For advisers

Our new platform

nucleus platform

# How to create an adviser model

3 minute read

# How to create a model



## How to use this document

Important information will look like this.

**Key messages**

Key messages will look like this.

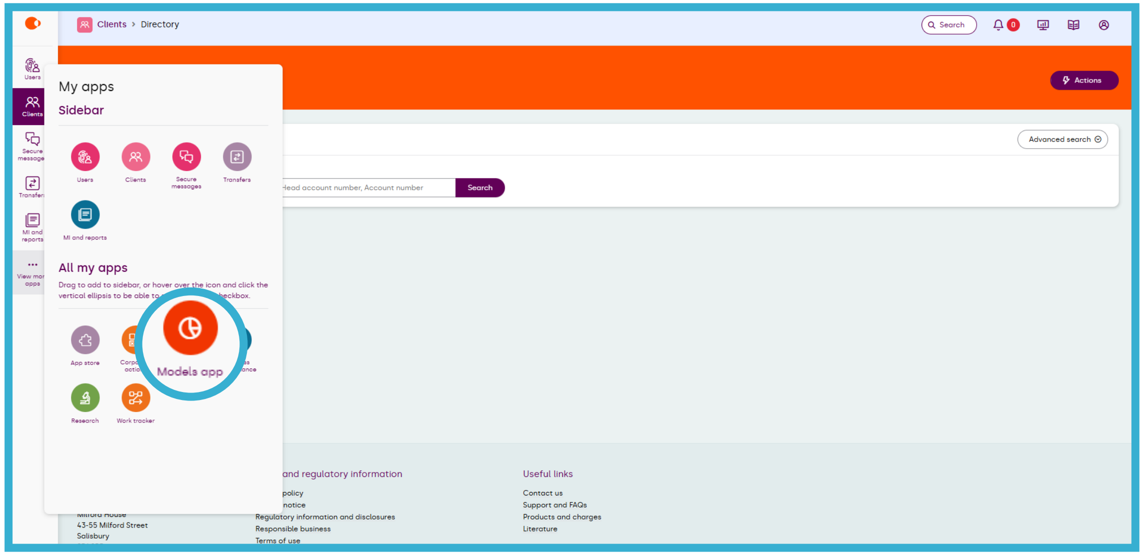
Useful info will look like this.

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

# How to create a model

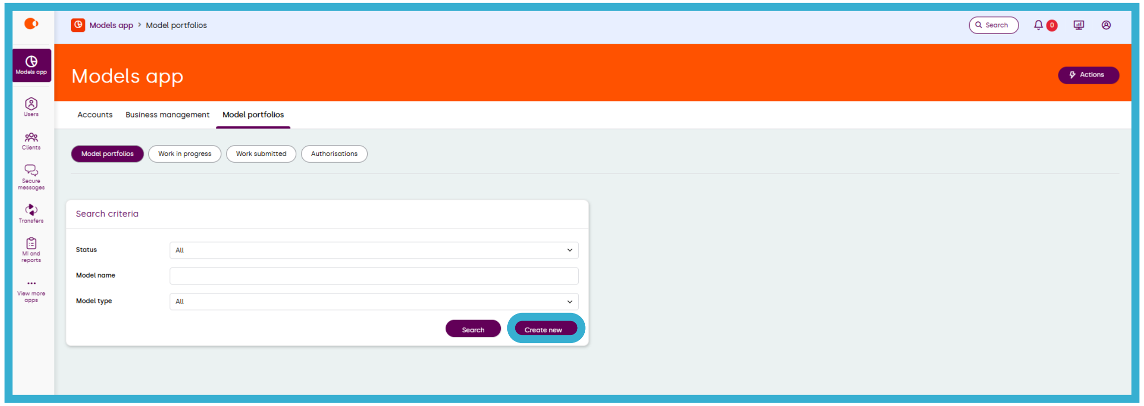
This guide is demonstrated using an adviser user with master user role permissions. If you have different user role permissions, some functionality may not be available to you.

To start creating a model, from the dashboard, select ‘**View more apps**’, and then select ‘**Models app**’.




The models app can be pinned to the side navigation bar, by hovering over the ‘**Models app**’, select the vertical ellipsis (three dots), then select ‘**Pin**’.

Select ‘**Create new**’.



Enter the model portfolio name.

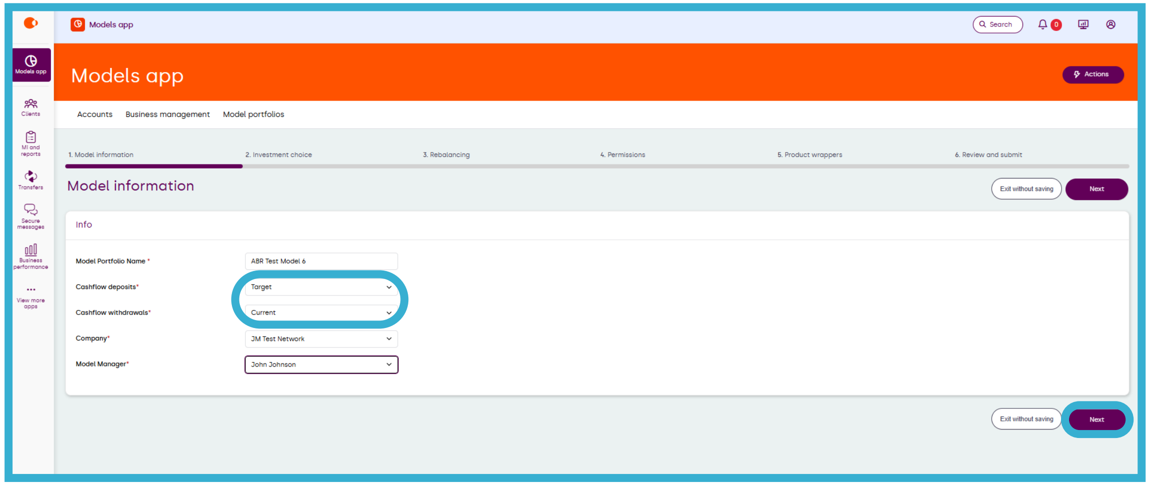
Cashflow deposit is set to '**Target**' and cashflow withdrawals is set to '**Current**'.

Select the model manager from the drop down.

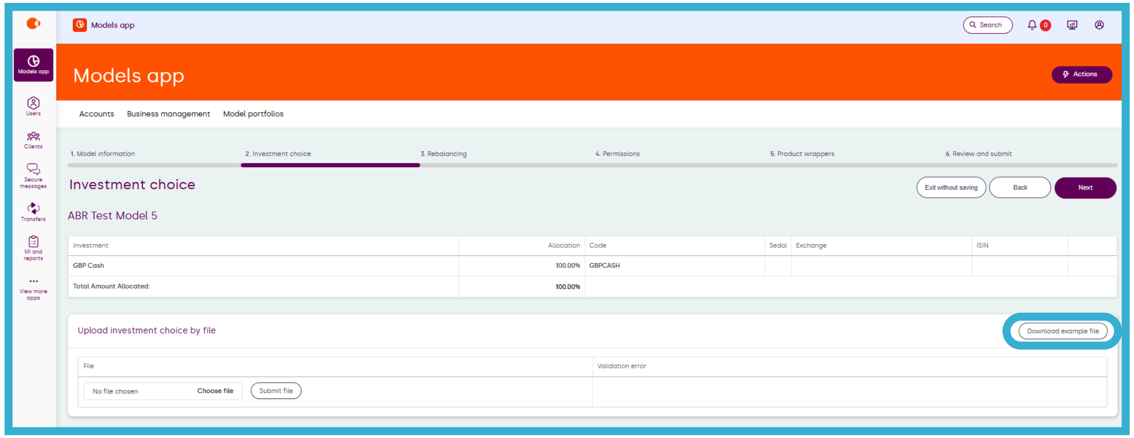
Select '**Next**'.

Confirm the company (network) which is needed and select who is the model manager.

You can exit the journey at any stage by selecting '**Exit without saving**'.



## Investment choice




### Key messages

The cash allocation will always start at 100% and reduces as you select funds to add into the model.

At any point you can switch between the tabs along the top of the page.

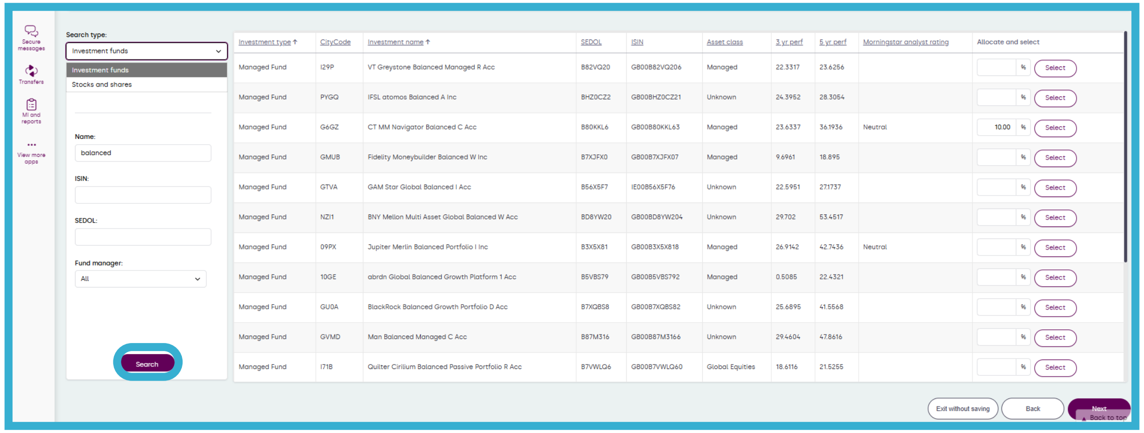
You can upload the investment choices by selecting '**Choose file**' and then '**Submit file**'.

### Key messages

You can select '**Download example file**' for the required .csv file format.

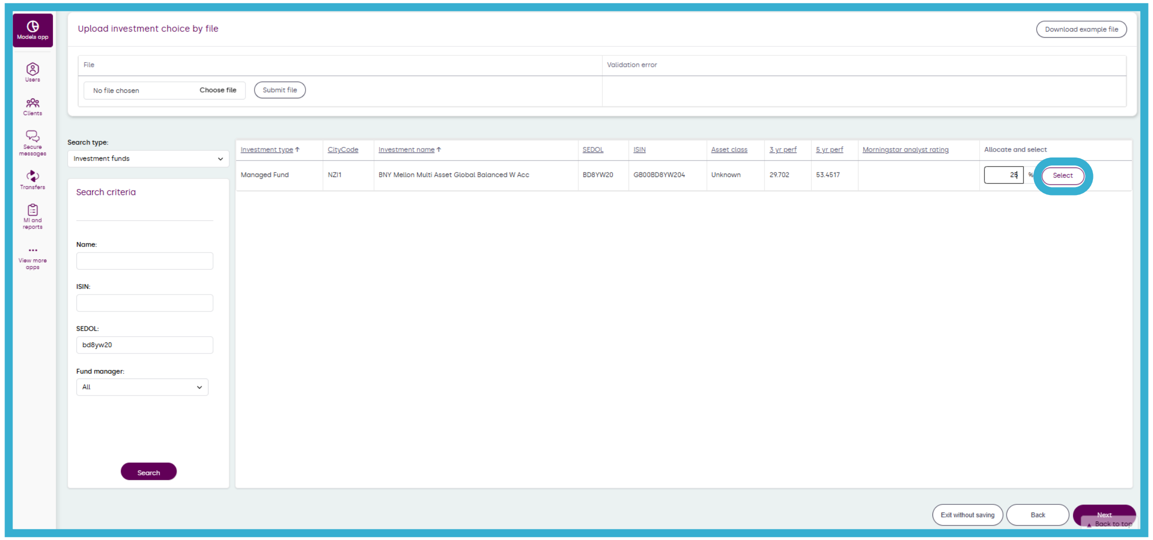
Select the search type from the drop-down list.

Enter the known investment details into the search criteria and then select '**Search**'.



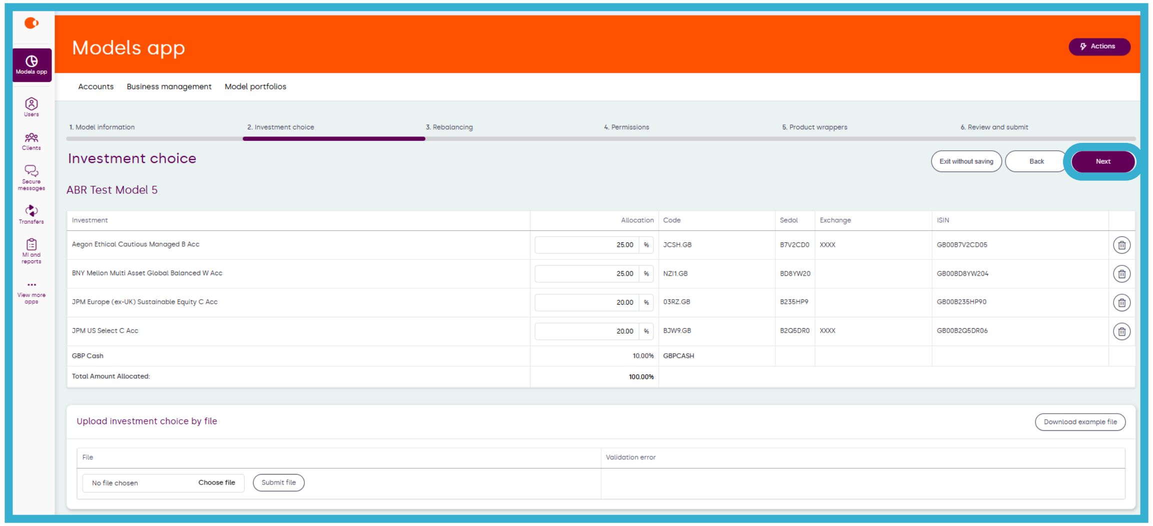
Enter the percentage allocation for the chosen investment, and then click '**Select**'.

Once the funds are selected, they will display along with the percentage in the model.



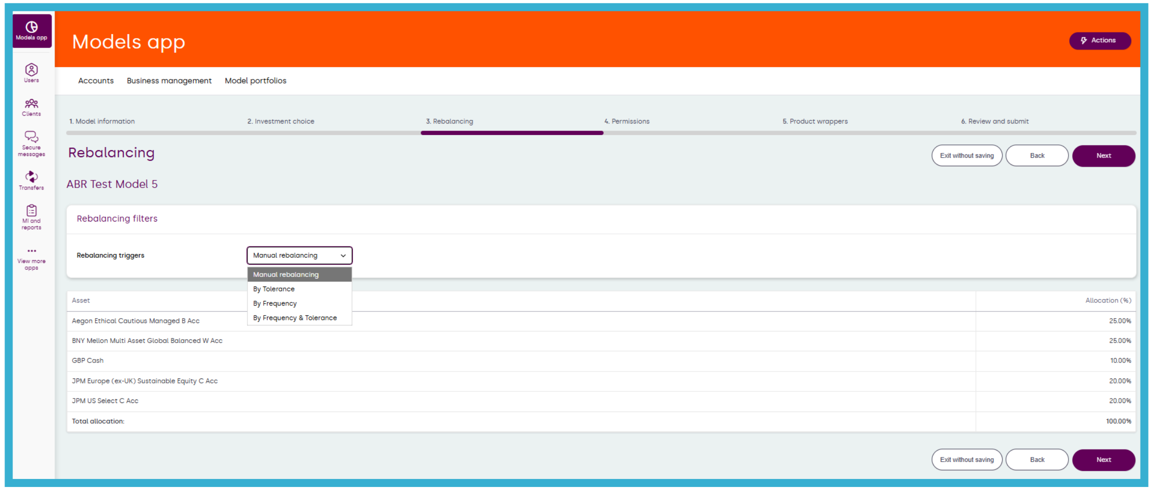
To remove an investment, select the ‘**bin**’ icon.

Once you’re happy with your investment choices, select ‘**Next**’.



## Rebalancing

Select a rebalancing method from the drop-down list.



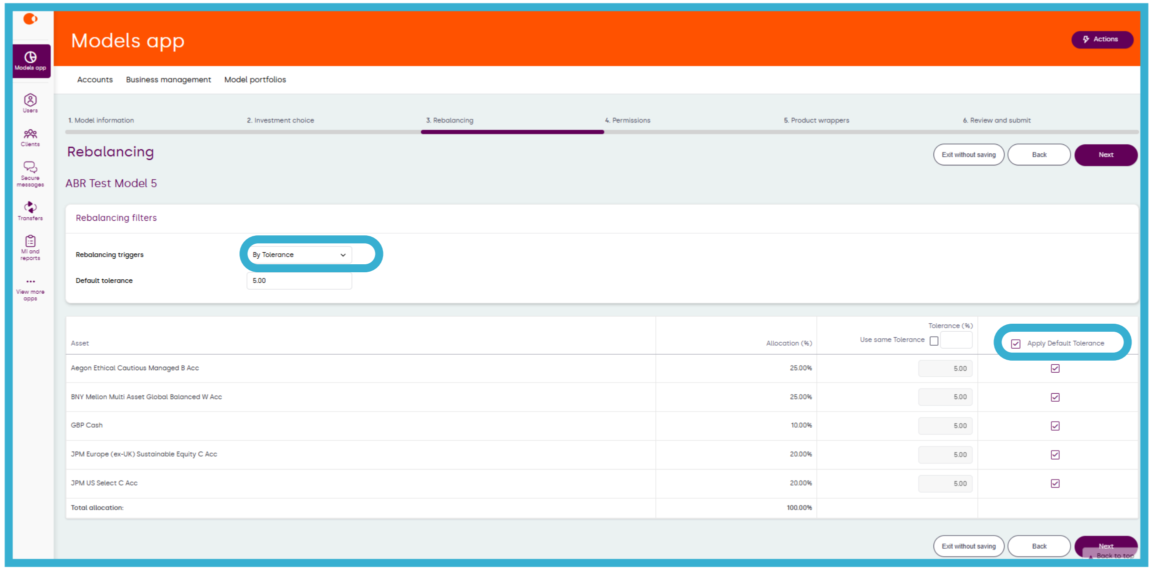
## Rebalancing by tolerance

Select '**By tolerance**' from the drop-down list.

You can select a default tolerance which you can then apply to all by ticking the '**apply all**' box. Or manually amend each investment.

> If you apply a default tolerance you can still amend individual tolerances per investment by unticking the box.

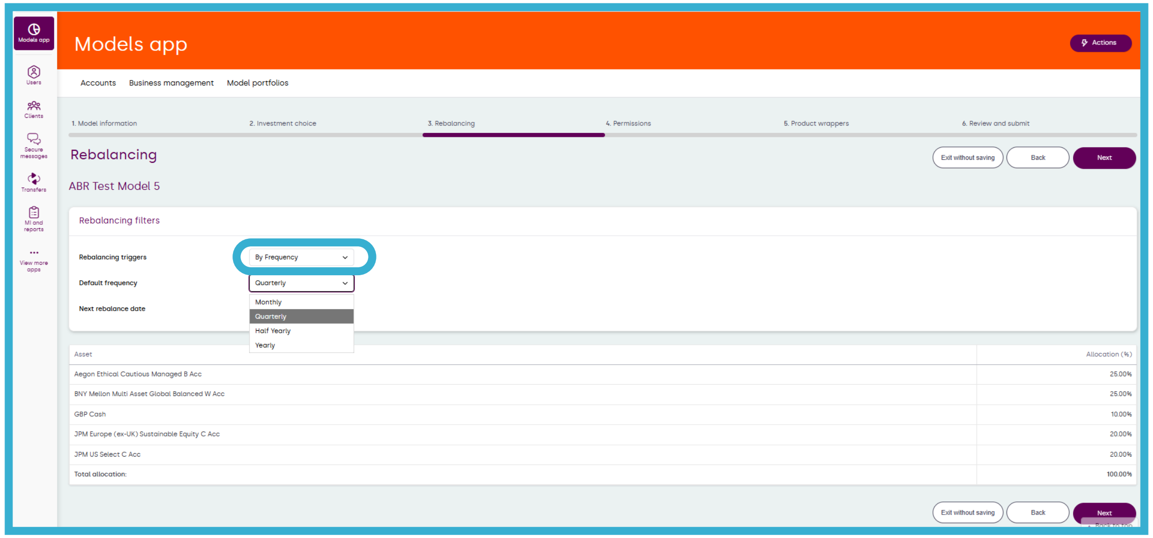
Once you're happy with your rebalancing details, select '**Next**'.



## Rebalancing by frequency

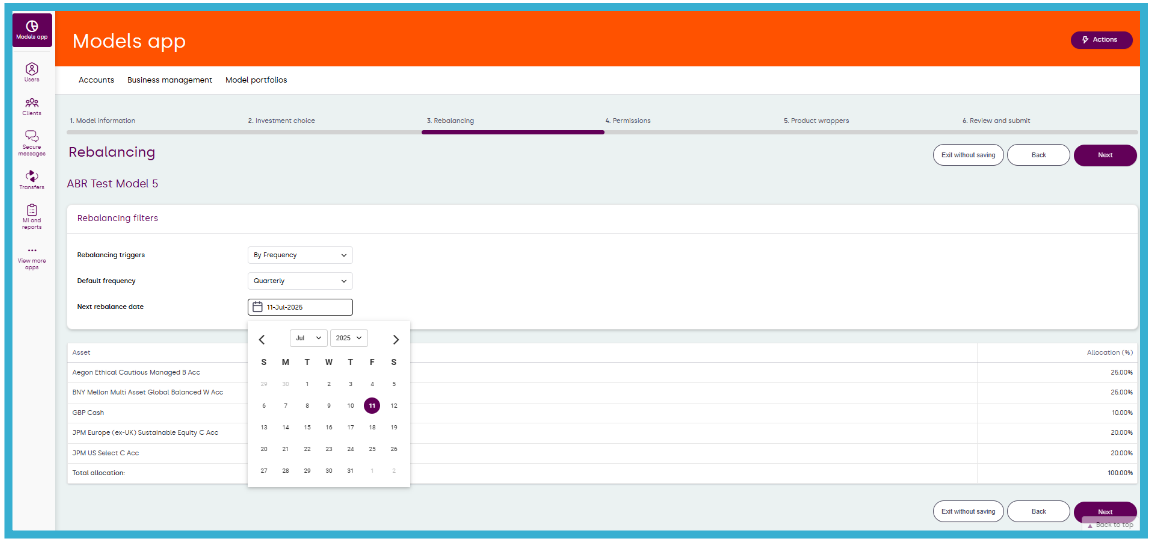
Select ‘**By frequency**’ from the drop-down list.

Choose a frequency for the rebalance from the drop-down list.




Confirm a date for the first rebalance.

Once you’re happy with your rebalancing details, select ‘**Next**’.

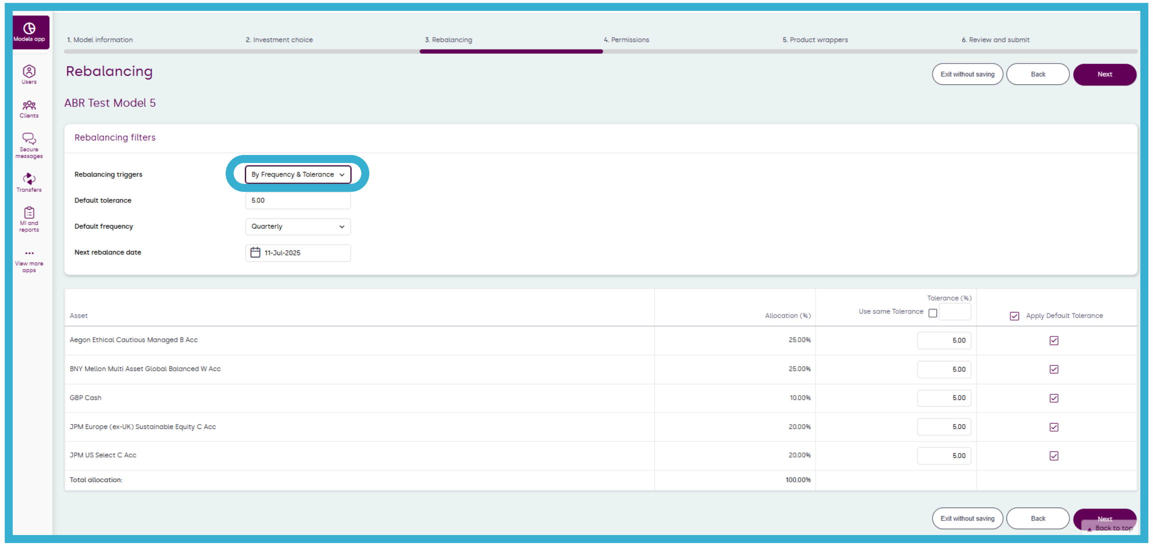


## Rebalancing using frequency and tolerance

Select '**By frequency and tolerance**' from the drop-down list.

Select the tolerance and frequency for the rebalance.

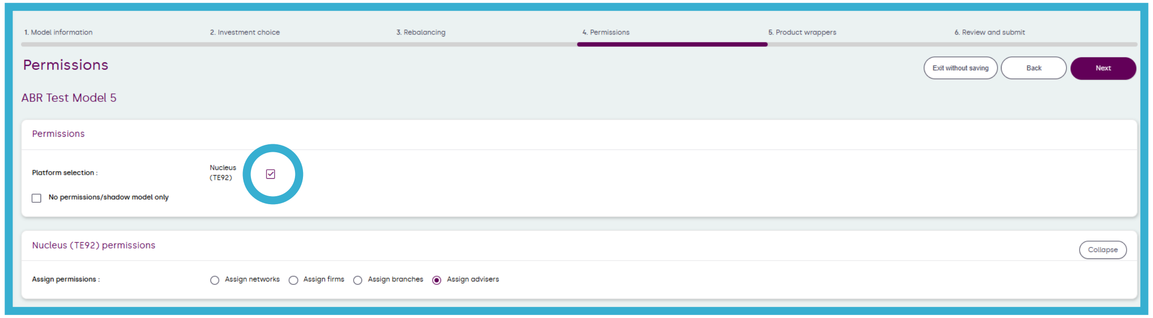
Once you're happy with your rebalancing details, select '**Next**'.



## Permissions

This tab will enable you to provide new users or firms with permission to access a model.

Tick the '**Platform selection**' box to select the platform.

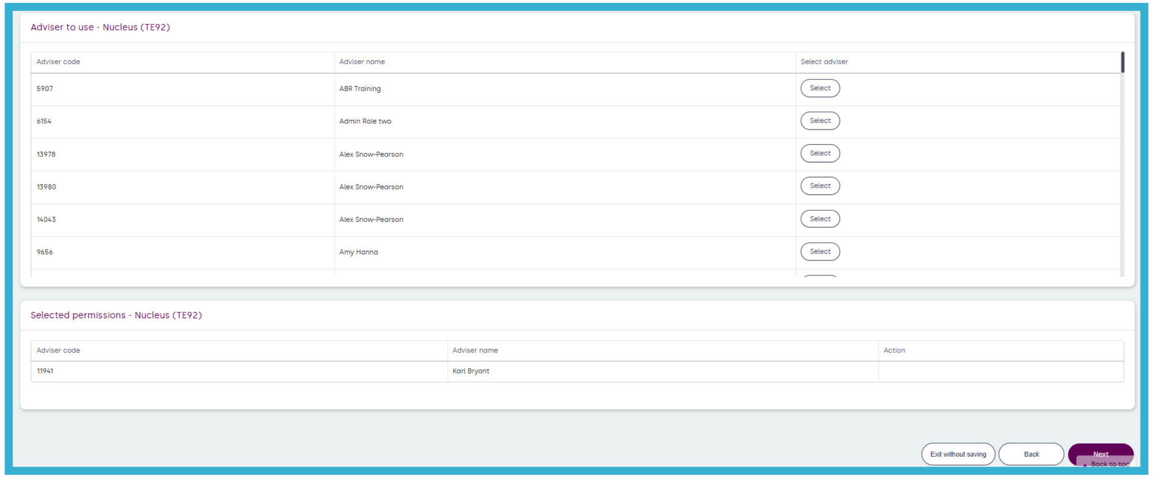


Select the permission level (networks/firms/branches/advisers). The assigned permissions will determine the options available to select.

Click ‘**Select**’.

If an option has been selected in error, select ‘**Remove**’.

Once all permissions have been set, select ‘**Next**’.

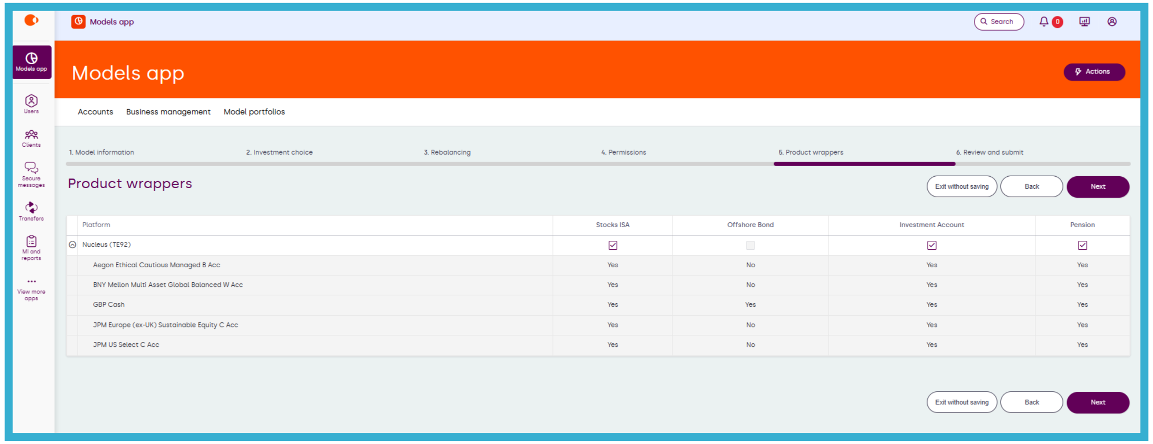


## Product wrappers

Tick to select each product wrapper the model can be used within.

> **!** By selecting the ‘**down arrow**’ on the table, you’ll be able to see if an investment is tradable within the product wrapper.

Once you’re happy with the product wrapper details, select ‘**Next**’.

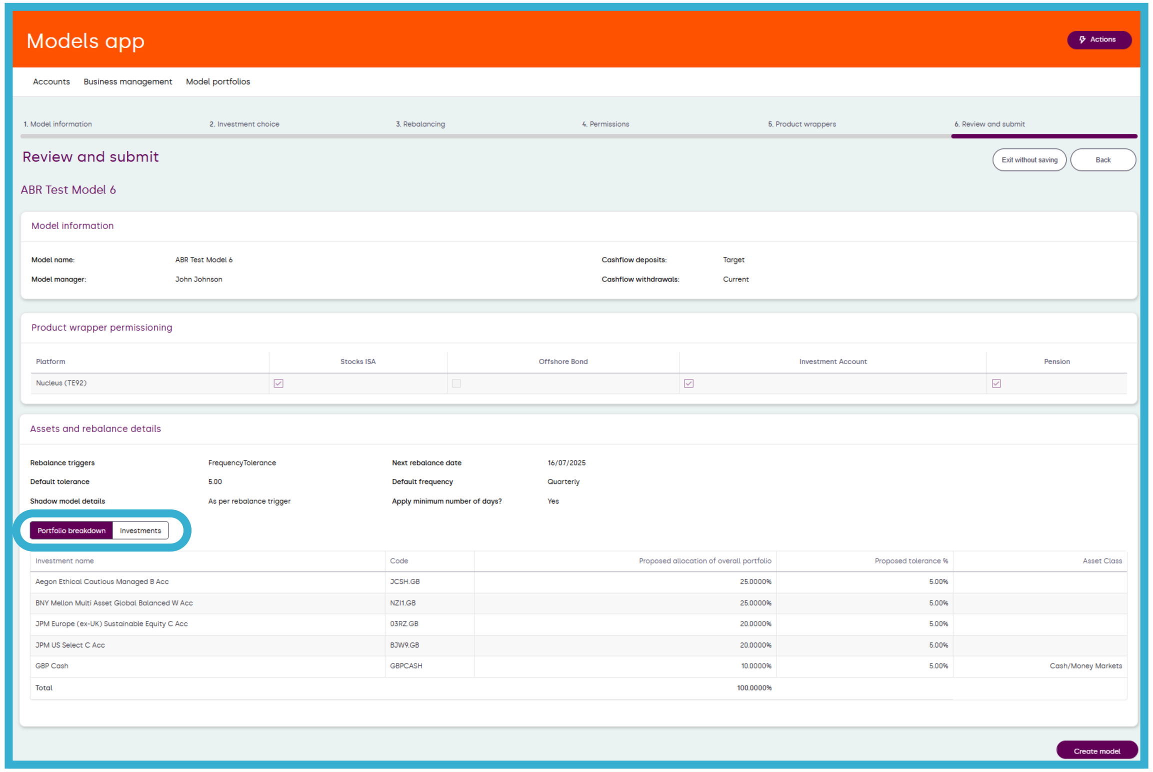


## Review and submit

Review the model details for accuracy. Select the tabs to make any necessary changes.

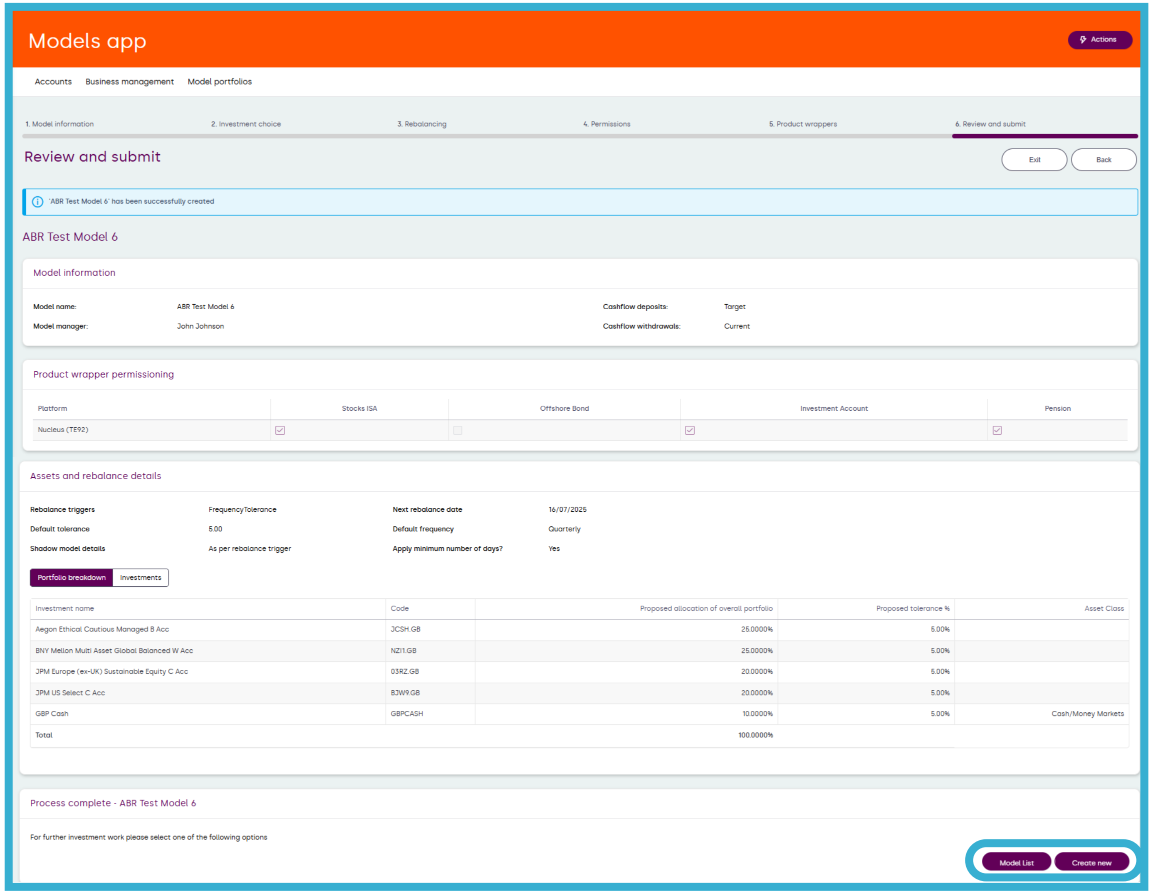
The page can be filtered by ‘**Portfolio breakdown**’ or ‘**Investments**’.

Once you’re happy with the accuracy of the model, select ‘**Create model**’.



A banner will appear to confirm the model has now been successfully created.

Depending on your permissions, the model may need to be authorised before becoming live.




The process is now complete.

From here you can select:

- '**Model List**' to return you to the app page.
- '**Create new**' to create a new model.
- '**Exit**' to close and return to the app page.

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