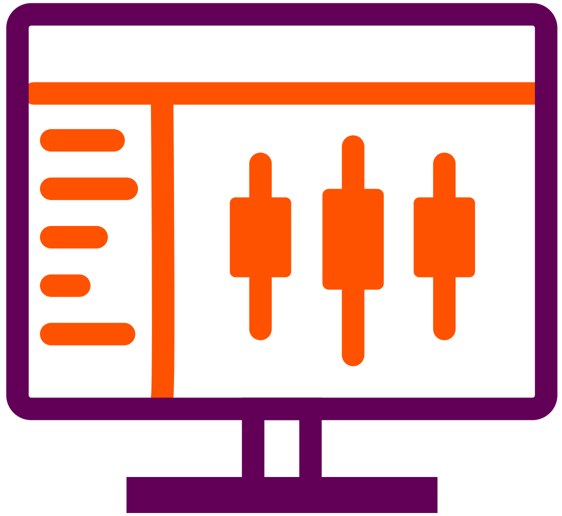
For advisers

Our new platform

nucleus platform

How to create a non-adviser user



2 minute read

How to create a non-adviser user

How to use this document

Important information will look like this.

Key messages

Key messages will look like this.

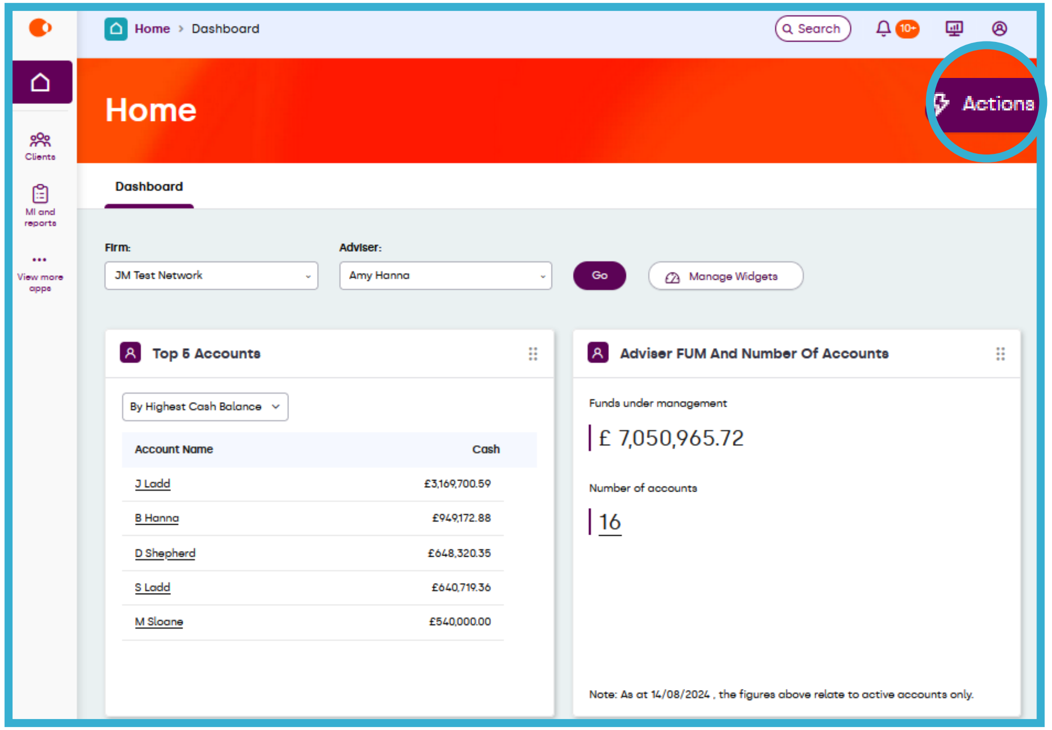
Useful info will look like this.

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

How to create a non-adviser user

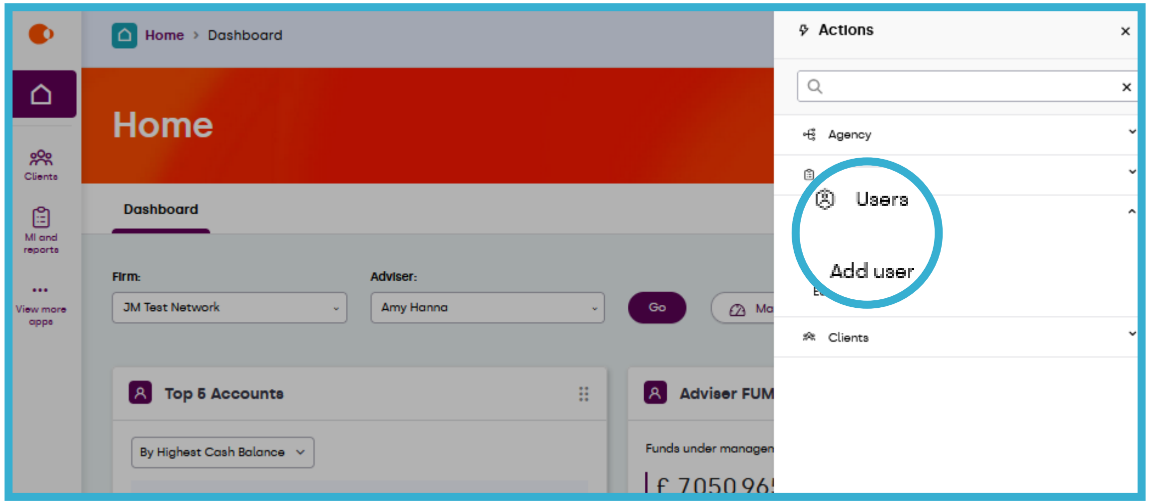
Please note adviser users can only be created by users with a "master user" or "user maintenance" role, therefore you would need to be one of these to perform this action. If your firm doesn't have one of these roles, please contact us.

To start creating the non-adviser user, select the '**Actions**' button on the home page.

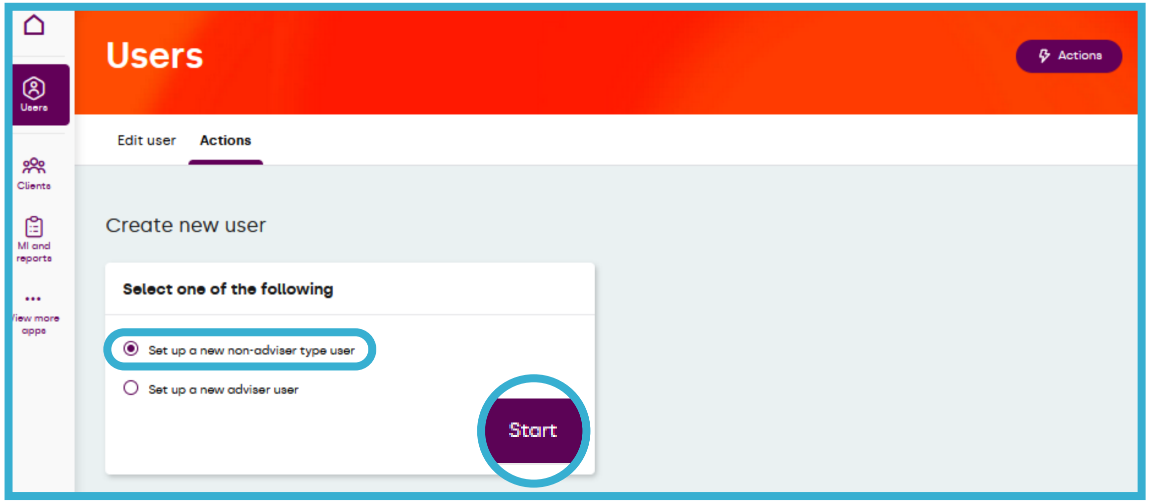


A list of actions will appear.

To create a new user, select '**Users**' and then select '**Add user**'.

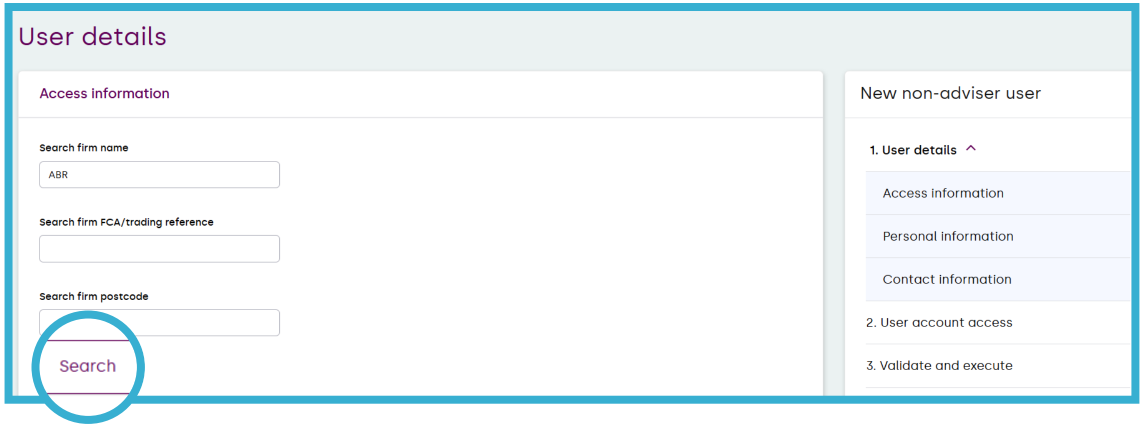


Select '**Set up a new non-adviser type user**', then select '**Start**'.

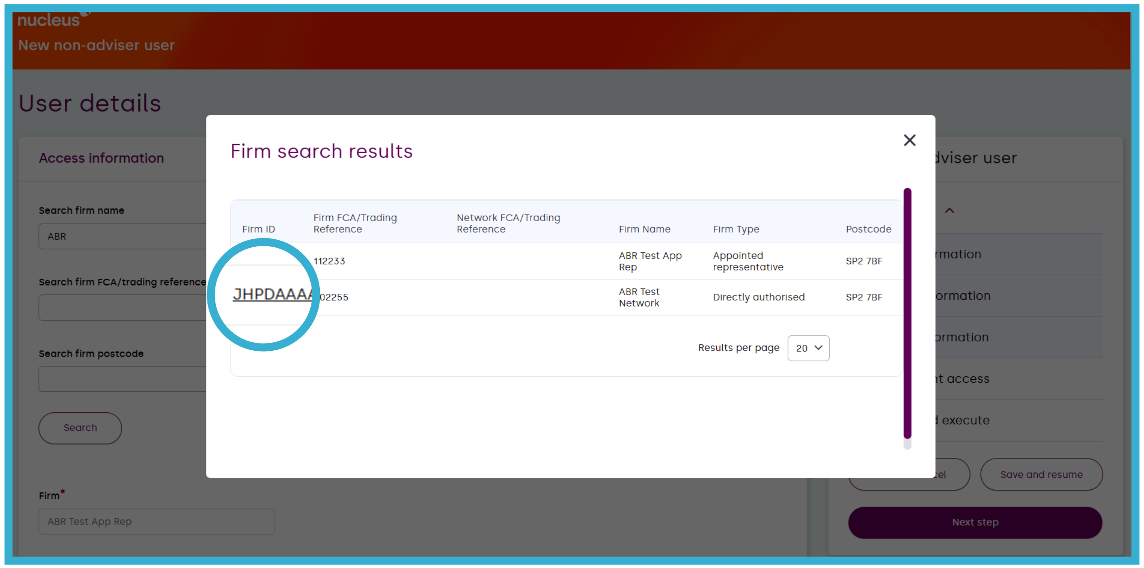


User details

Enter any adviser firms details into the relevant search bar, then select '**Search**'.



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

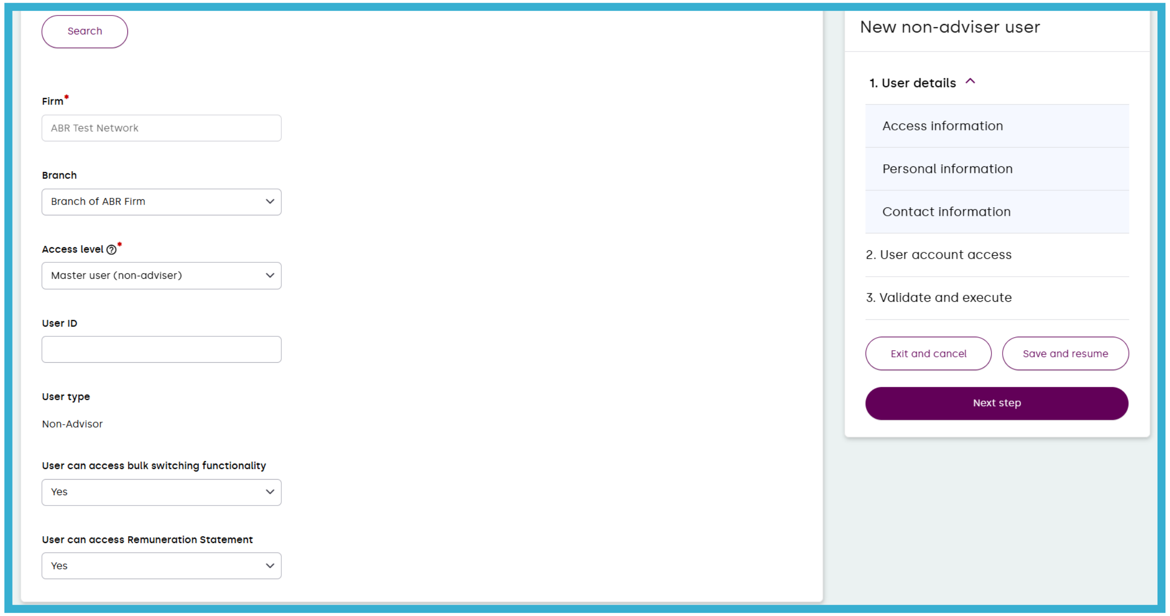


The firm details will be automatically populated.

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 and 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 remuneration statements.

Enter the non-adviser user's personal and contact information.

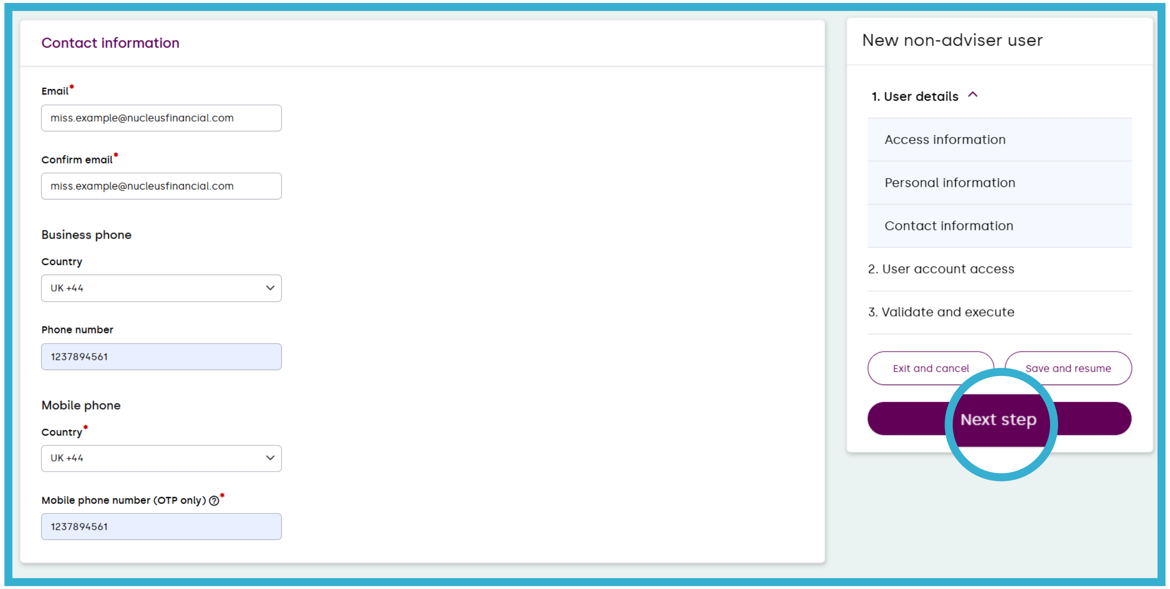
Key information

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

All fields are mandatory excluding the 'Phone Number' field.

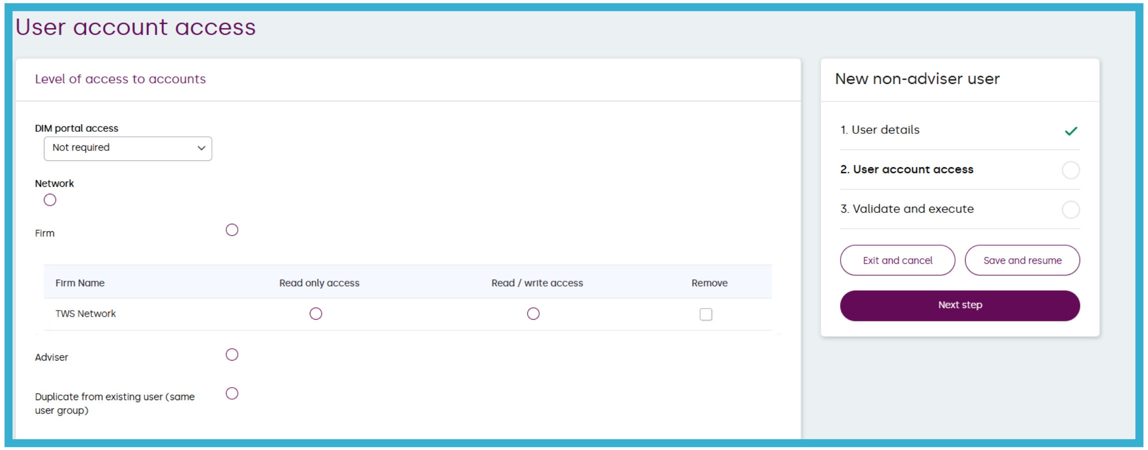
A mobile phone number will be required for one time password (OTP) verification, when the user first logs into the platform.

Once you're happy with your user's details, select '**Next Step**'.



User account access

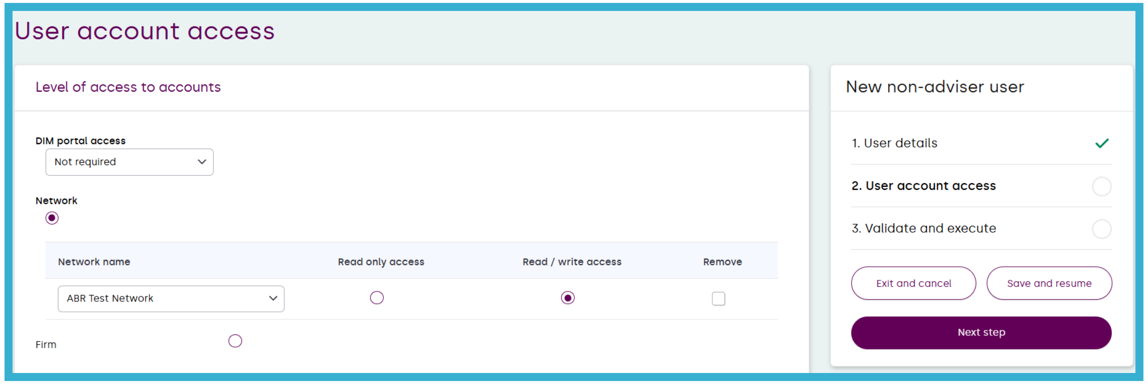
Confirm if DIM Portal access is required for the adviser user.



> The access level selected will determine the clients the adviser user will be able to view.

Network level access

Confirm the non-adviser user's access level.

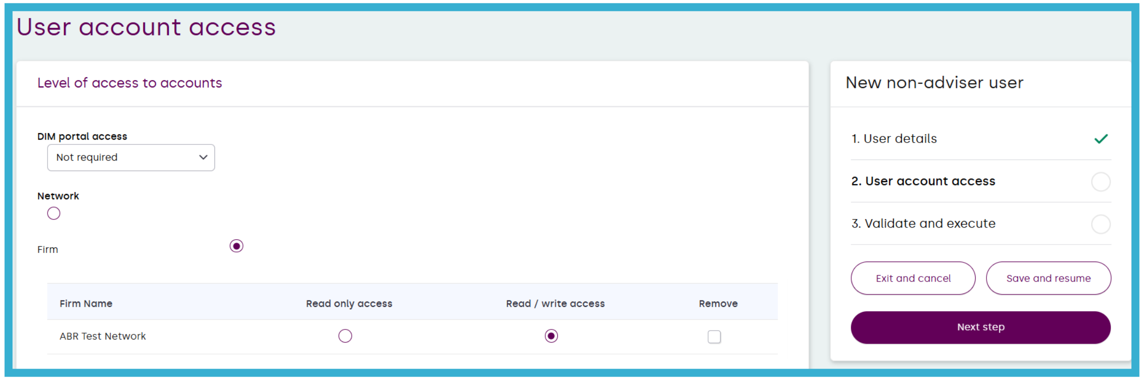


> A non-adviser user with read-only access won't be able to submit any changes, applications or transactions to client accounts.

Firm level access

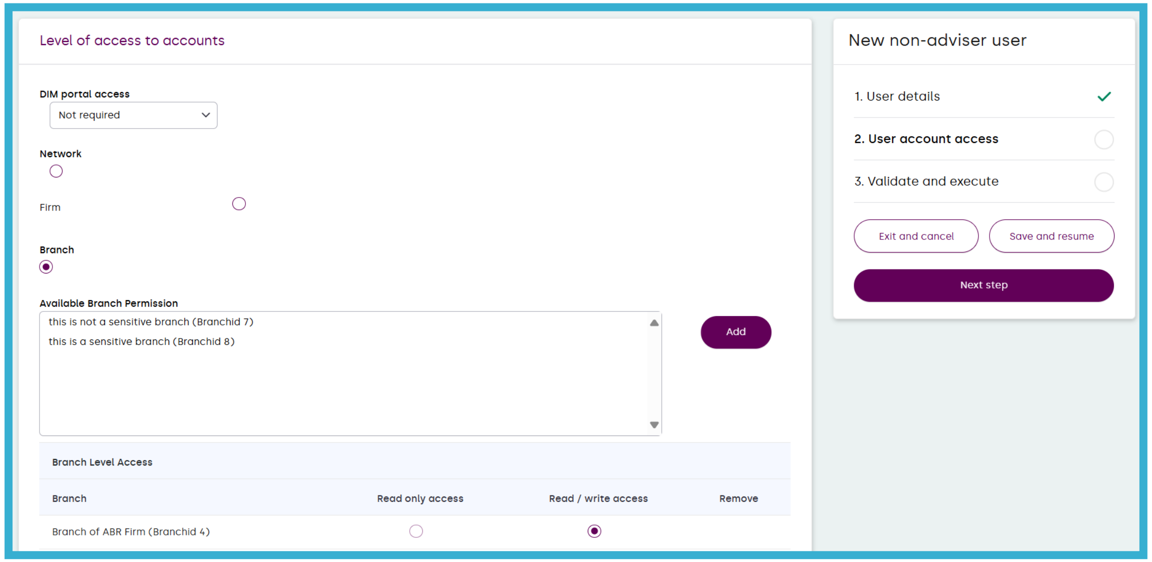
Confirm the adviser user's access level.

A non-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 non-adviser user's access at branch level, if applicable.



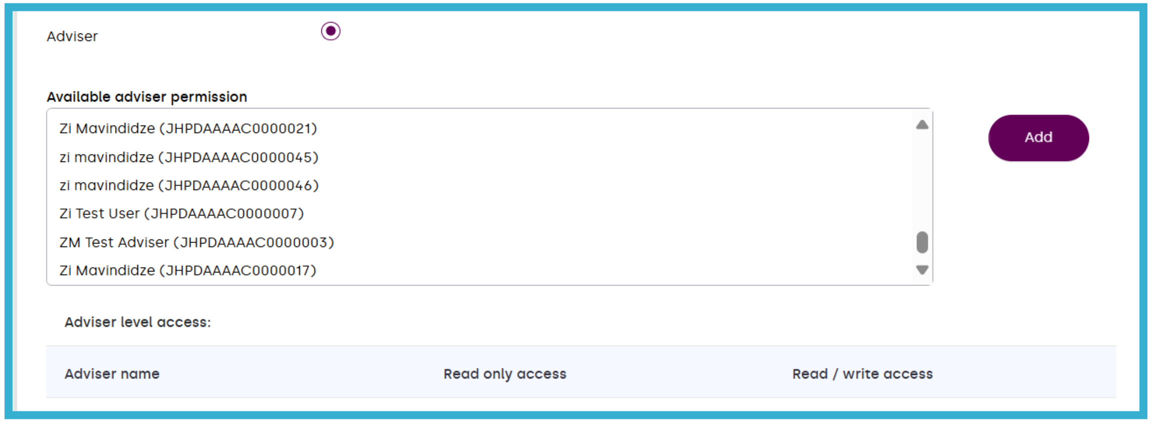
Adviser level access

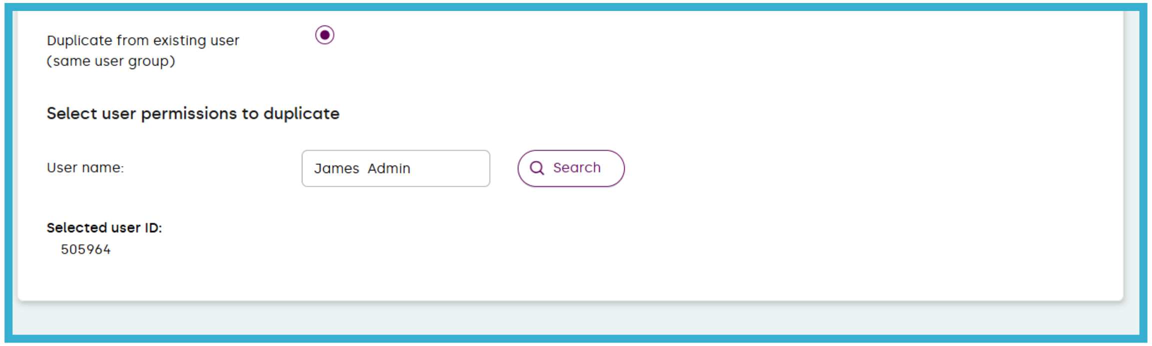
Select the adviser user the permissions should reflect.

> A non-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 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.

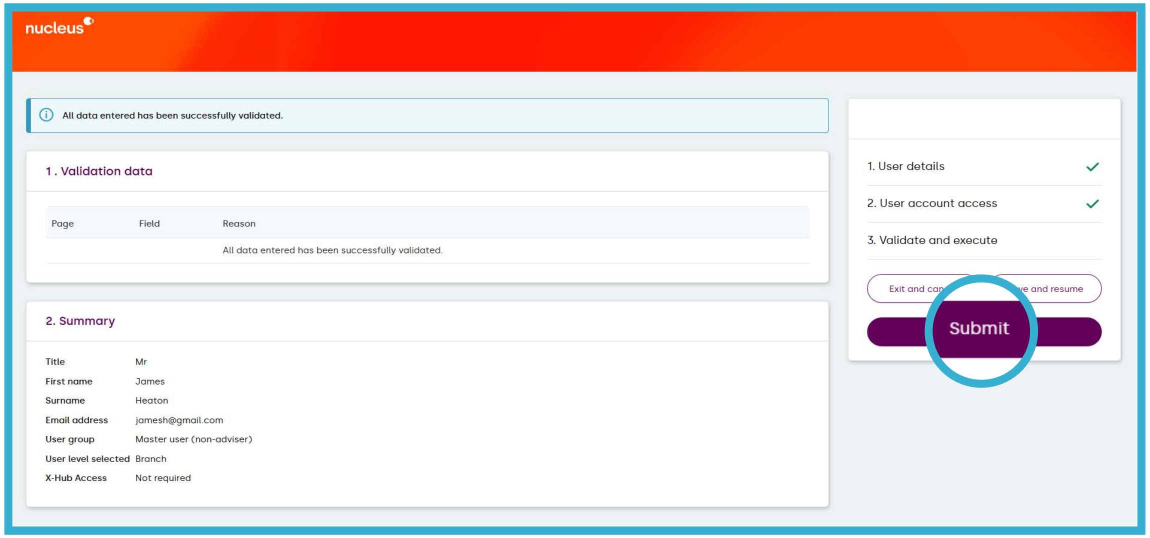




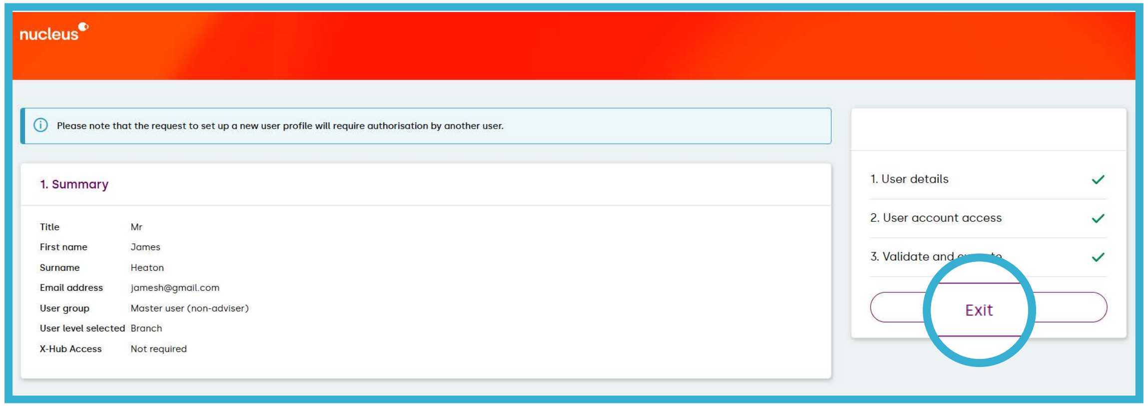
Review and submit

Take a moment to check the user's details for accuracy. Once you're happy with the accuracy of the user's details, select '**Submit**' to create the non-adviser user.

Once submitted, the new user profile will require authorisation by another user in your network. Please see the "how to authorise a user" guide for more information. Once authorised, a user ID will be created for the user.



Select '**Exit**' to complete the action.



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