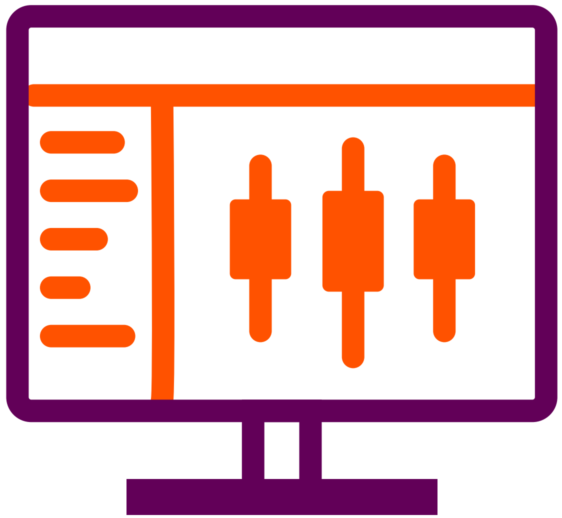
For advisers

Our new platform

nucleus platform

How to create an adviser user



2 minute read

How to create an adviser user

User details	5
User account access	9
Network level access	9
Firm level access	10
Adviser level access	11

How to use this document

Important information will look like this.

Key messages

Key messages will look like this.

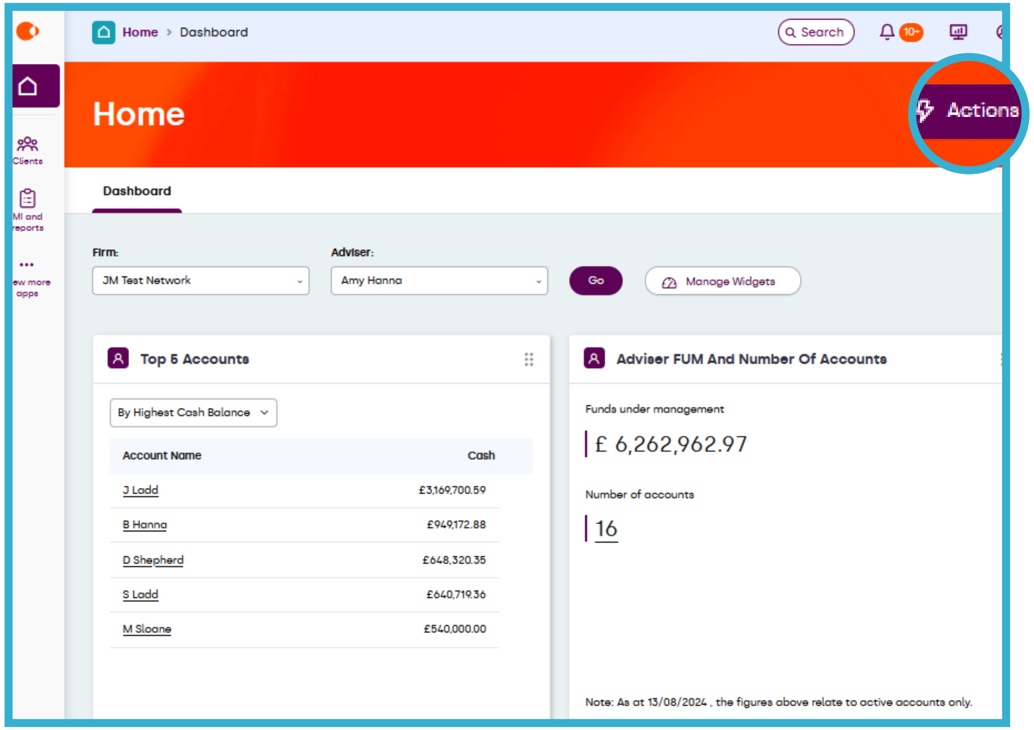
Useful info will look like this.

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

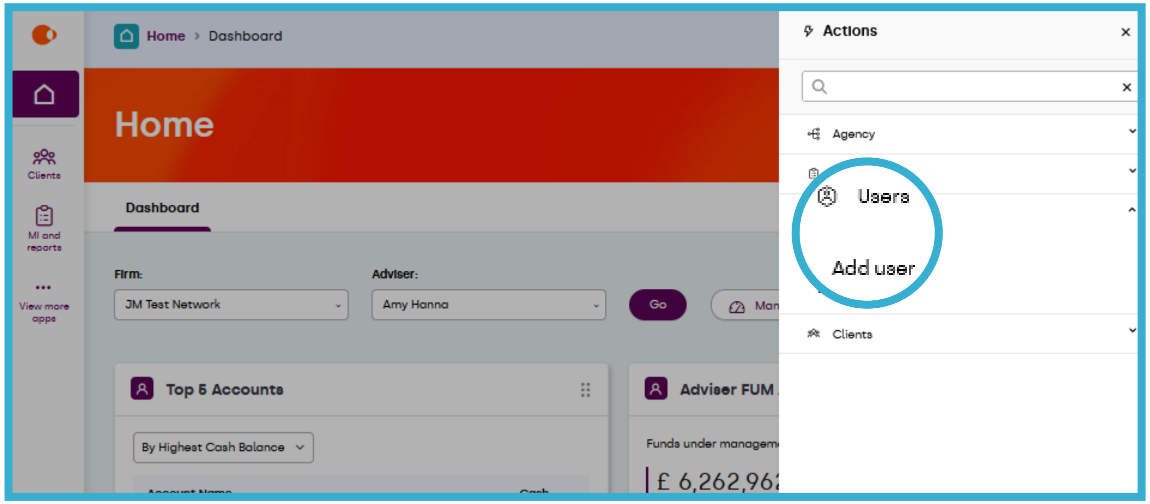
How to create an adviser user

Please note adviser users can only be created by users with a “master user” or “user maintenance” role, therefore you would need to be one of these to perform this action. If your firm doesn’t have one of these roles, please contact us.

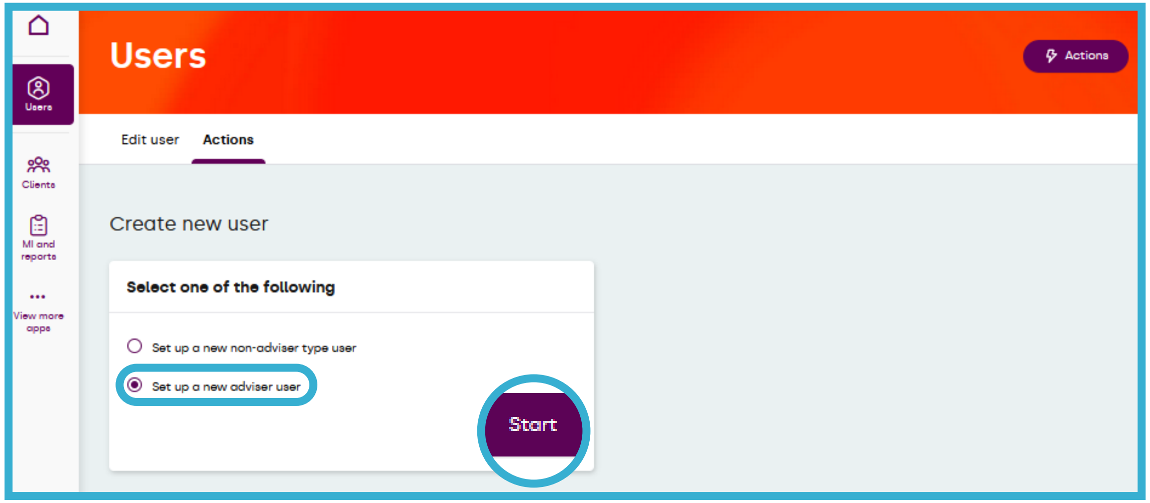
To start creating the adviser user from the home page select the ‘**Actions**’ button.



A list of actions will appear. To create the new adviser user, select ‘**Users**’ and then select ‘**Add user’**.

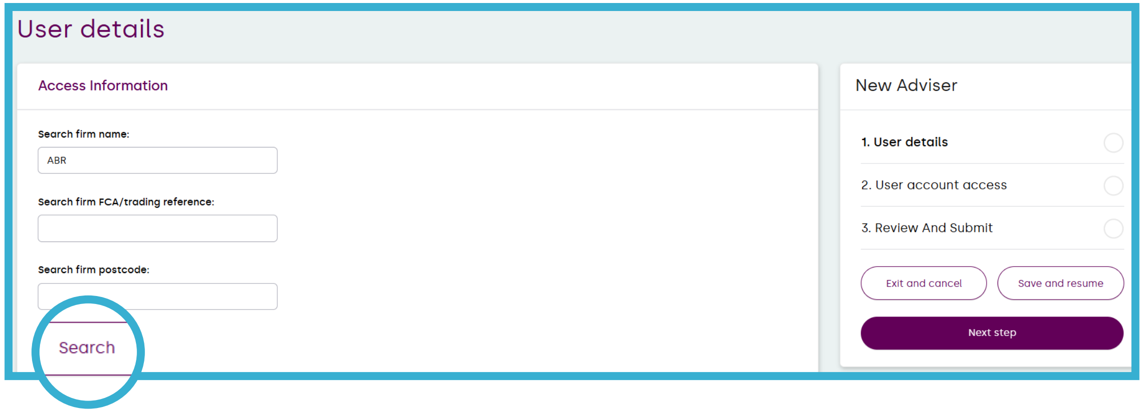


Select ‘**Set up a new adviser user**’, then select ‘**Start**’.

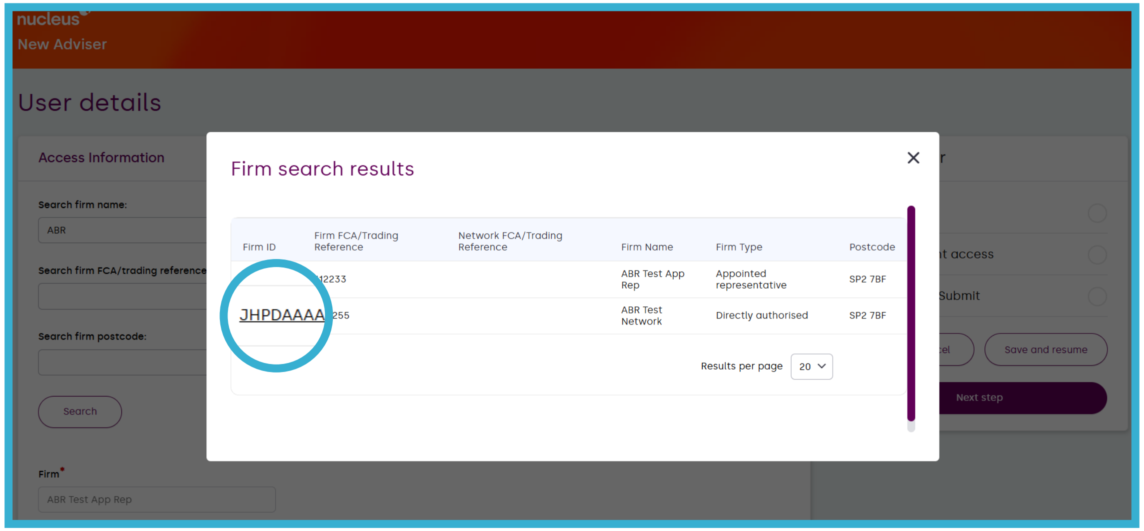


User details

Enter the adviser firm's details into the relevant search bar, then select '**Search**'. You can search by firm name, FCA/trading reference or postcode.



Select the adviser firm from the search results by selecting the '**Firm ID**'.



The firm details will automatically populate.

Once you've selected your network, if different branches are available you'll now have the option to select a branch.

Select the access level for the adviser user from the drop-down list.

Confirm if the user will have access to bulk switching.

Selecting 'yes' can override firm level permissions. If the firm or branch permissions don't allow bulk switches this adviser user will have the ability to complete bulk switches.

Confirm if the user will have access to adviser remuneration statements and reports.

Enter the adviser user's contact information.

Key information

The email address used must not be linked to another user.

A mobile phone number will be required for one time password (OTP) verification.

Select the preferred contact method.

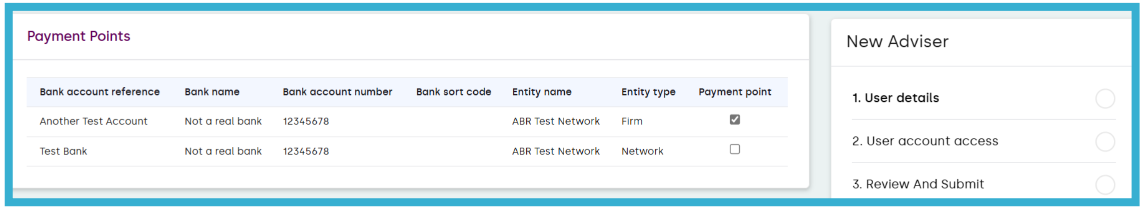
Select the bank account any adviser charges will be sent to.

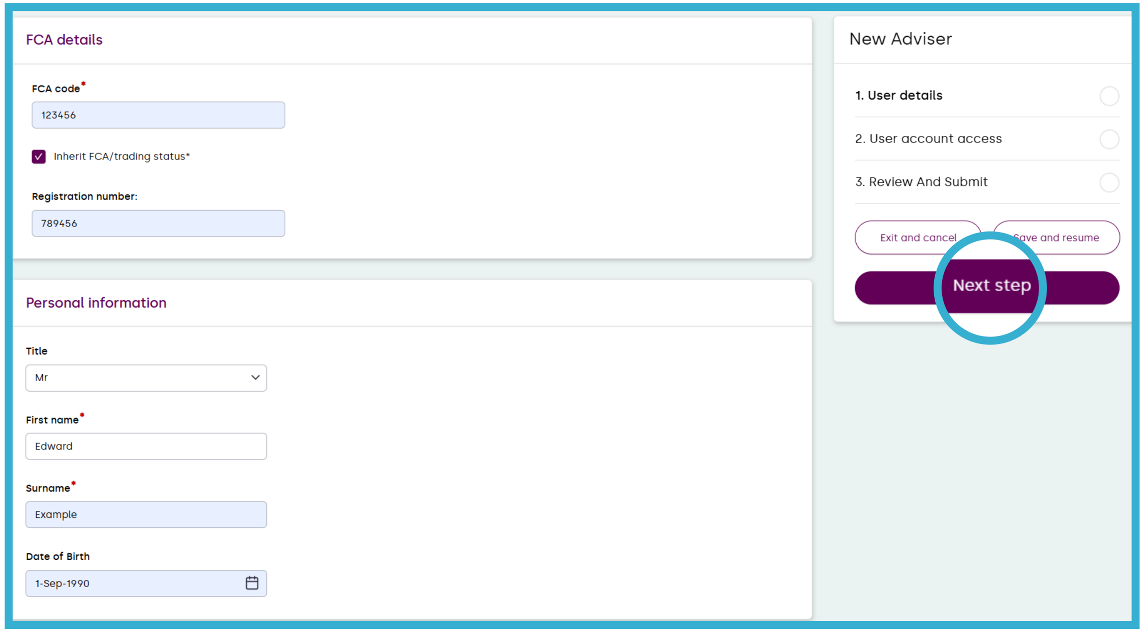
Enter the adviser's FCA code and confirm if the adviser user will inherit the firm's FCA/ trading status.

Enter registration number, if applicable.

Enter the user's personal details.

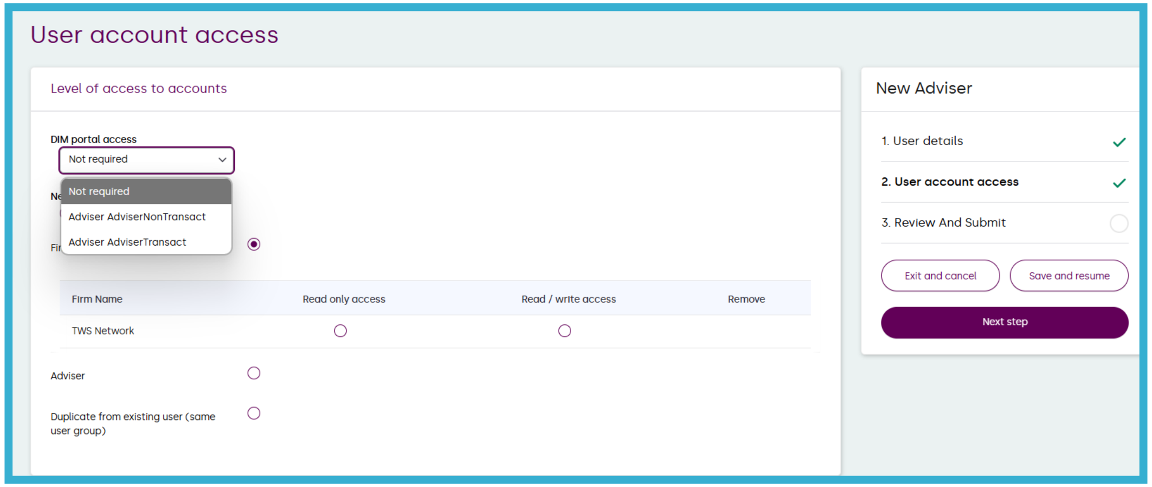
Once you're happy with the user's details, select '**Next Step**' to move on to the user account access page.





User account access

Confirm if DIM Portal access is required for the adviser user.

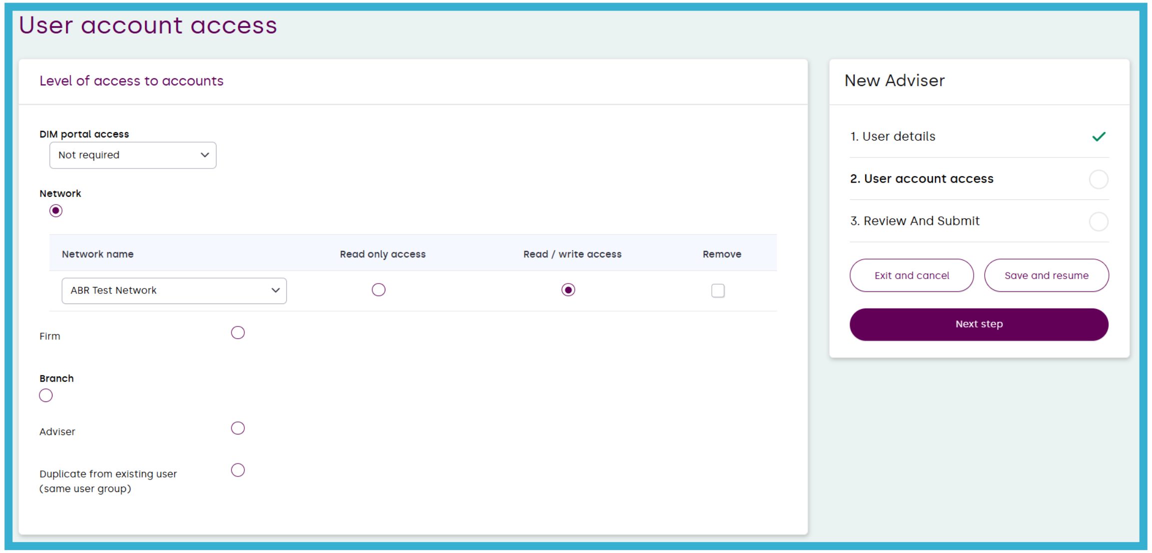


Key information

The access level selected will determine which clients the adviser user is able to view.

Network level access

Confirm the adviser user's access level.

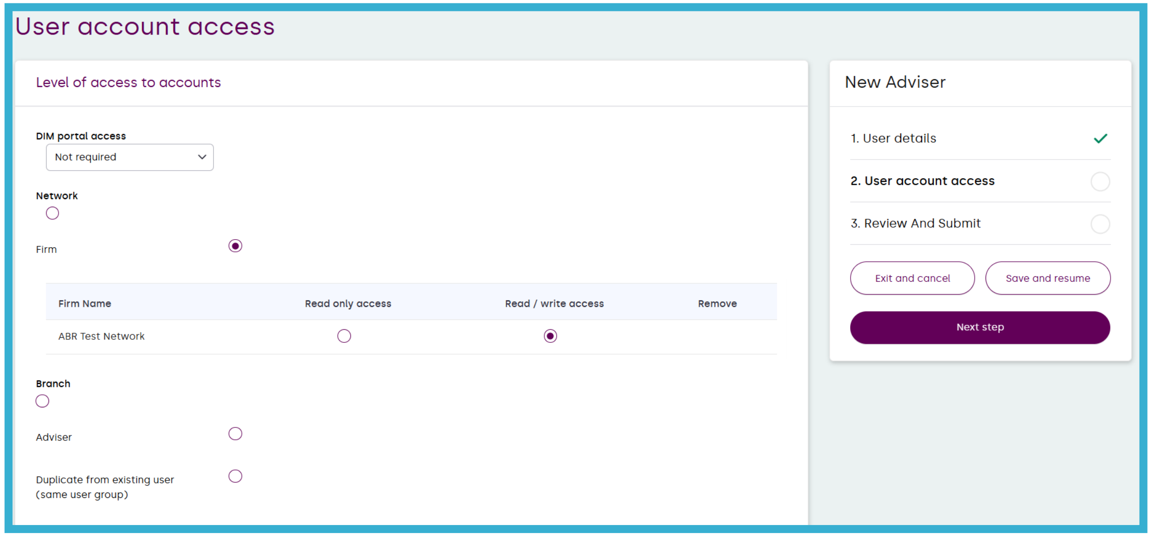


! An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.

Firm level access

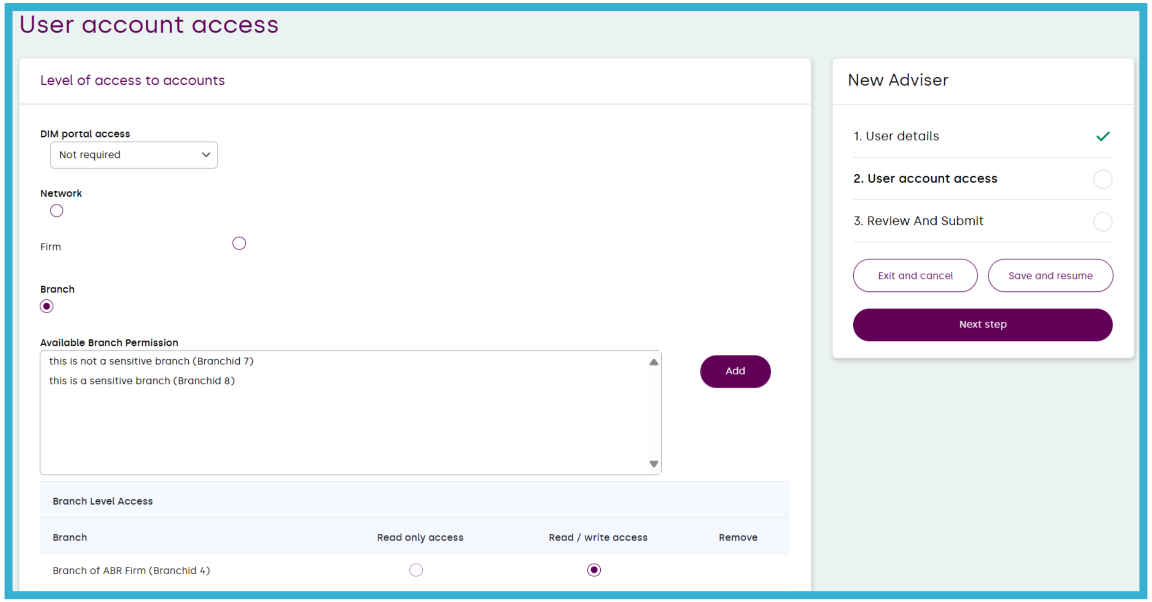
Confirm the adviser user's access level.

An adviser user with read only access won't be able to submit any changes, applications or transactions to client accounts.



Branch level access

Confirm the adviser user's access at branch level, if applicable.



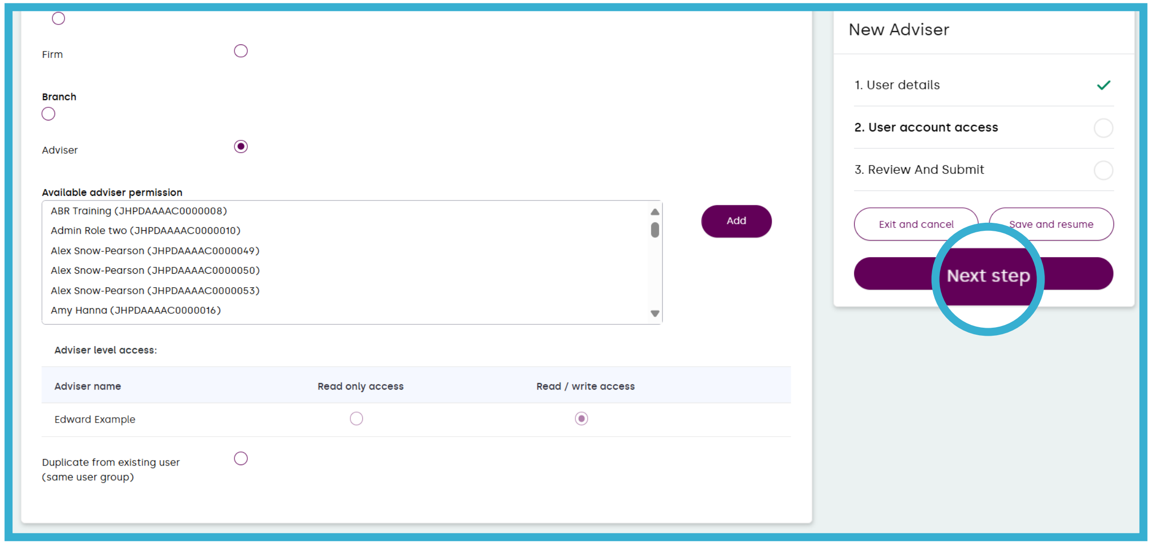
Adviser level access

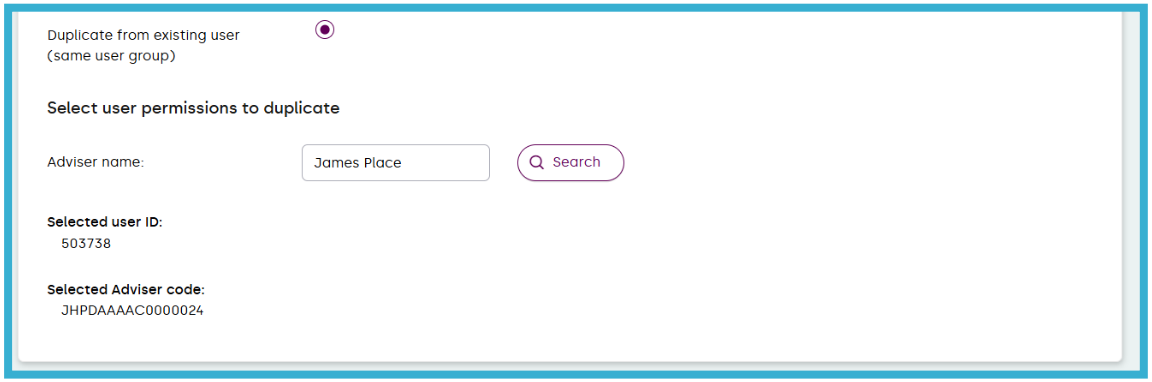
Select the adviser user which the permissions should reflect.

An adviser user with read-only access won't be able to submit any changes, applications or transactions to client accounts.

You can choose to duplicate settings from an existing user by searching the user whose settings you wish to duplicate.

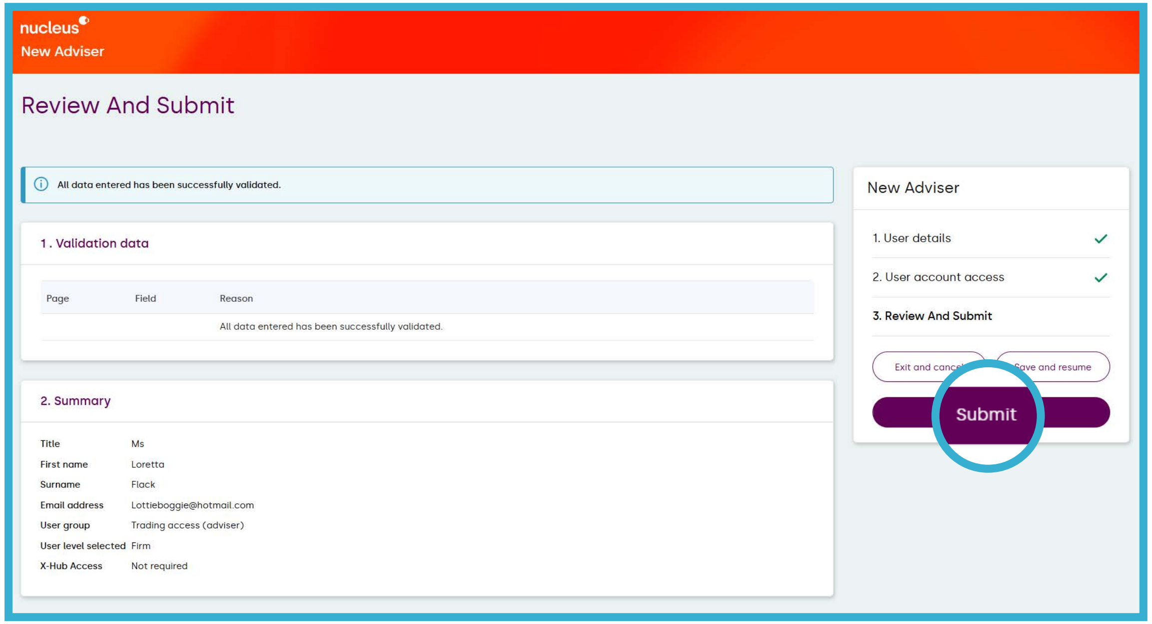
Once you're happy with your user's details, select '**Next Step**' to move on to the review and submit page.





Review and submit

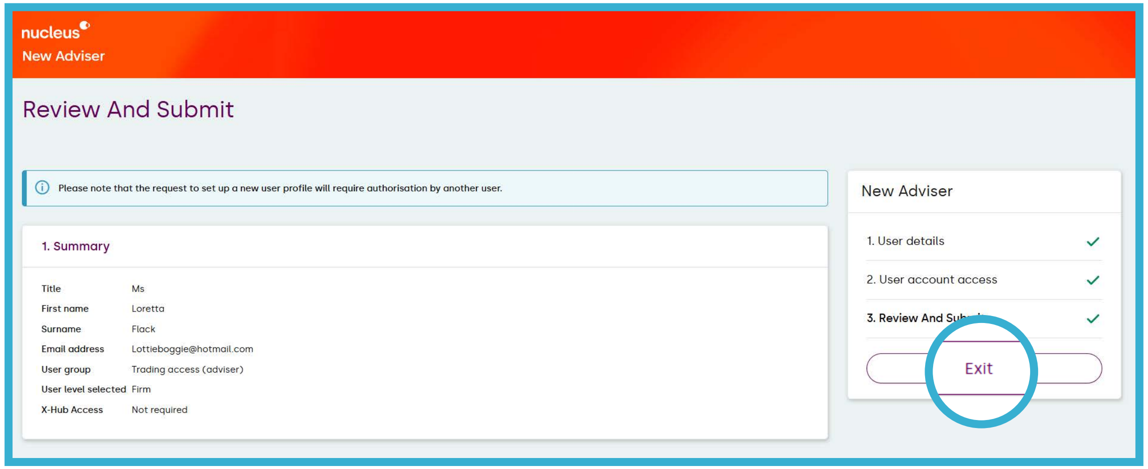
Review the user's details. When you're happy they're correct, select '**Submit**' to create the adviser user.



Once submitted, the new user profile will require authorisation by another user in your network. See the '**how to authorise a new user**' guide for more information.

Once authorised, a user ID will be created.

Select '**Exit**' to finish.



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