

The ID Register – Inviting New Users

Introduction

The ID Register requires users to register with the platform and either create or connect to their profile records. As part of on boarding The ID Register on boarding team would have created the initial users and connected them to the records.

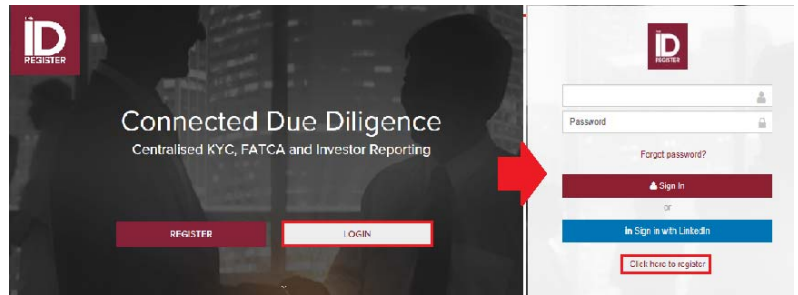
Once on boarding has been completed managers are responsible for directing those persons they wish to use the ID Register (investors, directors, staff members) to register with the site. This guide has been prepared to show how you can do this.

Standard Registration

The ID Register has been designed to allow anyone to register to the platform. to do so a person needs to:

1. Go to www.theidregister.com and click **Login**

2. On the login page click **Click here to register**.



Register

3. Complete their Forename and Surname

4. Enter and Confirm their Password.

Minimum of 8 characters, including 1 upper case letter and 1 number.

5. Choose Security Questions 1 & 2 and provide your answers.

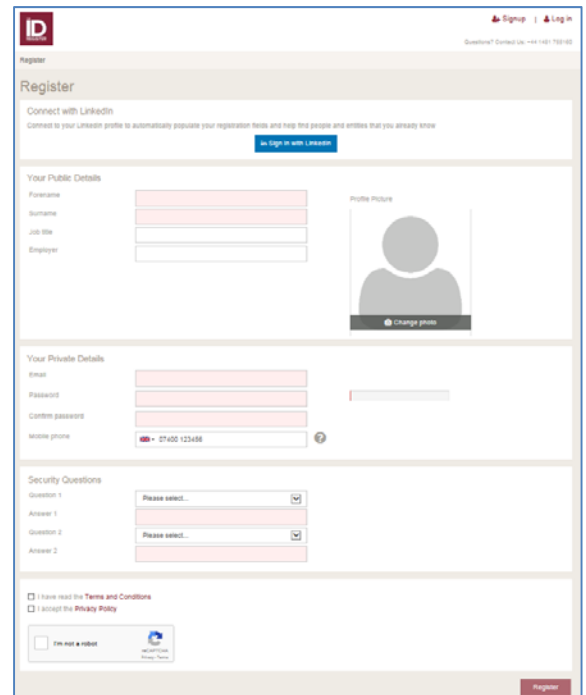
This will be use to verify your identity should you need to call The ID Register.

6. Read and Accept the following:

- a. Terms and Conditions
- b. Privacy Policy

7. Complete the reCAPCHA Anti Robot security feature

8. Click **Activate**. (cannot be clicked unless all compulsory fields have been completed)



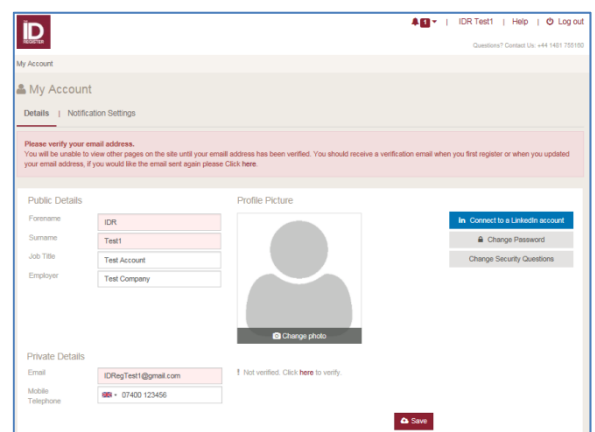
My Account

This is the first section of The ID register that a new User will see. Before you can proceed you must first verify your email:

9. Next to your email address will be the message:

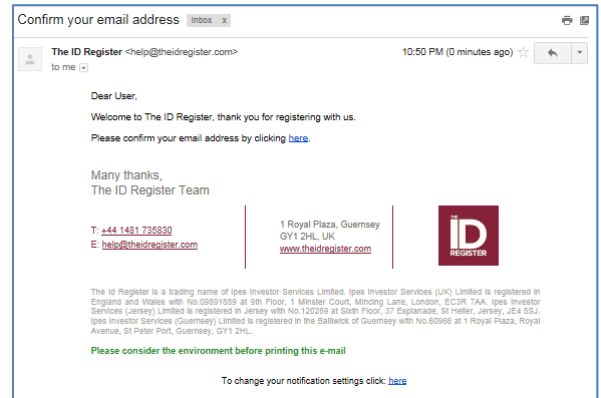
! Not verified. Click here to verify

10. Click here in **My Account**. An email will be sent to you.



Email Confirmation

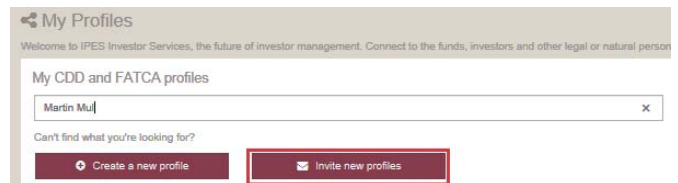
11. To confirm your email address click [here](#) in the email.
12. Your email is now Verified and you can proceed to use the rest of the site.



My Profiles - Invite New Profiles:

This is typically used when you are sending an email to another person to register with The ID Register and create their own Profile(s).

1. On the “My Profiles page, type in the name of the profile you wish to connect to. If the name does not appear click on “Invite new Profiles”
2. Complete the pop up form with the Username you are inviting, their email address and the name of the profile you want them to create.
3. Click “Send Invitation”, an email with a link to The ID Register will be sent to the Invitee



4. The user will need to complete steps 2 – 12 of the **Standard Registration** process.
5. After the Invitee registers / logs into The ID Register they will start on the “New Person or Legal Entity Screen” with the Profile Name already populated. The user will need to complete this screen to create the requested profile.
6. Once the Profile has been created the user who sent the invite to create the Profile will be linked as a full control user.



Profile to Profile Connection - Send Invitation

This is a useful option when a Profile already exists but a Relationship Profile does not. You can send an email from the Profile asking someone to create the Relationship Profile and upon creation it will be automatically connected.

(e.g. A Fund has a new Investor who is not yet set up on The ID Register. Using this allows you to invite that Investor to The ID Register and connect their Profile once it has been created).

1. In the Profile screen (that you would like to add a Relationship Profile to) enter into the "This Profile is Connected to" search field the full name of the Profile you would like to connect to.

2. Click on "Send Invitation".

3. In the Pop up complete:

- **Name** – The Person being asked to create the profile
- **Email** – The Person's email address (They do not need to be users of The ID Register as they can register before they create the Profile).
- **Name of Entity** – This automatically populates from the name you have entered into the search field.
- **This Profile will be connected to me as a(n)** – The type of Connection Relationship your Profile will have with the Profile being invited

4. Click "Send Invitation". This will send an email to the person being invited to create a profile. You will be copied in.

5. Clicking on the link in the email will take the Invitee to:

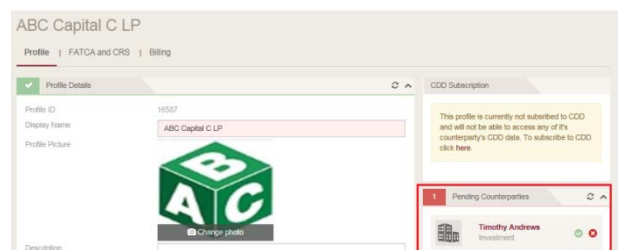
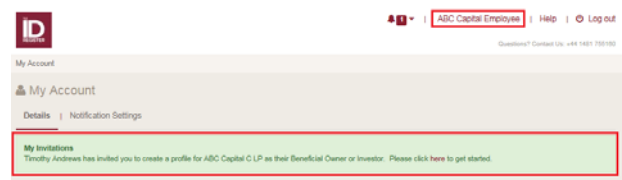
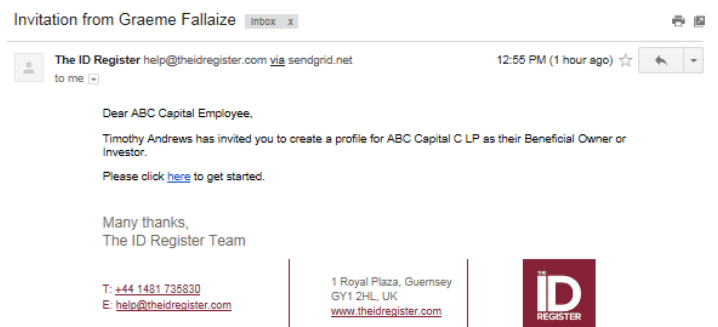
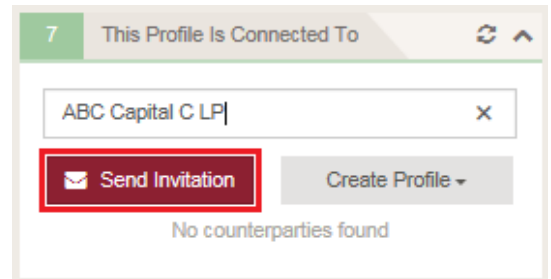
- **The ID Register Login** – If the Invitee is not already logged in/registered. They will need to complete the **Standard Registration** process.

- **New Person or Legal Entity** – If the Invitee is already registered/logged in they will instead go directly to the New Person or Legal Entity form (when they log in via the email link). Note that the New Profile Name for the Relationship Profile will already be populated on the form.

6. If the Invitee does not complete the profile a reminder will appear in the User Profile screen (the Invitee can click on their Username in the top right corner to see this).

7. After the Profile has been created the Profile Relationship will already be created and awaiting approval from the Invitee.

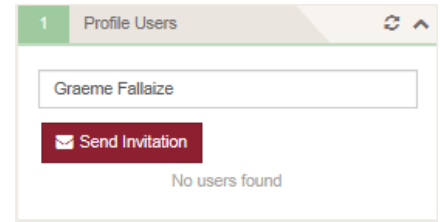
8. Once accepted the connection will be completed.



Invite User to Connect to a Profile

You may have set up a Profile for an Investor on their behalf. Once the Profile is created you can Invite them to The ID Register and connect them to their Profile at the same time. You can do this by sending the Invitation through the “Profile Users” Section of their Profile.

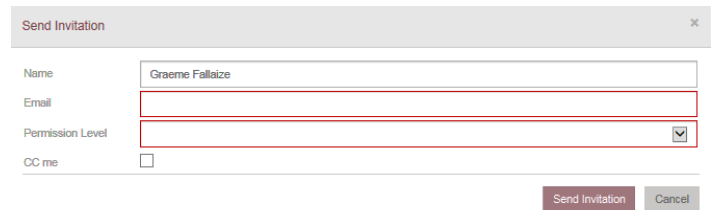
1. Type the Name of the User you want to invite into the Search field in the Profile Users Section of the Profile.
2. Check to ensure the User is not already in The ID Register (If they are follow step 3)
3. Click on “Send Invitation.



The screenshot shows a window titled 'Profile Users'. At the top, there is a search bar containing the text 'Graeme Fallaize'. Below the search bar is a red button with a white envelope icon and the text 'Send Invitation'. Underneath the button, it says 'No users found'.

In the Pop up complete:

- **Name** – The Person being asked to create the profile.
 - **Email** – The Person's email address (They do not need to be users of The ID Register as they can register before they create the Profile).
 - **Permission Level** – As you are inviting the person who should own the Profile to connect this should be set to **Full Control**.
4. An Email Message will be sent which contains a link.
 5. Clicking on the link in the email will take the Invitee to:
 - **The ID Register Login** – If the Invitee is not already logged in/registered. They will need to complete the **Standard Registration** process.
 - **New Person or Legal Entity** – If the Invitee is already registered/logged in they will instead go directly to the New Person or Legal Entity form (when they log in via the email link). Note that the New Profile Name for the Relationship Profile will already be populated on the form.
 6. Once the user has logged into the system they will be connected to the profile they were invited to connect to.



The screenshot shows a 'Send Invitation' dialog box. It has four input fields: 'Name' (containing 'Graeme Fallaize'), 'Email' (empty), 'Permission Level' (with a dropdown menu showing 'Full Control' selected), and 'CC me' (with an unchecked checkbox). At the bottom right, there are two buttons: 'Send Invitation' and 'Cancel'.

Dear Graeme Fallaize,
Graeme Fallaize has invited you to sign up to the ID register and connect to ABC Test 3.
Please click [here](#) to get started.

Many thanks,
The ID Register Team

T: +44 1481 735830
E: help@theidregister.com

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Next Steps

Once a user has registered to the site they can proceed to complete any existing profiles they have been connected to or create new profiles. The following guides provide additional detail in respect of updating, creating and linking profiles.

- [The New User Guide](#)
- [The Evidence and Certification Guide](#)