

Navigation within Portal

Winnie Yuen - 2024-02-01 - Client Portal

When you first login to the client portal, you will land on our Dashboard page.

In the top bar, you will see a green dropdown list to select your account (only available if you have another account linked to your account) and different sections such as **Dashboard, Asset Transfer, Services, Invite Clients, and My Profile.**

Dashboard

The Dashboard page shows the service entity you have and your total portfolio value. If you are using multiple services, you will see multiple service boxes next to each other. All your assets will be listed under the Assets & Holdings section except for NFTs. You can use the dropdown list on the right to filter your assets and in order to show your NFT, please select NFT from the list.

For any announcement regarding our client portal or service interruptions, we will post in the our Notices section at the bottom.

Notices	
Date	Events
19 Aug 2022 02:03 PM	Service Interruption

Asset Transfer

To perform an asset transfer, you will need to create an instruction through the client portal before the team can handle your request. Transfer types are categorized as below:

Transfer-In: With our multi-asset accounts, you can deposit fiat or crypto to your custody account.

Transfer-Out: Send assets to your own account

Third-Party Transfer: Send assets to external 3rd Party accounts

RSN Transfer: Send assets to internal First Digital accounts

Services

First Digital offers various unique services to cater to your needs, such as OTC, FX, Digital Payroll, and Marketplace.

Invite Clients

Designed to help employers who want to onboard their employees to use our services, they can invite their employees directly from our client portal. Individual users can also use it to invite friends or family to use our services.

My Profile

Under this menu, you will find various settings regarding your account information and initial account setup before you can get started.