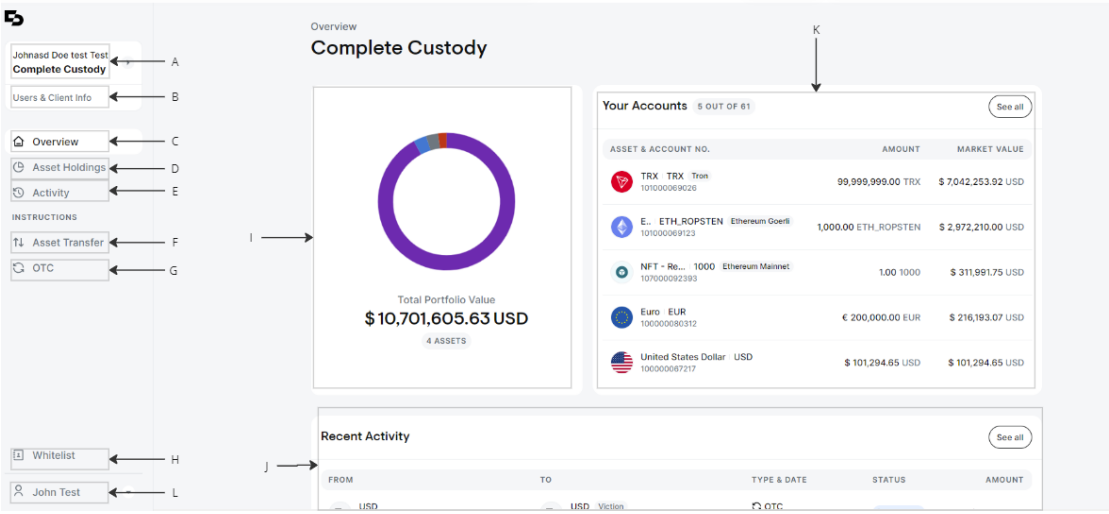
Navigate within Portal

sara li - 2024-05-24 - Client Portal Next Gen

Dashboard Overview

When you first log in to the Client Portal, you will land on the Dashboard page. On this screen, you will find an overview of your account, current asset holdings and your recent instruction activities.

As referenced in the screenshot below, each touchpoint is labeled with a description to help you easily identify its' purpose and functionality.



A: You will see your Client Account and the corresponding Service Suite. If you have another account linked to your email address, you can switch between accounts here. If you are using multiple services, you can switch between them here too, under "Select Service Suite".

B: Navigate to "Users & Client Info" to view a list of authorized users and your personal information.

C: This shows an overview of your account, including your total portfolio value, account asset holdings, and recent activities.

D: This shows a comprehensive view of your asset holdings and their USD value, by type.

E: This shows all the instruction activity within your account.

F: Navigate to this tab to create various types of instructions, including Transfer-In, Transfer-Out, Third-Party Transfer, and RSN Transfer.

G: This allows you to provide Over-the-Counter instructions to swap your assets, with the service fee indicated.

H: You can review your whitelisted bank accounts and crypto wallet addresses and add additional accounts and addresses to be whitelisted. Please note that you can only create instructions involving whitelisted accounts/wallets.

I: This shows an aggregated view of your total Portfolio Value, including all asset types.

J: You can view your most recent activities here. Click the "See all" button to view all of your instruction activity within your account.

K: You can view a snapshot of your accounts by asset. Click the "See all" button to view all your asset holdings and their USD value by type.

L: You can update your profile information, or change your password, and log out of the portal here.