For advisers

Our new platform

nucleus platform



Transfer tracker and client information

2 minute read

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How to use this document

Important information will look like this.

Key messages

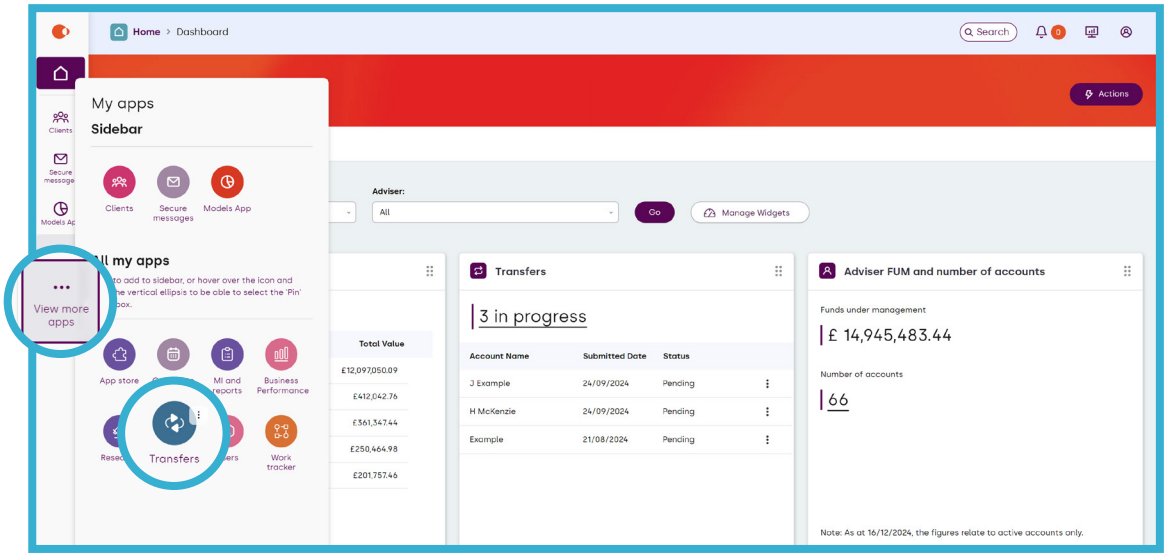
Key messages will look like this.

Useful info will look like this.

We recommend using the zoom function to view the details on the platform screens in this guide.

Transfer tracker

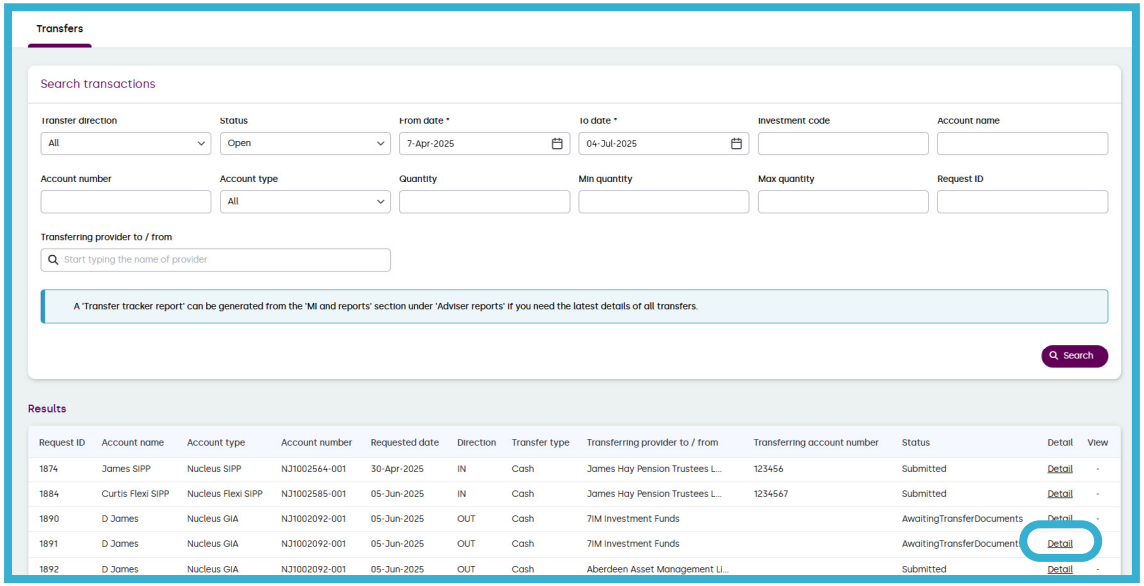
From the home page, select the **'Transfers'** app on the left-hand side.



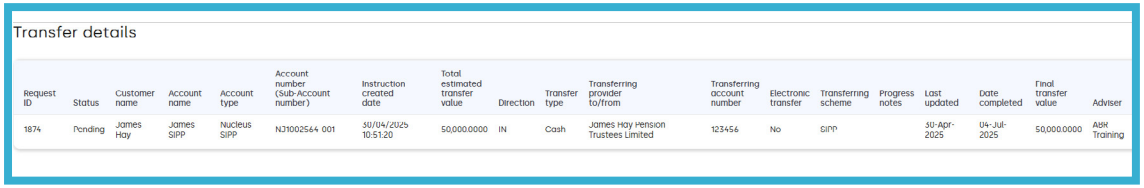
Transfers app

Enter your required search criteria to find the transfers you wish to track. Transfers matching your criteria will appear at the bottom of the page.

Select the **'Detail'** link for the appropriate transfer.



This will open a new window which displays the transfer information.

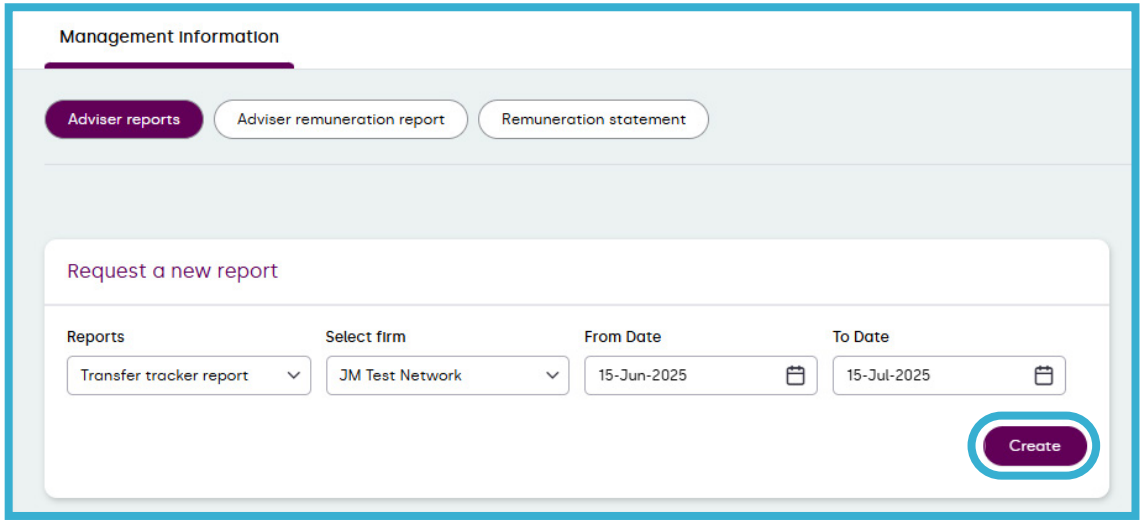


A **transfer tracker report**, with details of all transfers, can be generated from the **MI and reports** section, under **adviser reports**.

Transfer tracker report

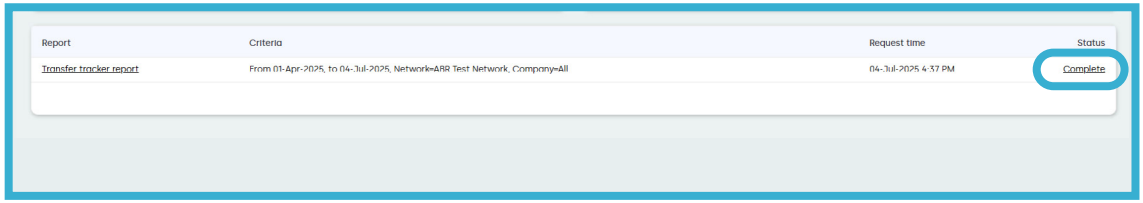
To use the transfer tracker report, you first need to select the **'MI and reports'** icon on the left-hand side of the screen

Within the '**Adviser reports'** section, under **'Request a new report'**, use the **'Reports'** drop-down to select **'Transfer tracker report'.**

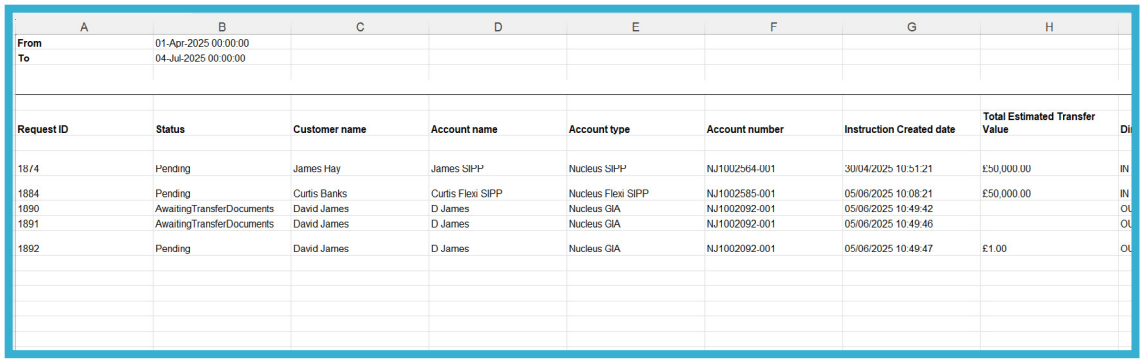


Select the date range required, then select **'Create'.**

The platform will then produce the requested report, and it will be available to download by selecting **'Complete'**.



After opening the spreadsheet, you'll see the data in full and this can be sorted or filtered as required.



	A	B	C	D	E	F	G	H
1	**From**	01-Apr-2025 00:00:00						
2	**To**	04-Jul-2025 00:00:00						
3								
4	**Request ID**	**Status**	**Customer name**	**Account name**	**Account type**	**Account number**	**Instruction Created date**	**Total Estimated Transfer Value**
5	1874	Pending	James Hay	James SIPP	Nucleus SIPP	NJ1002564-001	30/04/2025 10:51:21	£50,000.00
6	1884	Pending	Curtis Banks	Curtis Flexi SIPP	Nucleus Flexi SIPP	NJ1002585-001	05/06/2025 10:08:21	£50,000.00
7	1090	AwaitingTransferDocuments	David James	D James	Nucleus GIA	NJ1002092-001	05/06/2025 10:49:42	
8	1891	AwaitingTransferDocuments	David James	D James	Nucleus GIA	NJ1002092-001	05/06/2025 10:49:46	
9	1892	Pending	David James	D James	Nucleus GIA	NJ1002092-001	05/06/2025 10:49:47	£1.00

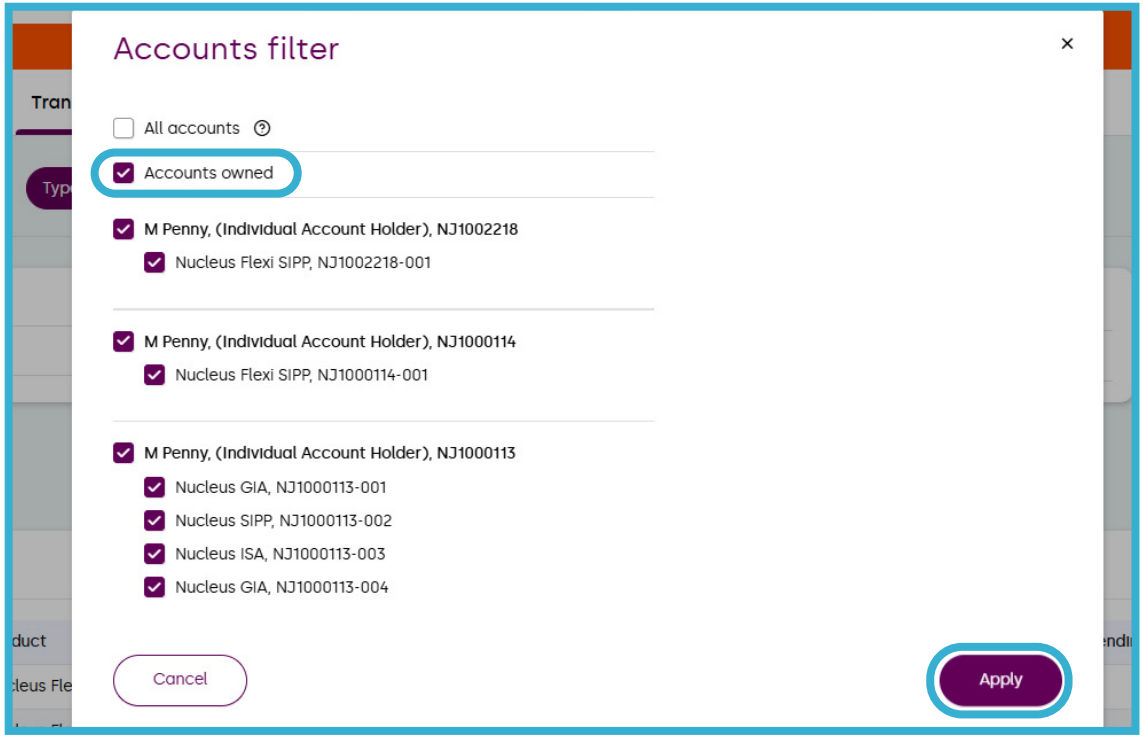
Client specific information

To get client specific details, you first need to find your client. Please refer to the guides on our website to search for a client or create a new client.

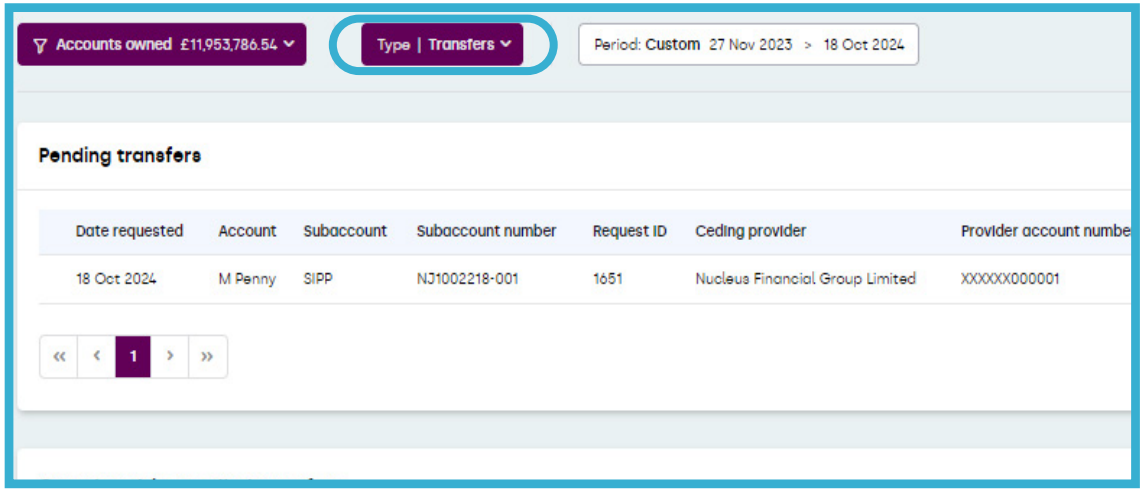
From the client's home page, select the **'Transactions'** tab.



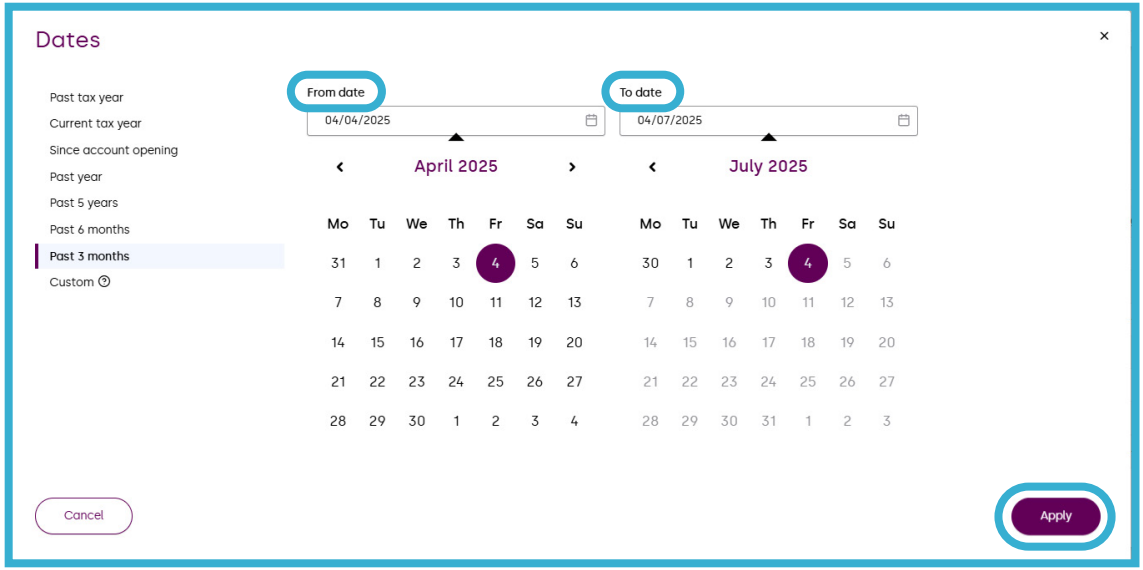
Select **'Accounts owned'** to choose the accounts that you require information. Then select **'Apply'**.



Select the **'Type'** drop-down and choose **'Transfers'**.

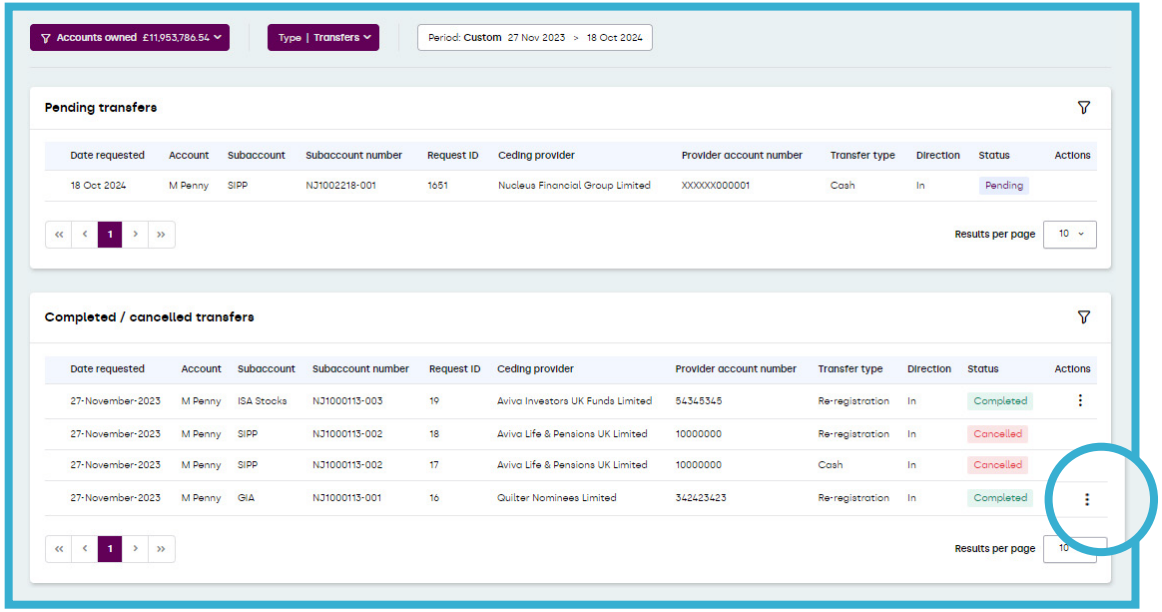


Select the required date range using the **'Period'** button and then select **'Apply'**.

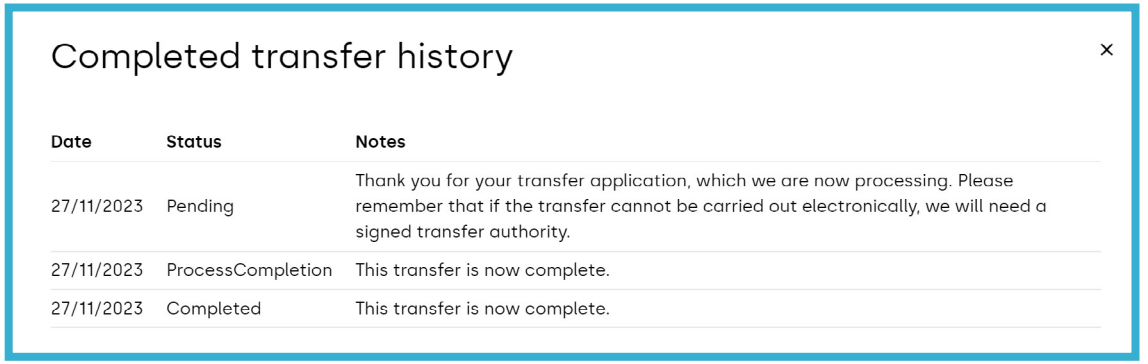


The Platform will generate information on any ongoing, completed, or cancelled transfers within the time period specified.

Unlike the MI report previously shown, these are not produced in Excel. The information is displayed on the Platform.



Selecting the vertical ellipses (three dots) under the **'Actions'** heading will display the history of the transfer.



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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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