Manage Firm Links

Manage Firm Links

Where Investment Intermediaries has delegated Super User access to a firm to act on their behalf, details of the linked firms are displayed in the section below:

Investment Intermediaries has authorised the following linked firms to act on their behalf:

Firm Name	Requested	Confirmed	Removed	Status
		There are no records		

Previous   Next

+ Add a firm link

Where Investment Intermediaries has been delegated Super User access by a linked firm to act on their behalf, details of the linked firms are displayed in the section below. Super User code activations and requests from firms can be confirmed here:

Investment Intermediaries has been authorised to act on behalf of the following linked firms:

Firm Name	Requested	Confirmed	Removed	Status
		There are no records		

Previous   Next

+ Activate a Super User Code

My GFSC

Introduction

NOTE: This functionality is only available to Super Users.

The 'Manage Firm Links' functionality of the Online Submissions Portal provides Super Users with the ability to link firms together via a request or by entering multiple Super User codes.

Linking firms together allows Super Users access to control permissions across both parent entities and all child entities.

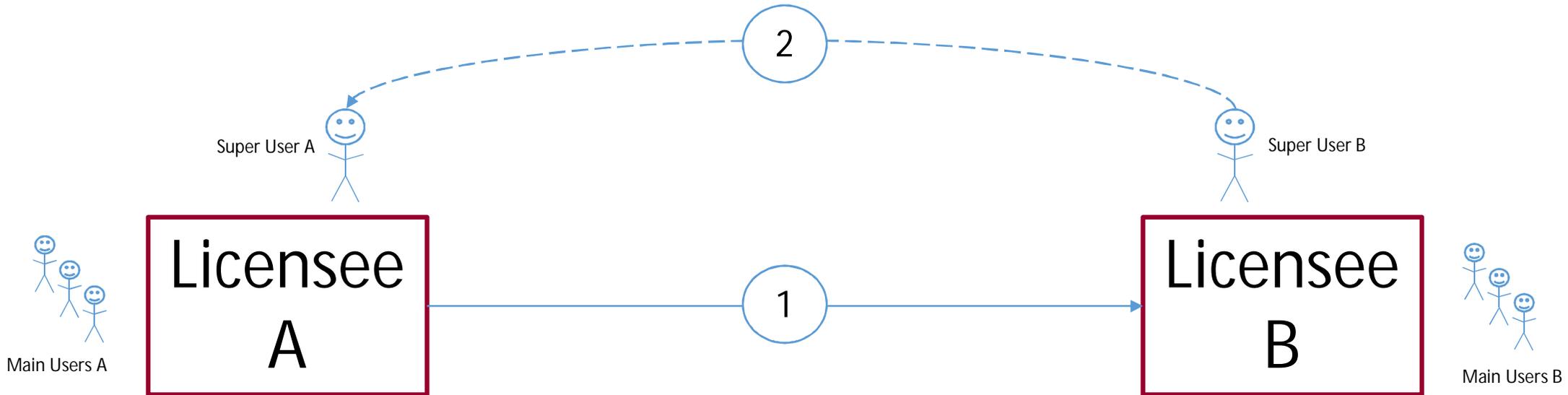These links can be broken at any time by either linked entity.

How-To

To access 'Manage Firm Links', click on the link located on the homepage, upon login, underneath the GFSC reference and the primary mailing address.

Once in the 'Manage Firm Links' page, Super Users can link firms together in two ways:

1) Click 'Add a firm link'. This effectively gives another firm access to work on your behalf but not vice versa. If a user requires access to work on behalf of another firm, said firm must click 'Add firm link'. This request must be approved by a Super User on the linked firm.
2) Click 'Activate a Super User Code'. If a user received more than one Super User code, they can enter multiple codes into this section, allowing them to act as Super User across all firms connected to those Super User codes.
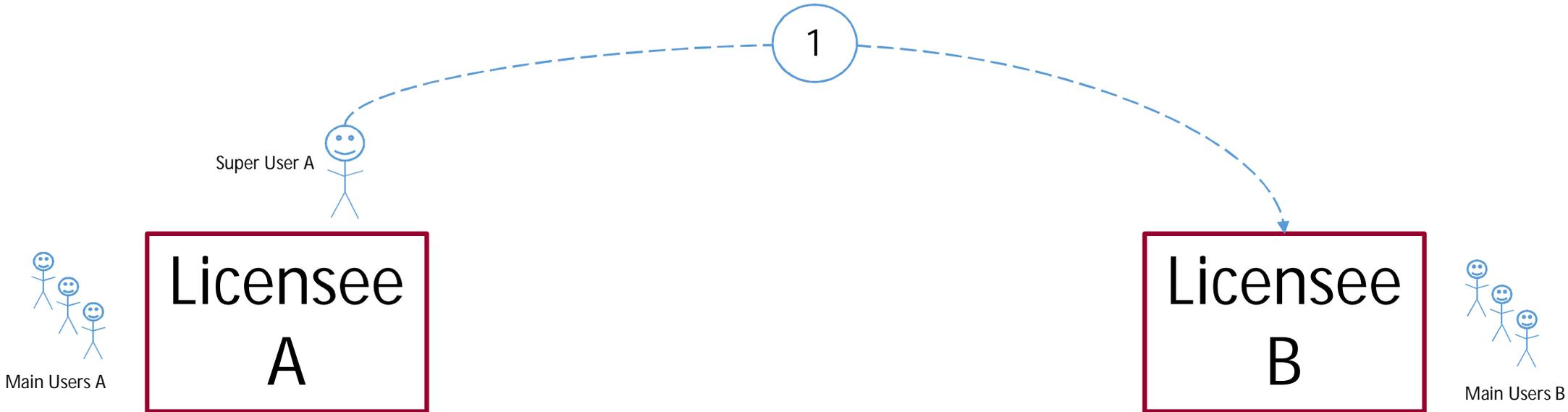
NOTE: Super User codes can only be used once by one user.

Manage Links Scenario 1: Both entities have a Super User ('Add firm link')

1. Licensee A requests Licensee B to act as a super user for them.

2. Licensee B accepts the request and now has Super User rights over Licensee A

3. Super User B can now manage permissions for ALL main users and Super Users associated with Licensee A and Licensee B.

Manage Links Scenario 2: Activate Super User Code

Super User A

Licensee A

Main Users A

Licensee B

Main Users B

1. Licensee A's Super User enters Super User code of Licensee B

2. Super User A can now manage permissions for ALL main users and Super Users associated with Licensee A and Licensee B.