5 First Digital

Knowledgebase > Invite Clients > Online Onboarding

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 Ir	vite Clients.				
Dashboard	Asset Transfer	~	Services \lor	Invite Clients	SL

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

Iome > Invite Clients	
Invite Clients	
Invite Invitee List	
	Upload Review Success
Select Service Clients you invited will be	assigned to this services. Don't worry this can be changed in the future.
Upload Invitee List Click here to download the	template ở
	Drag and drop file, or Browse Maximum 25MB, csv or xlsx only
	Upload

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

ome > Invite Clients			
nvite Clients			
Invite Invitee List			
	Upload	Review Success	
Select Service Clients you invited will be assigned to this services.	Don't worry this can be	changed in the future.	1
Upload Invitee List			
	Drag and drop	file, or <u>Browse</u>	
	Maximum 25MB	, csv or xlsx only	

 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.

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Invite List			
	Upload 1	Review Success	
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	(j)
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1. After you successfully uploaded your Invitee List, click on **Upload**.

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	Upload	Review	Success		
Select Service Clients you invited will be assigned to this services. Don't w	vorry this can be	e changed in the	future.		
Core Custody	×				
Upload Invitee List Click here to download the template &					
1684913771.8498745_Application_Other.csv					×
100 Bytes					100 %
					Upload

 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 Rev	view Success 2 3	
Review Invitee(s) Please review the list of clie	ent(s) below before proceedir	ng.		
Row No.	First Name	Last Name	Email	Service
1	Winnie	Yuen	w.yuen+2@1stdigital.com	Core Custody
				Back Send Invite(s)
Invite Clients				
Invite Invitee List				
		Upload Re	view Success	
Review Invitee(s) Please review the list of clie	ent(s) below before proceedi	ng.		
You can hover over	ror(s) and upload again. 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

 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
1. A.	
The ir	invitation has been successfully sent to clients!
	Invite More
	Check Invitees

 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.

Date First Name Last Name Email Service 2023 May 24 0.33 8 FM Winnie Yuen Myuen+2@1stdigital.co m Core Custody Invite Sent Resend 2023 May 06 10.43 AM Winnie y yuenwinnie88+19@gmail .com Core Custody Under Review Resend 2023 Mar 06 10.43 AM Winnie y yuenwinnie88+19@gmail .com Core Custody Under Review Resend 2023 Mar 06 10.43 AM Winnie y yuenwinnie88+18@gmail .com Core Custody Under Review Resend 2023 Jan 12 0925 AM Ashwin Mahtani Tes 1 asmahtani+800@gmail. com Core Custody Invite Sent Resend 2022 Dec 30 1128 AM Ashwin Mahtani asmahtani+905@gmail. com Core Custody Invite Sent Resend 2022 Dec 29 1111 AM Winnie Yuen yuenwinnie88+2@gmail. com Complete Custody Invite Sent Resend 2022 Dec 23 1114 AM ashwin mahtani asmahtani+90@gmail. com Complete Custody Invite Sent Resend 2022 Dec 23 1114 AM <td< th=""><th>Home > Invite Clients Invite Client Invite Invite I</th><th>S</th><th></th><th></th><th></th><th>Status Legend Invite Sent: Invite sent to email. Invite Failed: Email failed to deliver (ic. email invalid, rejected by recipient's inboo). Under Review. Application submitted and pending FDT review. Completed: Application completed.</th><th></th></td<>	Home > Invite Clients Invite Client Invite Invite I	S				Status Legend Invite Sent: Invite sent to email. Invite Failed: Email failed to deliver (ic. email invalid, rejected by recipient's inboo). Under Review. Application submitted and pending FDT review. Completed: Application completed.	
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