

For advisers

Our new
platform

nucleus^o platform

How to create a client

🕒 2 minute read



How to create a client

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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.

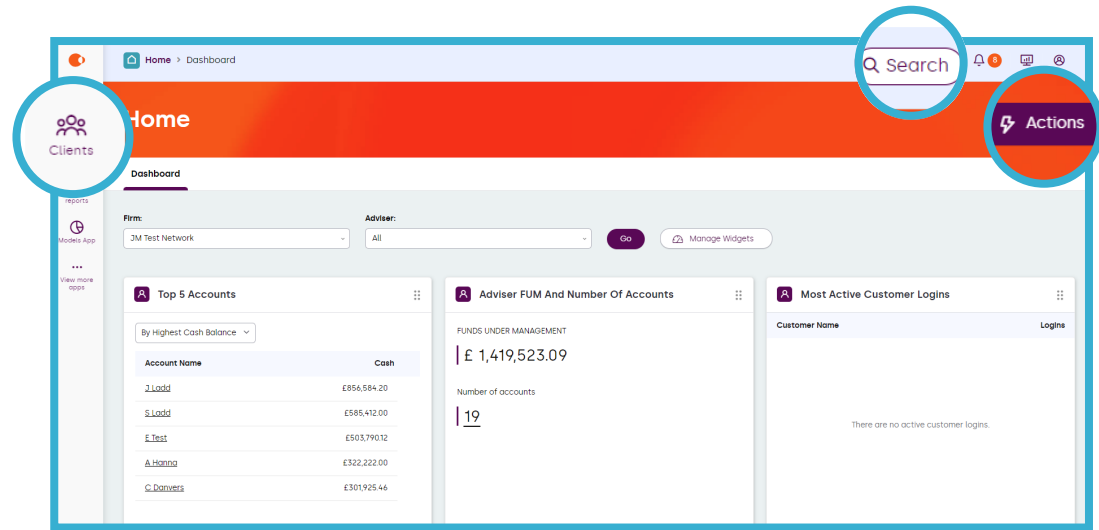
How to create a client



Before creating a client, please search for the client to confirm they're not an existing client.

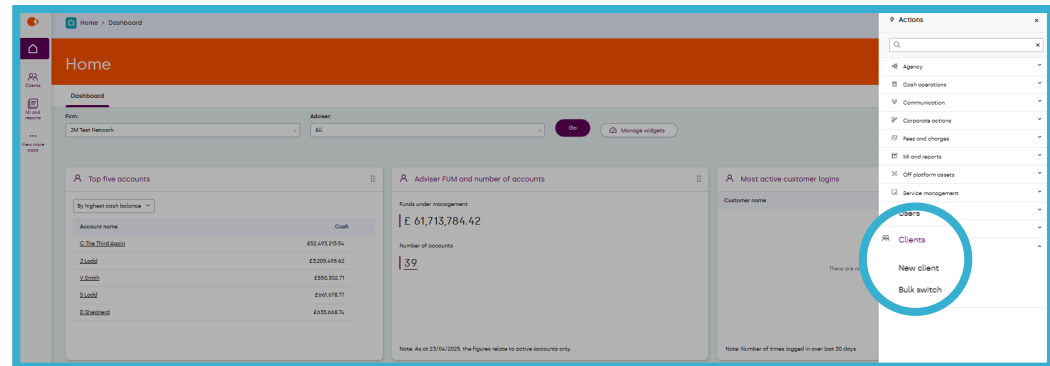
Once a client has been created, the record can't be deleted by either the user or Nucleus.

To find for your client you can use the 'search bar' or the 'clients app'.



From the adviser landing page select the 'Actions' button.

A list of actions will appear. To create your client, select 'Clients', then 'New client'.



Individual client

Select the client's adviser from the drop-down list.

Select '**Individual**' client type.

Once you're happy with all your client type details, select '**Next: Client details**'.

The screenshot shows a web interface for adding a client. At the top, there is a red header bar. Below it, the text 'Add client' is displayed in a small font, followed by the main heading 'Client type' in a larger, purple font. The form is divided into two main sections: 'Set up details' and 'Add client'. In the 'Set up details' section, there is a dropdown menu for 'Assign an adviser' with the value 'zi mavindidze (JHPDAAAAC0000045)'. Below this is a 'Client type' section with three radio button options: 'Individual' (which is selected and highlighted with a blue border), 'Trust', and 'Company'. In the 'Add client' section, there is a progress indicator with two steps: '1. Client type' and '2. Client details'. At the bottom of this section, there are two buttons: a white 'Cancel' button and a purple 'Next: Client details' button.

Enter your client's details into the required fields.



If your client has an alternative contact number, select '**Add another**'.

Key messages

The email address and phone number are optional at this stage of the application. However, if you want your client to have access to the platform, digital signatures and paperless correspondence, we'll need their email address and phone number.

The client's contact details can be added at any time after the client has been submitted.

Once you're happy with the client details, select '**Next**'.

The screenshot shows a web interface for adding a client. The main section is titled 'Set up client' and contains the following fields:

- Title: A dropdown menu with 'Miss' selected.
- First name: A text input field containing 'Jessica'.
- Surname: A text input field containing 'Example'.
- Date of birth: A date picker showing '10/10/1970'.
- Email address (optional): A text input field containing 'Jessica.example@gmail.com'.
- Phone (optional): A dropdown menu with 'Mobile' selected.
- Country: A dropdown menu with 'UK (+44)' selected.
- Phone number (optional): A text input field containing '07000000001'.

At the bottom right of the 'Set up client' section is a purple button with a plus icon and the text 'Add another'. To the right of the main form is a sidebar titled 'Add client' with a progress indicator:

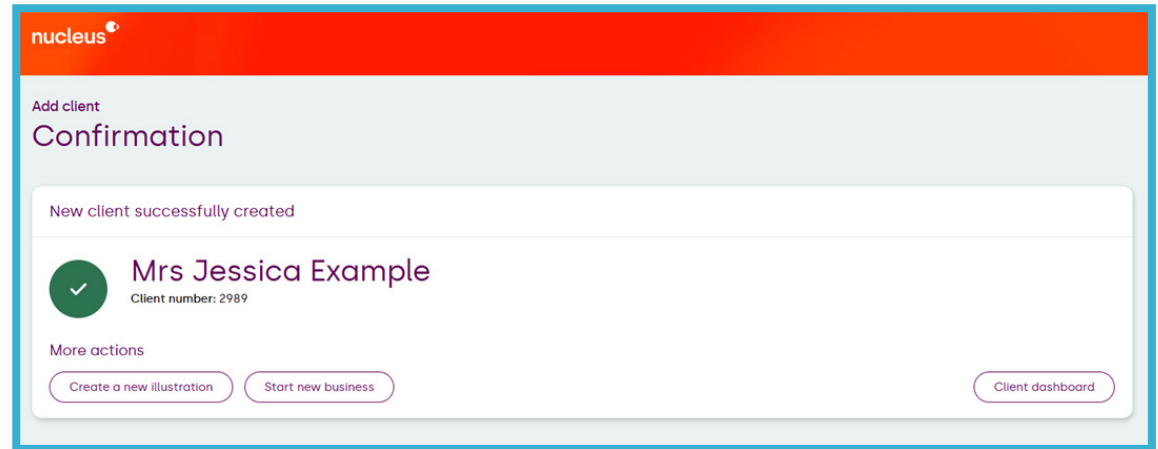
- 1. Client type: Completed with a checkmark.
- 2. Client details: Current step.

Below the progress indicator are three buttons: 'Previous' (disabled), 'Cancel' (disabled), and 'Next' (active/highlighted).

The client has been created.



At this stage, you can create a **new illustration**, start a **new business** application or return to the **client dashboard**.



Trust client

Search for a network and a firm, then assign an adviser by selecting one from the drop-down list.

Select **'Trust'** client type.

Once you're happy with all your client type details, select **'Next: Trust details'** to move on to the trust details page.

The screenshot shows the 'Add client' form in the Nucleus system. The form is titled 'Add client' and 'Client type'. It is divided into two main sections: 'Set up details' and 'Add client'.

Set up details:

- Search for a network:** A search box containing 'JM Test Network (JHPNW00011)'. A magnifying glass icon is on the left.
- Search for a firm:** A search box containing 'JM Test Network (JHPDAAA1)'. A magnifying glass icon is on the left.
- Assign an adviser:** A dropdown menu showing 'Zi Mavindizze (JHPDAAA10000005)' with a downward arrow.
- Client type:** Three radio button options: 'Individual', 'Trust' (which is selected and highlighted with a blue circle), and 'Company'.

Add client:

- A progress indicator showing '1. Client type' and '2. Trust details'.
- A 'Cancel' button.
- A 'Next: Trust details' button, which is highlighted with a blue circle.

Confirm the trust type and remaining trust details.

Once you're happy with the client details, select **'Next'**.

The screenshot shows the 'Trust details' form in the Nucleus system. The form is titled 'Add client Trust details' and is divided into two main sections: 'Set up trust' and 'Add client'. The 'Set up trust' section contains four fields: 'Trust type' (set to 'Private'), 'Trust name' (set to 'The example trust'), 'Unique tax payer reference (UTR)' (set to '1124AYDDD999997'), and 'UTR exemption reason' (set to 'Not Required'). The 'Add client' section shows a progress indicator with two steps: '1. Client type' (completed with a checkmark) and '2. Trust details' (current step). Below the progress indicator are three buttons: 'Previous', 'Cancel', and 'Next' (highlighted in purple).

The trust has been submitted.



At this stage, you can create a **new illustration**, start a **new business** application or return to the **client dashboard**.

The screenshot shows the 'Confirmation' screen in the Nucleus system. The screen is titled 'Add client Confirmation' and displays a message: 'New client successfully created'. Below the message is a green checkmark icon and the text 'The example trust 1' with 'Client ID: 1299' underneath. At the bottom, there is a section titled 'More actions' with three buttons: 'Create a new illustration', 'Start new business', and 'Client dashboard'.

Company details

Search for a network and a firm, then assign an adviser by selecting one from the drop-down list.

Select '**Company**' client type.

Once you're happy with all your client type details, select '**Next: Company details**' to move on to the trust details page.

The screenshot shows the 'Add client' form in the Nucleus system. The main section is titled 'Client type' and contains a 'Set up details' panel. This panel has three search fields: 'Search for a network' (containing 'JM Test Network (JHPNW00011)'), 'Search for a firm' (containing 'JM Test Network (JHPDAAA1)'), and 'Assign an adviser' (a dropdown menu showing 'Zi Mavindidze (JHPDAAA10000005)'). Below these is the 'Client type' section with three radio button options: 'Individual', 'Trust', and 'Company'. The 'Company' option is selected and highlighted with a blue border. To the right of the main form is a sidebar titled 'Add client' with a progress indicator showing '1. Client type' and '2. Company details'. At the bottom of the sidebar are two buttons: a 'Cancel' button and a 'Next: Company details' button, which is highlighted in blue.

Enter the company details into the required fields.



If your client has an alternative contact number, select '**Add another**'.

Key message

The email address and phone number are optional at this stage of the application. However, if you want your client to have access to the platform, digital signatures and paperless correspondence, we'll need their email address and phone number.

The client's contact details can be added at any time after the client has been submitted.

Once you're happy with the client details, select '**Next**'.

The screenshot shows the 'Add client' form in the nucleus system. The main heading is 'Company details'. The form is divided into two main sections: 'Set up company' and 'Add client'.

Set up company:

- Company name:** Text input field containing 'Example Ltd'.
- Email address (optional):** Text input field containing 'exampleltd@example.com'.
- Phone (optional):** Dropdown menu with 'Mobile' selected.
- Country:** Dropdown menu with 'UK (+44)' selected.
- Phone number (optional):** Text input field containing '07465012892'.
- + Add another:** A button with a plus sign and the text 'Add another'.

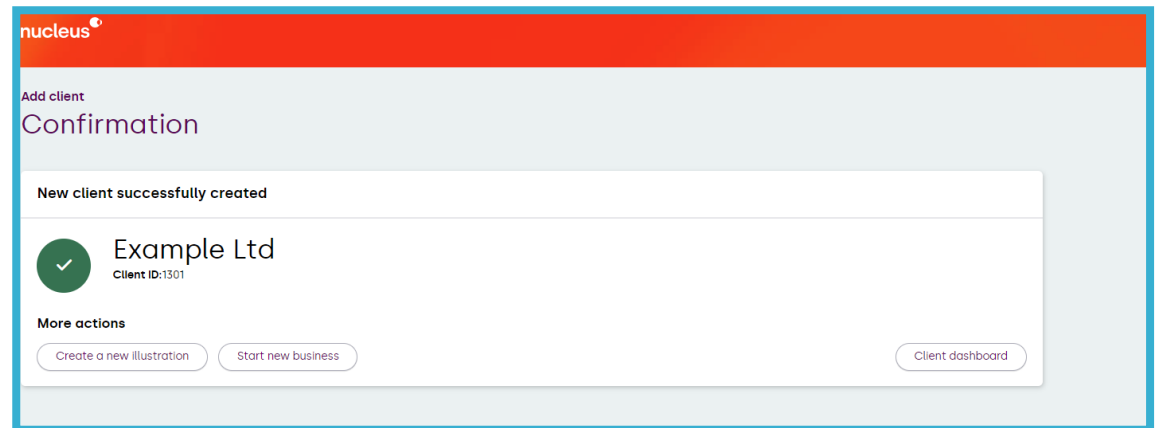
Add client:


- 1. Client type:** A step indicator with a green checkmark.
- 2. Company details:** The current step, indicated by a purple bar.
- Buttons:** 'Previous' (disabled), 'Cancel' (disabled), and 'Next' (active, highlighted in purple).

The client has been created.




At this stage, you can create a **new illustration**, start a **new business** application or return to the **client dashboard**.



 03455 212 414

 ask@nucleusfinancial.com

 nucleusfinancial.com

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