

How to send a business sole trader self
certification document through lightico –

A Quick Step by Step Guide

LIGHTICO – LOADING FROM ADVISOR HUB

1. On advisor Hub, click Lightico for **Orbit**

This is single sign on, so will load automatically without a need for a login.

2. Click Start Session



Lightico for Orbit

Lightico screen share tool for use in Retail via single sign on capability.

Launch



Start Session

LIGHTICO – ENTERING CUSTOMER DETAILS AND CHOSING THE DOCUMENT

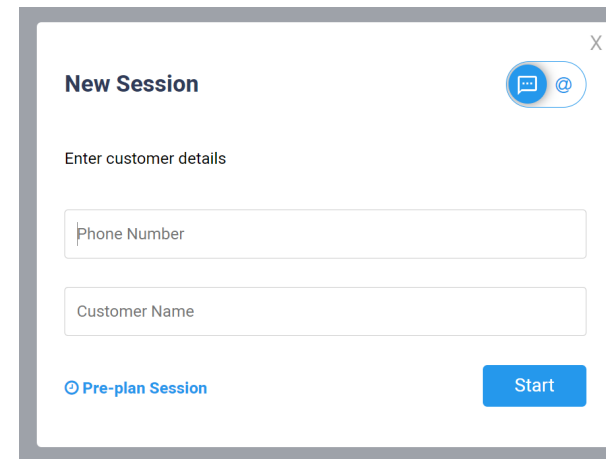
3. Enter the Customer details:

For New Customers

- Send to the contact number or email address that will be captured during the customer account set up

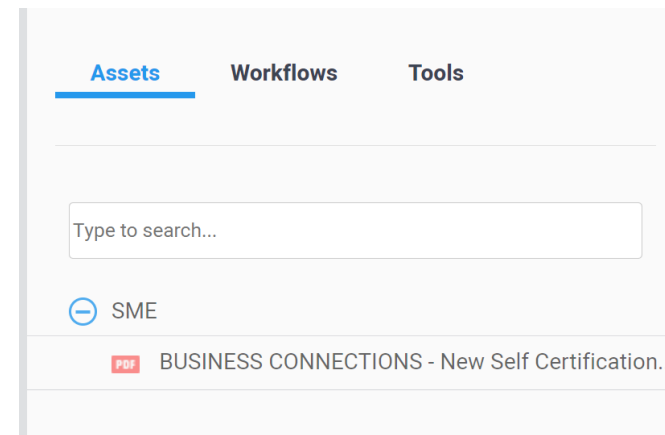
For Existing Customers

- Send to the number that the OTP was sent to



The screenshot shows a 'New Session' window with a close button (X) in the top right corner. Below the title, there is a sub-header 'Enter customer details'. There are two input fields: 'Phone Number' and 'Customer Name'. At the bottom left, there is a link 'Pre-plan Session' with a circular icon. At the bottom right, there is a blue 'Start' button.

4. Under Assets, open the SME menu and select “BUSINESS CONNECTIONS – New Self Certification”



The screenshot shows a navigation menu with three tabs: 'Assets' (selected), 'Workflows', and 'Tools'. Below the tabs is a search bar with the placeholder text 'Type to search...'. Below the search bar is a dropdown menu with a minus sign icon and the text 'SME'. Below the dropdown menu is a list of items, with the first item being 'BUSINESS CONNECTIONS - New Self Certification....' with a PDF icon to its left.

LIGHTICO – FILLING IN AND SENDING THE SELF CERTIFICATION

5. Fill in the customers Business Name or Trading Name, and the Customers Full Name (Highlighted in the yellow fields.)

Once completed, click send.

The customer will be prompted to sign the document sent to them. Once this is completed, the self certification is now complete.

BUSINESS CONNECTIONS

SOLE TRADER SELF CERTIFICATION



Business Name or
Trading Name

SOLE TRADER SELF CERTIFICATION

I am a self-employed / sole trader business in the UK and I wish to register as a small business customer with EE. I understand that if I register as a business, EE will pass my information to credit reference agencies relating to my business. I also understand that if EE later asks for documentation evidencing my business status, I must provide it or if not, EE reserves the right to remove or amend my contract. I confirm that I have read and understood and therefore accept the statement above.

Customers Full Name:

Signature:

Signature