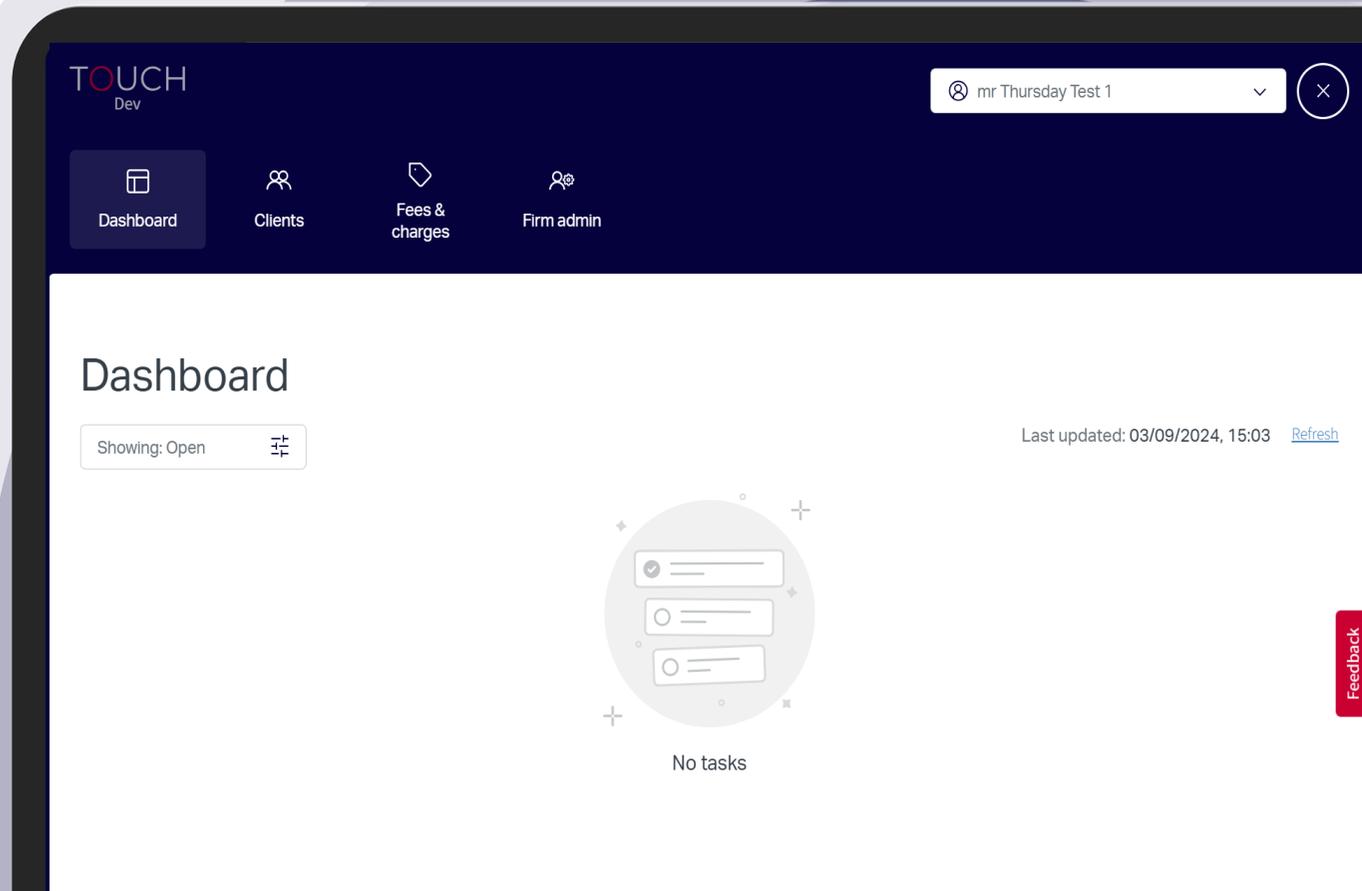


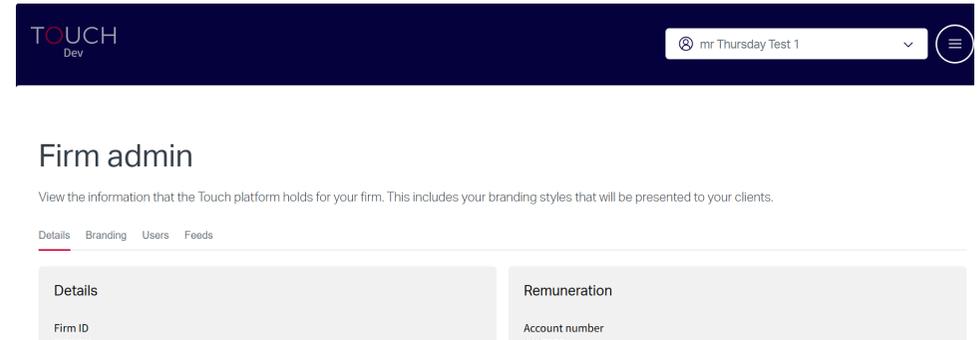
Adding new users to Touch

This short user guide will walk you through the process of adding new users to your firm's Touch account, and explain how you can register yourself as both your firm's administrator and an adviser.

Once you've accepted our invitation and set up two-factor authentication (2FA), you'll see this Dashboard page.



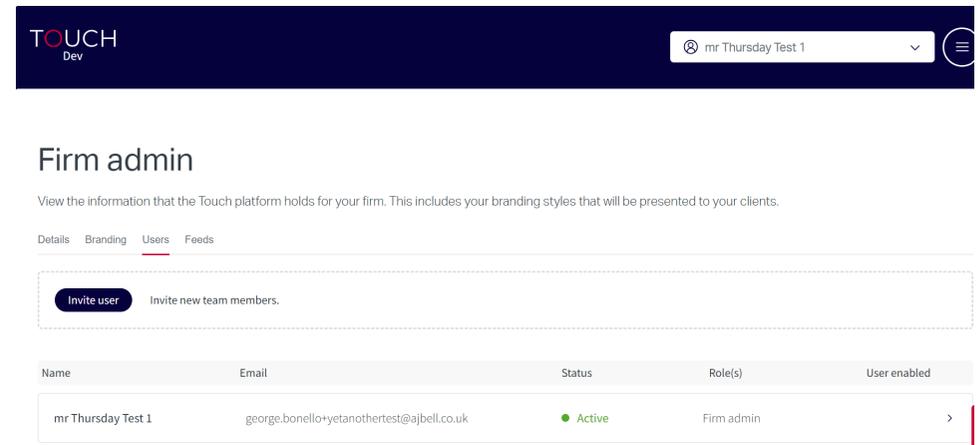
When you click 'Firm admin', you'll be taken to this page.



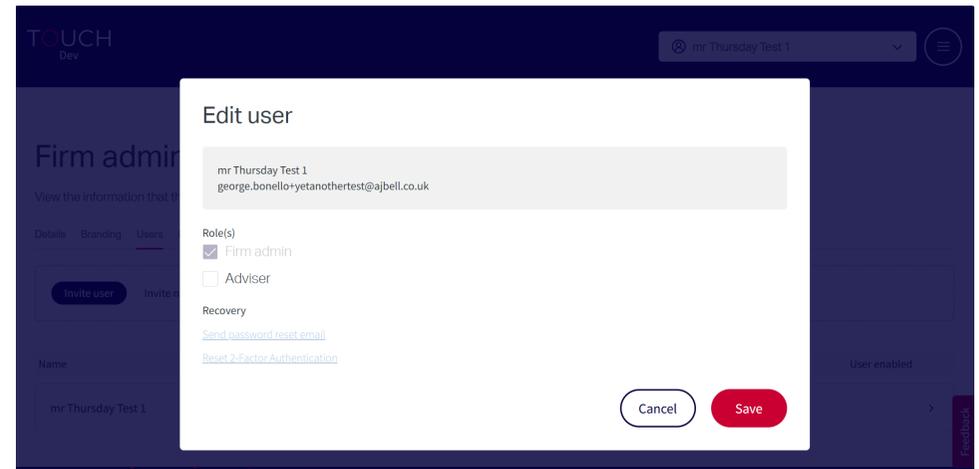
Clicking 'Users' will then take you to this page.

If you simply want to add a new user to the system, click 'Invite user'. We'll then send them an invitation email which is valid for 72 hours. Once they have registered and set up 2FA, they can access the adviser site.

If you want to register yourself as both your firm administrator and an adviser, click on your user profile.



You'll arrive on this page. If you select 'Adviser', you'll be able to add your FCA reference number. Click 'Save' to complete the update





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