

Getting Started - Logging onto the Opacity Site



1) TO REGISTER...

1. TYPE <http://opacityservices.com/web/account/login.xhtml> in your web browser address line

*The **Opacity Oversight Login** screen appears*

2. CLICK on the **Click [here](#) to Register** link at the bottom of the page

Click [here](#) to register.

*The **Register** screen appears. It displays questions for you to complete about yourself*

3. TYPE your personal details in the **First Name, Last Name, Email Address, Mobile Phone, Office Telephone** and **Address lines**

PLEASE NOTE: Fields with an asterisk* are mandatory and must be completed. The system does not require a specific format. Please check that your information is entered accurately.

4. TYPE a unique personal username in the **Username** field
5. TYPE a unique password in the **Password** field.

PLEASE NOTE: The password must have at least contain upper case character, one lower case character, one letter, one number, one special character.

6. CLICK on the down arrow in the **Distributor** field,

A look-up list appears

-AND-

Select your option from the **Distributor** field

7. CLICK on the down arrow in the **User Role** field

A look-up list appears showing the following options: Investor, Broker, Organization or Administrator

-AND-

Select the user role from the list for which you wish to register. You will be able to request access to selected entities as follows:

- Investor Role – One or more Investor accounts
- Broker Role - As per investor role plus one or more broker accounts – a broker account will provide access to all investors linked to the broker account
- Organization Role – as per broker role plus one or more parent broker / organization accounts. A parent broker / organization role will provide access to all broker accounts (and their investors) linked to the parent broker / organization account
- Administrator – access to all accounts

8. CLICK on the **Submit** button

*A feedback message appears saying '**Registration complete. An email with instructions were sent to the email address provided**'*

9. Find the noreply@opacityoversight.co.za email in your email inbox, saying that '**your account is inactive. Go to link to activate it**'

10. CLICK on the link from the email

The Opacity site opens with a Feedback message saying '**Email validation complete. Your account is now active. You may log in now**'

2) TO LOGON FOR THE FIRST TIME AND REQUEST ACCESS TO SPECIFIC INFORMATION...

1. TYPE <http://opacityservices.com/web/account/login.xhtml> in your web browser address line

*The **Opacity Oversight Login** screen appears*

2. TYPE your unique user name in the **Username** field

3. TYPE your unique password in the **Password** field

4. CLICK on the **Login** button

*The **Profile Management** screen appears, showing no Investor or Broker details yet. You have to request permission to view specific Investor or Broker details. Your assigned Administrator will approve your request, if found appropriate*

5. CLICK on the **Request Access to entities** link at the top left corner of the screen

*The **Request access to Entities** fields appear*

6. To select a **Manco**, CLICK on the down arrow in the **Manco** field

A drop down list appears

7. Select your option from the drop down list

8. To select your required **Entity type**, CLICK on the down arrow in the **Entity Type** field

A drop down list appears

9. Select your option from the drop down list

10. To select your required **Entity code**, TYPE on the relevant code **Entity Code** field

11. CLICK on the **Request** button

*The request appear in the **Request Access to Entity** fields, showing a **Pending** Status, and an email is sent to the System Administrator who then approved or reject your request. Once approved, you receive a **User Access Request** email that your request has been approved and the status of your request changes to Approved on your web page, for example:*