

for Adviser use only

MANAGING VISIBILITY GROUPS

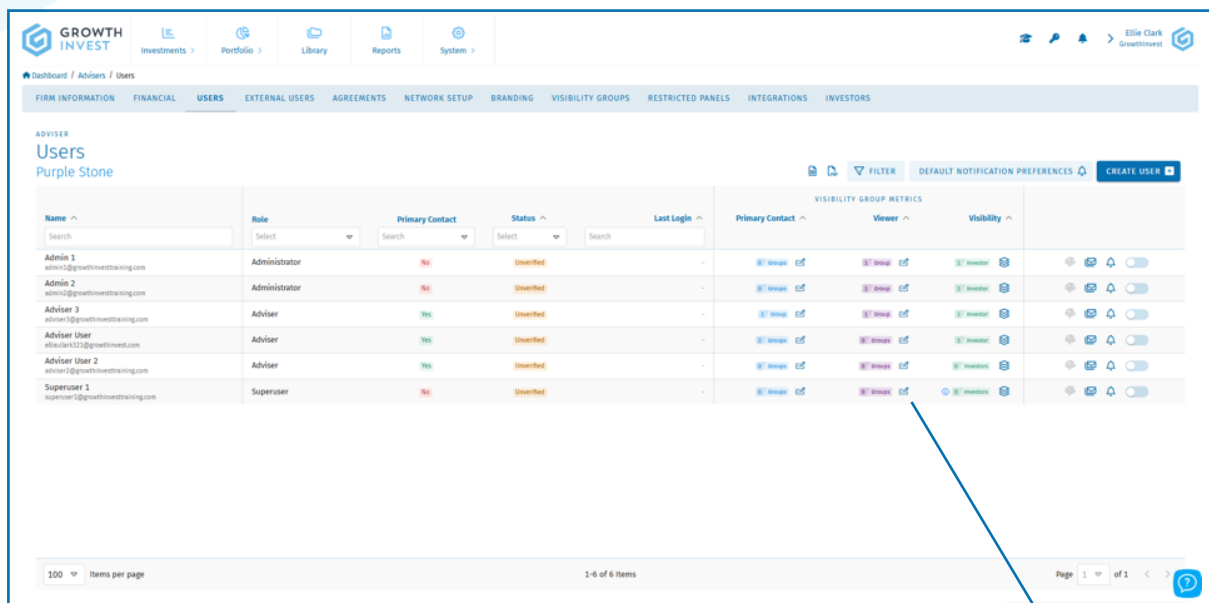
INTRODUCTION

Visibility Groups allow you to control which users can view specific advisers, clients, and data within the platform. By assigning users to the appropriate groups, you can ensure they only have access to information relevant to their role, helping to maintain both efficiency and data security. This guide explains how to assign users to groups, view and update existing settings, and create new Visibility Groups as your firm's needs evolve.

ADDING VISIBILITY REQUIREMENTS TO A USER

Once a user has been created, you may wish to tailor their access by assigning them to one or more Visibility Groups.

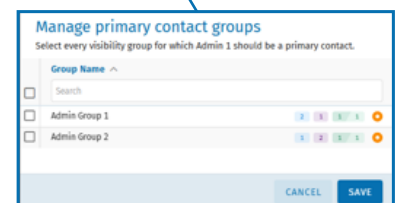
Within the Users table, you will find the Visibility Group Metrics columns. These provide a simple way to view and manage the groups a user belongs to.



Name ^	Role	Primary Contact	Status ^	Last Login	VISIBILITY GROUP METRICS		
					Primary Contact ^	Viewer ^	Visibility ^
Admin 1 admin1@growthinvesttraining.com	Administrator	No	Unverified	-			
Admin 2 admin2@growthinvesttraining.com	Administrator	No	Unverified	-			
Adviser 3 adviser3@growthinvesttraining.com	Adviser	Yes	Unverified	-			
Adviser User adviser1@growthinvest.com	Adviser	Yes	Unverified	-			
Adviser User 2 adviser2@growthinvesttraining.com	Adviser	Yes	Unverified	-			
Supersuser 1 supersuser1@growthinvesttraining.com	Supersuser	No	Unverified	-			

To add a user to an existing Visibility Group:

1. In the Viewer column, click the Edit button next to the purple "Group" label.
2. A pop-up window will appear displaying all available groups.
3. Select the appropriate group(s) using the tick boxes.
4. Click Save to apply your changes.



Manage primary contact groups

Select every visibility group for which Admin 1 should be a primary contact.

Group Name ^

Admin Group 1

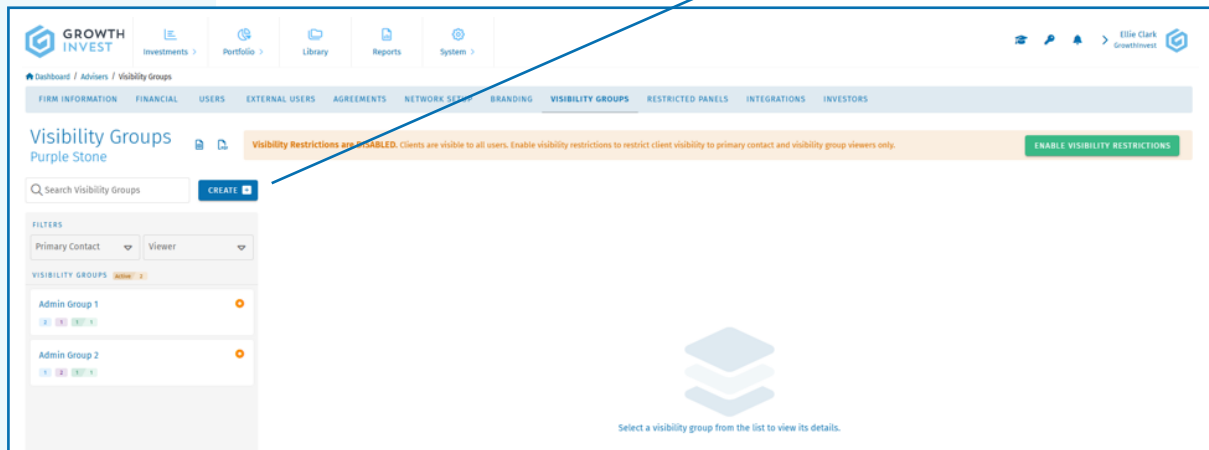
Admin Group 2

Once saved, the user's visibility will automatically update the next time they log in, ensuring they see only the information relevant to their role.

VIEWING AND UNDERSTANDING VISIBILITY GROUPS

To explore or manage your firm's Visibility Groups, navigate to the Visibility Groups tab. Here, you will see a list of all available groups displayed in the left-hand panel.

To help you quickly find what you're looking for, you can use the search bar or apply filters to refine the list.



GROUP OVERVIEW

Selecting a group will open a detailed view, providing full transparency over how it has been configured. This includes:

- **Primary Contacts**

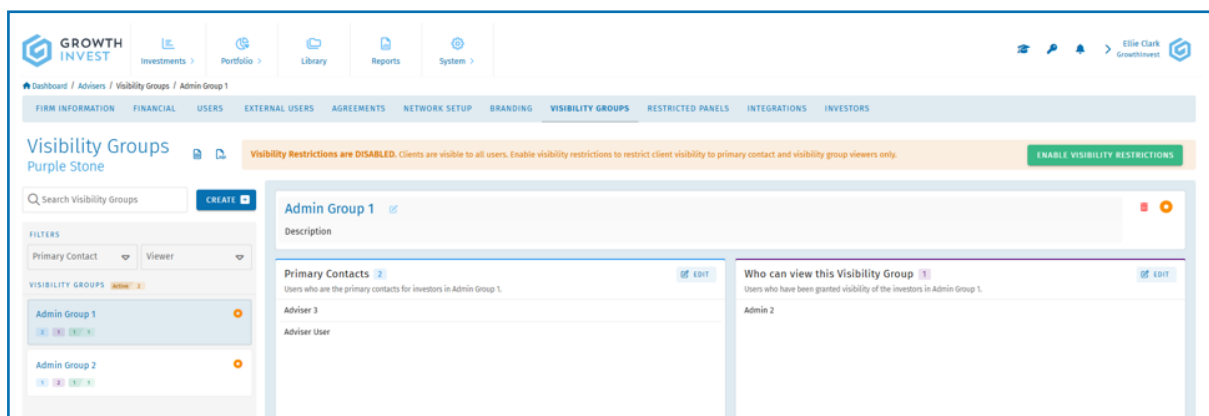
These are the advisers associated with the group.

Where an adviser is included, all of their clients will automatically fall within the scope of that Visibility Group.

- **Who Can View This Visibility Group**

This section outlines which users currently have access to the selected group.

This clear structure allows you to easily understand both *who is included* in the group and *who can see it*.

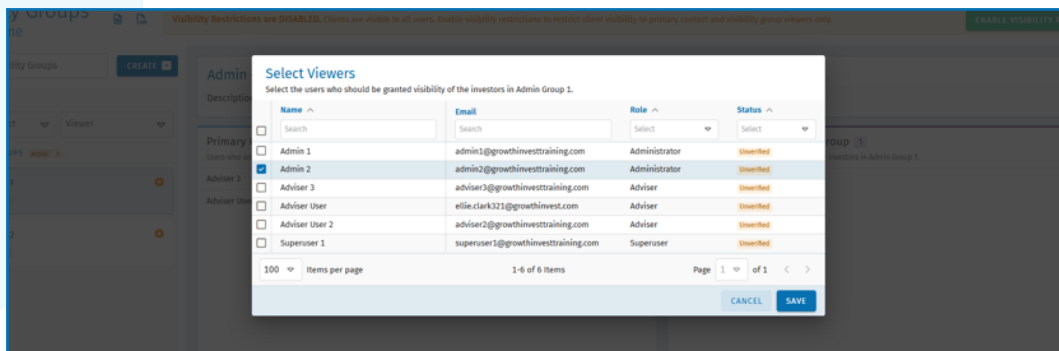


UPDATING VISIBILITY GROUP SETTINGS

As your team or client relationships evolve, you may need to adjust visibility settings. This can be done quickly and easily from within the group view.

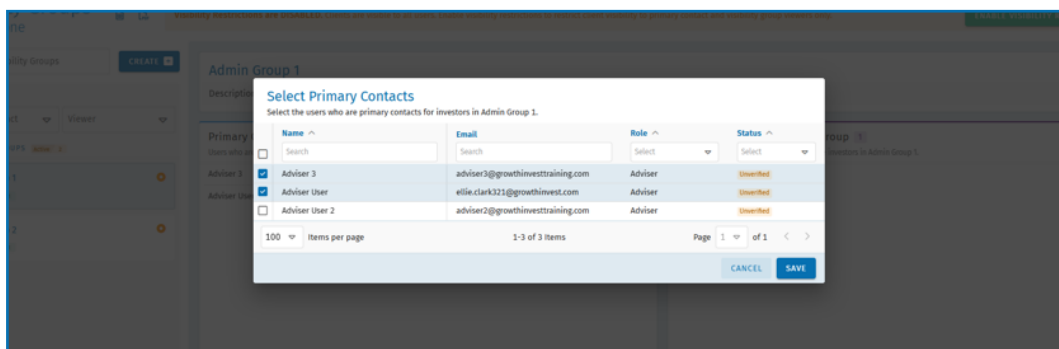
To update user access:

1. Click Edit within the “Who can view this Visibility Group?” section.
2. Select or deselect users using the tick boxes provided.
3. Click Save to confirm your changes.



To update Primary Contacts:

1. Click Edit within the Primary Contacts section.
2. Add or remove advisers as required using the tick boxes.
3. Click Save to apply the update.



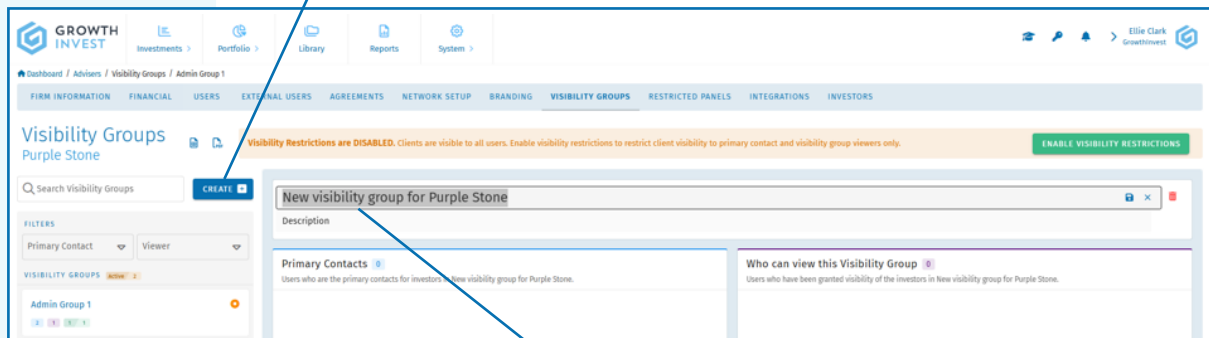
These updates take effect immediately, helping you maintain accurate and appropriate access at all times.

CREATING A NEW VISIBILITY GROUP

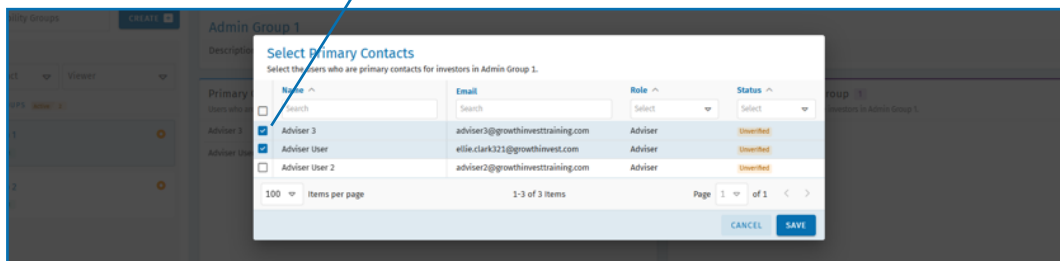
If your firm requires a new level of access control, you can easily create a bespoke Visibility Group.

To create a new group:

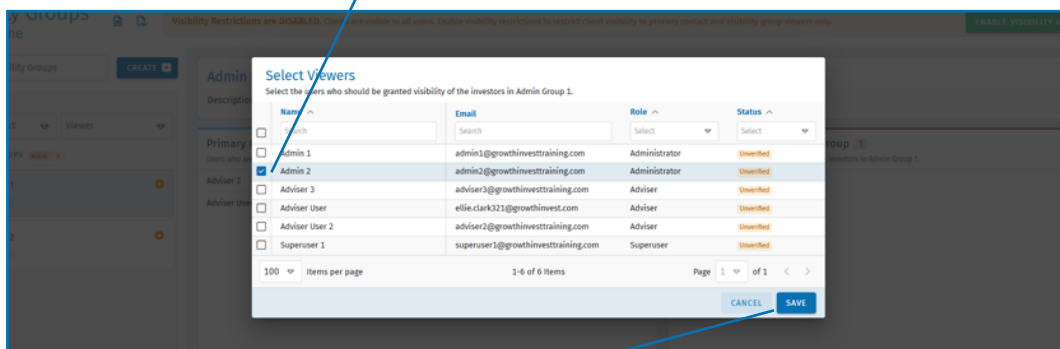
1. Click the Create button within the Visibility Groups page.



2. Enter a clear and descriptive Name and Description to help others understand the group's purpose.
3. Add Primary Contacts:
Click Edit and select the relevant advisers from the list.



4. Define Who Can View the Group:
Click Edit and select the appropriate users who should have access.



5. Click Save to create the group.

Taking a moment to clearly define your groups will make ongoing management much simpler and more intuitive for your team.

ADDITIONAL SUPPORT AND RESOURCES

For a comprehensive overview of all Visibility Groups across your firm, an audit report is available to download directly from the Visibility Groups page. This can be useful for internal reviews or compliance purposes.

If you require support setting up more advanced visibility structures, or would like guidance, our team will be happy to assist.

For more information about user roles, and how to add users to the platform, please speak to a member of the GrowthInvest team at clientservices@growthinvest.com.

ADDITIONAL HINTS & TIPS

- Please check that the user does not already have a GrowthInvest account before creating a new account.
- Please let your colleagues know that they are being set up with a GrowthInvest platform account, and to be on the look out for communications from GrowthInvest.
- Each user account has the option to be set up with Multi-Factor Authentication. This can be confirmed at Firm level.
- When sending the user a verification email, if initial email has not been received, please ask the user to check Spam/Junk folders.
- Any restrictions on client visibility (for intermediary users) are controlled at firm level.
- Any restrictions on the visibility of investment offers and any bespoke client panels are controlled at firm level, and will automatically be applied to new users.

SUPPORT

If you have any questions, please do not hesitate to contact the GrowthInvest Client Services team **via the portal**, by email at **clientservices@growthinvest.com** or call us on **0300 303 0037**.



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