Setting Up an Account

This article provides information about setting up a new account in the Collaboration Center. New users messaged by Collaboration Center users can join with a Basic account type through an invitation code. A Basic account provides you with access to basic functionality, such as messaging, chatting, and uploading files. You can also perform limited administration including the following: creating teams to group individuals within your organization, adding employees to your account, and messaging others within your organization.

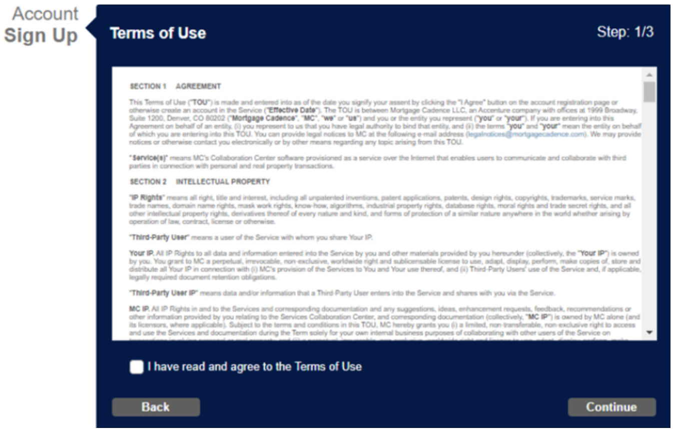
Professional users can use these same instructions for setting up a Professional account, with the exception that Professional accounts require billing information.

During the initial account creation, the system assesses your device when you enter an invitation code and click **Get Started**. Your computer is verified by the service during the initial account creation process and then again, each time you sign in to the Collaboration Center. Devices are analyzed using industry leading identity partners to ensure devices are legitimate. The Collaboration Center does not enable high risk devices to create accounts or access existing accounts to reduce fraud risk.

After the verification process, the system returns one of the following indicators:

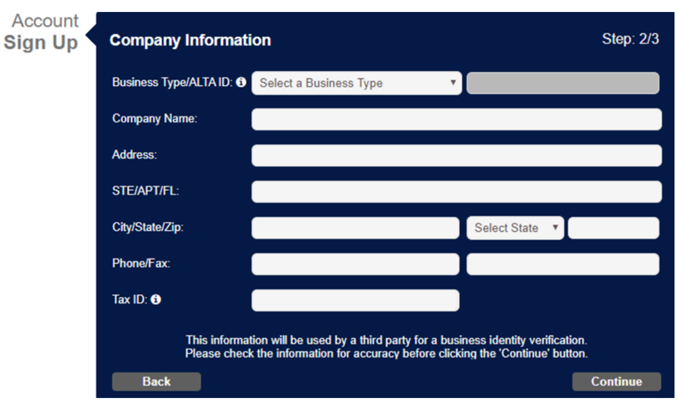
- If your device is verified, the system continues the account creation process.
- If your device is not verified, the system displays a dialog instructing you to contact Collaboration Center Support.

This figure illustrates the Terms of Use page, which begins the account creation process.



To sign up for a Collaboration Center account, complete the following steps:

1. Complete the Terms of Use page using these steps:
    1. Read the Terms of Use information.
    2. Select the **I have read and agree to the Terms of Use** checkbox.
    3. Click **Continue**.
       The Company Information page displays.



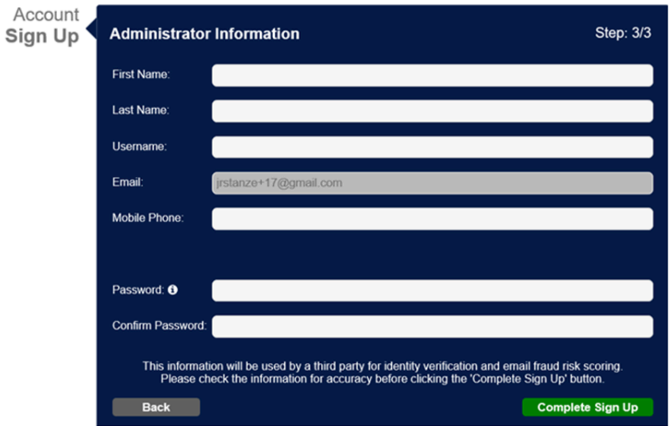
2. Complete the Company Information page, using the following information:

    - You must select **Title/Settlement** in the **Select a Business Type** drop-down list for the American Land Title Association (ALTA) ID field to become active.
    - When you enter an ALTA ID in the ALTA ID field in the Company Information page, the system attempts to verify the company information and enables you to identify if the information is correct through the following choices:
        - If you identify that the company information is correct, the system populates the company information fields for you.
        - If you identify that the information is incorrect, the system enables you to manually enter your company information.
    - The Tax ID is your company's nine-digit tax ID number for the IRS. This number is also called the Federal Tax Identification Number, 95 Number, and the E.I.N.

3. Click **Continue**.

When you click **Continue**, the system performs a security and risk assessment on your company's information and returns one of the following indicators:

- If your company's identity is not verified, the system displays a dialog instructing you to contact Collaboration Center Support.
- If your company's identity is verified, the system continues the account creation process, and you see the Administrator tab.



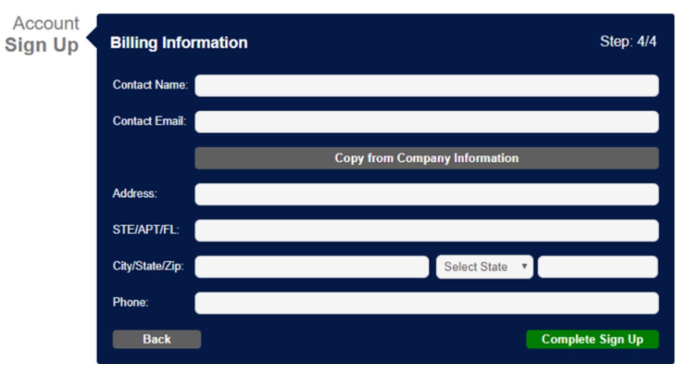
4. Complete the fields in the Administrator Information page.

The Collaboration Center designates the administrator's email domain as the organization's reserved domain.

5. If you are not setting up a Professional account, click **Complete Sign Up**.
   When you click **Continue**, the system performs a security and risk assessment on your administrator information and returns one of the following indicators:

   - If the administrator's email address or phone number is not verified, the system displays a dialog indicating the account cannot be completed and instructs you to contact Collaboration Center Support.
   - If the administrator's email address or phone number is verified, the system continues the account creation process.

6. If you are setting up a Professional account, click **Continue**.
   The system displays the Billing Information page.



7. Complete the fields in the Billing Information page.
   The **Copy from Company Information** button enables you to populate the billing address fields with the the address information you previously entered on the Company Information page.

8. Click **Complete Signup**.
   The Welcome to Collaboration Center Sign In page displays.
   Collaboration Center assigns administrative permission to the first user added to a new organization. The administrator then receives a welcome email with additional information.

For professional accounts, the platform assigns an Active status when an organization passes a business identity assessment. Once Active, a user can log in to Collaboration Center. If the organization does not pass a business identity assessment, the platform assigns a Pending status. When a user attempts to log in, Collaboration Center displays a status-pending message as well as instructions about accessing Collaboration Center support to complete account activation.