

CheckKIT™

User Guide – Registration Process

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Introduction

In order to register for the CheckIT™ service you will need to follow the process detailed below:

1. Your firm will be required to register for the service. In order to do so you will be required to have a **Firm Registration Code** which will have been provided to you by your sponsoring organisation. This sponsoring organisation could be a Network, Club or Packager. The Firm registrant will be appointed as the system administrator for the company.
 - a. On completion of the **Firm Registration** section you will be sent an email containing an *Account Activation Link* and *Administrator* sign in protocols.
 - b. Once you have clicked on the *Account Activation Link* a further email will be sent to you containing your company's individual **User Registration Code**. This is the code that individuals within your company will need to register under the **Individual Registration** section of the system.
 - c. If you also wish to register as a user as well as administrator you will also need to complete the individual registration process as detailed below.
2. Once your firm is registered and you have received the **User Registration Code** colleagues can then access the **Individual Registration** section.
 - a. On completion of the **Individual Registration** section the user will receive an email. This email again contains an individual *Account Activation Link* and system *Username*.
 - b. Once the *Account Activation Link* has been clicked the user can then sign into the system using their *Username* and the *Password* chosen in the registration process.

More detailed information on the registration process is outlined below.

Firm Registration

If you do not want to register an individual user account, but want to register a new firm level account then please click the **Register Firm** link to take you to Firm Registration process.

Individual User Registration

This page is displayed at the start of the user registration process. To register for the CheckIT™ Service it is necessary to have a **User Registration Code** that should be supplied to you by the administrator of your firm level account. If you do not have such a code you will not be able to register for the service.



[Help](#)

Sign Up for Your Personal CheckIT™ Account

User Registration Code: ? [Register Firm](#)


Password: ?

Confirm Password: ?

E-mail: ?

Security Question: ?

Security Answer: ?

Please enter these letters and numbers in the Security Code:  ?

Security Code: ?

Firm Registration


This page is displayed at the start of the Firm Registration process. It is accessed from the **Register Firm** link on the **User Registration** page. To register your firm for the CheckIT™ Service it is necessary to have a **Firm Registration Code** that should be supplied to you by your sponsoring organisation, a network or mortgage club you belong to or indeed a parent business unit within your own organisation. If you do not have such a code you will not be able to register your firm for the service.

The initial Register Firm page is shown below. Once you have answered all the items you should press the **Continue** button to continue the Registration process. Pressing the **Cancel** button will return you to the **Login** page.

Firm Name: ?

Firm Registration Code: ?

Please enter these letters and numbers
in the Security Code below:

 ?

Security Code: ?

Firm Name

This is the name of your firm.

Firm Registration Code

This is a registration code that should be supplied to you by your sponsoring organisation, a network or mortgage club you belong to or indeed a parent business unit within your own organisation. If you do not have such a code you will not be able to register for the service.

Security Code

You must enter the numbers and letters displayed in the picture into this code in order for your registration to be successful. Please note all letters are lower case characters. You can click the following icons with this feature.



This icon will refresh the picture with a new set of numbers and letters

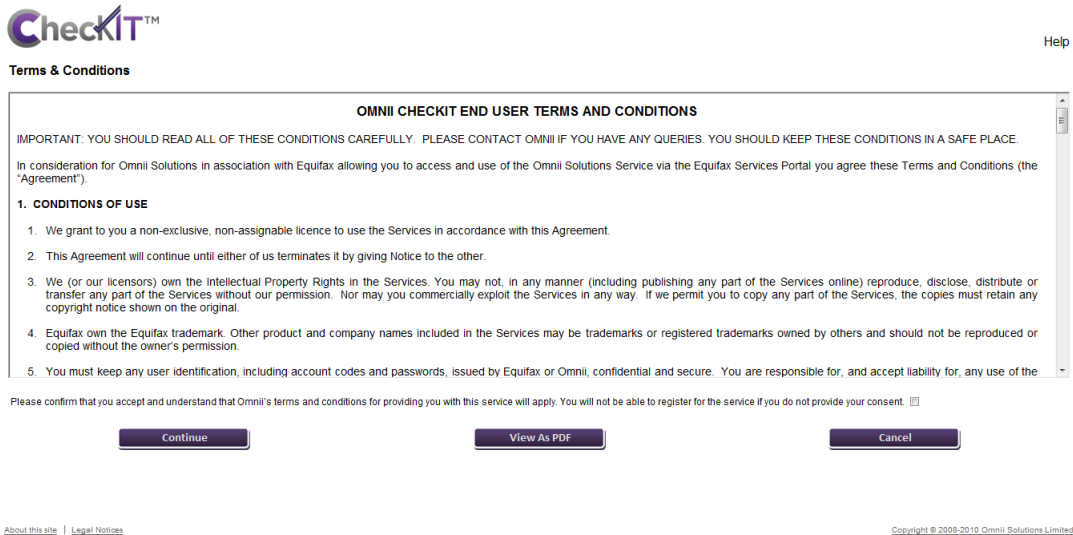


This icon will sound out the numbers and letter. You will need to have sound enabled on your computer for this.

Terms & Conditions

This page displays the Terms & Conditions that your firm must agree to be bound by in order to use the CheckIT™ service. Once you have read and understood the Terms & Conditions then answer the following question by checking the box to confirm your consent...

Please confirm that you accept and understand that Omnia's terms and conditions for providing you with this service will apply. You will not be able to register for the service if you do not provide your consent.

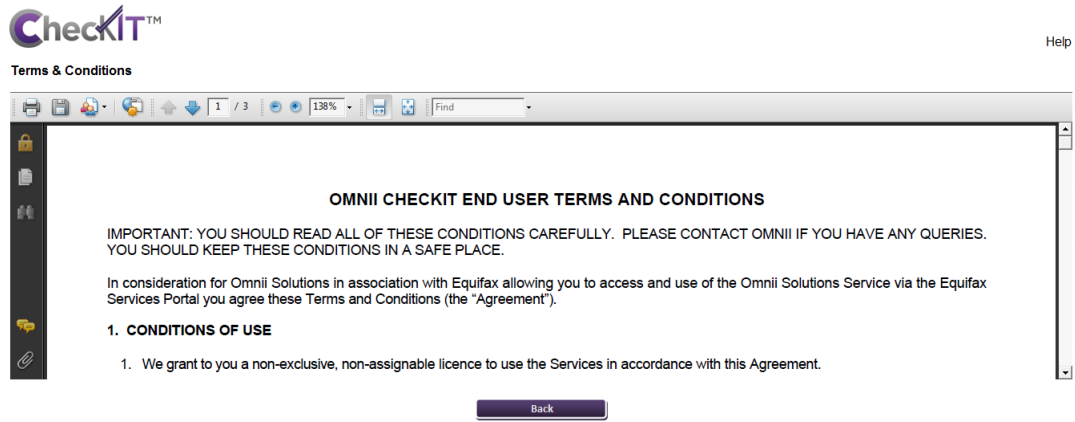


The screenshot shows the 'CheckIT™ Terms & Conditions' page. At the top left is the CheckIT logo, and at the top right is a 'Help' link. Below the logo is the title 'Terms & Conditions'. The main content area is titled 'OMNII CHECKIT END USER TERMS AND CONDITIONS'. It contains an important notice: 'IMPORTANT: YOU SHOULD READ ALL OF THESE CONDITIONS CAREFULLY. PLEASE CONTACT OMNII IF YOU HAVE ANY QUERIES. YOU SHOULD KEEP THESE CONDITIONS IN A SAFE PLACE. In consideration for Omnia Solutions in association with Equifax allowing you to access and use of the Omnia Solutions Service via the Equifax Services Portal you agree these Terms and Conditions (the "Agreement").' Below this is a section titled '1. CONDITIONS OF USE' with five numbered points: 1. We grant to you a non-exclusive, non-assignable licence to use the Services in accordance with this Agreement. 2. This Agreement will continue until either of us terminates it by giving Notice to the other. 3. We (or our licensors) own the Intellectual Property Rights in the Services. You may not, in any manner (including publishing any part of the Services online) reproduce, disclose, distribute or transfer any part of the Services without our permission. Nor may you commercially exploit the Services in any way. If we permit you to copy any part of the Services, the copies must retain any copyright notice shown on the original. 4. Equifax own the Equifax trademark. Other product and company names included in the Services may be trademarks or registered trademarks owned by others and should not be reproduced or copied without the owner's permission. 5. You must keep any user identification, including account codes and passwords, issued by Equifax or Omnia, confidential and secure. You are responsible for, and accept liability for, any use of the... Below the text is a confirmation checkbox: 'Please confirm that you accept and understand that Omnia's terms and conditions for providing you with this service will apply. You will not be able to register for the service if you do not provide your consent.' At the bottom are three buttons: 'Continue', 'View As PDF', and 'Cancel'. At the very bottom of the page are links for 'About this site' and 'Legal Notices' on the left, and 'Copyright © 2008-2010 Omnia Solutions Limited' on the right.

If you wish to view these Terms & Conditions as an Adobe® PDF document by pressing the **View As PDF** button. This will allow you to either print them or save a copy to your computer. This feature requires the **Adobe® Acrobat Reader** to be installed on your computer. We recommend using version 7 or later, the latest version is available from this link <http://get.adobe.com/uk/reader/>.

Press the **Continue** button to proceed with the Registration process.

Terms & Conditions in PDF



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This page displays the Terms & Conditions as an Adobe® PDF document. Here you can print the terms & Conditions of save them as a file on your computer. You can use the following toolbar buttons in **Adobe® Acrobat Reader** to print and save the Terms & Conditions...



Use this button to print the document.



Use this button to save the document as a file on your computer

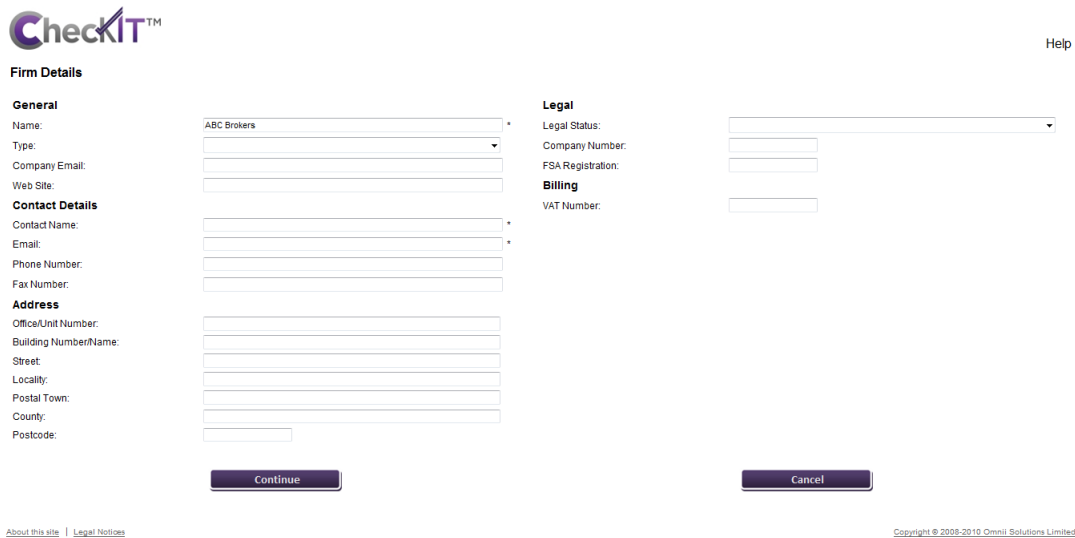
Pressing the **Back** button will take you back to the **Terms & Conditions** page.

If this page does not display properly it may be because you do not have **Adobe® Acrobat Reader** installed on your computer. You can install it by following this link <http://get.adobe.com/uk/reader/>.

Firm Details

On this page you can specify details about your firm. The firm name will be set to the same name you specified in the first step of the Firm Registration process. Only those items marked with an asterisk (*) are mandatory, the other details can be added/amended at a later date within the Administration system (<https://CheckIT.omnii.co.uk/adminsite/>).

Many of the items on this page may be displayed on reports that you create within the CheckIT™ system, depending on how the report templates have been configured by the sponsoring organisation, network or mortgage club you belong to or indeed any parent business unit within your own organisation.



CheckIT™ Help

Firm Details

General

Name: *

Type:

Company Email:

Web Site:

Contact Details

Contact Name: *

Email: *

Phone Number:

Fax Number:

Address

Office/Unit Number:

Building Number/Name:

Street:

Locality:

Postal Town:

County:

Postcode:

Legal

Legal Status:

Company Number:

FSA Registration:

Billing

VAT Number:

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Name

This is the name of your firm and is set to the same name you specified in the first step of the Firm Registration process and cannot be edited on this page. You can change it once your firm has been registered, via the administration system.

Type

This list allows you to specify the type of firm/organisation you are. Possible values are **Network, Mortgage Club, IFA Firm, Appointed Representative, Branch, Lender** or **Other**.

Company Email

This is a general email address for your firm.

Web Site

This is your firm web site.

Contact Name

This is the name of the primary contact for your firm typically this is the person that is performing this registration process. An administrative account will automatically be set up in the name of this person. This item is mandatory.

Email Address

This is the mail address of the primary contact. An automated email will be sent to this address with details of how to activate the account once it has been registered as well as details of the administrative account set up for this firm. This item is mandatory.

**Phone Number**

This is the phone number of the primary contact and may be used by Omnii Solutions or your sponsoring organisation, network or mortgage club you belong for the purposes of managing your account or providing you with support.

Fax Number

This is the fax number of the primary contact and may be used by Omnii Solutions or your sponsoring organisation, network or mortgage club you belong for the purposes of managing your account or providing you with support.

Address

This is the address of the firm. This may be used by Omnii Solutions or your sponsoring organisation, network or mortgage club you belong for the purposes of managing your account or providing you with support.

Legal Status

This is the legal status of your firm. Possible values are ***Public Limited Company, Private Limited Company, Limited Liability Partnership, Partnership or Sole Trader.***

Company Number

If your firm is a ***Public Limited Company*** or a ***Private Limited Company***, you should enter your company number here.

FSA Registration

If you are registered with the Financial Services Authority (FSA), enter your registration number here.

VAT Number

If you are registered for VAT then you should enter your VAT registration number here.

Complete

This page is displayed when you have successfully completed the Registration process. Although you have completed the Registration process, your account will **not** yet be active. To activate your account, please follow the instructions in the confirmation email that will have been automatically sent to the email address you specified for the primary contact. Clicking the **Finish** button will take you to the CheckIT™ Log In page.



Registration Complete

Help

Abc Brokers has been successfully registered for the Checkit service.

A confirmation email has been sent to XXXXX@XXXXX.co.uk

You will need to click the activation link in this email to finalise the registration process.

Finish

The email that you receive will have the following content. It is important that you click the link within the email to activate your account and complete the registration process. This will also allow users within your organisation to start to register for access to CheckIT™.

Abc Brokers has been successfully registered for the CheckIT™ service.

You need to activate the registration using this link:

[https://CheckIT.omnii.co.uk/brokersite/FirmActivation.aspx?FirmID=778be76e-e603-44fd-aa10-260528c5525f&ActivationCode=SP50904208&ActivationCode=SP50904208&UserName=SPA551108&TempPassword=&\\$5JgmE4MU](https://CheckIT.omnii.co.uk/brokersite/FirmActivation.aspx?FirmID=778be76e-e603-44fd-aa10-260528c5525f&ActivationCode=SP50904208&ActivationCode=SP50904208&UserName=SPA551108&TempPassword=&$5JgmE4MU).

An administrative account has been created for Mortgage Advisers Limited, with the following details...

User ID: SPA551108

Password: &\$5JgmE4MU

You can log into the administration system using this link: <https://CheckIT.omnii.co.uk/adminsite/>. When you log in for the first time you will be required to change your password, unless you change it using the link from the firm activation page.

Please note that you will not be able to log in with this account until you have activated the firm, using the link above.

Regards,

The Omnii Solutions Team.

Note: This is an automated e-mail address, please don't reply.

Automatic Activation

Clicking on the activation link within the email that is sent you at the end of the Firm Registration process will display this page with the following message.



Firm Activation

Help

The account for **Abc Brokers** has been activated successfully.

The User Activation Code for your firm is: **SP80943464**.

You will need this code to register individual user accounts. An email with these details has been sent to
XXXXXXXX@XXXXXX.co.uk

If you wish your advisers to be able to register automatically and use their accounts without being manually approved by you, then check this box .

Please the **Continue** button to access the Administration system where you can now create a permanent password for your administrator account.

Continue

The firm's **User Activation Code** is displayed; this is required for the registration of individual user accounts by you and / or your advisers. An email confirming this code will be sent to your email address.

You can choose whether you want your advisers to be able to register and use their accounts immediately without the need for you to manually approve their accounts first. If this is the case use the **tick box** embedded within this message. If however you wish to maintain control of which accounts are activated then do not select this option. In this case the system will generate an automated email to your email address that will request you to manually activate a new account once the user has gone through the registration process. You can change this option at a later date within the **Administration** system.

Pressing the **Continue** button will take you to the administration system where you can set a permanent password for your Administrative account.

The email that is sent to confirm your firm's **User Activation Code** has the following content...

The account for Abc Brokers has been activated successfully.

The User Activation Code for your firm is: SP51338181.

You will need this code to register individual user accounts, and it should be passed on to any individual in your firm who requires to use the CheckIT™ service.

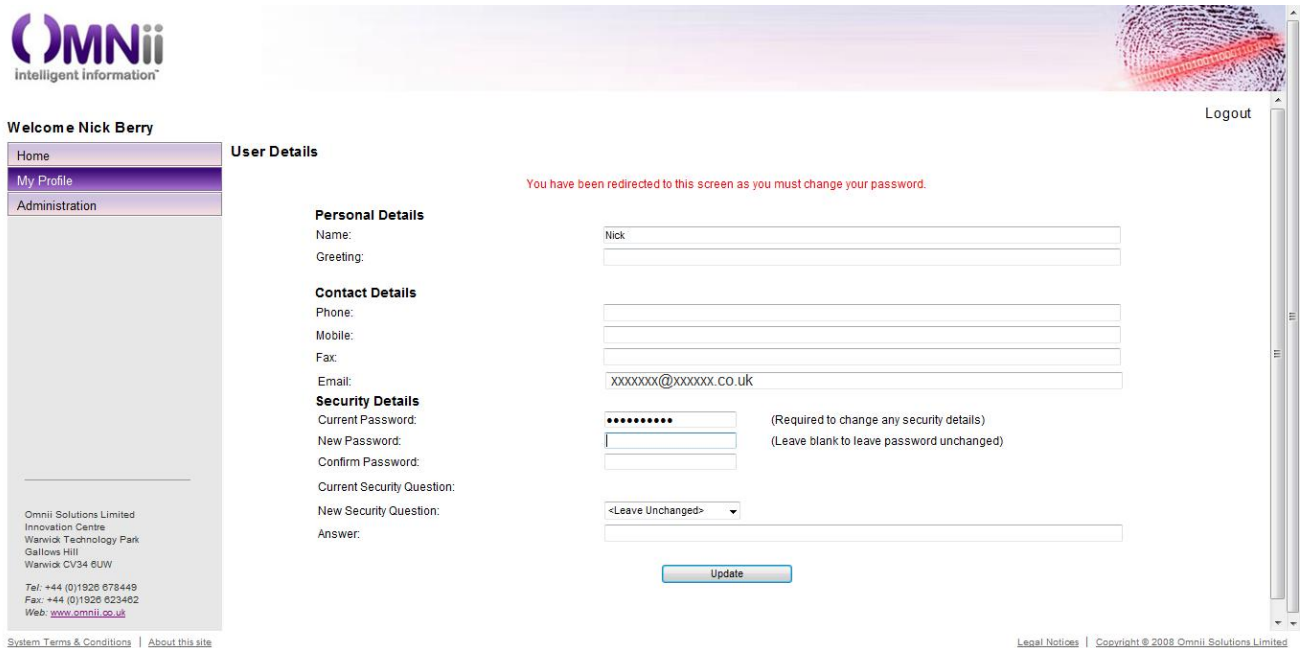
You can register for an individual user account using the following link...

<https://CheckIT.omnii.co.uk/BrokerSite/RegisterUser.aspx?RegistrationCode=SP51338181>

Regards,

The Omnii Solutions Team.

Administration System - User Details



OMNii
intelligent information™

Welcome Nick Berry

Home
My Profile
Administration

User Details

You have been redirected to this screen as you must change your password.

Personal Details
Name: Nick
Greeting:

Contact Details
Phone:
Mobile:
Fax:
Email: xxxxxxxx@xxxxxx.co.uk

Security Details
Current Password: (Required to change any security details)
New Password: (Leave blank to leave password unchanged)
Confirm Password:
Current Security Question:
New Security Question: <Leave Unchanged>
Answer:

Update

Logout

System Terms & Conditions | About this site

Legal Notices | Copyright © 2008 Omnii Solutions Limited

This **My Profile** page contains your personal information. It also allows you to change your security details such as your password and security question.

Name

You should enter your full name here. This item is mandatory and will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Greeting

This is an optional greeting is how you would like the system to refer to you when access the CheckIT™ system. If you don't specify it then the system will use your **Name**.

Phone

This is your telephone number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Mobile

This is your mobile phone number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Fax

This is your fax number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Email

Enter your email address. This item is mandatory and will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

If you are entering the system for the first time you will need to create a new password. You can change your password at anytime subsequently. Your password should be memorable and kept secret.

Current Password

You will be required to enter your **Current Password** before changing your password or security question.

New Password

If you want to change your password then enter it here. This password must be a minimum of 8 characters, with a mix of both upper and lower case characters. It must contain at least one numeric character and one or more punctuation type characters.

Confirm Password

If you are changing your password you need to re-enter it here to ensure it is correctly recorded on the system.

Current Security Question

If you have already created a security question then it will be displayed here. Normally this is set during the initial registration process.

New Security Question

You can create or change your security question here. You will need to have entered your current password if you wish to create or change your security question.

You can choose to leave your **Security Question** the same if you have already set one. If you wish to change your **Security Question** you can choose either one of the standard questions listed below or choose *Other*. If you choose *Other*, then a box will appear next to the list for you to enter your desired question.

Answer

If you are creating or changing your security question then you must enter the answer here.


You can amend this information by using the **Update** button.

Individual User Registration

This page is displayed at the start of the individual user registration process. To register for the CheckIT™ Service it is necessary to have a user registration code that should be supplied to you by the administrator of your firm level account. If you do not have such a code you will not be able to register for the service.

The Register User page is shown below. Once you have answered all the items you should press the **Register** button to continue the Registration process.

Sign Up for Your Personal Checkit™ Account

User Registration Code:	<input type="text"/>	<input data-bbox="1007 689 1034 719" type="button" value="?"/>	Register Firm
Password:	<input type="password"/>	<input data-bbox="1007 734 1034 763" type="button" value="?"/>	
Confirm Password:	<input type="password"/>	<input data-bbox="1007 779 1034 808" type="button" value="?"/>	
E-mail:	<input type="text"/>	<input data-bbox="1007 824 1034 853" type="button" value="?"/>	
Security Question:	<input type="text"/>	<input data-bbox="1007 869 1034 898" type="button" value="?"/>	
Security Answer:	<input type="text"/>	<input data-bbox="1007 913 1034 943" type="button" value="?"/>	
Please enter these letters and numbers in the Security Code:		<input data-bbox="1007 990 1034 1019" type="button" value="?"/>	
Security Code:	<input type="text"/>	<input data-bbox="1007 1093 1034 1122" type="button" value="?"/>	

User Registration Code

This is a registration code that is required to register an individual user account. It will be supplied to you by the administrator of your firm level account and is unique to the firm you belong to. If you do not have such a code you will not be able to register for the service.

Password

You must specify a password to access you account. This password must be a minimum of 8 characters, with a mix of both upper and lower case characters. It must contain at least one numeric character and one or more punctuation type characters.

Confirm Password

You must re-enter the password you have chosen here to check that the password will be recorded correctly on your account.

Email

You must specify a valid email address. This email address will be used as part of the registration process to send you an automated email with an account activation link that you must use to activate your account before you can use it. This email address is also used to recover you User ID should you forget it at some point in the future.

Security Question

You must specify a Security Question that you will need to answer should you require to use the automated password recovery process at some time in the future, in the event you forget your password. You can choose from a list of pre-selected questions or you can select the option of *Other* to specify your own question.

Security Answer

This is the answer to the Security Question that you have set in the previous item.

Security Code

You must enter the numbers and letters displayed in the picture into this code in order for your registration to be successful. Please note all letters are lower case characters. You can click the following icons with this feature.

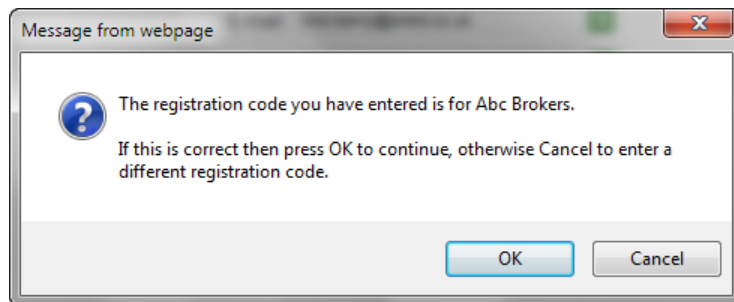


This icon will refresh the picture with a new set of numbers and letters



This icon will sound out the numbers and letter. You will need to have sound enabled on your computer for this.

In order to ensure that you have registered under the correct company **Registration Code** the following message will be displayed prior to continuing with the registration process. If the information is correct press **OK**. If the information is incorrect press **Cancel** and you will be returned to the Sign Up section to re-enter your **Registration Code**.



Personal Details

This page is displayed when you have successfully created your user account as part of the Registration process. You will have been allocated a unique **account user name/id** (which is SPU243957 in the example below). You will need to use this in order to access the CheckIT™ system. This account is unique to you and should not be shared with anyone else.

Now the account has been created you need to specify some basic personal details, the minimum of which is your name. Providing contact details will aid Omnii in providing you with support should your ever need it. To record these details once entered, press the **Finish** button.



Help

Account Created

Your Omnii account has been created successfully.
Your account user name is: SPU243957
Your firm is: **Abc Brokers**

You will shortly receive a confirmation email that will contain details on how to activate your account. In the meantime please supply some further details about yourself...

Personal Details	
Name:	<input type="text"/> ?
Greeting:	<input type="text"/> ?
Contact Details	
Phone:	<input type="text"/> ?
Mobile:	<input type="text"/> ?
Fax:	<input type="text"/> ?

Name

This is your name and is the only required item. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Greeting

This is an optional greeting is how you would like the system to refer to you when access the CheckIT™ system. If you don't specify it then the system will use your **Name**.

Phone

This is your telephone number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Mobile

This is your mobile phone number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Fax

This is your fax number. This will be displayed on any reports that you create within the CheckIT™ system, depending on how the report templates have been configured by your firm administrator.

Registration Complete

This page is displayed when you have successfully completed the Registration process. Although you have completed the Registration process, your account will not yet be active. To activate your account, please follow the instructions in the confirmation email that will have been automatically sent to the email address you specified at the start of the Registration process. Clicking the **Continue** button will take you to the CheckIT™ Log In page.



Help

Registration Complete

You have completed registered successfully. Your account is not yet active.

Please look out for a confirmation e-mail that provides details of how to activate your account.

Continue

Confirmation Email

Thank you for registering with Omnii CheckIT™ Service. Your account was set up with the following details:

Username: SPU243957

To reset your password, you must answer the following question:

Password Question: Birth Place

Before you can use your account it must be activated by your Business Unit administrator - to automatically generate a request for them to do to this, please click on the following link...

<https://test.omnii.co.uk/BrokerSite/RequestAccountActivation.aspx?UserID=e0ebef67-bb66-412b-af2c-7f421eeba718&RegistrationCode=SP80943464>

If you cannot click on the above link, please copy and paste it into your browser address.

Regards,

The Omnii Solutions Team.

Note: This is an automated e-mail address, please don't reply.