



How to invite someone to connect to an entity

ASIC Regulatory Portal user guide | Version 1.2, March 2024



You must have Senior Administrator or Administrator access for an entity to have the ability to invite users to connect to that entity.

1. Log in to the [ASIC Regulatory Portal](#)
2. Select the **entity** you wish to invite the user to connect to.

Who would you like to represent?

Select an entity from the list below or click '+ Connect to an entity' to add another entity.

[+ Connect to an entity](#)

Current connections

Entity name	Entity type	ASIC identifier
Shane Ross (Myself)	Individual	
Brody Jenner	Individual	
TEST COMPANY PTY LTD	Australian registered company	003070120

3. On the entity page, click on **Administration** in the top navigation bar and select **Users** from the drop-down menu.

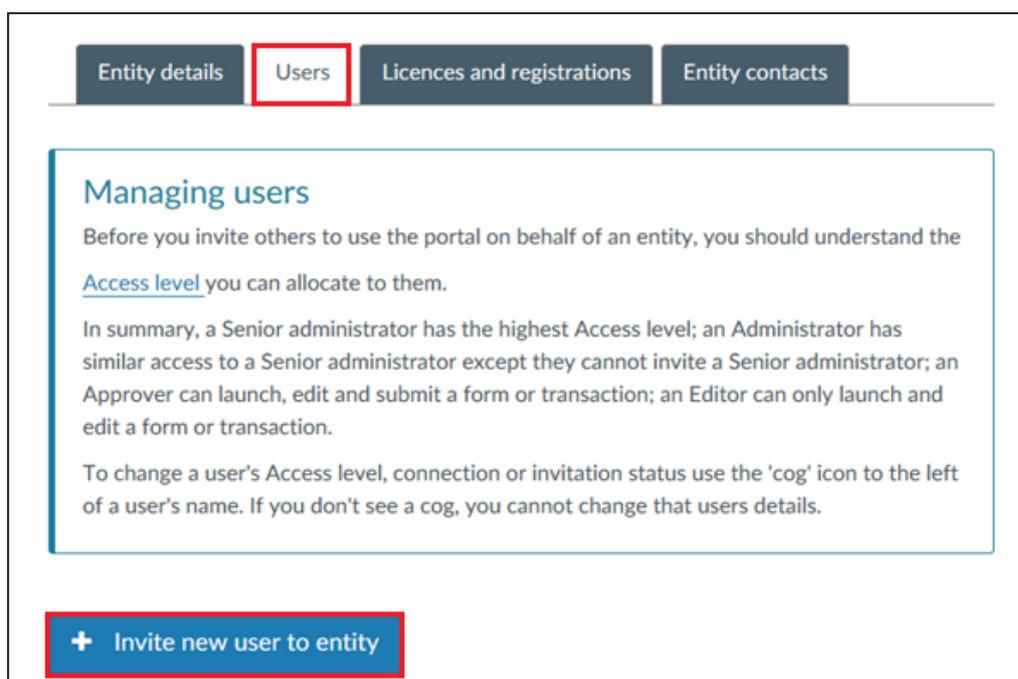
TEST COMPANY PTY LTD
[Switch entity](#) / [Connect to another entity](#) SR Help

Dashboard Transactions Administration

TEST COMPAN

Entity details
Users
Licences and registrations
Entity contacts

4. On the **Users** tab, click on the **Invite new user to entity** button.



5. Fill in the **invitee details**. Mandatory fields are marked with a red asterisk (*).

The name and email address entered in the invitation must match:

- the name and email address entered at registration (if the invitee does not have an existing portal account); or
- the name and email address on the invitee's existing portal account (if the invitee has already registered).

You will also be asked to allocate an Access level. These are:

- **Administrator** – can launch, edit and submit a transaction, and invite other users with an Approver or Editor Access level to the entity.
- **Approver** – in general, can launch, edit and submit a form or transaction.
- **Editor** – in general, can launch and edit a form or transaction, but they cannot submit it.

See the full list of [Access levels](#) for more information on what each level can do in the portal.



You **cannot** invite a user to connect as a Senior administrator.

This access level is generally reserved for the following users: individual licence holders (e.g. self-managed superannuation fund (SMSF) auditors, registered company auditors, Australian financial services (AFS) licensees, Australian credit licensees, liquidators); officeholders of a company (e.g. director, secretary); and partners of a partnership. The correct connection validation must be conducted to grant this access level. For more information, see our [How to connect to an entity](#) user guide.

6. Read and make the declaration that you understand the Access level you are allocating, click the **check box** and select **Confirm**.

* I understand this invitation will give the recipient the access level indicated in the field above for the nominated regulated entity (the entity) in the ASIC Regulatory Portal.

Cancel Confirm

We email the invitee an invitation key that will enable them to connect to the entity.