

Online Invoicing System Registration Guide

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Important Information

Thank you for deciding to register for our online invoicing portal.

Please note: The registration process for the online invoicing portal varies depending on whether you are an existing Connect/RegData user or not.

Please go the appropriate section and follow the guidance:

- Users Not Registered for Connect/RegData
- Users Registered for Connect/RegData

If in doubt, go to the "**Users** <u>Not</u> **Registered**" section to progress your registration. The application will alert you if a Connect/RegData user already exists and then guide you accordingly.

If you experience any issues or require assistance, please email <u>fcafees@fca.org.uk</u> or telephone the FCA Supervision Hub on 0300 500 0597.

Once registered

The system allows registered users to use the platform.



All individuals from your organisation who need to use the system must register individually for access. **Sharing your username and password with other users is strictly prohibited.**

Technical requirements

To access the new online invoicing portal, we recommend you have:

- Google Chrome
- Adobe Acrobat Reader 7.0 or above (free download)

Users Not Registered for Connect/RegData

Step 1: Go to the online invoicing login page (<u>https://fees.fca.org.uk</u>) and click on **Register for Online Invoicing**.

Online Invoicing Need Help?	Benefits of Online invoicing
User Name 🚯	Online Invoicing is the FCA's "one-stop shop" fees portal. 95% of our firms now use this paperless service which reduces our environmental impact and ensures the FCA has an efficient and effective fees invoicing and collection process.
Password 🚯	Firms have direct access to their fees account to view fees invoices and statements. Firms can also pay fees online (by card), set up a Direct Debt instruction and, if requested by the FCA, submit fee tariff data. Hore than one person can register for a single firm and an individual user can have access to multiple firms (if required) via single looin. A firm's registered users receive email notifications when invoices have
Foropt Your Password?	been raised for their firm and can opt to receive pdf copies of their invoice with these
LOGIN	Inducations. For more information, see our veosite [https://www.fca.org.uk/firms/fees/online-invoices].
Register For Online Invoicing	Welcome to the new Online Invoicing portal.
	We hope you like the new look and feel

Step 2: Enter your email address

•	•	•
1. Account Information	2. Personal Information	3. Review & Confirm
Register for Online Invoicing		
For fast invoice payments, access and transactions, ability to raise and submit Tariff data. Register t	i to previous invoices, statement disputes, apply credit refunds selow.	
A few details about you and you :	are on your way	
All fields are required		
Login Details		
Email Address Your email address will be your username		
Confirm Email Address		
ADD PERSONAL INFORMATIC	N CANCEL	

When providing account information, please note:

- Your email address must to be your **work email address**.
- Your email address will be used as your Online Invoicing System username. Once submitted, your email address cannot be changed.
- Your contact telephone number must be your direct line, not a switchboard number.

Step 3: Enter your Personal Information

1. Account Information	2. Personal Information	3. Review & Carllen	
A few more details allow? you and All fields are required unless must	ana ang an yaar way wal as "Optional"		
Login details Email Address John-doe@barclays.co.uk			
Personal details Suffix First Iware Tit: V Job Title Country Cook Telephone Nam ett V Telebar Namber (Optional)	Let Nore		
Security Question What was your childhood nic Security Answer	deenst v		
BACK REVOLW & C	CONFIRM CANCEL		
	Accessibility States Copyright & 2020 12 Endeering Taxana, Li	wet 1 Contactula 1 Privace/Nation Financial Conduct Authority (FCA) Index. 628 128. Company vol. 61920623	

Step 4: Review and confirm

] I have read and agre	ve with the Terms and Conditions.	
I'm not a robot		
r further information ab	bout how to complete the above challenge or if you are experiencing difficulties,	
sase refer to Google rec	Captithe support.	

When reviewing **account information**, please note:

- You will have to select **Back** to make any changes to information you have entered
- You must select I am not a robot
- You must select I have read and agree to the Terms and Conditions

Step 5: Click on Register for online invoicing

When you click **Register for online invoicing**, you will see an on-screen **Registration confirmation** message and an email will be sent to your registered email address.

If you choose **Cancel** in Step 4, the registration request you have created will be void and no further action will be taken.

Step 6: Activating Your Registration

After submitting your account information, an email will be sent to your registered email address. This email will confirm your username and provide a link to activate your account.

Click on the link in the email and you will be prompted to set a password when you first log in.

	Change Your Password
	alas a sur assured (as achiede) @fea arguit Malas
su	ire to include at least:
	8 characters
	1 letter
	1 number
	1 special character 1
• 1	New Password
••	Confirm New Password
Pa	assword was last changed on 13/01/2021 11:19.

Your password must be at least 8 characters long, with a mix of uppercase, lowercase and at least one special character: !#

You'll have access to the online invoicing portal.

Once you have set up a password for a user account you will be able login to the **Online Invoicing Portal** or **Connect**.

You have just set or re	eset a password for an FCA user account. You should only proceed to RegData if
to confirm where you	i would like to go now.
	0
	Go to Connect
	Go to Connect
	Go to Connect

Step 7: select online invoicing portal

Benefits of Online involcing
Online Invoicing is the FCA's "one-stop shop" fees portal. 95% of our firms now use this paperless service which reduces our environmental impact and ensures the FCA has an efficient and effective fees invoicing and collection process.
Firms have direct access to their fees account to view fees involces and statements. Firms can also pay fees online (by card), set up a Direct Debit instruction and, if requested by the FCA, submit fee tauff data. More than one person can register for a single firm and an individual user can have access to multiple firms (if required) via single loss. After instructions receive email indications when involces have and access the single size of the size
been raised for their firm and can opt to receive pdf copies of their invoice with these
Induncations. For more information, see our website [https://www.fca.org.uk/firms/fees/online-invoices]-
Important Notes

Step 8: Request Firm Access

To gain online invoicing access to your firm you need to enter your **Firm Reference Number** and **Unique Validation Code** (to obtain a Unique Validation Code you will need to email <u>fcafees@fca.org.uk</u> or call the Supervision Hub on 0300 500 0597).

Request Firm Access
All fields are required
Firm details
Firm Reference Number
Unique Validation Code 🚯

Once you have entered your **Firm Reference Number** and **Unique Validation Code** and selected **Submit Firm Request** you will be re-directed to the **online invoicing system Home page**.

Setting Up A Passcode and Security Question

When logging in for the second time, if you haven't set up a passcode or security question and answer you will be asked to set them up

salesforce	salesforce
amolsingh.rajput2@fca.org.uk.oat.connect Log Out	amolsingh.rajput2@fca.org.uk.oat.connect Log Out
Security Question What was your childhood nickname? Answer must be greater than 6 characters.	Please create a six digit passcode now. You must keep this passcode private, safe and secure. It will not be possible to reset or change this passcode without contacting the FCA directly. Passcode
Previous Next	Net

Please note: You will not be able to reset or change the passcode unless you contact the FCA directly.

Users Registered for Connect/RegData

Step 1: Go to the online invoicing login page (<u>https://fees.fca.org.uk</u>)Step 2: login in using your connect login credentials

Consister Online Invoicing	System
Online Invoicing Need Help? User Name Password Forgot Your Password? LOGIN Register For Online Invoicing	Benefits of Online invoicing Online Invoicing is the FCA's "one-stop shop" fees portal. 95% of our firms now use this paperless service which reduces our environmental impact and ensures the FCA has an efficient and effective fees invoicing and collection process. Firms have direct access to their fees account to view fees involces and statements. Firms can also pay fees online (by card), set up a Direct Debit instruction and, if requested by the FCA, submit fee tariff data. More than one person can register for a single firm and an individual user can have access to multiple firms (if required) via a single login. A firm's registered users receive email notifications when invoices have been raised for their firm and can opt to receive pdf copies of their invoice with these notifications. For more information, see our website [https://www.fca.org.uk/firms/fees/online-invoices]. Important Notes Welcome to the new Online Invoicing portal. We hope you like the new look and feel.
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Step 3: if you do not have access to a firm you will be required to request firm access by entering your **Firm Reference Number** and **Unique Validation Code** (to obtain a Unique Validation Code you will need to email <u>fcafees@fca.org.uk</u> or call the Supervision Hub on 0300 500 0597).



Once you have entered your **Firm Reference Number** and **Unique Validation Code (UVC)** and selected submit firm request you will have access to the online invoicing system Home page.

Please note: If your firm already has a registered user, the registered user will be able to obtain the UVC via the online invoicing portal. They can request it using the link on the Home page:

Useful Links	
Request Firm's Unique Validation Code () See Disputes	

Please note: You are only required to obtain firm access once.

Setting Up A Passcode and Security Question

When logging in for the second time, if you haven't set up a passcode or security question and answer you will be asked to set them up

salesforce	salesforce
amolsingh.rajput2@fca.org.uk.oat.connect Log Out	amolsingh.rajput2@fca.org.uk.oat.connect Log Out
Security Question Answer Answer must be greater than 6 characters.	Please create a six digit passode now. You must keep this passode private, safe and secure. It will not be possible to reset or change this passode without contacting the FCA directly. Passode
Previous Next	Next

Please note: You will not be able to reset or change the passcode unless you contact the FCA directly.

Logging Out

You can log out of the system at any time by clicking on **Logout** in the top right corner of the page.

