GUIDE DOCUMENTATION | **ACCOUNTANCY PRACTICE / BUREAU**

How to onboard your clients onto Modulr

June 2022

This guide

This guide explains the steps required to onboard your clients onto Modulr.

You can complete the application on your Client's behalf **or** they can complete it themselves from a link you provide.

Completing the application on your Client's behalf

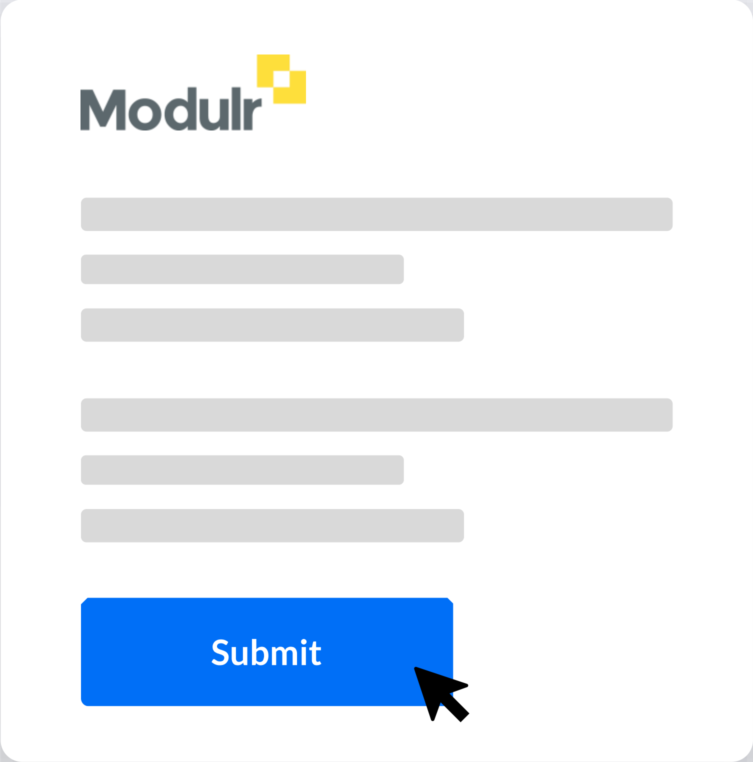
1. Complete the application form

You'll need to complete the application form, providing a few details about your Client's business, and its ownership and structure, to meet industry compliance requirements.

Good to know

You can save the application form and return to it later at any time.

[View the form]

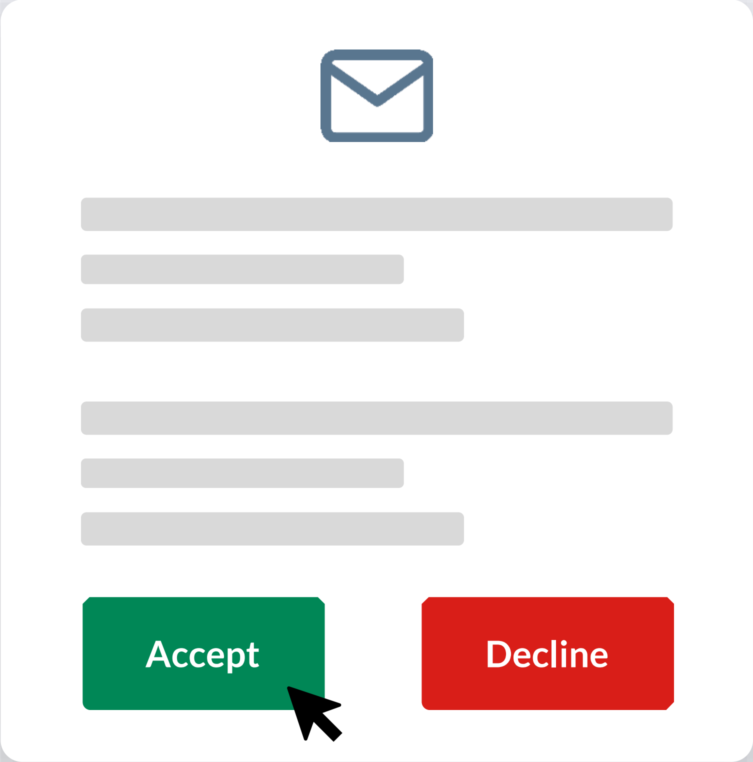


2. Client reviews the application via an email

Your Client will receive an email from Modulr, asking them to review the application and accept or decline the Modulr Terms of Business and Privacy Policy.

Who gets the email?

Emails will be sent to the Applicant provided in the application form



3a. If your Client **accepts** the application

You’ll be notified by email when your client accepts the application.

What happens next?

Modulr will review the client application. Subject to information being provided correctly, most applications are reviewed within 5 business days.

We’ll contact your Client directly if there’s any further information required.

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3b. If your Client **declines** the application

You’ll be notified by email that your client has declined the application.

What happens next?

Modulr will contact your Client directly to understand why the application was declined so we can update any information and re-submit the application.

4. Client receives their 'New User' email

Once Modulr has accepted your Client's application, your client will receive a 'New User' email.

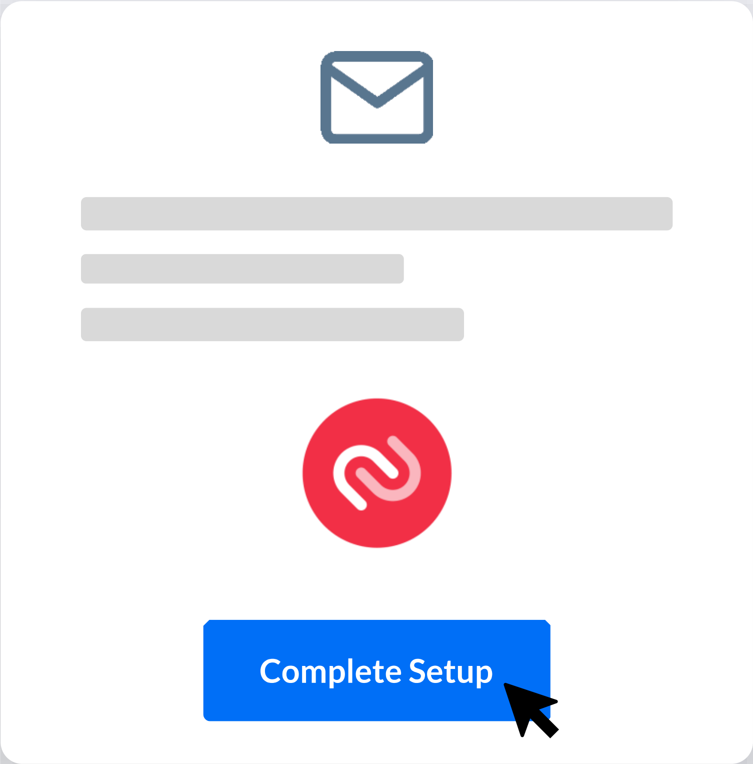
Your Client will need to:

- Download the Twilio Authy app for mobile or desktop via their app store or Google Play (for desktop).

Instructions on how to register, set up and use Authy can be found here

- Create a password and sign in to the Modulr Portal then link their account to you using your **Delegate Reference Number (DRN)**.

Instructions on how clients link their account can be found here



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Your Client is completing the application

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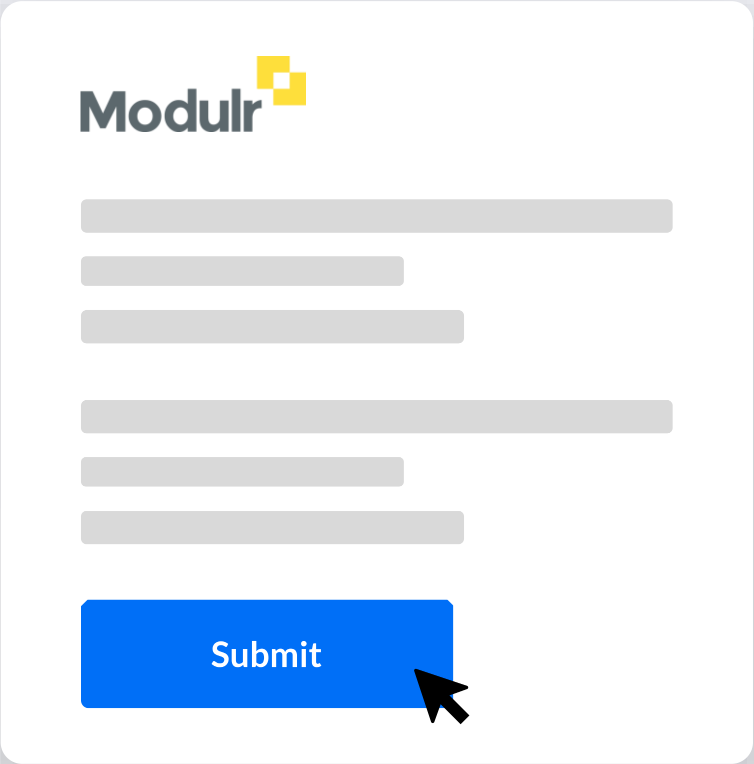

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