

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.



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



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.



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.





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.



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.

