for Adviser use only

SETTING UP AN INTERMEDIARY USER

INTRODUCTION

This guide explains how to set up Intermediary user accounts (user accounts for your staff) on the GrowthInvest platform, how users receive secure access, and the visibility considerations to keep in mind when onboarding new staff.

Once an intermediary user has been created and verified, they will be able to access a wide range of platform functionality, including:

- A summary dashboard showing portfolio metrics, client activity, pending applications and key updates.
- Full client portfolio views, including valuations, investment documents, transaction history and application progress.
- Access to relevant documents such as application forms, product information and tax certificates.
- The ability to review and update client information (where permissions allow), upload supporting documents and manage proposals.

Intermediary users can be added to the platform in the following ways:

1. Created directly by an authorised user
(SuperUser only)

2. Uploaded by GrowthInvest via secure data transfer
(typically during initial onboarding or when adding large numbers of users)

This guide focuses on the self-service creation of intermediary users via the portal. Please note that, even if you have SSO enabled, users must be created on the platform and a permissions role configured before they can log in.

CREATING AN INTERMEDIARY USER ACCOUNT

Only users with SuperUser access can create new users on the platform.

If you do not have SuperUser permissions, please either:

- Ask your designated SuperUser(s) to create an account for you, or
- Email clientservices@growthinvest.com to request access.

Requests to Client Services must include:

- User’s full name and email address.
- The role required (Read Only, Adviser, Admin, Manager, Accounts or SuperUser).
- Any client visibility restrictions (where applicable).
- A SuperUser or Adviser copied in to confirm approval.

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STEP 1 Navigate to the User Management Area

- Log in and click your username & firm in the top-right corner.
- Select **Settings → Users** to see all current users under your firm.
- Click **Create User**.

STEP 2 – CREATING THE USER

- Click **Create User.**
- Complete all mandatory fields; missing fields will prevent submission.
- If visibility restrictions apply, select the appropriate Visibility Group to grant this user access to.
- Click **Submit** to create the account.
- If ***"Can this user login to the platform?"*** is ticked, the user will receive a verification email immediately, or
- Leave unticked if you do not wish to send the verification email.
- If the user is going to be a designated **Primary Contact** for clients, ensure that the **Primary Contact** option is ticked.

STEP 3 – VERIFICATION EMAIL

- Once the "Can this user login to the platform" box is ticked (at any point) the user will receive an email asking them to verify their email and set a password.
- If a user requires a new verification email as the old one has expired, they can request one by using the **Forgotten Password** link on the platform login page.
- If your organisation has SSO enabled, users will not receive an email notification until they are logging in for the first time – see the relevant SSO documentation for further details.

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UNDERSTANDING ACCESS LEVELS PER USER

Choosing the correct user permissions level is important, as this impacts internal work-flows and client visibility. The table below outlines the permissions for each role:

ACCESS LEVEL/ PERMISSION	READ ONLY	ADVISER	ADMIN	MANAGER	ACCOUNTS	SUPERUSER
MANAGE OWN ORGANISATION INFORMATION						YES
MANAGE OWN ORGANISATION STAFF						YES
MANAGE SUBSIDIARY ORGANISATIONS					YES	YES
MANAGE SUBSIDIARY STAFF					YES	YES
MANAGE OFFER PANELS						YES
MANAGE VISIBILITY GROUPS					YES	YES
MANAGE CLIENT/ADVISER ASSIGNMENT				YES	YES	YES
REGISTER AND MANAGE CLIENTS		YES	YES	YES	YES	YES
REGISTER AND MANAGE INVESTMENTS		YES	YES	YES	YES	YES
ACCESS MONTHLY ADVISER FEES STATEMENTS					YES	YES
VIEW OFFERS	YES	YES	YES	YES	YES	YES
VIEW CLIENT PORTFOLIOS	YES	YES	YES	YES	YES	YES
VIEW CLIENT DOCUMENTS & LIBRARY	YES	YES	YES	YES	YES	YES
VIEW REPORTS	YES	YES	YES	YES	YES	YES

Once a user has been created, you may wish to tailor their access by assigning them to one or more Visibility Groups. Please view our **Managing Visibility Groups** guide for further information on setting up or adjusting groups. Or, 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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