

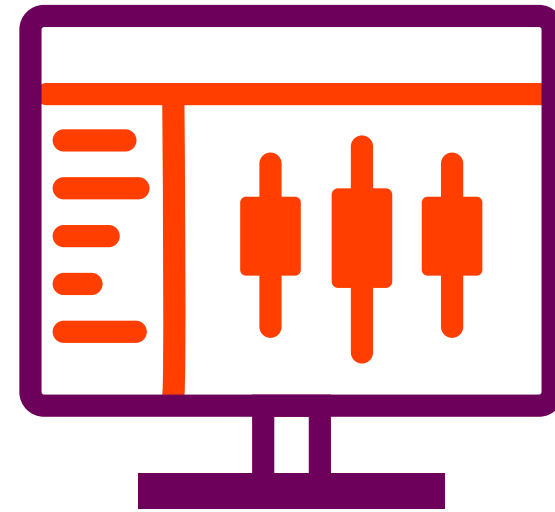
For advisers

Our new
platform

nucleus^o platform

How to authorise a new user

🕒 2 minute read



How to authorise a new user

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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.

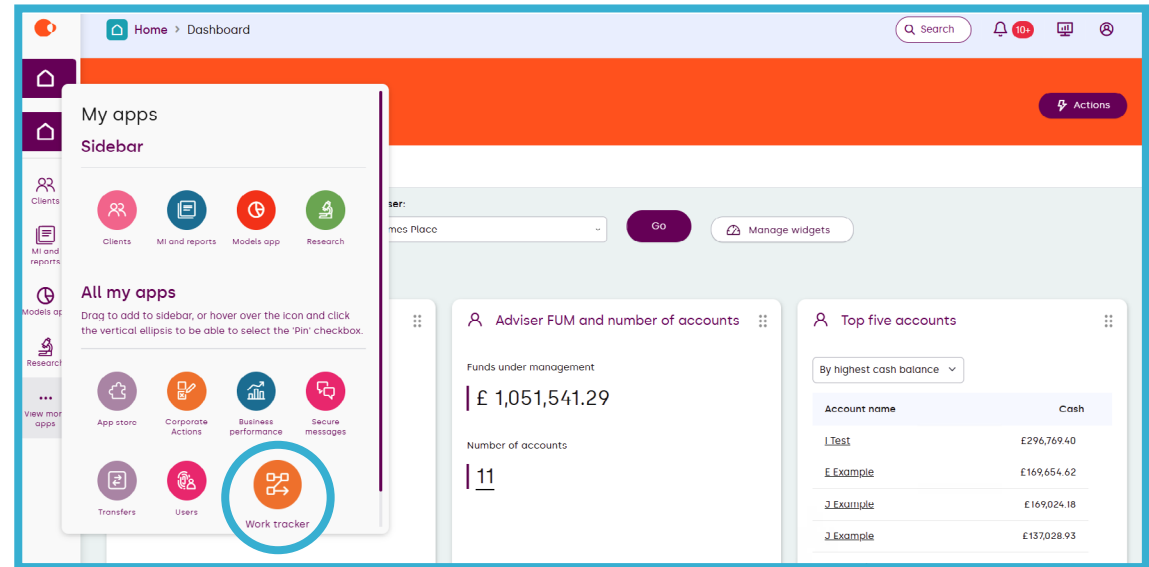


We recommend using the zoom function to view the details on the platform screens in this guide.

How to authorise a new user

To start, from your home page go to the left hand side options and select the **'View more apps'**.

Select the app **'Work tracker'**.



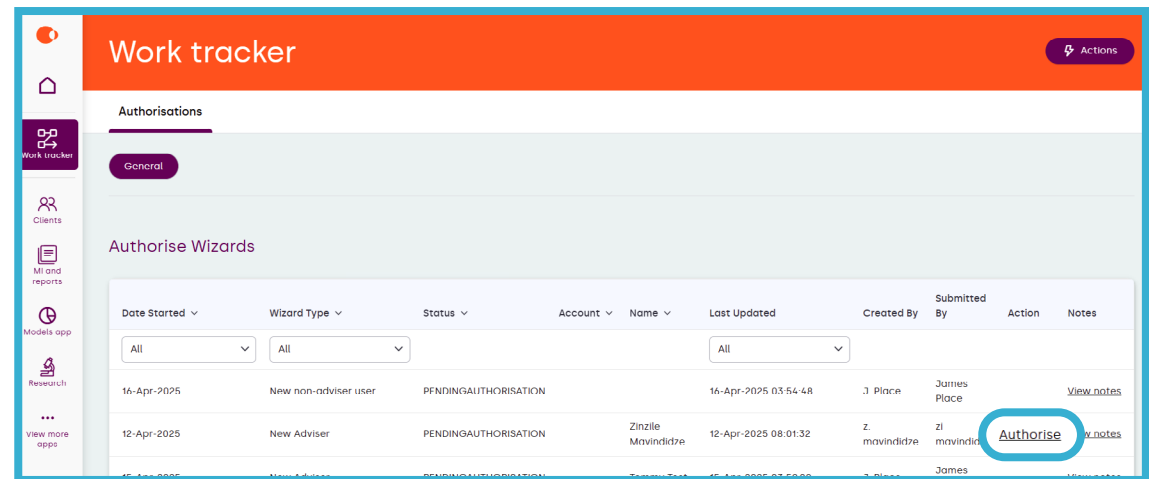
Work tracker authorisations

You'll see a table with a list of new users that need authorising.

Under the action column select **'Authorise'** next to the user you wish to authorise.



You cannot authorise your own work. If one user creates the new user, then another user will need to authorise it.



User details

All user details that were entered when the new user was created will be displayed.

Scroll through the information provided at the set up stage and make sure you're happy with the details entered.

The screenshot displays a 'User details' form with the following sections and fields:

- Access Information**
 - Search firm name:
 - Search firm FCA/trading reference:
 - Search firm postcode:
 - Firm*
 - Branch
 - Access level ⓘ
What does each role allow the user to do
 - User type
Adviser
 - User can access bulk switching functionality:
 - User can access Remuneration Statement:
 - External user ID:
- New Adviser**
 - 1. User details ✓
 - 2. User account access ✓
 - 3. Review And Submit ✓
 -
 -

Key message

You cannot edit any of the details entered. The information is view only.

Contact Information

Email*

Confirm email*

Country* **Phone number**

Country* **Mobile phone number (CTP only - Please do not use to contact adviser) ☎***

Preferred contact method*

Payment Points

Bank account reference	Bank name	Bank account number	Bank sort code	Entity name	Entity type	Payment point
Another Test Account	Not a real bank	12345678		ABR Test Network	Firm	<input checked="" type="checkbox"/>
Test Bank	Not a real bank	12345678		ABR Test Network	Network	<input type="checkbox"/>

New Adviser

- 1. User details
- 2. User account access
- 3. Review And Submit

Select **'Next step'** to continue.

The screenshot shows a web form for authorizing a new user, divided into two main sections: 'FCA details' and 'Personal information'. The 'FCA details' section includes a text input for 'FCA code' (containing '456114'), a checked checkbox for 'Inherit FCA/trading status', and a text input for 'Registration number'. The 'Personal information' section includes a dropdown for 'Title' (set to 'Miss'), text inputs for 'First name' (containing 'Zinzile') and 'Surname' (containing 'Mavindize'), and a date input for 'Date of Birth' (set to '19-Apr-1984'). On the right side, a 'New Adviser' summary panel lists three steps: '1. User details' (checked), '2. User account access' (checked), and '3. Review And Submit' (checked). Below this panel is an 'Exit' button. At the bottom right, a large purple button labeled 'Next step' is highlighted with a blue border and a white shadow.

FCA details	
FCA code*	456114
<input checked="" type="checkbox"/> Inherit FCA/trading status*	
Registration number:	

Personal information	
Title	Miss
First name*	Zinzile
Surname*	Mavindize
Date of Birth	19-Apr-1984

New Adviser	
1. User details	✓
2. User account access	✓
3. Review And Submit	✓
Exit	

Next step

User account access

Review the access levels being granted for this new user.



You cannot edit any of the details entered. The information is view only.

Select **'Next step'** to continue.

nucleus[®]
New Adviser

User account access

Level of access to accounts

DIM portal access
Not required

Network

Network name	Read only access	Read / write access	Remove
ASK test Network	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

Firm

Adviser

Duplicate from existing user (same user group)

New Adviser

1. User details ✓
2. **User account access** ✓
3. Review And Submit ✓

Exit

Next step

Review and submit

Please select **'Authorise'** to validate the new user set up.

If you're not happy with any of the details entered, then select **'Reject'**.

nucleus
New Adviser

Review And Submit

All data entered has been successfully validated.

1. Validation data

Page	Field	Reason
All data entered has been successfully validated.		

2. Summary

Title	Miss
First name	Zinile
Surname	Mavindidze
Email address	andy.m@nucleusfinancial.com
User group	Master user (adviser)
User level selected	Network

New Adviser

- 1. User details ✓
- 2. User account access ✓
- 3. Review And Submit ✓

Exit

Authorise

Reject



If you select reject, then the user will not be created and will need to be re-entered using the "how to set up a new user guide".

nucleus
New Adviser

Review And Submit

User successfully rejected.

1. Summary

Title	Mr
First name	Danny
Surname	Adviser
Email address	daniel.mackay@nucleusfinancialt4.com
User group	Trading access (adviser)
User level selected	Adviser

New Adviser

- 1. User details ✓
- 2. User account access ✓
- 3. Review And Submit ✓

Exit

Reject

Once authorised, the new user will be successfully created.




Please take note of the user ID as the new user will need this to log in.


Select '**Exit**' to finish.


The screenshot shows the 'New Adviser' review and submit screen. At the top, there is a red header with the 'nucleus' logo and the text 'New Adviser'. Below the header, the main title is 'Review And Submit'. A blue notification box at the top left states: 'User successfully created with User ID of ZMavindidze236.' To the right, a 'New Adviser' summary table shows three steps: '1. User details' with a green checkmark, '2. User account access' with a green checkmark, and '3. Review And Submit' with a green checkmark. Below this, a table displays the user's details:

1. Summary	
Title	Miss
First name	Zinzile
Surname	Mavindidze
Email address	andy.m@nucleufinancial.com
User group	Master user (adviser)
User level selected	Network
Username	ZMavindidze236

At the bottom right, there is a blue button labeled 'EXIT'.

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