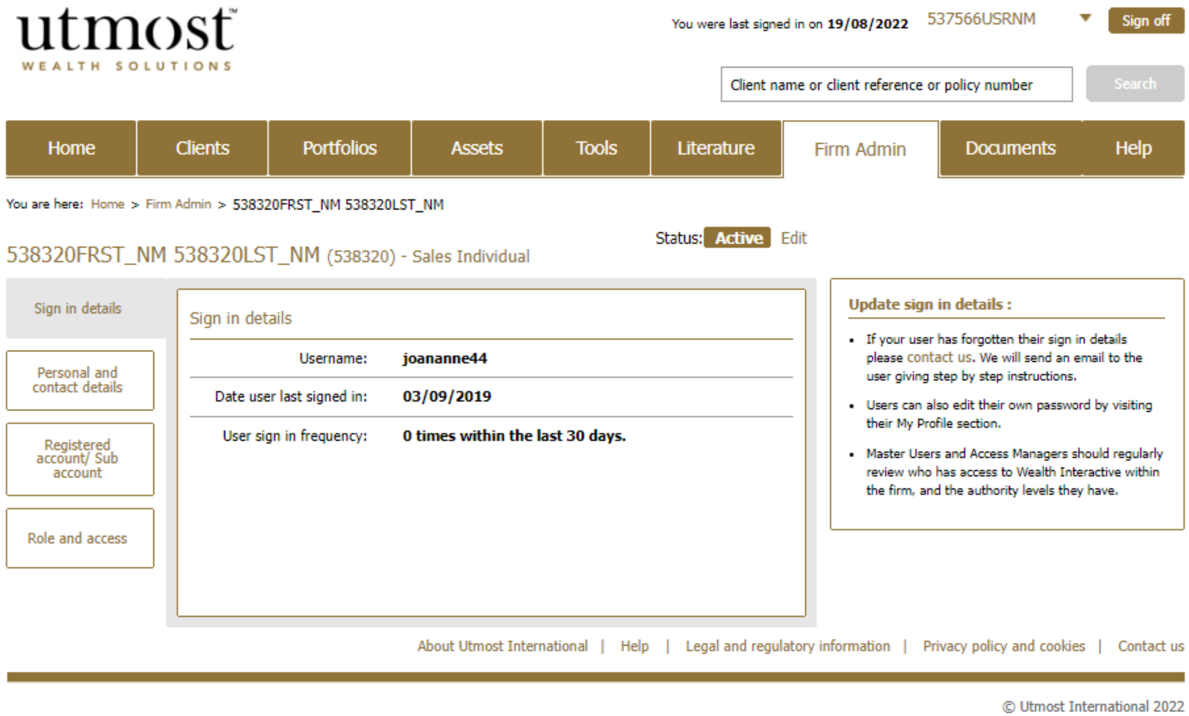
- From '**Firm Admin – Manage Individual user**', you can either search the specific user you would like to amend or select them from the list of all users.



- All options on the left-hand side of this page are editable:
- **Sign in details:** you can use this section to remind a user of their username or, if you have a leaver you can make their account inactive.
- **Personal and contact details:** Can be edited to update name, personal details and email address.
- **Registered account/Sub account:** you can edit which account this user has access to.
- **Role and access:** You can amend the users role and specific permissions.
- **Staff this user supports:** You can change which adviser(s) policies this user supports/ can view.



3

MANAGE INDIVIDUAL USERS

DEACTIVATE A USER

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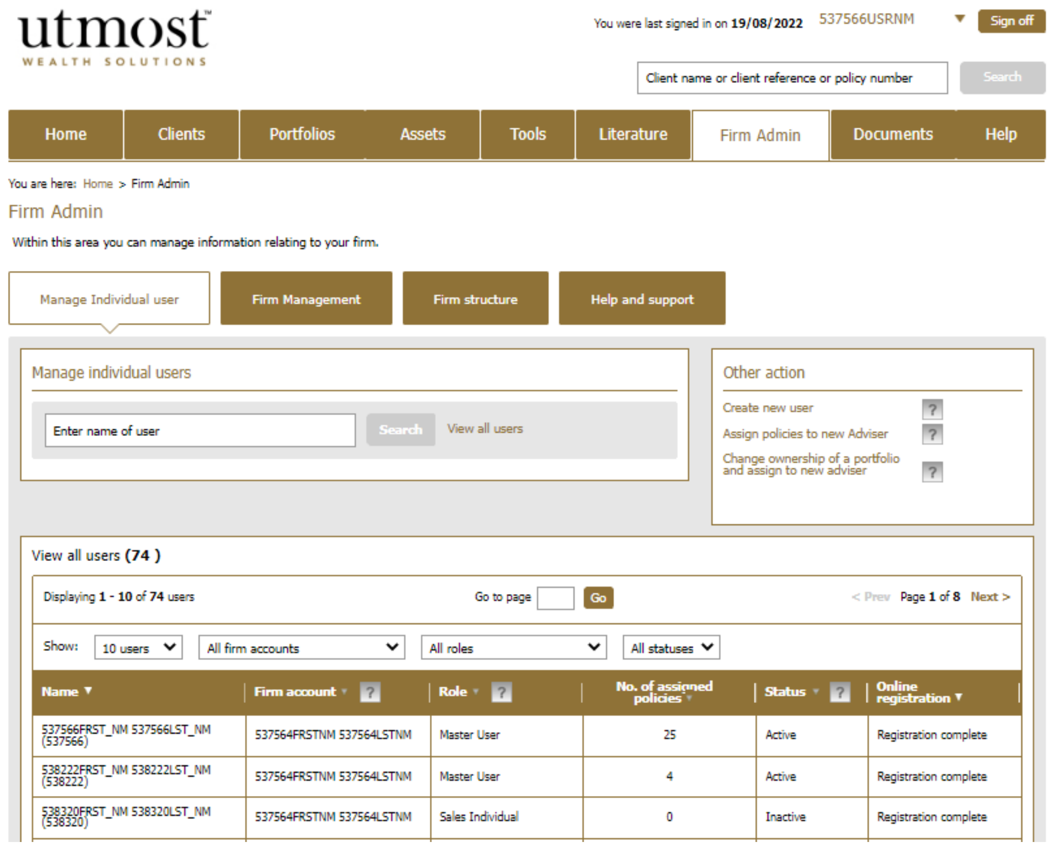
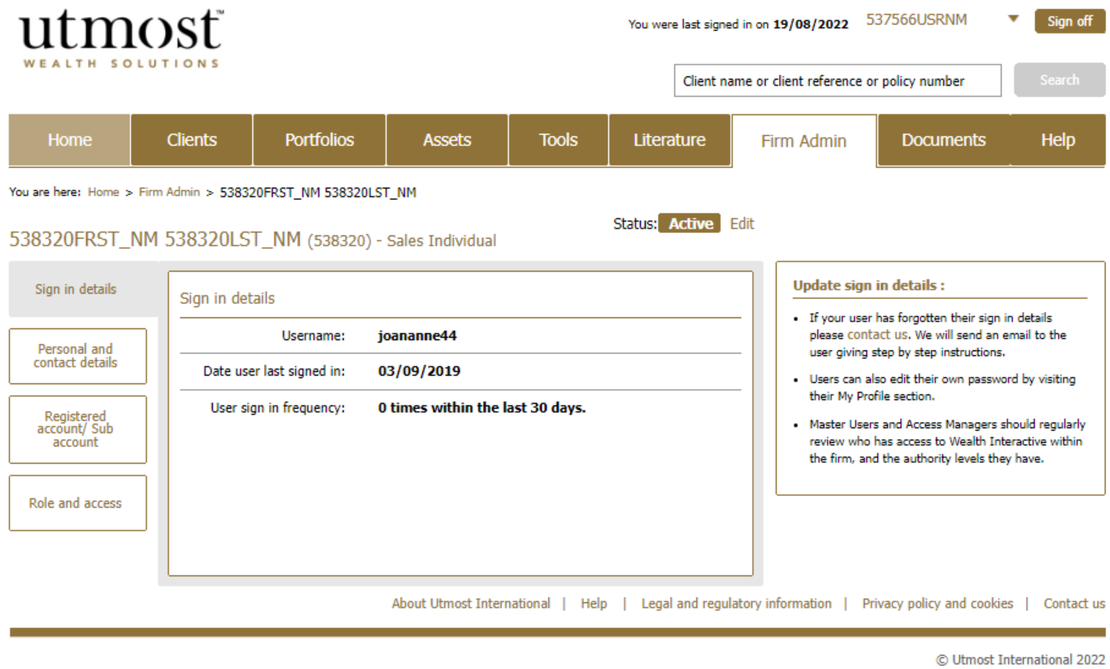
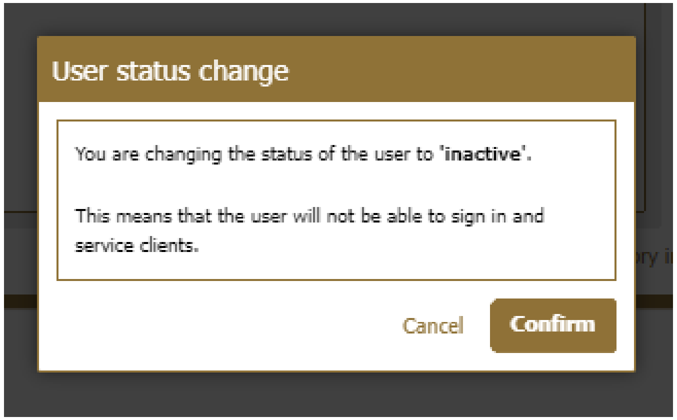
- From your homepage click on the ‘Firm Admin’ tab.
- Then under ‘Manage Individual user’ find the person who you want to deactivate.



- Click on ‘Edit’.
- Then select ‘Inactive’ from the drop-down and click ‘Save’.



You'll see this confirmation message and press 'Confirm'.

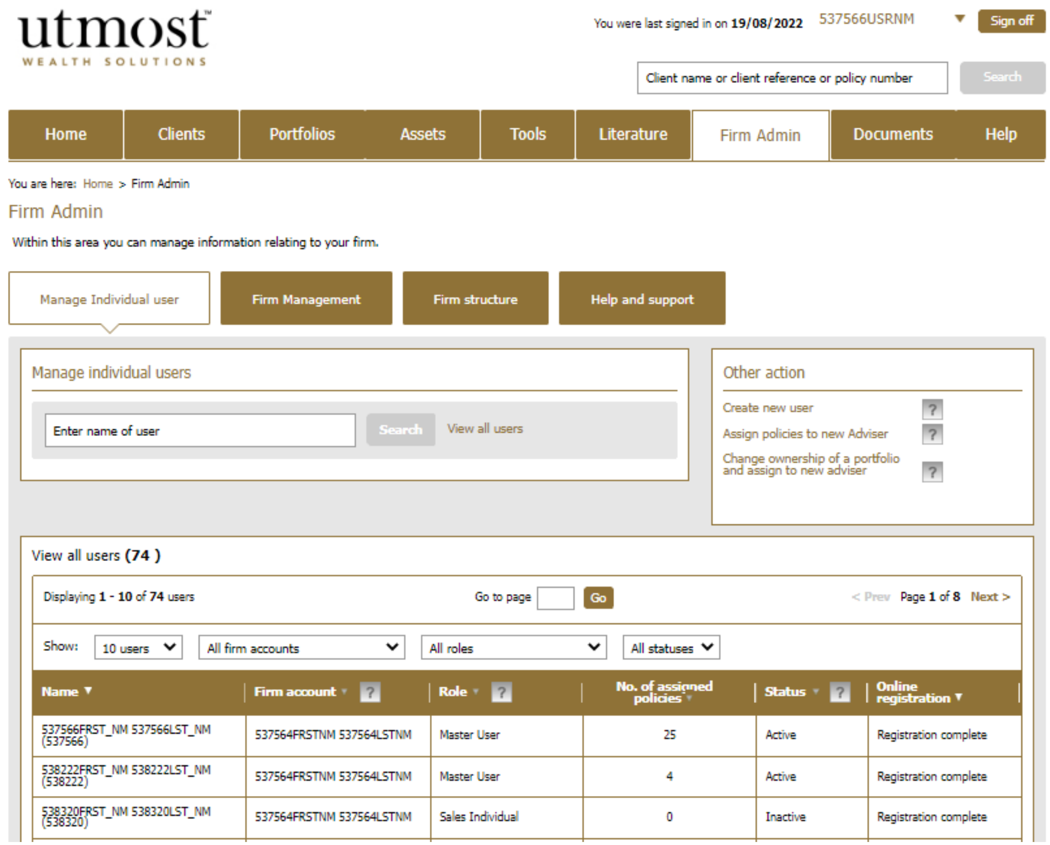


4

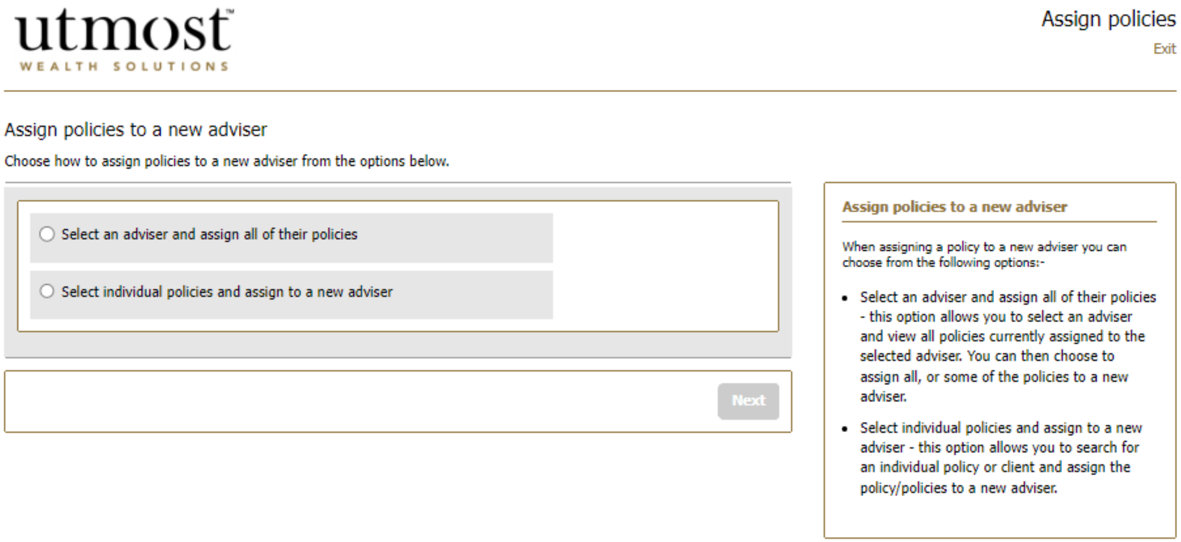
MANAGE INDIVIDUAL USERS

ASSIGN POLICIES TO A NEW ADVISER

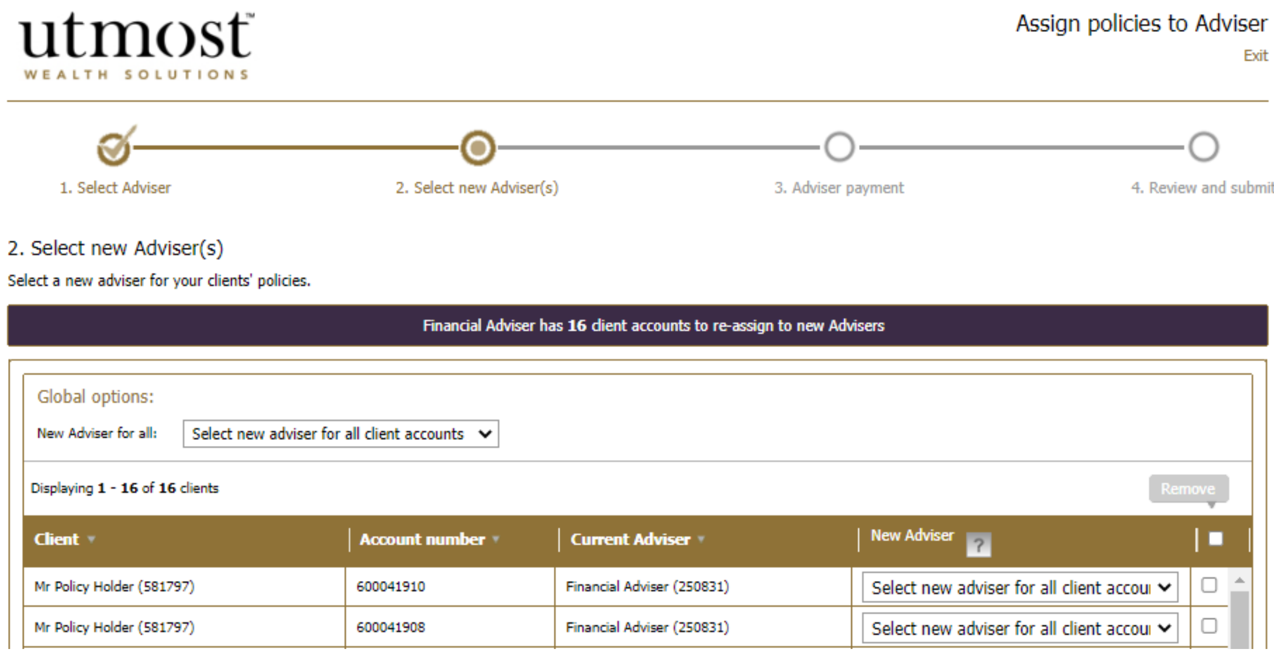
- If an adviser has changed roles or left, you may need to move their policies to another financial adviser to support them.
- You can do so under '**Firm Admin**', '**Other actions**' and select '**Assign policies to new Adviser**'.



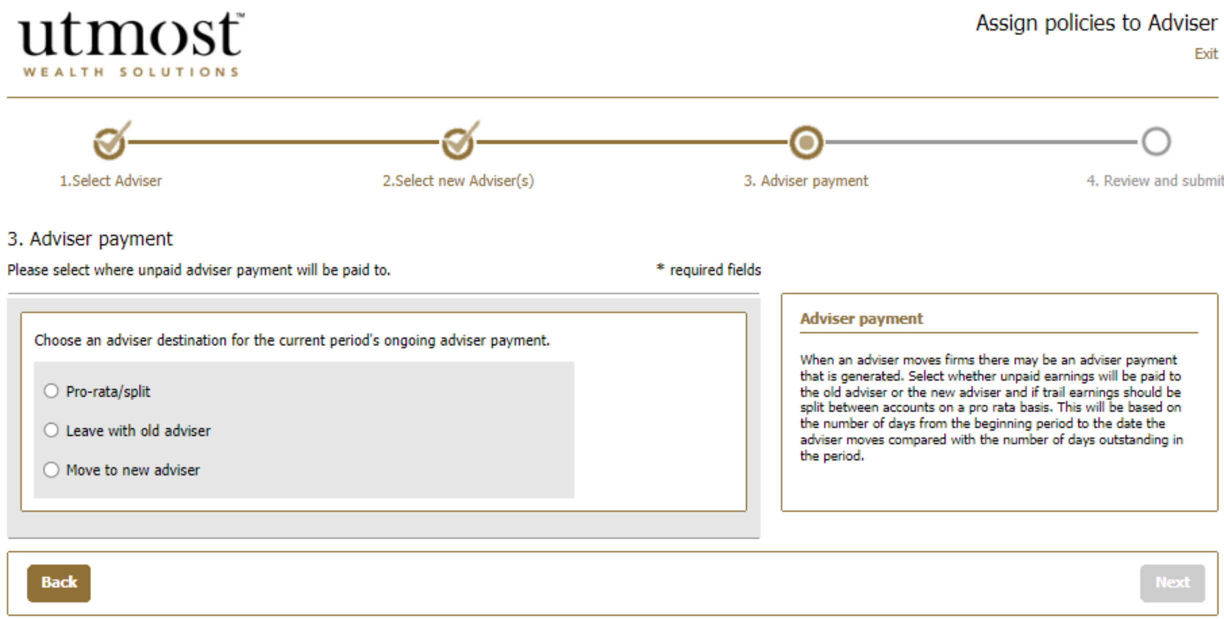
- Select the action you wish to take.
  You can either:
  - **Select an adviser and assign all of their policies** – this option allows you to select an adviser and view all policies currently assigned to the selected adviser. You can choose to assign all, or some of the policies to a new adviser.
  - **Select individual policies and assign to a new adviser** – this option allows you to search for an individual policy or client and assign the policy/policies to a new adviser.
- Please note the new adviser must be set up and registered for Wealth Interactive.



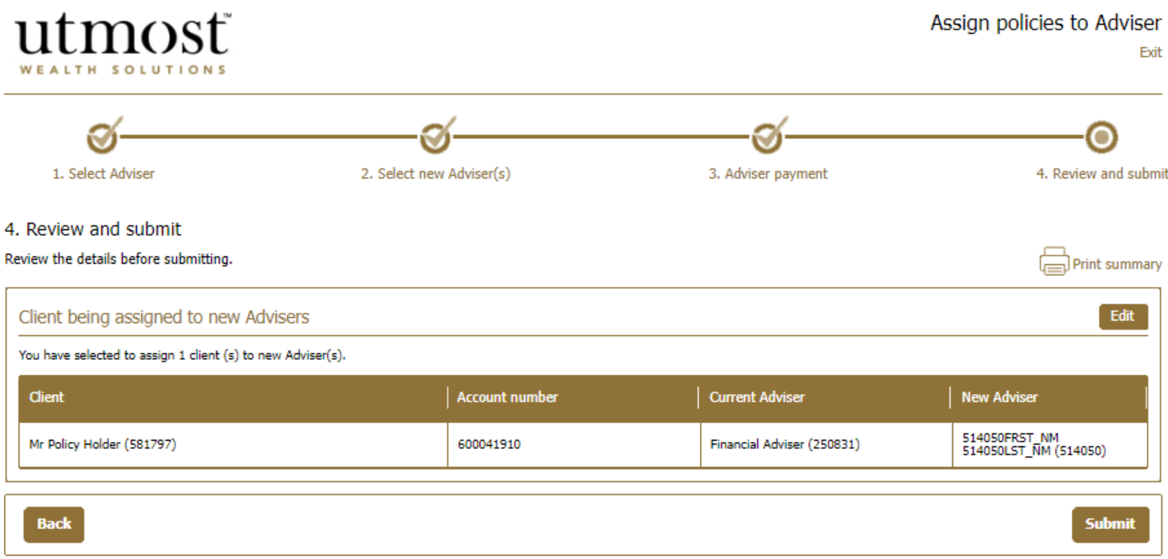
- Once you have selected the policies or specific adviser to transfer from, you will then need to select the new adviser these policies should be assigned to.
- Please note you can only assign policies to a Sales Individual or Master User.



- The next step of this process is determining where any ongoing adviser payments should be paid to. Select one of the available options.
- Please be aware of your adviser companies payment account before proceeding.



Once all sections of the journey are complete, you can review all details and submit. These changes are made immediately on submission.


Assign policies to Adviser

Exit

1. Select Adviser — 2. Select new Adviser(s) — 3. Adviser payment — 4. Review and submit

4. Review and submit

Review the details before submitting.

Print summary

Client being assigned to new Advisers

Edit

You have selected to assign 1 client (s) to new Adviser(s).

Client	Account number	Current Adviser	New Adviser
Mr Policy Holder (581797)	600041910	Financial Adviser (250831)	514050FRST_NM 514050LST_NM (514050)

Back

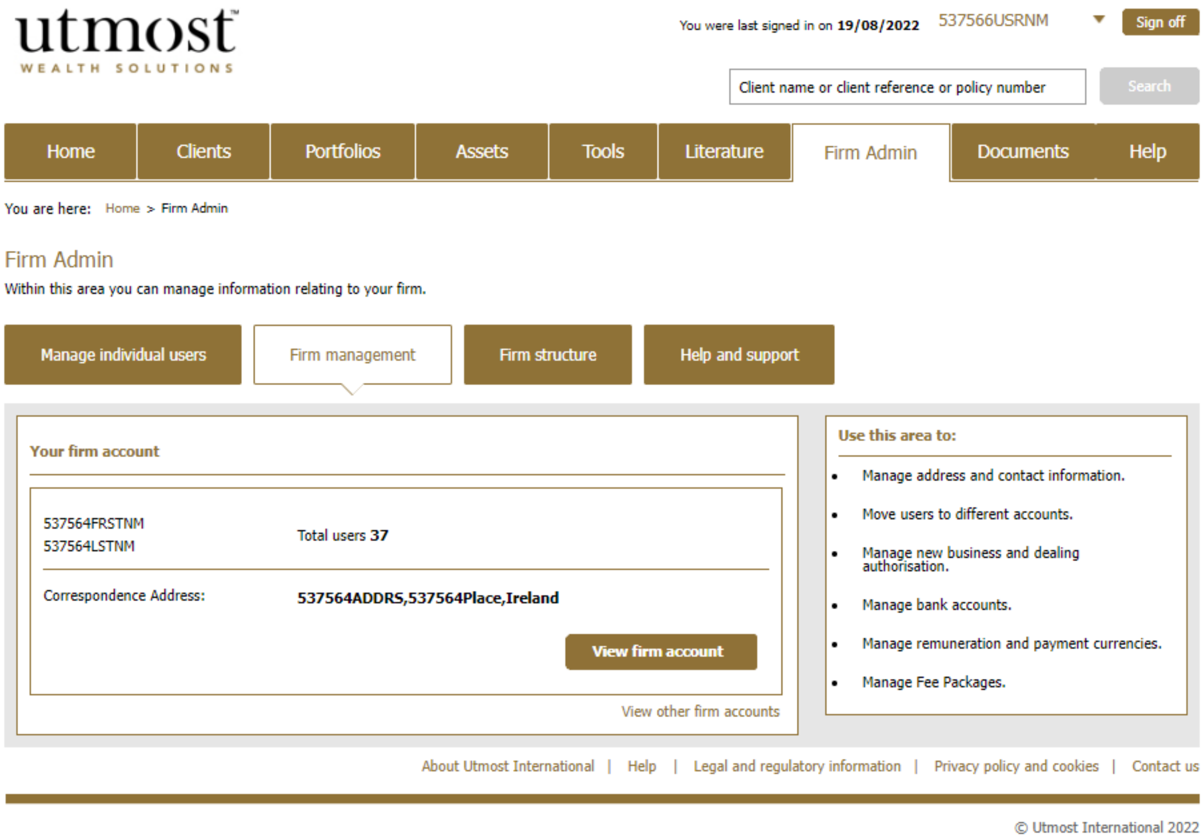
Submit

1

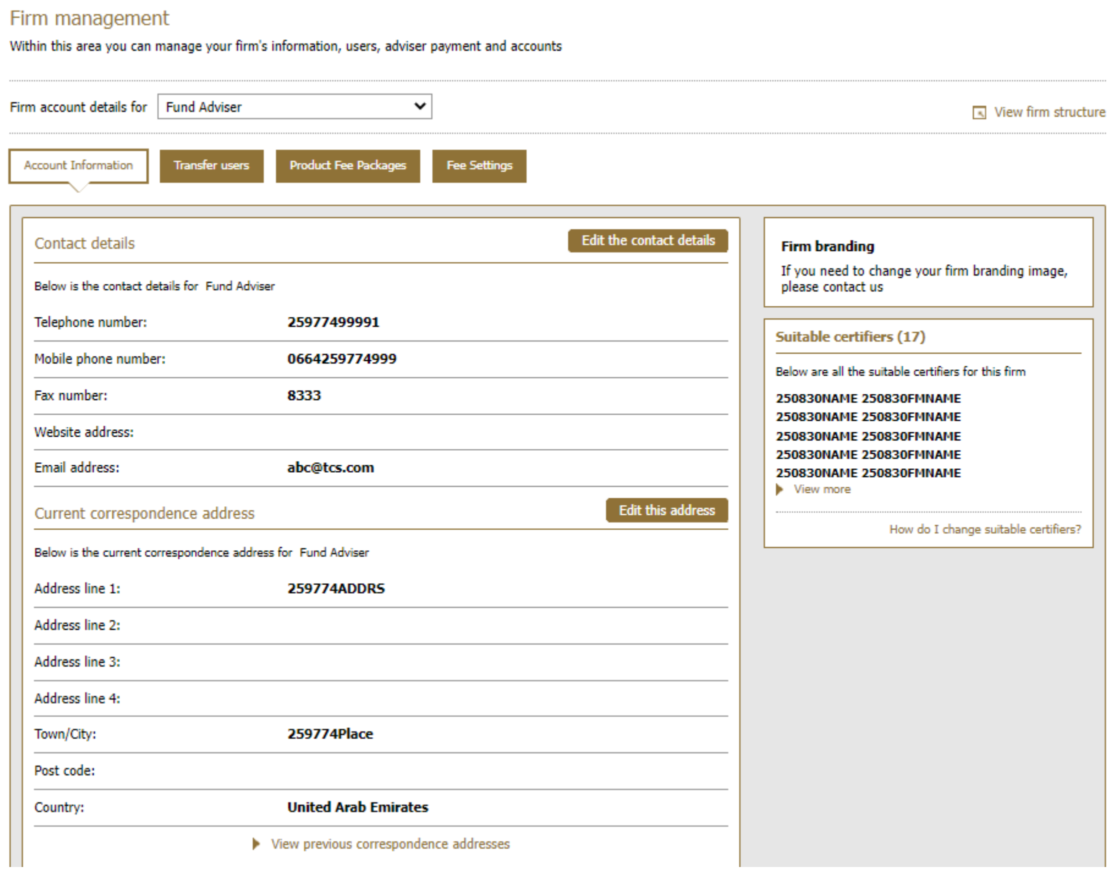
FIRM MANAGEMENT

HOW TO AMEND CONTACT AND ADDRESS DETAILS

- You can amend certain information on your Firm Account through Wealth Interactive.
- By selecting '**Firm Admin - Firm management**' you will be able to click on '**View firm account**' to see the main account details or you can select '**View other firm accounts**' if there is a sub agency you would like to view and/or amend.



Within the '**Registered account information**' tab you can use the edit fields to update contact and correspondence address information.



2

FIRM MANAGEMENT

VIEWING SUITABLE CERTIFIERS

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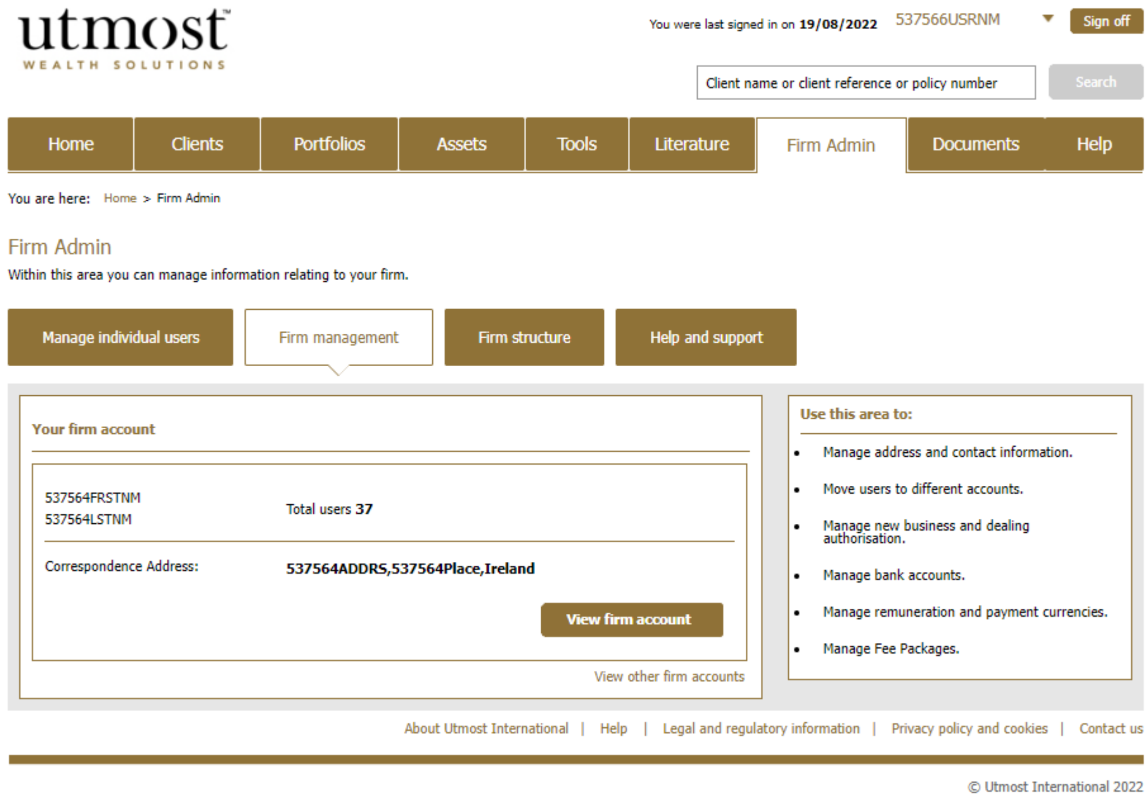
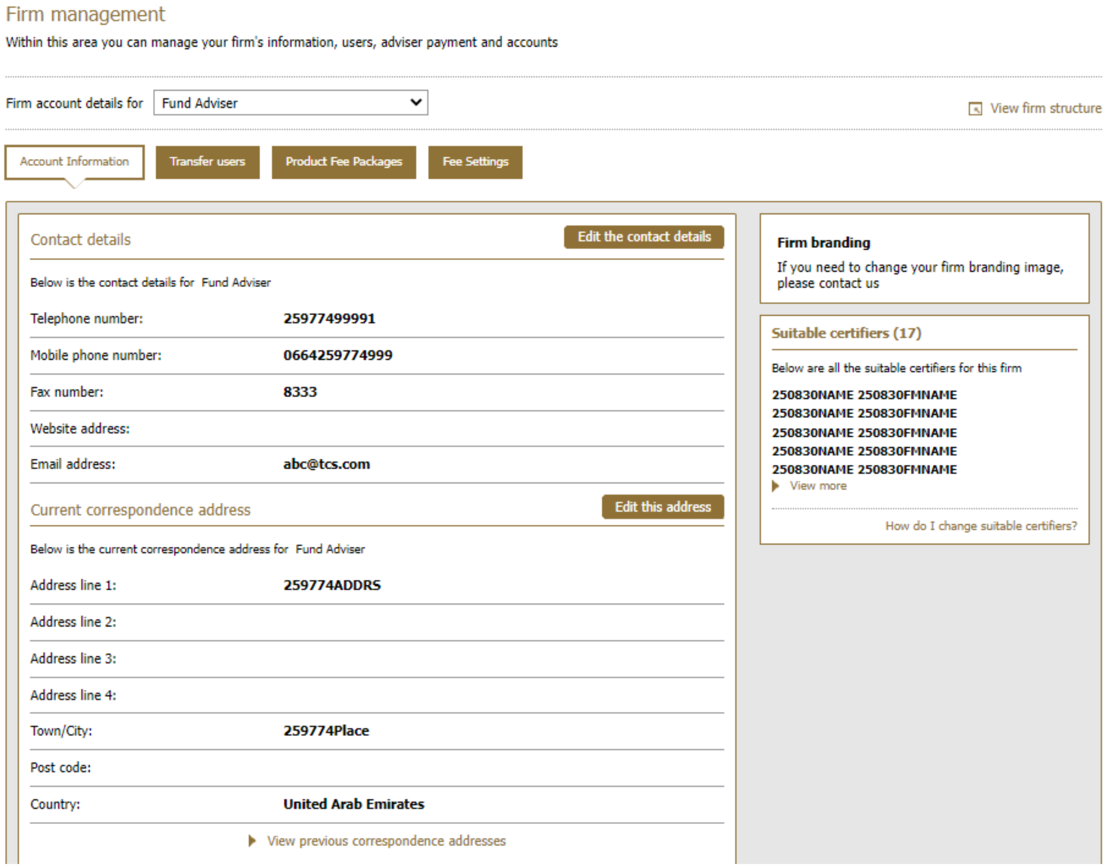
- To view all suitable certifiers currently set up with us, please select '**Firm Admin – Firm management**' and the relevant account.



- On the highlighted section of the page, you will see a list of all '**Suitable certifiers**'. Please select '**View more**' to view the full list.

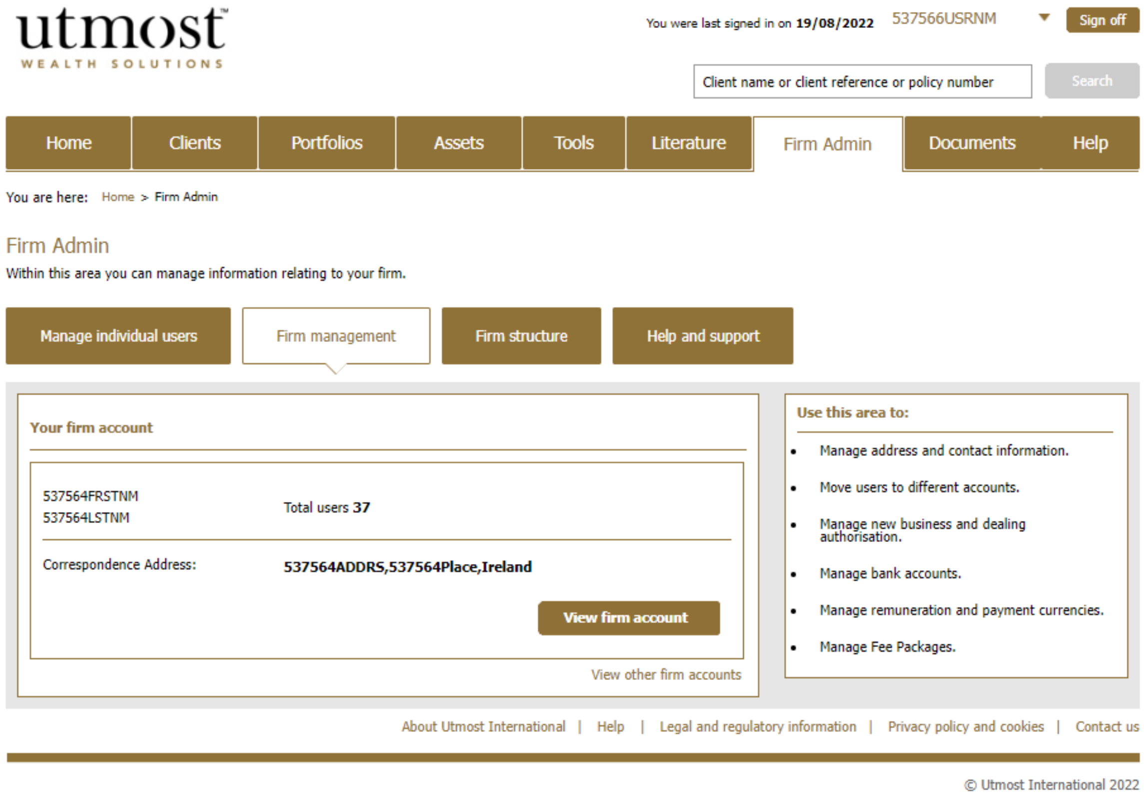


3

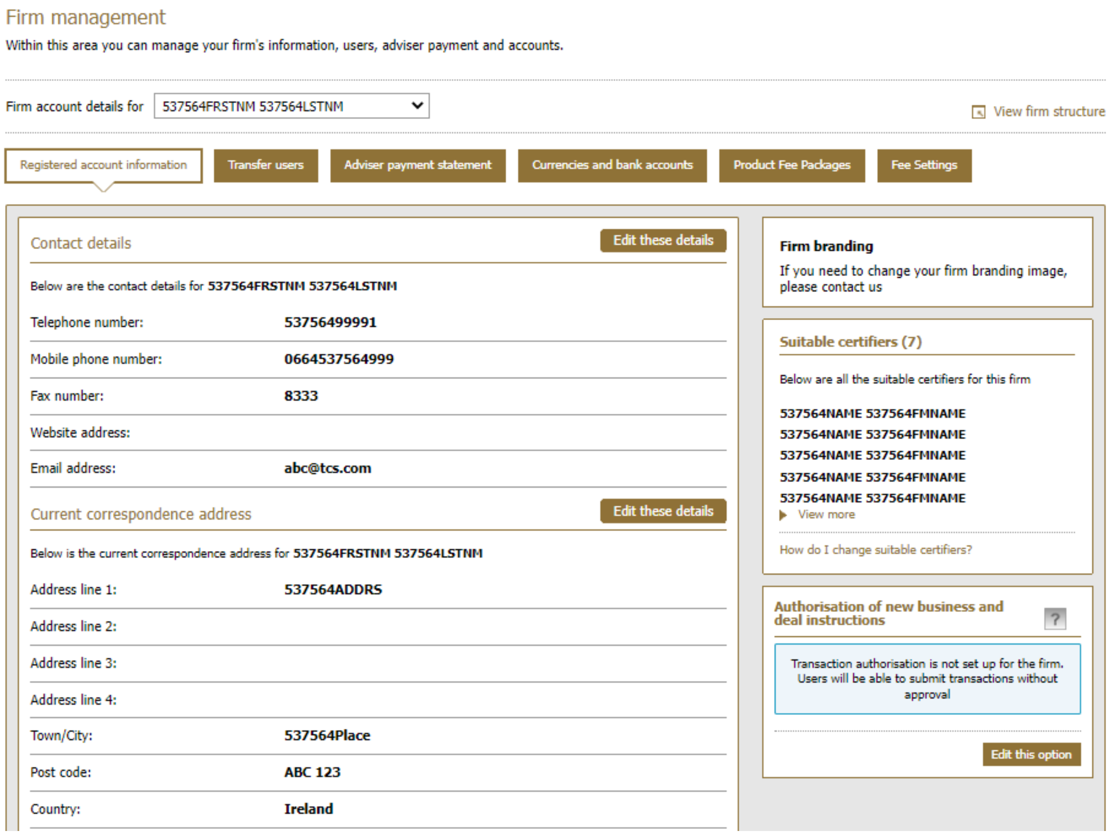
FIRM MANAGEMENT

AUTHORISATION OF TRANSACTIONS

- Authorisation of transactions is an optional feature of Wealth Interactive.
- This feature allows you to set up a four-eye check over specific transactions submitted by your users through Wealth Interactive.
- To enable the feature, please visit '**Firm Admin – Firm management**' – and select the registered account.
- If this feature is enabled, it will enable this for all sub agencies associated with your firm.

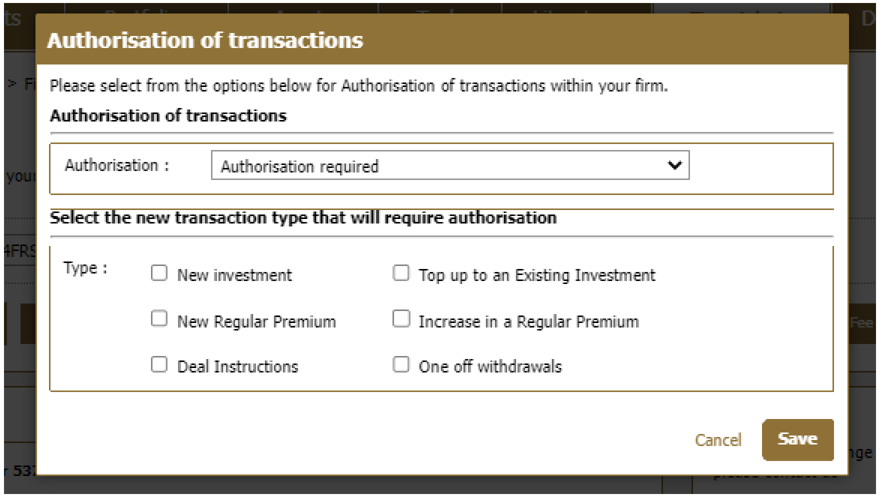


On the right-hand side of the '**Registered account information**' is where authorisation of transactions can be enabled by selecting '**Edit this option**'.



- You can select '**Authorisation required**' on the dropdown and select which transactions you would like to enable a four-eye check for. Please note new permissions relevant to four-eye check will be automatically available to amend per user.

- You would then need to set up or amend users to either:
    - Be able to four-eye check and approve transactions
    - Amend any users who do not require a four-eye check on submissions.



4

FIRM MANAGEMENT

TRANSFERRING USERS BETWEEN ACCOUNTS

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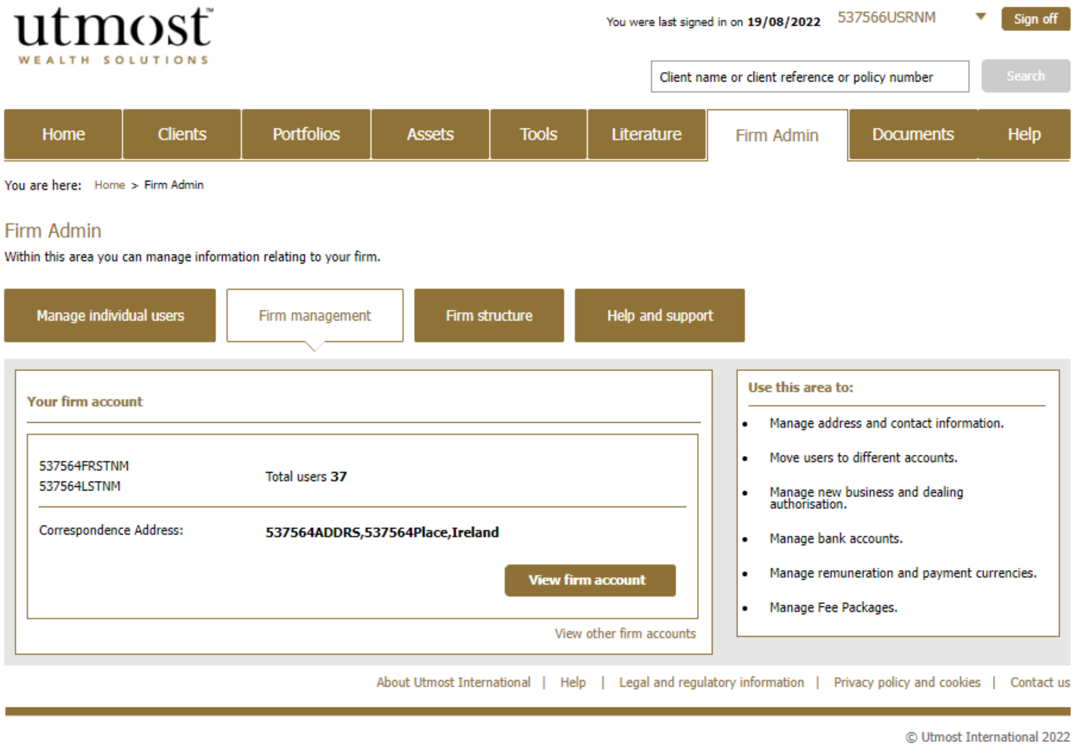
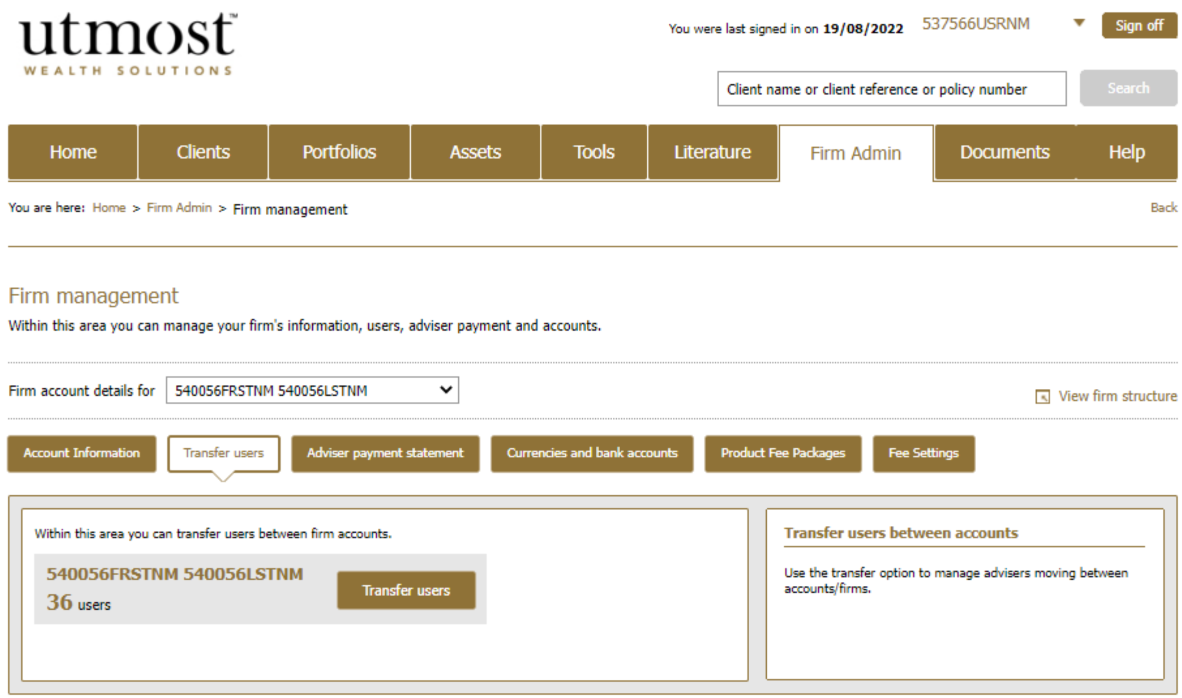
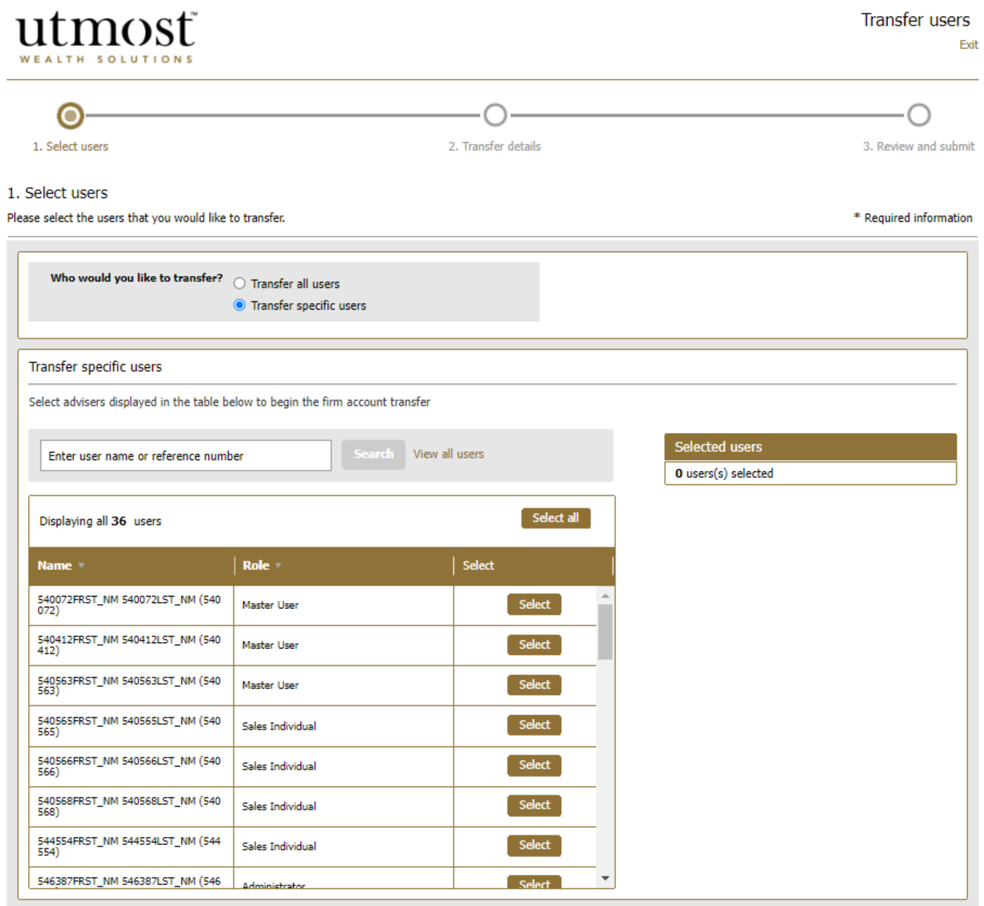
- Where users have been created or are existing under an account that needs to be changed, this can be done through Wealth Interactive.
- Please visit '**Firm Admin – Firm management**' and select the relevant account the users are currently assigned to.



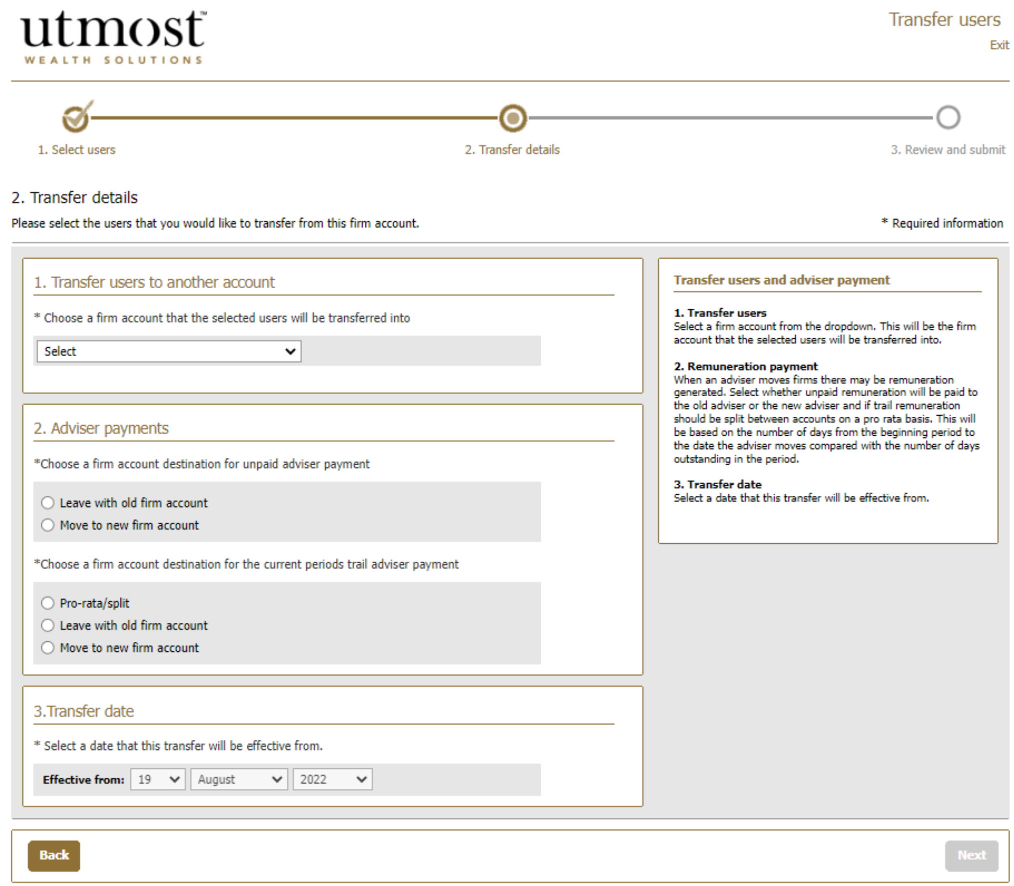
Select the **Transfer users**' tab and then click on the '**Transfer users**' button to begin the process.



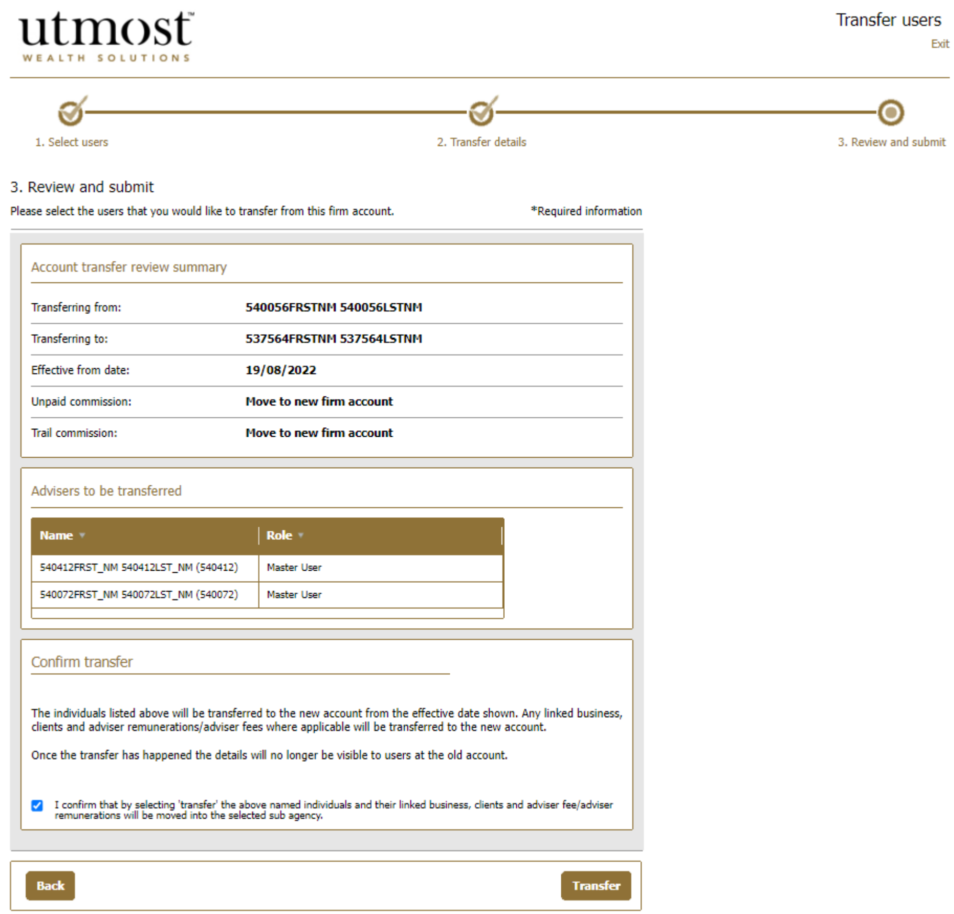
- First you will need to select whether you will be transferring all users from this account or specific users.
- If you have selected specific users as the option, you will then need to select those required users from the list.



- Within this section you will need to:
  - Select the account within the hierarchy these users should be transferred to.
  - Select whether any unpaid adviser payments should be left with the current account or the new. Please be aware of your companies payment accounts.
  - Choose whether the payments should be split, left or moved to the new account.
  - Select the date this should be effective from.



Once all sections of the journey are complete, you can review all details and submit by pressing '**Transfer**'. These changes are made immediately on submission.

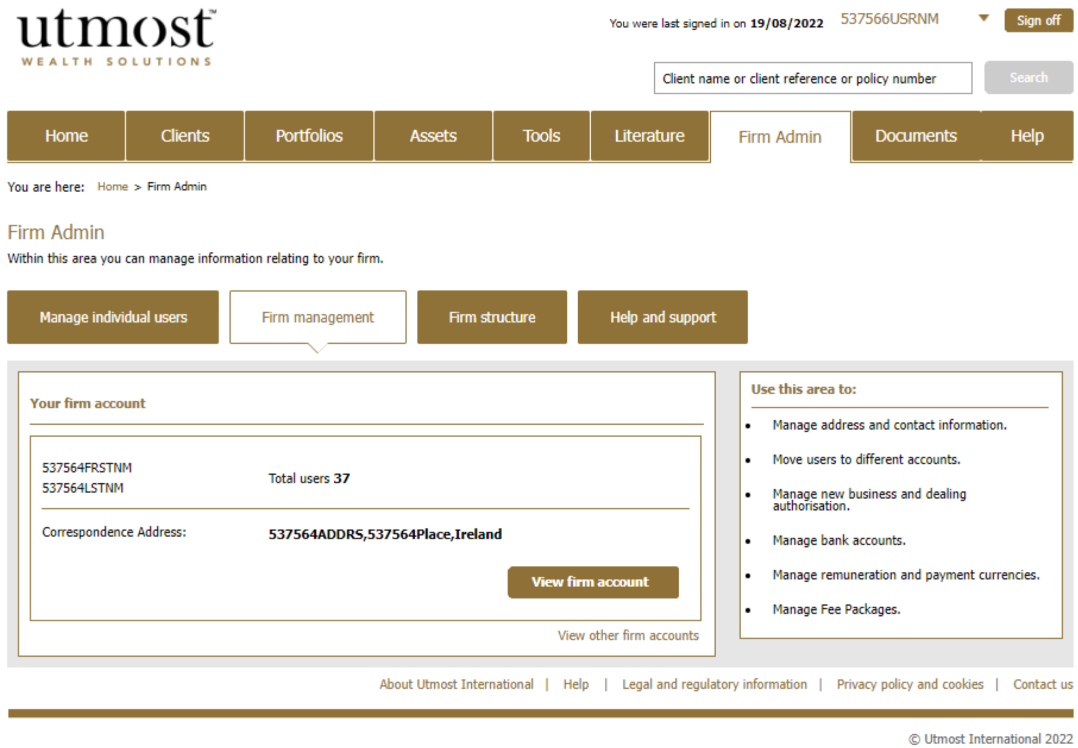


5

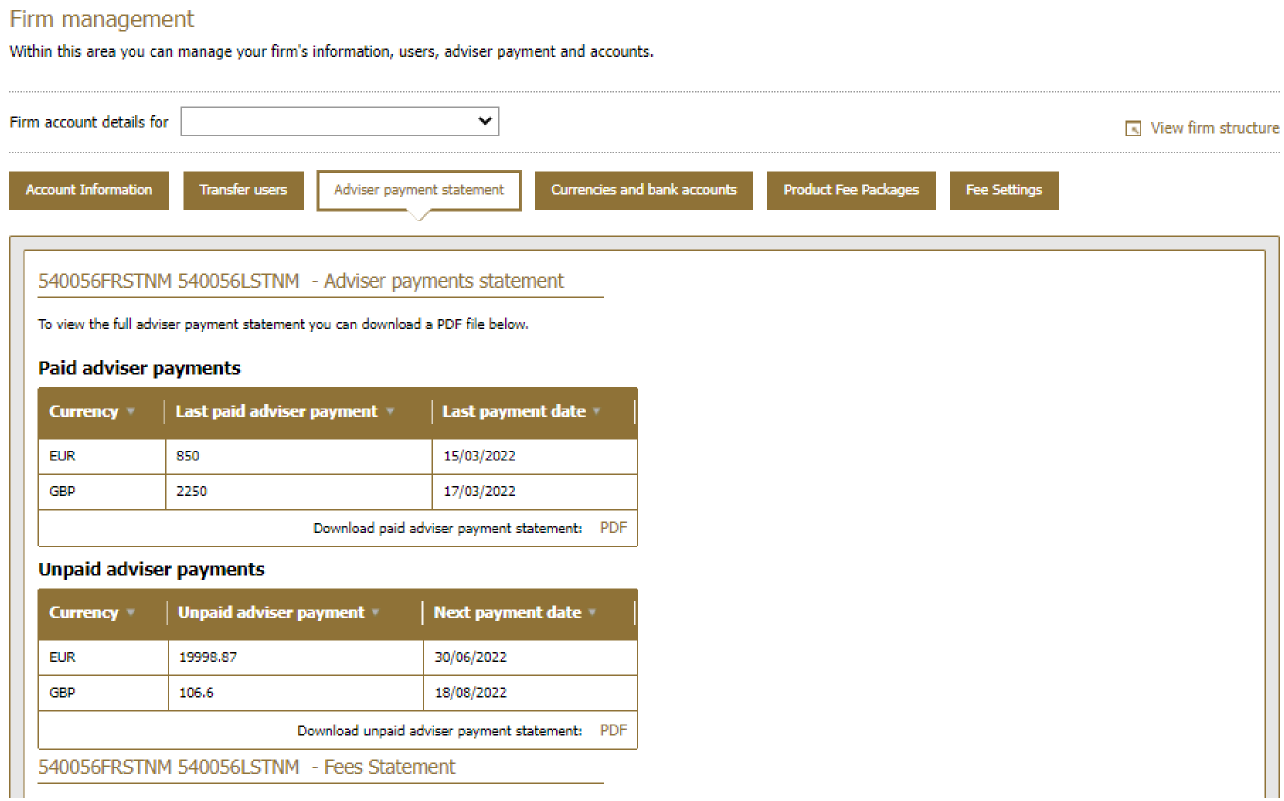
FIRM MANAGEMENT

ADVISER PAYMENT STATEMENT

- You can view an overview of paid and unpaid commission/fees/ renumeration through Wealth Interactive.
- To do so, visit '**Firm Admin – Firm management**' and select the payment account(s) for your firm.



- From the tabs along the top as shown, select '**Adviser payment statement**'.
- You will see an overview here of the relevant payments for the current time period. You will also be able to download the statement.



6

FIRM MANAGEMENT

HELP AND SUPPORT

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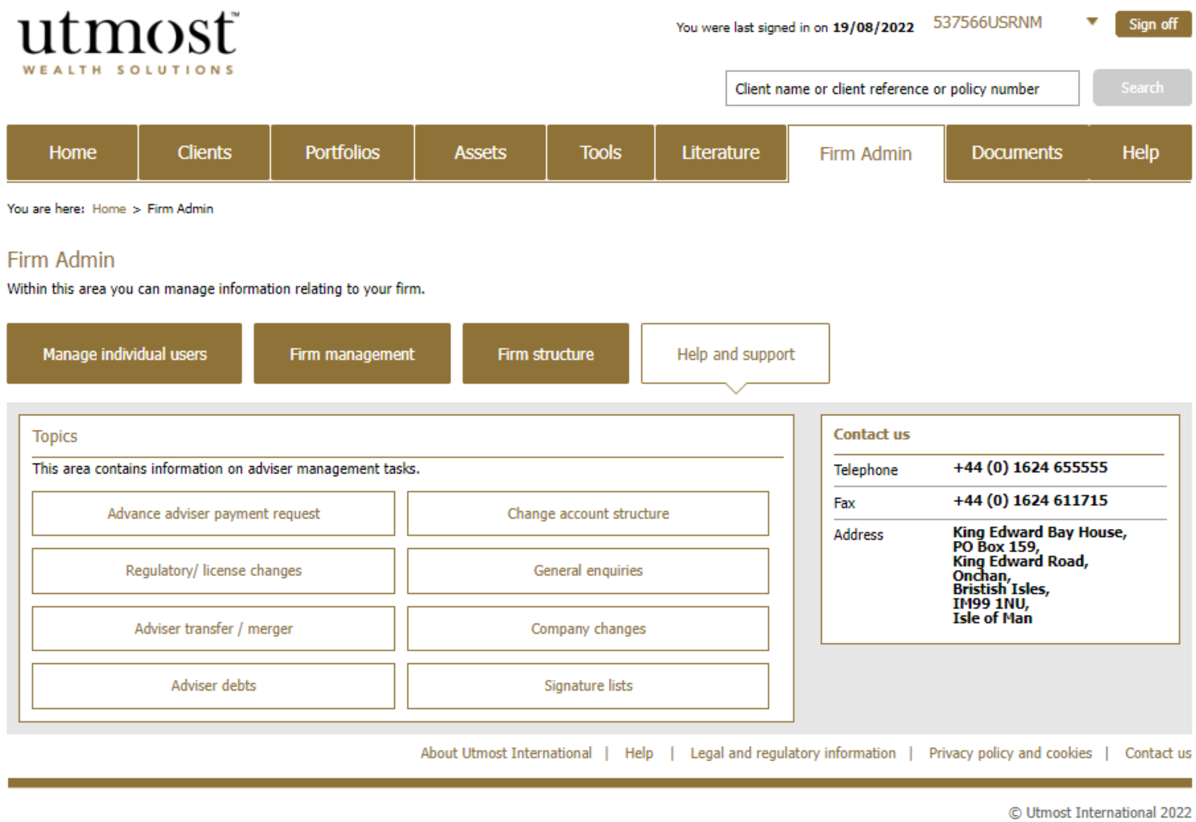
- Please visit the Help & Support section within Firm Admin for any help with Adviser Management tasks.



IMPORTANT INFORMATION

www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

UWSQ PR 25137 | 05/23

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