

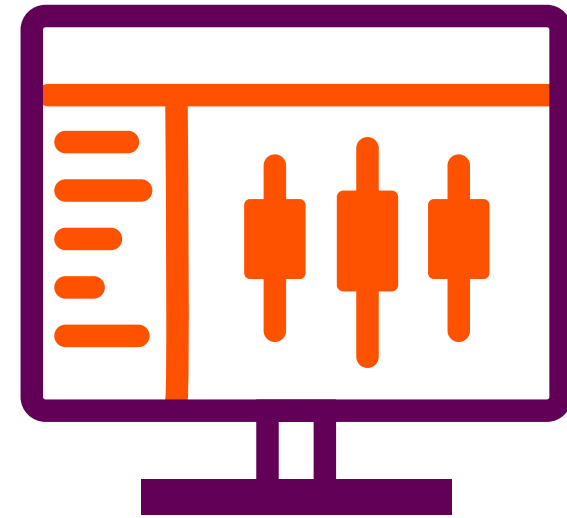
For advisers

Our new
platform

nucleus^o platform

How to create a non-adviser user

🕒 2 minute read



How to create a non-adviser 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.



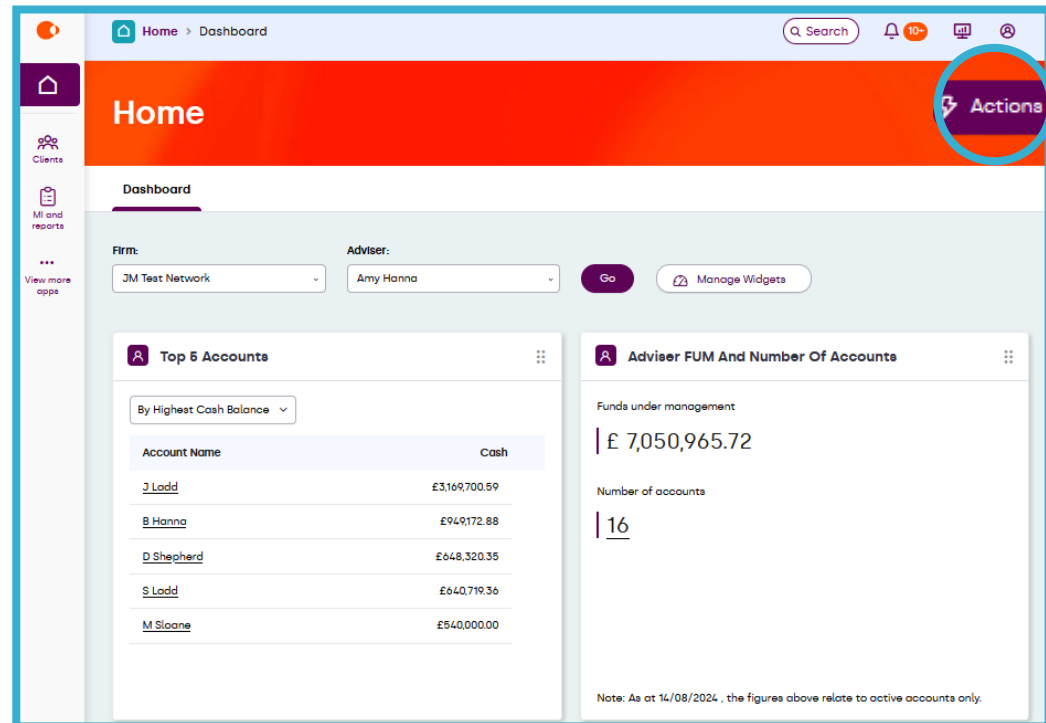
We recommend using the zoom function to view the details on the platform screens in this guide.

How to create a non-adviser user



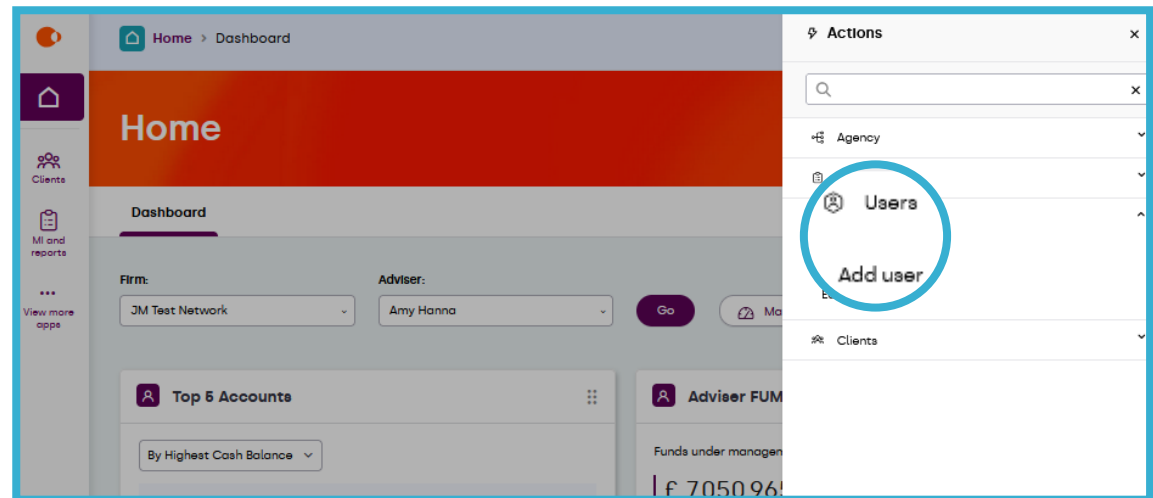
Please note non-adviser users can only be created by users with a "master user" or "user maintenance" role, therefore you would need to be one of these to perform this action. If your firm doesn't have one of these roles, please contact us.

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

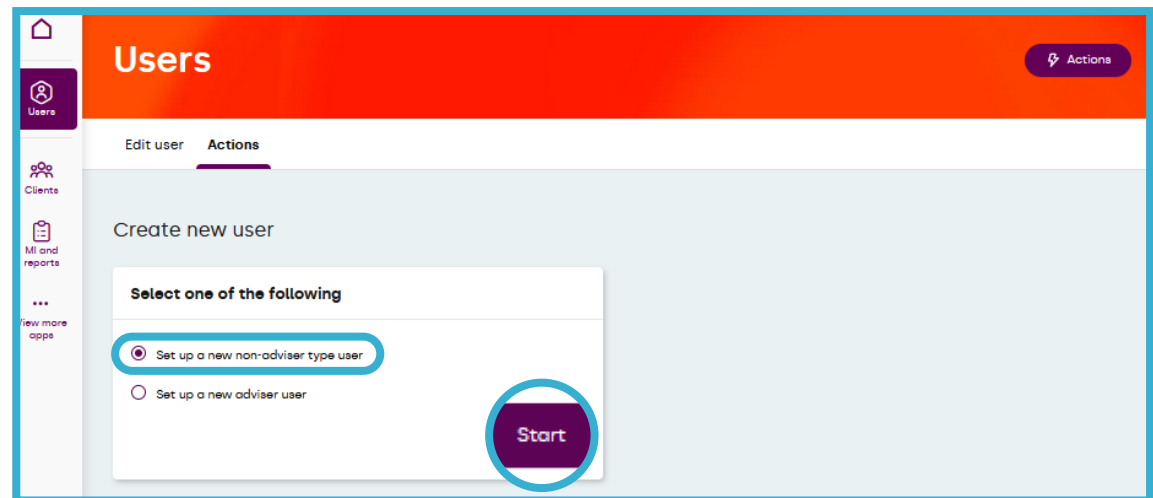


A list of actions will appear.

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

Use the search bars to locate your firm. You can search either by firm name, FCA/trading reference, or postcode.

User details

Access information

Search firm name
ABR

Search firm FCA/trading reference

Search firm postcode

Search

New non-adviser user

1. User details ^

- Access information
- Personal information
- Contact information

2. User account access

3. Validate and execute

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

nucleus

New non-adviser user

User details

Access information

Search firm name
ABR

Search firm FCA/trading reference

Search firm postcode

Search

Firm*

ABR Test App Rep

Firm search results

Firm ID	Firm FCA/Trading Reference	Network FCA/Trading Reference	Firm Name	Firm Type	Postcode
	112233		ABR Test App Rep	Appointed representative	SP2 7BF
JHPDAAA	02255		ABR Test Network	Directly authorised	SP2 7BF

Results per page 20

Save and resume

Next step

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 non-adviser user from the drop-down list to determine the role required, and confirm if the user will have access to bulk switching.

The User ID will auto-populate.



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.

Search

Firm*
ABR Test Network

Branch
Branch of ABR Firm

Access level ⓘ*
Master user (non-adviser)

User ID
[Empty]

User type
Non-Advisor

User can access bulk switching functionality
Yes

User can access Remuneration Statement
Yes

New non-adviser user

1. User details ^

Access information

Personal information

Contact information

2. User account access

3. Validate and execute

Exit and cancel Save and resume

Next step

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

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'**.

The screenshot shows the 'Personal information' section of a form. It includes a 'Title' dropdown menu with 'Miss' selected, a 'First name' text field with 'Jane', a 'Surname' text field with 'Example', and a 'Date of birth' date picker with '1-Mar-1990' selected. To the right, a sidebar titled 'New non-adviser user' shows a progress indicator with three steps: '1. User details', '2. User account access', and '3. Validate and execute'. The '1. User details' step is expanded, showing sub-sections for 'Access information', 'Personal information', and 'Contact information'. The 'Personal information' sub-section is currently active.

The screenshot shows the 'Contact information' section of the form. It includes an 'Email' text field with 'miss.example@nucleusfinancial.com', a 'Confirm email' text field with the same address, a 'Business phone' section with a 'Country' dropdown set to 'UK +44' and a 'Phone number' text field with '1237894561', and a 'Mobile phone' section with a 'Country' dropdown set to 'UK +44' and a 'Mobile phone number (OTP only)' text field with '1237894561'. The sidebar on the right is identical to the previous screenshot, but the 'Contact information' sub-section is now active. At the bottom of the sidebar, there are three buttons: 'Exit and cancel', 'Save and resume', and a prominent purple 'Next step' button circled in blue.

User account access

Confirm if DIM Portal access is required for the user.



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

The screenshot shows the 'User account access' form. On the left, under 'Level of access to accounts', 'DIM portal access' is set to 'Not required'. Under 'Network', 'Firm' is selected with a radio button. Below this is a table with columns 'Firm Name', 'Read only access', 'Read / write access', and 'Remove'. The row for 'TWS Network' has radio buttons for 'Read only access' and 'Read / write access', and a checkbox for 'Remove'. Under 'Adviser', 'Duplicate from existing user (same user group)' is selected with a radio button. On the right, the 'New non-adviser user' progress bar shows '1. User details' as complete (with a green checkmark) and '2. User account access' as the current step (with an empty radio button). '3. Validate and execute' is also empty. Buttons for 'Exit and cancel', 'Save and resume', and 'Next step' are visible.

Choose the user access at either, network, firm, or branch level.

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.

The screenshot shows the 'User account access' form. On the left, under 'Level of access to accounts', 'DIM portal access' is set to 'Not required'. Under 'Network', 'Network' is selected with a radio button. Below this is a table with columns 'Network name', 'Read only access', 'Read / write access', and 'Remove'. The row for 'ABR Test Network' has radio buttons for 'Read only access' and 'Read / write access', and a checkbox for 'Remove'. Under 'Firm', there is an empty radio button. On the right, the 'New non-adviser user' progress bar shows '1. User details' as complete (with a green checkmark) and '2. User account access' as the current step (with an empty radio button). '3. Validate and execute' is also empty. Buttons for 'Exit and cancel', 'Save and resume', and 'Next step' are visible.

Firm 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.

User account access

Level of access to accounts

DIM portal access
Not required

Network

Firm

Firm Name	Read only access	Read / write access	Remove
ABR Test Network	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

New non-adviser user

1. User details
2. User account access
3. Validate and execute

Exit and cancel Save and resume

Next step

Branch level access

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



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

User account access

Level of access to accounts

DIM portal access
Not required

Network

Firm

Branch

Available Branch Permission

this is not a sensitive branch (Branchid 7)
this is a sensitive branch (Branchid 8)

Add

Branch Level Access	Read only access	Read / write access	Remove
Branch of ABR Firm (Branchid 4)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

New non-adviser user

1. User details
2. User account access
3. Validate and execute

Exit and cancel Save and resume

Next step

Adviser level access

Select the 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.

Adviser

Available adviser permission

- ZI Mavindidze (JHPDAAAAC0000021)
- zi mavindidze (JHPDAAAAC0000045)
- zi mavindidze (JHPDAAAAC0000046)
- ZI Test User (JHPDAAAAC0000007)
- ZM Test Adviser (JHPDAAAAC0000003)
- ZI Mavindidze (JHPDAAAAC0000017)

Add

Adviser level access:

Adviser name	Read only access	Read / write access
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Duplicate from existing user
(same user group)

Select user permissions to duplicate

User name:

Selected user ID:
505964

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.

The screenshot shows the 'Review and submit' step in the nucleus user creation process. The interface has a red header with the 'nucleus' logo. A light blue notification bar at the top states: 'All data entered has been successfully validated.' Below this, there are two main sections: '1. Validation data' and '2. Summary'. The 'Validation data' section contains a table with columns 'Page', 'Field', and 'Reason', and a message: 'All data entered has been successfully validated.' The 'Summary' section contains a table with the following details:

Title	Mr
First name	James
Surname	Heaton
Email address	jamesh@gmail.com
User group	Master user (non-adviser)
User level selected	Branch
X-Hub Access	Not required


On the right side, there is a progress indicator with three steps: '1. User details' (checked), '2. User account access' (checked), and '3. Validate and execute' (checked). Below the progress indicator, there is a button labeled 'Exit and complete user and resume' and a large purple button labeled 'Submit' which is circled in blue.

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


The screenshot shows the 'Exit' step in the nucleus user creation process. The interface has a red header with the 'nucleus' logo. A light blue notification bar at the top states: 'Please note that the request to set up a new user profile will require authorisation by another user.' Below this, there is a '1. Summary' section containing the same user details table as in the previous screenshot:

Title	Mr
First name	James
Surname	Heaton
Email address	jamesh@gmail.com
User group	Master user (non-adviser)
User level selected	Branch
X-Hub Access	Not required

On the right side, the progress indicator shows all three steps: '1. User details' (checked), '2. User account access' (checked), and '3. Validate and execute' (checked). Below the progress indicator, there is a button labeled 'Exit' which is circled in blue.

 03455 212 414

 ask@nucleusfinancial.com

 nucleusfinancial.com

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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