## **FX PORTAL**

## USER MANUAL

## **CORPORATE CUSTOMER REGISTRATION**

#### VERSION: 1.0

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Prepared by:

### JS Bank CPU-FT

#### Table of Contents

Edit User Error! Bookmark not defi	ned.
Add New User	14
User Management	13
Steps2: Edit Profile Information or Change Password	12
Step1: Login to FX Portal and Go to 'Profile'	11
How can I view and change my profile once registered?	11
Step1: Activates Account Via Email and OTP	6
How can I register myself on FX portal being a 'Corporate bank Customer'?	3

# How can I register myself on FX portal being a 'Corporate bank Customer'?

Corporate customer has to visit bank FX Portal link through which they will submit activation request electronically to bank with an authority letter mentioning company details email address, contact number on which Account Activation link and OTP PIN will be send.

Step1: Land on FX Portal login page and clicks 'REGISTER'

• You can land on FX portal main site and clicks on 'REGISTER'

<b>%JS BANK</b> BARHINA HAI AABEY		
	WELCOME TO JS BANK FX PORTAL	
	Username	
	٥	
	Password Forgot Password ?	
	٥	
		The second se
	-Ð sign in	
	New Here? Register	



Step2: Download Sample Authority Letter

- 1. Input all relevant information, sign company stamp and scan
- 2. Upload Authority Letter
- 3. Input Account Number and NTN then submit (*Note: all above information are already stored in bank system and get validate on proceed*)

JS BANK		
	Welcome to JS Bank FX Portal Already have an account? LOG IN	
	Select Customer Type Corporate Customer Individual Customer	
	Download Sample Authority Letter Authority Letter Choose File No file chosen	
	Account No Enter your bank account no O	
6 6 6	ЛТИ	
AL- BAN	E.g. 12345678	
	> NEXT × CANCEL	

	1/1   - 100% +   🗄 🖏		± ē :
	The Manager JS Bank Limited Shaheen Commercial Complex Dr. Ziauddin Ahmed Road, Karachi.		
	Dear Sir/Madam,	Date:	
	Subject: Request for the registration of JS Bank FX Portal		
	I / we as an authorized signatory of M/S	holding NTN with your branch ur company on your FX Portal by providing along with registered mobile	
	correct electronic document information / submissions.	a above statement and are responsible to	
	Best Regards,		
	Authorized Signatory	Authorized Signatory	
JS BANK BARHINA HAI AAGEY		n an	
	Welcome to JS Bank FX Portal Already have an account? LOG IN		
	Select Customer Type		
	Corporate Customer Individual Customer		
	Download Sample Authority Letter		
Carl I and Carl	Authority Letter Choose File 18 December, 2020 (7).pdf		
	8		
	Account No		
	C2000102000		
	0000183952		
	NTN		
	03930141		
	00000141		
	> NEXT × CANCEL		

JS BANK DARHNA HAN AAGEY		
	Welcome to JS Bank FX Portal Already have an account? LOG IN	
	Select Customer Type Corporato Customer Individual Customer Download Sample Authority Letter	
	SUCCESS	
	Your request for customer registration have been submitted	
A REVEN	NTN 03835141	
	> NEXT × CANCEL	

Bank Representative reviews company details fetches from bank system on the basis of CIF number and adds email address and contact number which company admin has provided through authority letter.

Corporate Admin will be receiving an 'Account Activation' email and on activating it by customer OTP will be generated and customer can proceed with following registration flow:

Step3: Activates Account Via Email and OTP

• Corporate admin activates his account by clicking on <u>Activation link</u> received on provided email address and OTP screen will be displayed where he has to provide OTP PIN received on email or contact number as EMAIL.



FX Registration fxportal to: shamoon.ather

02/25/2021 04:18 PM Show Details

Thanks for registration for FX Portal. Please complete the registration process using follwoing link/nhttp://10.111.222.89:8082/auth/registration/customerMasterid=127454te=2512f0212f2021



JS BANK		
	OTP Verification	
	<b>Code</b> 4321	
	SUBMIT Haven't received your code yet?	
	New Here? Register	

• Some of the fields will be auto populated like Name, Email Address and Phone number provided by company admin to bank.

	Create New Ac	count	
<b>%JS BANK</b> EARTHINA HAI AAGEY	First Name	Middle Name	
	Enter your first name	Enter your middle name	
	Last Name	Phone	
24	Enter your last name 🚺	03002130194	
H I I I I I I I I I I I I I I I I I I I	Email	Username	
	shamoon ather@jsbl.co	Choose a unique user	
	Password	Confirm Password	
	Password 🗿 🎕	Confirm Passi	
	Password must contain at 0/ least 8 characters, including UPPER/lovercase, numbe and special characters		
	NTN Number	Brief Profile	
	Enter NTN number	Enter brief profile	
	Ownership Structure		

• Select 'Ownership Structure' from drop down to link it with account. Corporate can be structured as Private Ltd, Public, Sole Proprietor etc.

	Create New Ac	count	
JS BANK	First Name	Middle Name	
	MATEEN	Enter your middle name	
	Last Name	Phone	
	FAROOQ	03002130194	
H I I I I I I I I I I I I I I I I I I I	Email	Username	and a second
	shamoon.ather@jsbl.co	MATEEN	
	Password	Confirm Password	
	Password must contain at 1		
	least 8 characters, including UPPER/lowercase, numbe and aphotal characters		
	NTN Number	Brief Profile	
	07107030	TRADER	and the second se
	Ownership Structure		

• Password should be *8 characters* with at-least 1 upper case,1 number and 1 special characters. User will be notified if any one rule is violated.



Create Ne	wAc	count	
First Name		Middle Name	
MATEEN		Enter your mid	die nam
Last Name		Phone	
FAROOQ		03002130194	
Email		Username	
shamoon.ather@	jsbl.co	MATEEN	
Password		Confirm Passv	vord
	8		ł
Password must contain a least 8 characters, includ UPPER/owercase, numb and apricial chrvacters.	tt 10/ ing se	8	
NTN Number		Brief Profile	
07107030		TRADER	



• Enter all valid information and clicks SIGNUP → Success message comes up and on Continue user will navigate to login screen.



MATEEN	Enter your middle name
Last Name	Phone
FAROOQ	03002130194
Email	Username
shamoon ather@jsbl.co	MATEEN
Password	Confirm Password
Password must contain at 10 least 8 characters, including UPPER/lowercase, numbe and special characters	6
NTN Number	Brief Profile
07107030	TRADER
Ownership Structure	
Private Limited Con	
-∃ SIGN UP	





#### How can I view and change my profile once registered?

Once user is registered in FX portal, he can access and login to FX portal to manage corporate profile, internal corporate users and perform transactions.

Step1: Login to FX Portal and Go to 'Profile'

• User (corporate admin) provides 'Username' and 'Password' (setup in registration flow above) on login form and clicks LOGIN. After verifying OTP user by default redirects to 'Home' screen.

JS BANK		
	Username         Mattern         Mattern         Password         Password         Orgot Password?         Username         Username         Password         Password?         Username         Username         Password?         <	
<b><i>IJS BANK</i></b>	OTP Verification	
	Code 4321 • SUBMIT Haven't received your code yet? Resend code in 235 New Here? Register	

• Click on Profile option on top left to view his profile

<b>≸JS</b> BANK ≪						HL HANIF
Home	Home Home				My F Accor	Profile port settings and more
<ul> <li>Inbox</li> <li>Cases</li> <li>Reports</li> <li>Users</li> </ul>		FX Categories Select Case Type: Trade Commercial			Sign Oc	a
FAQs		Recent Requests	Statistics Approved: Rejected: Discrepent:	0 0 0	Draft: Bank Review: Total Request:	0 0 0
		Action Required No records found.	Rejected Requests			

Steps2: Edit Profile Information or Change Password

• User can username and phone # from 'Edit Profile' tab.

<b>∅JS BANK</b> «				Hi, HANIF
Home				
$\checkmark$ Inbox				
Cases	User Profile			
Reports	EDIT PROFILE CHANGE PASSWORD			
Lusers				
🕞 FAQs	First Name HANIF	Middle Name MUHAMMAD	Last Name MURHTAR	
	National Id 42821142	NTN 42821142	Breif Profile TRADER	
	Ownership Structure Private Limited Company	Email/Username *     shamoon.ather@jsbl.com	Phone Number * 03002130194	
			× CANCEL •	

• User can update account password by giving Old Password and setting New Password.

<b>%JS</b> BANK ≪		HI, HANIF
Home		
$\checkmark$ Inbox		
💴 Cases	User Profile	
Reports	EDIT PROFILE CHANGE PASSWORD	
🔔 Users		
🕞 FAQs	Old Password * New Password * Confirm Password *	
	× CANCEL SAVE	

#### User Management

Corporate admin can manage internal users via 'Users' option

<b>%JS</b> BANK «								Hi, HANIF	-
Home	Home Home								
<ul> <li>Inhox</li> <li>Cases</li> <li>Reports</li> <li>Uters</li> <li>FAQs</li> </ul>		FX Categories Select Case Type: Trade Commen	cal						
		Recent Requests		Statistics Approved: Rejected: Discrepent:	0 0 0	Draft. Bank Review: Total Request:	0 0 0		
		Action Required		Rejected Request	5				

• Clicking on 'Users' will show all internal corporate users with their details and current status.

#### Add New User

• Corporate Admin can add internal user(s) by clicking on NEW USER button on top of users list



• Red Highlighted fields are mandatory and user can't Save without providing the mandatory details.

<b>%JS</b> BANK ≪						HI, HANIF
🗇 Home	Users Users					
🔶 Inbox	-					
🗰 Cases		User Profile				
Reports		EDIT PROFILE				
Lusers						
FAQs		First Name * WAQAR	Middle Name		Last Name * OURESHI	
		Email@Jername * waqar@gmail.com	CNIC * 4536896512345		NTN * 42821142	
		Breif Profile * TRADER	Ownership Structure ** Private Limited Company	• ×	Phone Number * 03002130194	
		User Role** CorporateMaker * ×	Effective Start Date * 2/24/2021	E ×	Effective End Date * 12/31/2021	
					V DONE X CANCEL	

• Admin can make internal user's with 'Corporate Maker' role

<b>%JS</b> BANK ≪				HI, HANIF
Home	ers Users			
🔶 Inbox				
👩 Cases	User Profile			
Reports	EDIT PROFILE			
🚢 Users				
G FAQs	First Name * WAQAR	Middle Name	Last Name * QURESHI	
	EmailUsername * waqar@gmail.com	CNIC * 4536896512345	NTN * 42821142	
	Breff Profile * TRADER	Ownership Structure** Private Limited Company - X	Phone Number * 03002130194	
	User Role ** CorporateMaker × ×	Effective Start Date * 2/24/2021 III X	Effective End Date * 12/31/2021	
			V DONE X CANCEL	

- Provide all valid user's data and clicks 'DONE'
  - 1. Success message is shown to user and activation link is sent to user's email address.
  - 2. Status of user will be 'Pending' unless new user activates his account.
  - 3. Once user has activated his account by clicking on ACTIVATE link from his email then status will become 'ACTIVE' in system.

<b>≸JS</b> BANK ≪						hi, hanif 💄
🔶 Home	Users Users					
🔶 Inbox						
Cases		User Profile				
Reports		EDIT PROFILE				
🔔 Users						
🕞 FAQs		First Name * WAQAR		100	Last Name * QURESHI	
		Email/Username * waqar@gmail.com	SUCCESS		NTN * 42821142	
		Breif Profile * TRADER	User has been created successfully with the name waqar@gmail.com	- ×	Phone Number * 03002130194	
		User Role * * CorporateMaker		e x	Effective End Date * 12/31/2021 Effective X	
					V DONE X CANCEL	