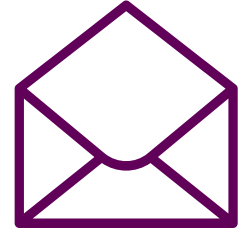


For advisers

Our **new**  
platform



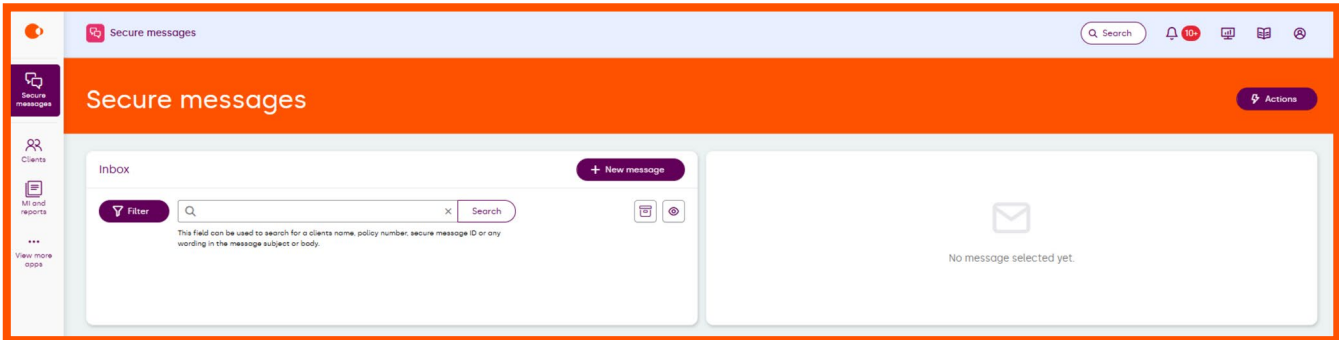
## Secure messages

### Overview:

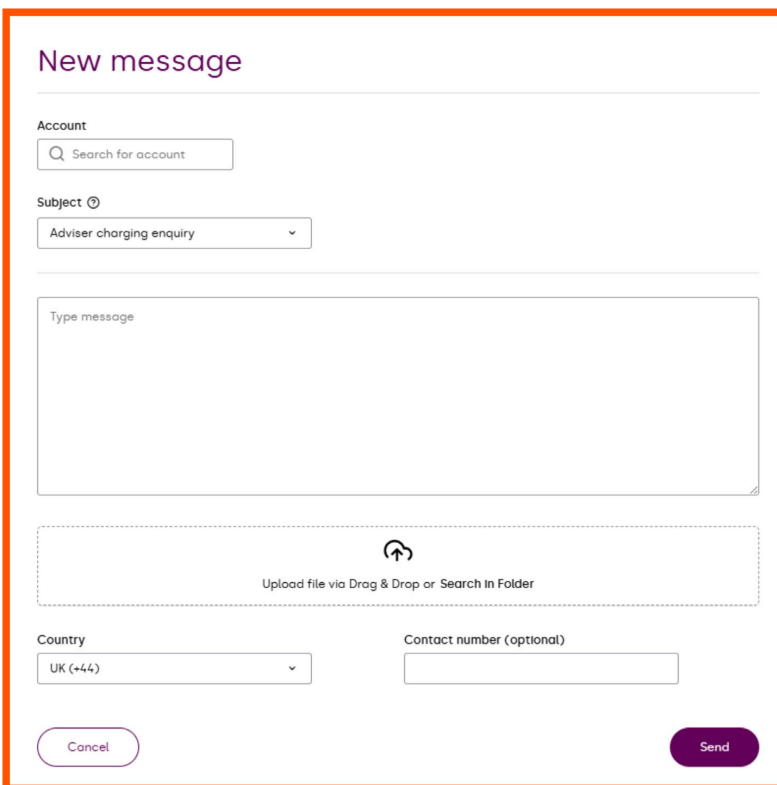
The purpose of secure messaging is to act as an additional communication channel between Nucleus Financial, you and your clients. It allows 2-way written communication to answer enquiries and acts as an electronic delivery system for documents.

## Secure message application functionality:

### New message creation



As an adviser or non-adviser user, you will have the ability to create a new secure message by selecting **"New message"**. This will open a new pop up window.

A screenshot of the 'New message' form. The form is titled 'New message' and has a search bar for 'Account'. Below this is a 'Subject' dropdown menu with the selected option 'Adviser charging enquiry'. There is a large text area for 'Type message'. Below the text area is a dashed box with an upload icon and the text 'Upload file via Drag & Drop or Search In Folder'. At the bottom, there are two input fields: 'Country' (with 'UK (+44)' selected) and 'Contact number (optional)'. There are 'Cancel' and 'Send' buttons at the bottom.

If your message is regarding a particular client, you can type an identifying detail into **'Account'** such as the policyholder's name or their product number and select the matching option from the list.



You will only be able to select clients linked to your firm and those you're permitted for.

The subject field contains a pre-defined drop-down list of options to choose from. You can also select **"Other"**, which will allow you to type free text instead.

You also have the option to upload attachments. This could be ID supporting a query or paperwork for an application. Many popular file types are supported.



There is a limit of 5 attachments per secure message. If you need to send us more than 5 items, please use multiple secure messages.



File names cannot contain special characters. If you try to send us an attachment with a file name that has special characters, it will fail. Special characters include < > : " / | ? \* .

If applicable, an additional confirmation message will be displayed to advise on time frames for response from us.

## Mailbox

Each mailbox is individual to the user. Here, you can search and filter your existing messages as well as perform several other actions.

The criteria when searching is:

- Status
- Head/sub account number
- Policyholder name
- Secure message subject
- Description (key word[s] search in body of message text)

The criteria when filtering is:

- Status
- Subject
- Date received

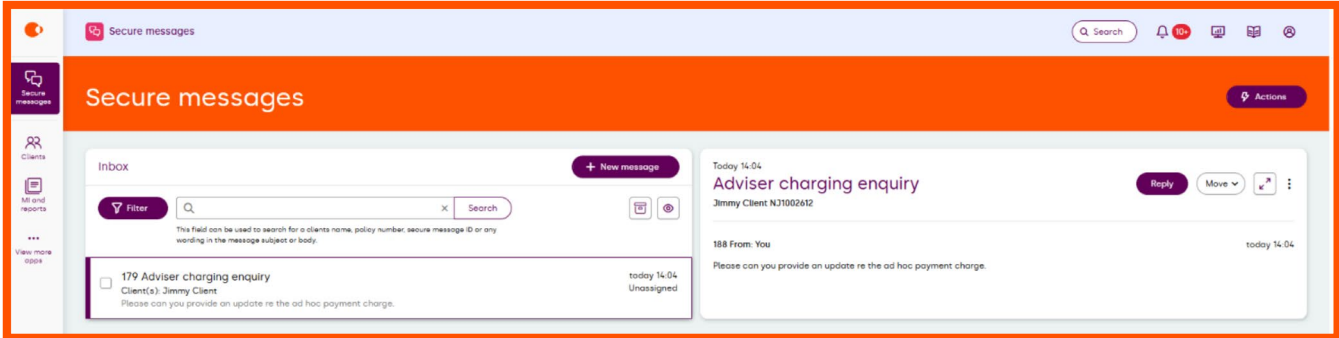
You can also undertake the following actions from the Mailbox page:

- Open a secure message
- Amend read/unread status of a secure message
- Move secure message to Archive folder / Mark secure message as 'No Further Action Required'

The header will display the total number of unread messages in your mailbox.

## Received messages

You can access any existing messages in your mailbox that you have access to and view the message thread in full. Once selected, the message will open in the same page.



When you select a message, its status will be updated from **'unread'** to **'read'**.

You will be able to view each message in the thread within a separate text box, each detailing whether the individual message was sent by Nucleus or you. The date and time for each message in the thread will also be visible.

You can reply to an existing message thread by selecting **'Reply'**. This opens a text box in the same page.

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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 Tynetalk service on 18001 03455 212 414.**

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