

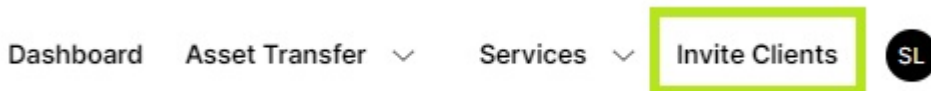
Online Onboarding

Winnie Yuen - 2024-02-02 - Invite Clients

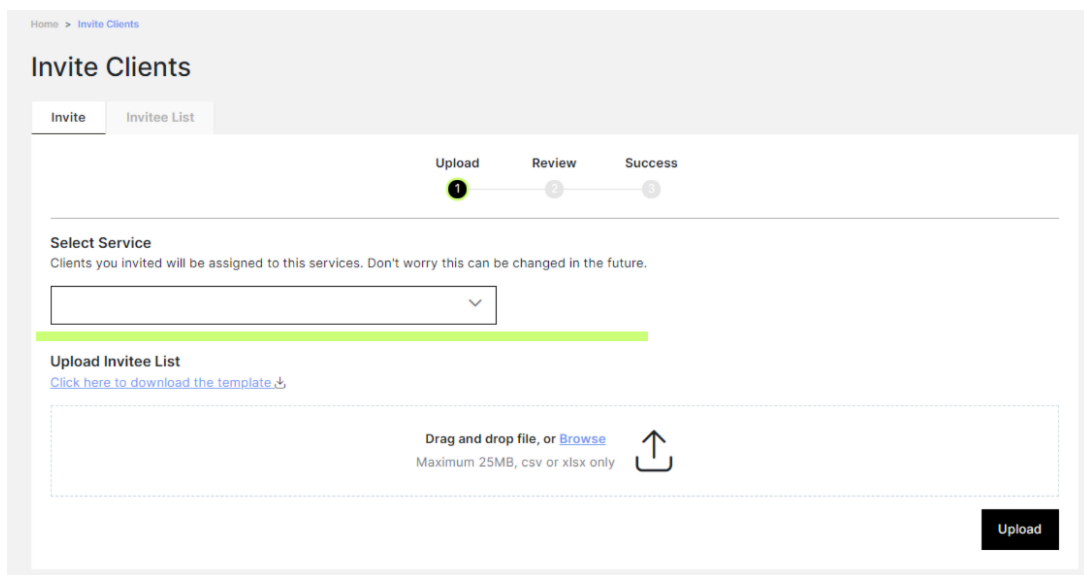
At First Digital, you can use our Invite Clients function to refer friends or family as an individual or use the service to onboard your employees if you sign up for our payroll service.

Invited users can sign up at First Digital online within minutes

1. Click on **Invite Clients**.



1. A new window will open and to start please select a service.

A screenshot of the 'Invite Clients' web interface. At the top, there is a breadcrumb trail 'Home > Invite Clients'. Below this is the title 'Invite Clients' and two tabs: 'Invite' (active) and 'Invitee List'. A progress indicator shows three steps: 'Upload' (1), 'Review' (2), and 'Success' (3). The 'Upload' step is currently active. Below the progress indicator is a 'Select Service' section with a dropdown menu. Below that is an 'Upload Invitee List' section with a link to 'Click here to download the template'. A dashed box contains the text 'Drag and drop file, or Browse' and 'Maximum 25MB, csv or xlsx only' with an upload icon. An 'Upload' button is located at the bottom right of the form.

1. If you have bespoke service, please select 'I Have A Service Code' and enter the service code into the right box.

Home > Invite Clients

Invite Clients


Invite Invite List

Upload 1 Review 2 Success 3

Select Service
Clients you invited will be assigned to this services. Don't worry this can be changed in the future.

I Have A Service Code × Enter Service Code ⓘ

Upload Invite List
[Click here to download the template](#) ↓

Drag and drop file, or [Browse](#) 
Maximum 25MB, csv or xlsx only

Upload

1. Download the template as indicated in the screenshot and fill it out the excel sheet. There is a sample on how to fill out it and please note that you need to delete the sample data before you save and upload the file back.

Home > Invite Clients

Invite Clients


Invite Invite List

Upload 1 Review 2 Success 3

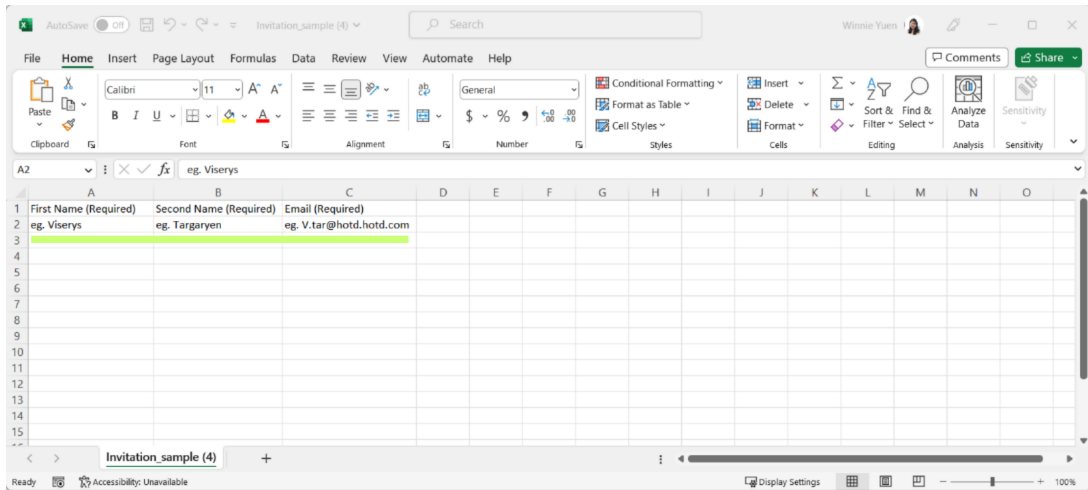
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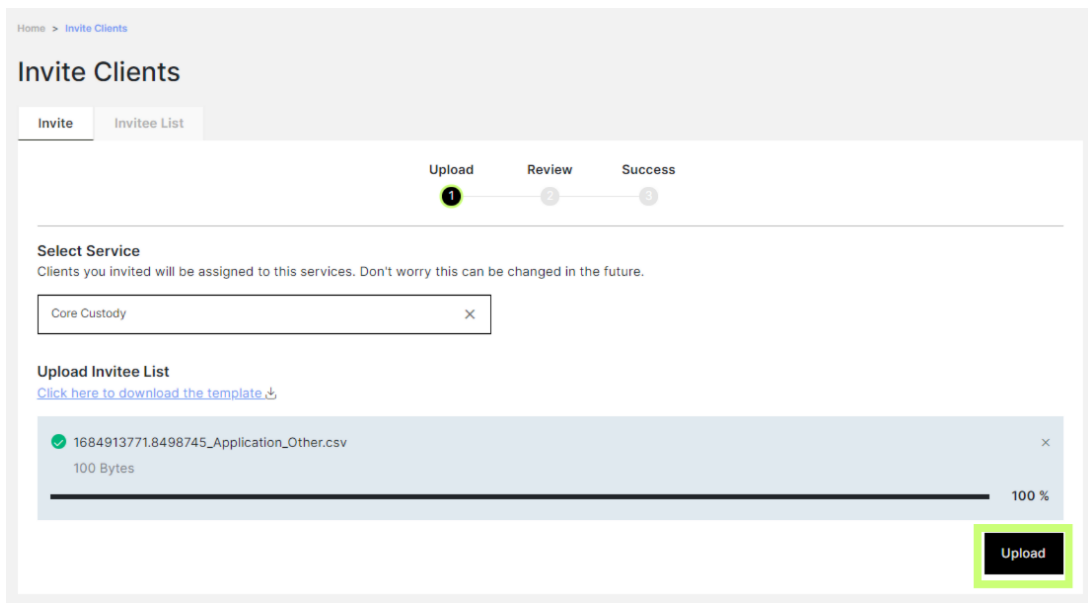
Upload Invite List
[Click here to download the template](#) ↓

Drag and drop file, or [Browse](#) 
Maximum 25MB, csv or xlsx only

Upload



1. After you successfully uploaded your Invitee List, click on **Upload**.



1. In the next step, you see the invitees in an overview and click on **Send Invite(s)**. If there is a problem with the Invitee, you will see an error pop up and please hover over the exclamation mark to find out the problem.

Home > Invite Clients

Invite Clients

Invite Invitee List

Upload Review Success

✓ 2 3

Review Invitee(s)
Please review the list of client(s) below before proceeding.

Row No.	First Name	Last Name	Email	Service
1	Winnie	Yuen	w.yuen+2@1stdigital.com	Core Custody

Back **Send Invite(s)**

Home > Invite Clients

Invite Clients

Invite Invitee List

Upload Review Success

✓ 2 3

Review Invitee(s)
Please review the list of client(s) below before proceeding.

⚠ Please resolve error(s) and upload again.
You can hover over the error icons in the rows below for more details.

Upload Again

Row No.	First Name	Last Name	Email	Service
⊖ 1	Winnie	Yuen	w.yuen+2@1stdigital.com	Core Custody

1. First Digital will send out an email invitation with a link for invitees to start the online application and you can click on **Invitee List** or **Check Invitees** to check the status of the online application.

Home > Invite Clients

Invite Clients

Invite Invitee List

Upload Review Success

✓ ✓ 3

✓

The invitation has been successfully sent to clients!

Invite More

Check Invitees

1. Under Invitee List, you will see an overview of all the invitees and their application status. If an invitee missed the invitation email, please click on **Resend** to send the

email again to the invitee.

Home > Invite Clients

Invite Clients

Invite **Invitee List**

Status Legend
Invite Sent: Invite sent to email.
Invite Failed: Email failed to deliver (i.e. email invalid, rejected by recipient's inbox).
Under Review: Application submitted and pending FDI review.
Completed: Application completed.

Date	First Name	Last Name	Email	Service		
2023 May 24 03:36 PM	Winnie	Yuen	w.yuen+2@1stdigital.com	Core Custody	Invite Sent	Resend
2023 Mar 06 10:45 AM	Winnie	y	yuenwinnie88+19@gmail.com	Core Custody	Under Review	Resend
2023 Mar 06 10:39 AM	Winnie	y	yuenwinnie88+18@gmail.com	Core Custody	Under Review	Resend
2023 Jan 12 09:25 AM	Ashwin	Mahtani Tes 1	aamahtani+8000@gmail.com	Core Custody	Invite Sent	Resend
2022 Dec 30 11:26 AM	Ashwin	Mahtani	aamahtani+905@gmail.com	Core Custody	Invite Sent	Resend
2022 Dec 29 11:11 AM	Winnie	Yuen	yuenwinnie88+2@gmail.com	Complete Custody	Invite Sent	Resend
2022 Dec 23 11:44 AM	ashwin	mahtani	aamahtani+909@gmail.com	Complete Custody	Invite Sent	Resend
2022 Dec 22 10:14 AM	ashwin	mahtani	aamahtani+906@gmail.com	Complete Custody	Invite Sent	Resend