FX PORTAL

USER MANUAL

INDIVIDUAL CUSTOMER REGISTRATION

VERSION: 1.0

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How can I register myself on FX portal being an 'Individual bank Customer'?

Bank existing individual customer can register themself on FX portal provided by bank. User has to provide his basic account details to get registered in foreign exchange portal so can perform transaction themselves via this portal.

Step1: Land on FX Portal login page and clicks 'REGISTER'
- You can land on FX portal main site and clicks on 'REGISTER'
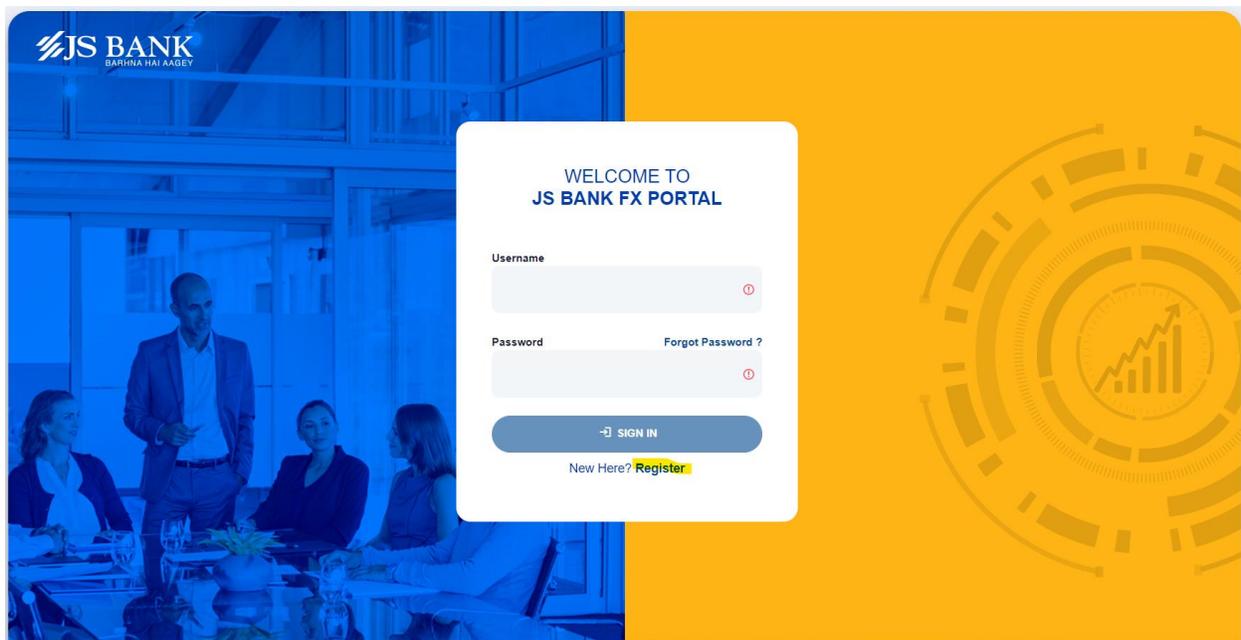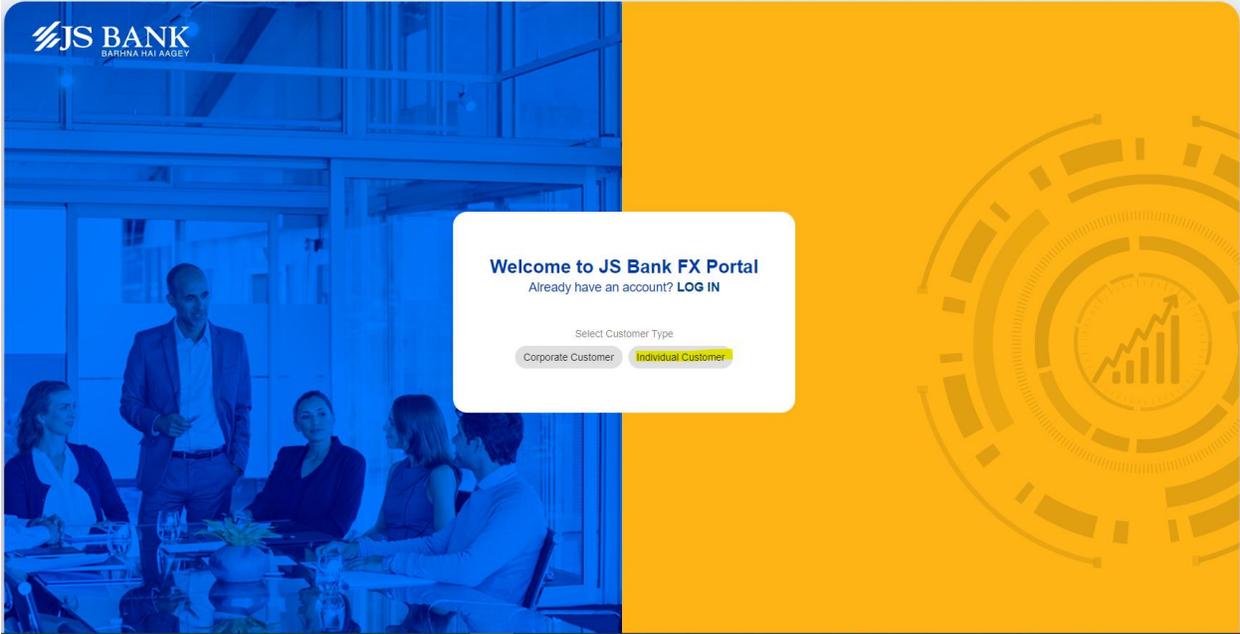
Step2: Provide basic account and user details

1. Provide your bank 'Account Number'
2. 'CNIC'
3. NTN number (optional) and click Next
   (Note: all above information are already stored in bank system and get validate on proceed)
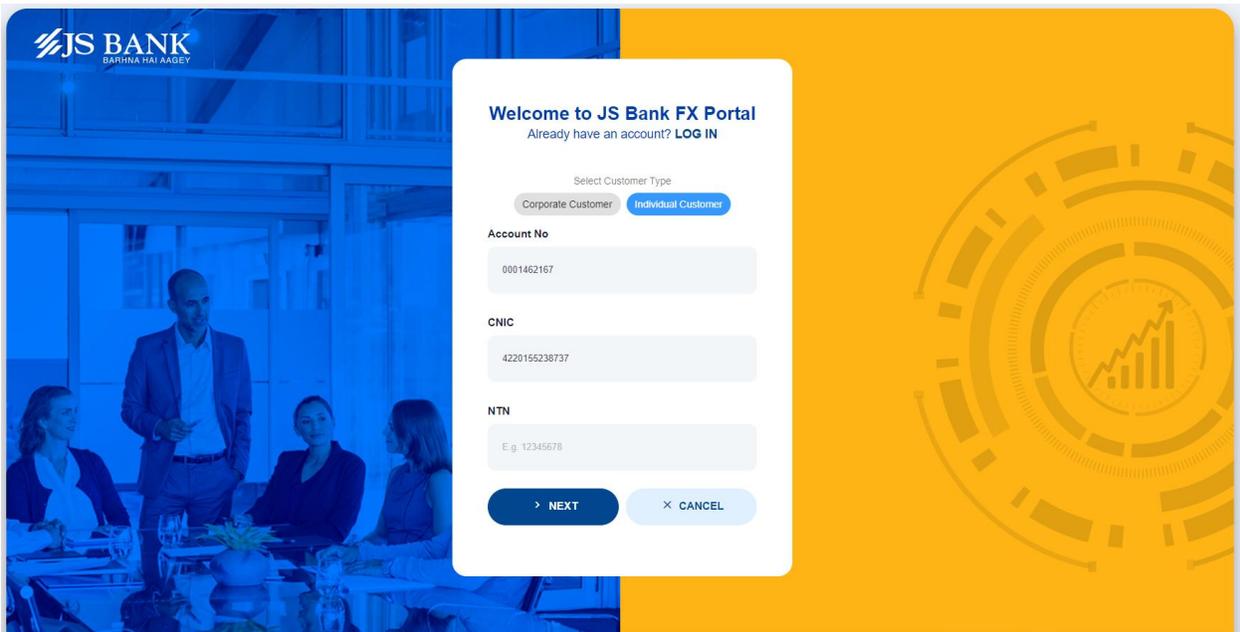
- CANCEL: Cancel will redirect you to login screen.
- On skipping either CNIC or Account number, you will be notified with an error to enter data in mandatory field.
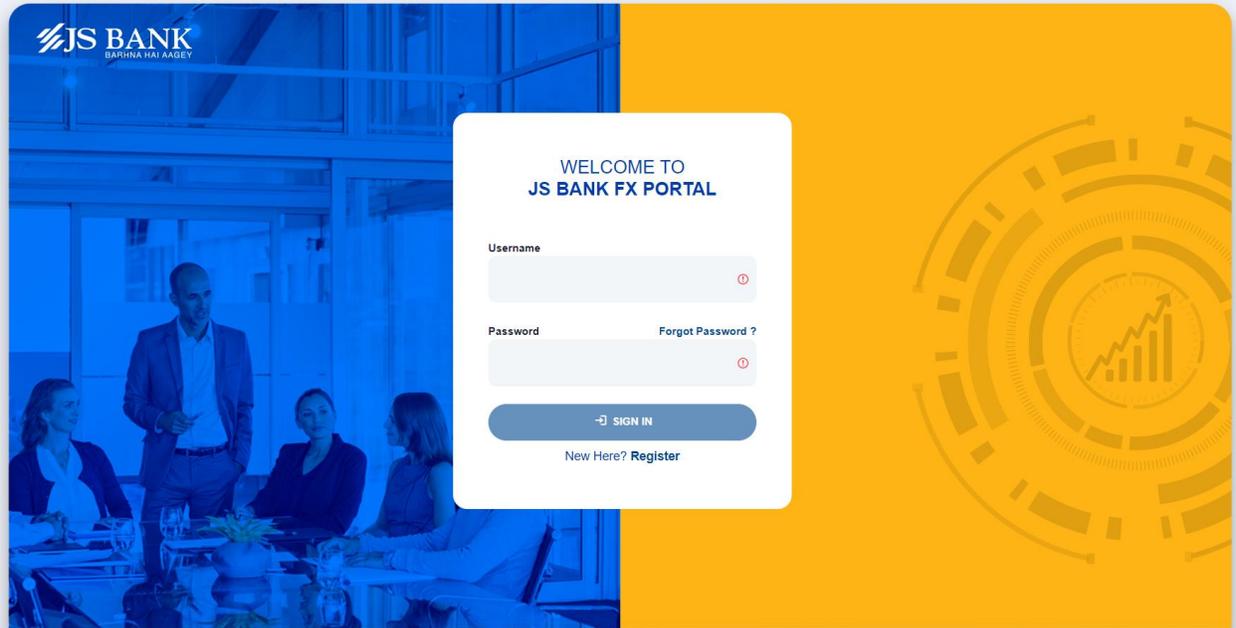
- Incase 'Account number' and 'CNIC' (any one of them) does not exist in bank system then you will be notified on Next.
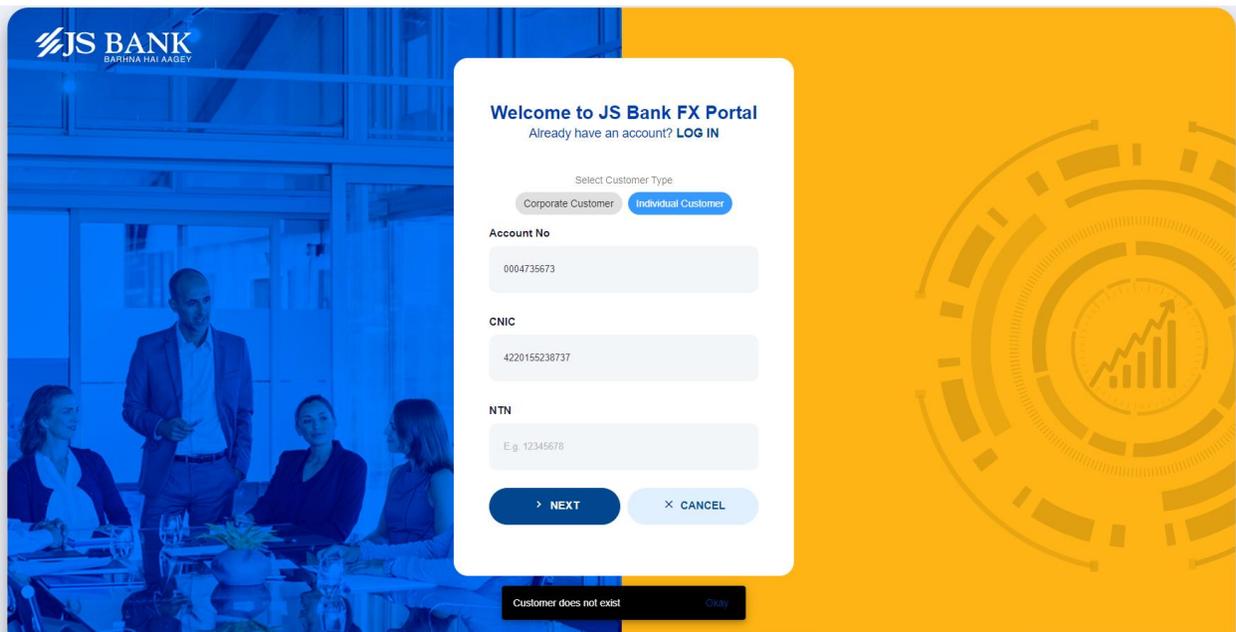
- If you are already registered in FX portal and tries to re-register then system will not allow to proceed showing 'Customer already exist' error.
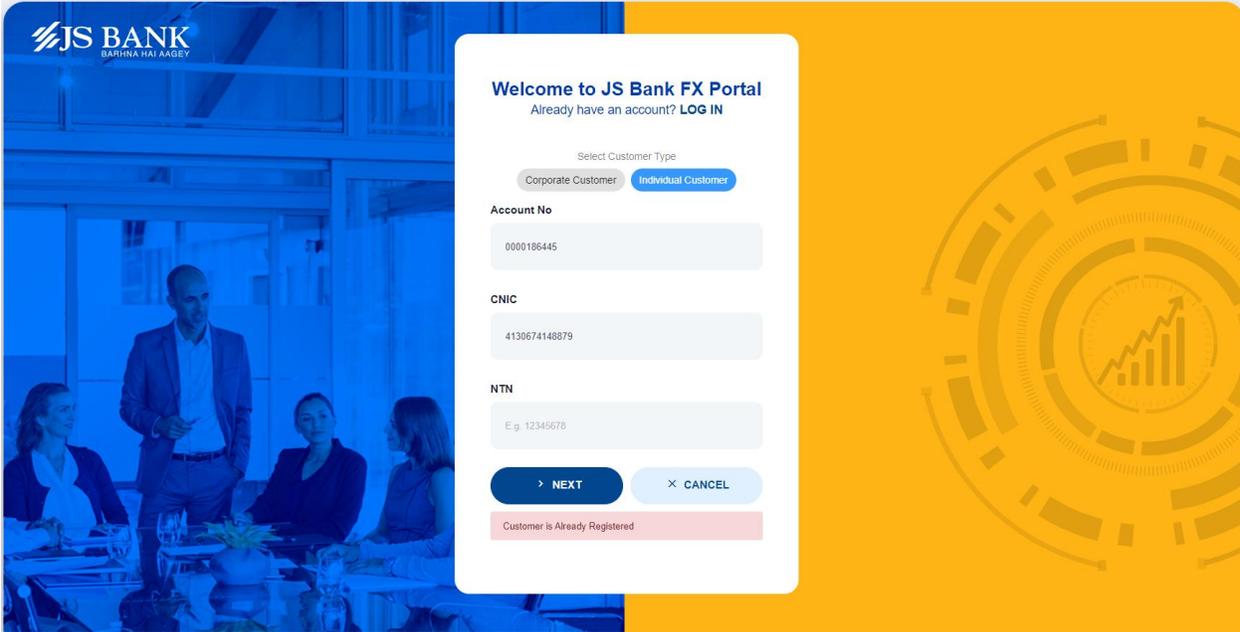
Step 3: Verify 'OTP' received as Email

- Once above information is validated and proceed, you will receive OTP PIN (one time password) on his email address (which is already registered with his account) for security purpose.
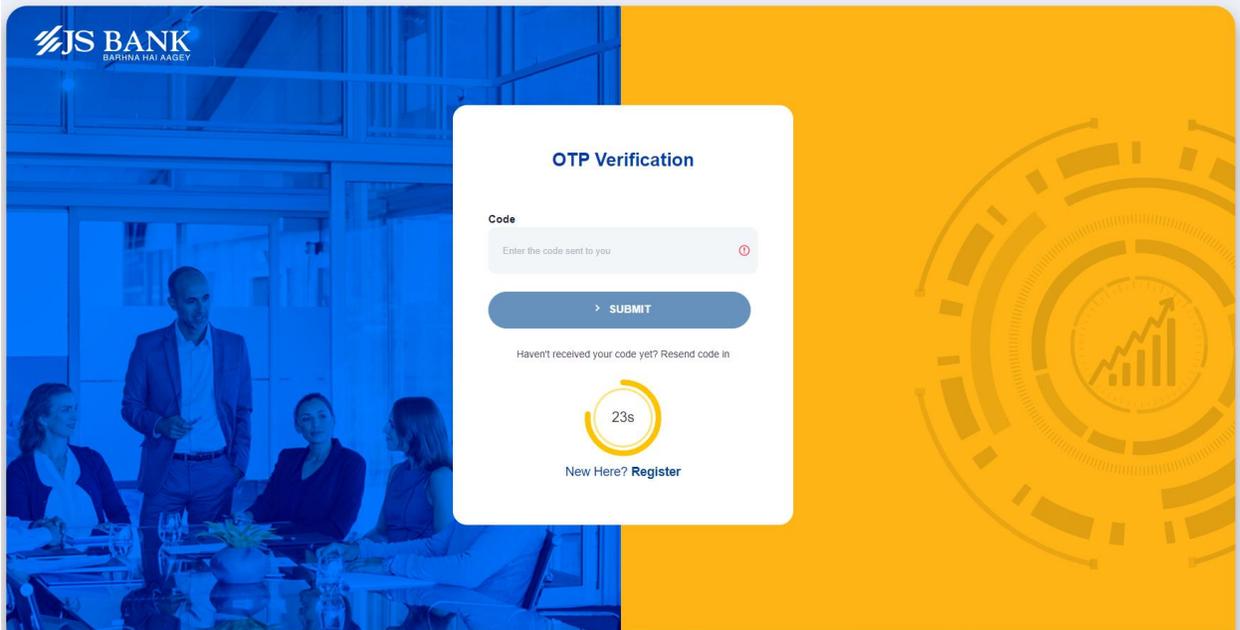
1. Enter '4' digits OTP PIN
2. Click Submit
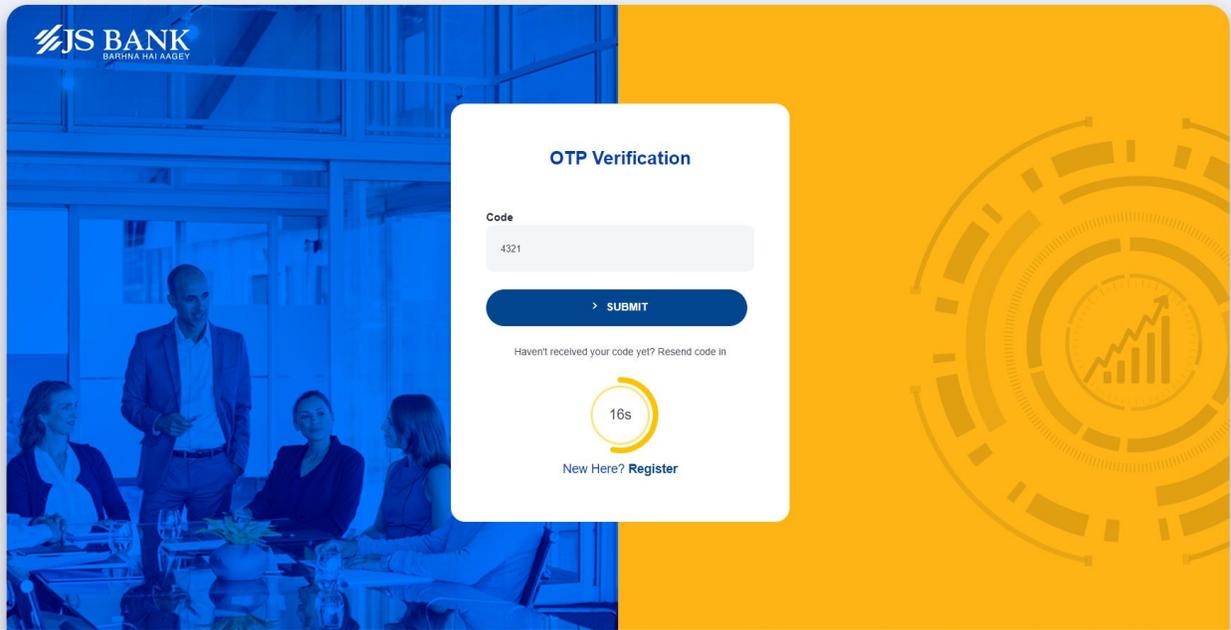
- You can click 'RESEND CODE' if previous PIN is expired or by somehow not received as EMAIL. Resend code will generate a new OTP PIN and send to the same contact number.
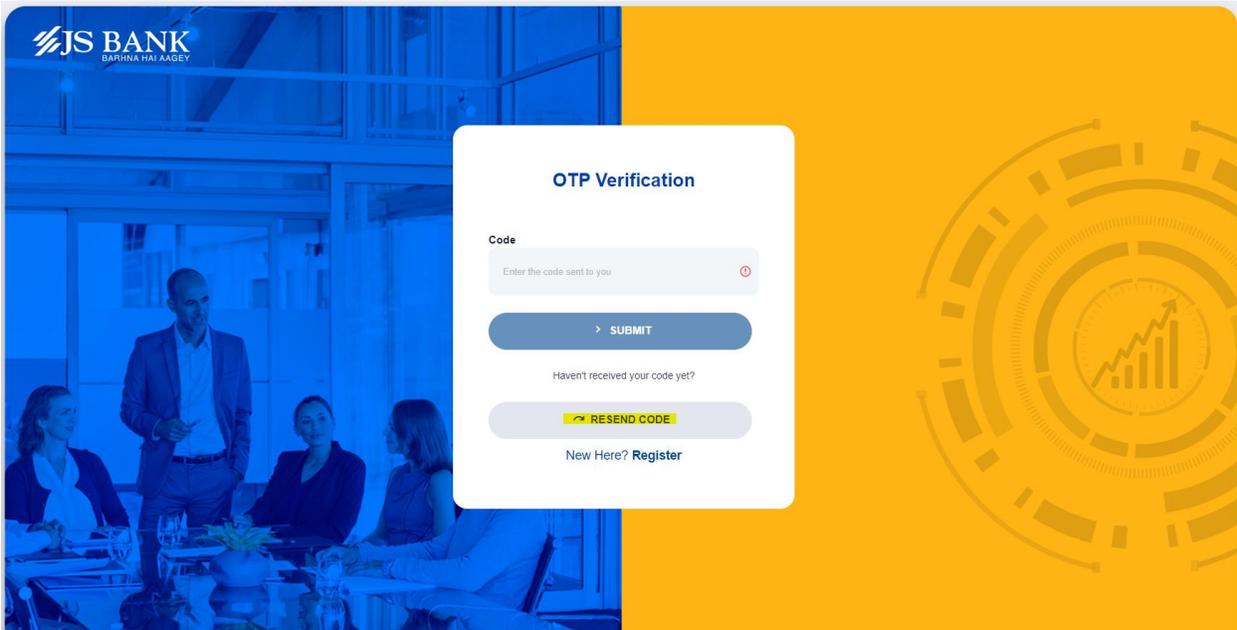
Step 4: Setting 'Username' and 'Password'

- Once OTP is verified, you are redirected to next screen where you can see your details fetched from bank. Like:
    1. FirstName
    2. Last Name
    3. Address

4. Account title

- All fields are editable and you need to provide 'Username', 'Password' and 'Confirm Password' and clicks 'SIGNUP' button → Success message comes up, and on Continue you will be navigated back to login screen.
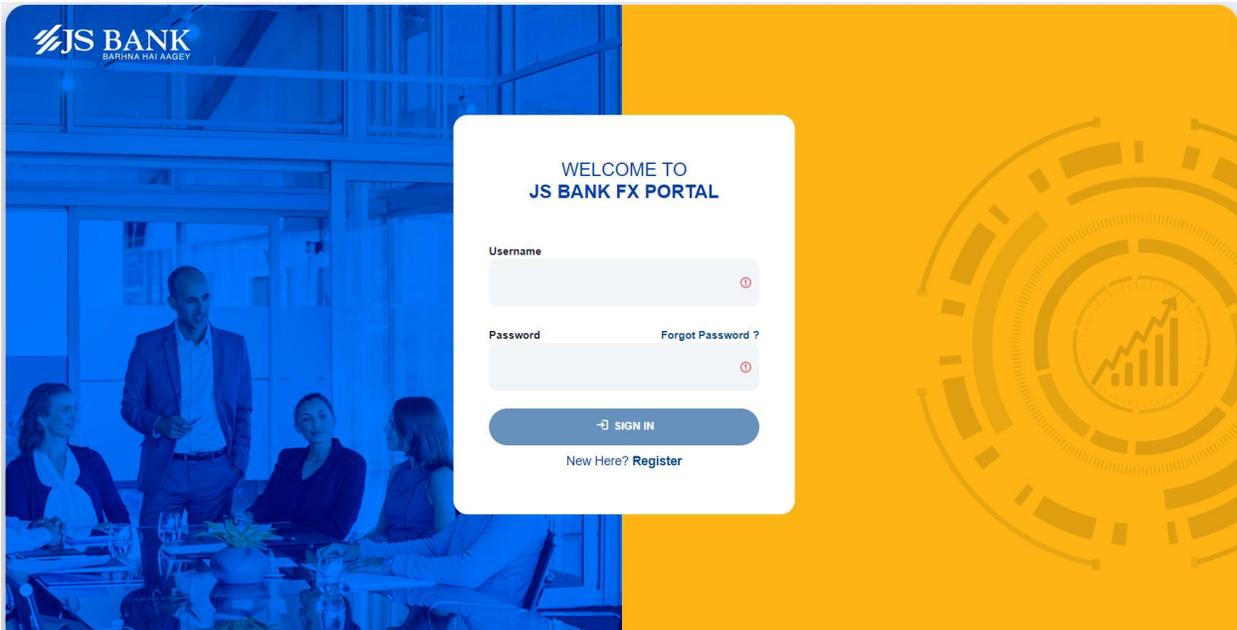
- Password should be 8 characters with at-least 1 upper case,1 number and 1 special characters. You will be notified if any one rule is violated.

How can I view and change my profile once registered?

Once you are registered in FX portal, you can access and login in to FX portal to manage your profile.

Step1: Login to FX Portal and Go to 'Profile'
1. Enter your 'Username' you set above on 'Create New Account' page.
2. Enter your 'Password' (setup in registration flow above)
3. Click Login → OTP screen will be displayed.
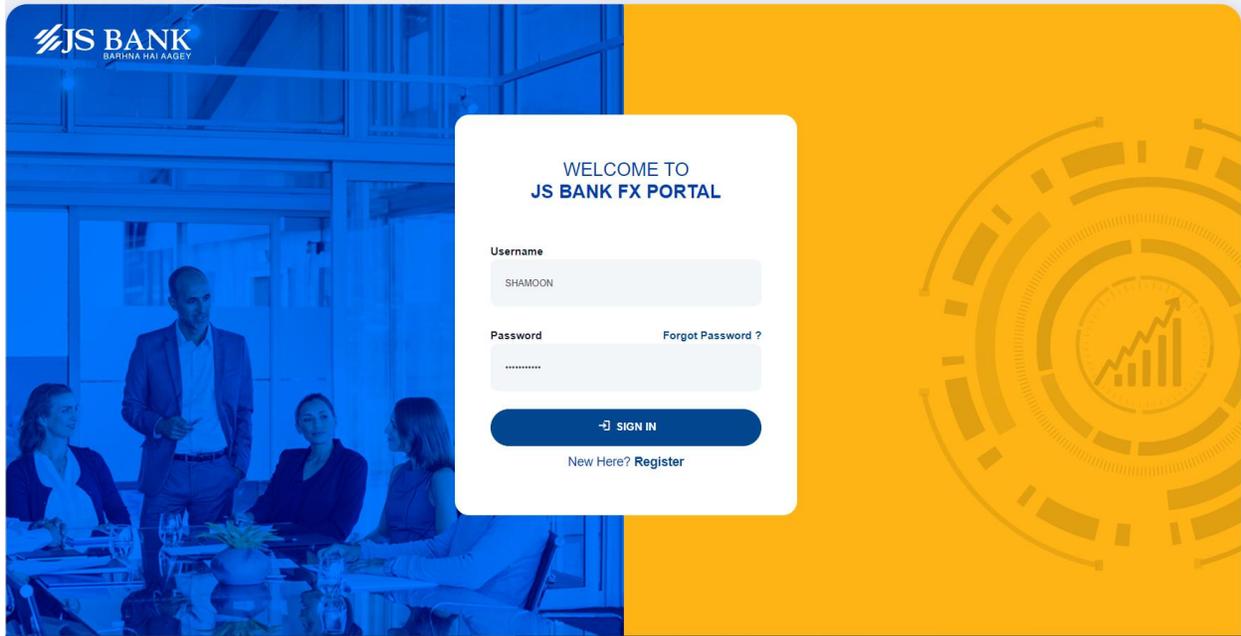
1. Enter received OTP PIN from email
2. Click Submit → Redirects you to FX Portal 'Home' screen
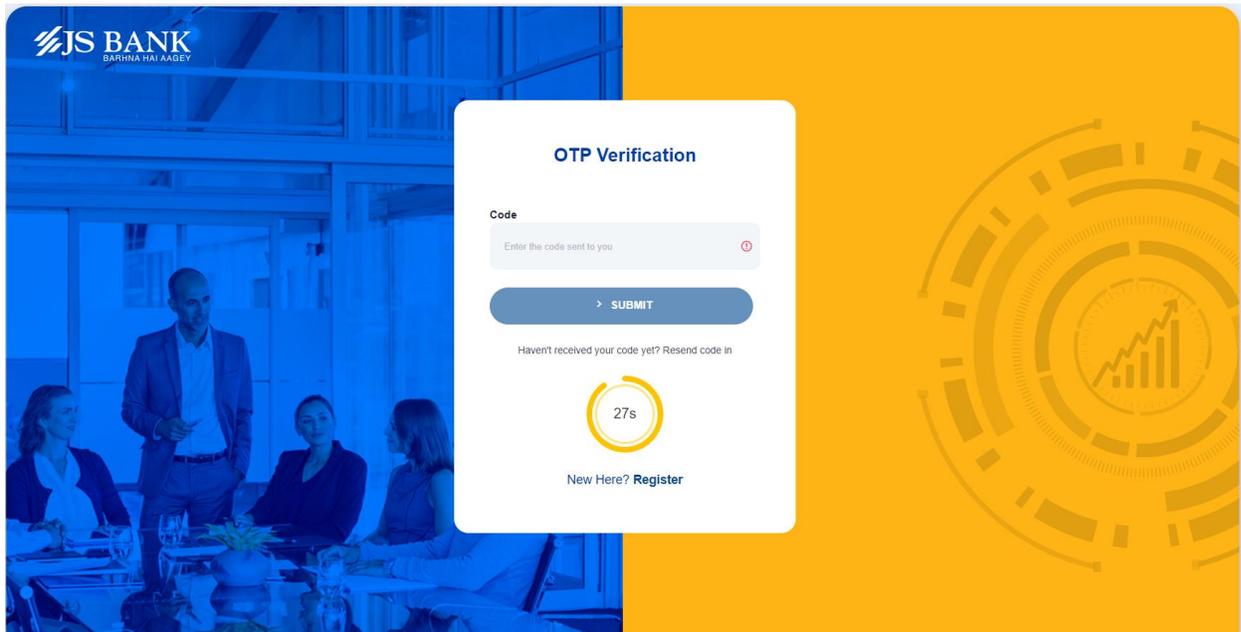
• Click on Profile option on top left to view his profile
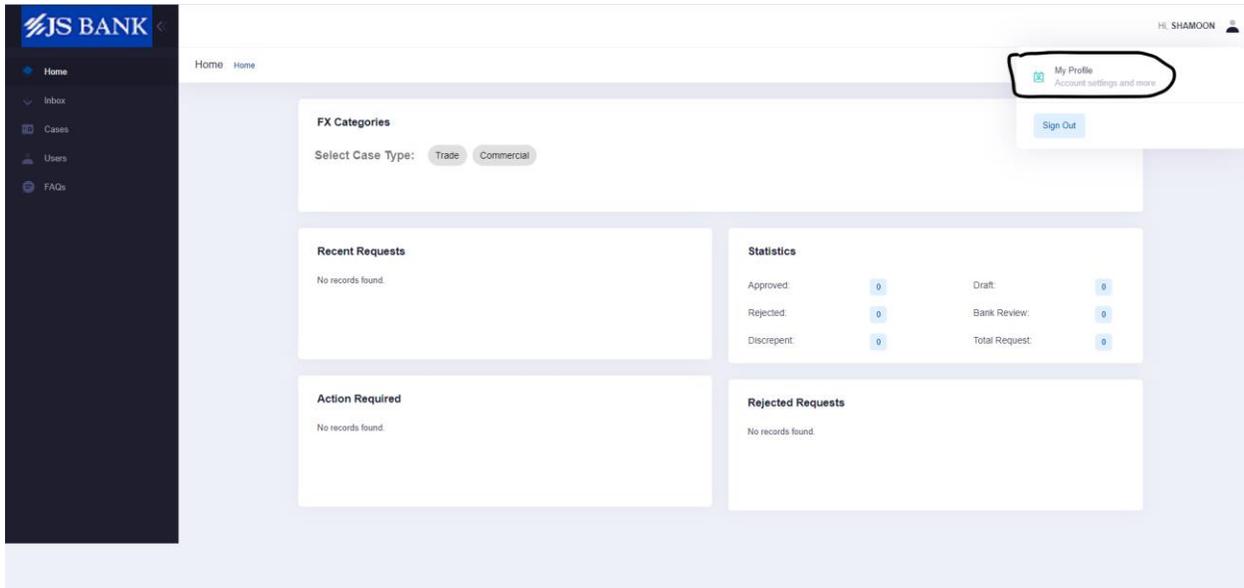
Steps2: Edit Profile Information or Change Password

- You cannot edit your profile since data has been fetched from bank system so you cannot edit your information in FX portal
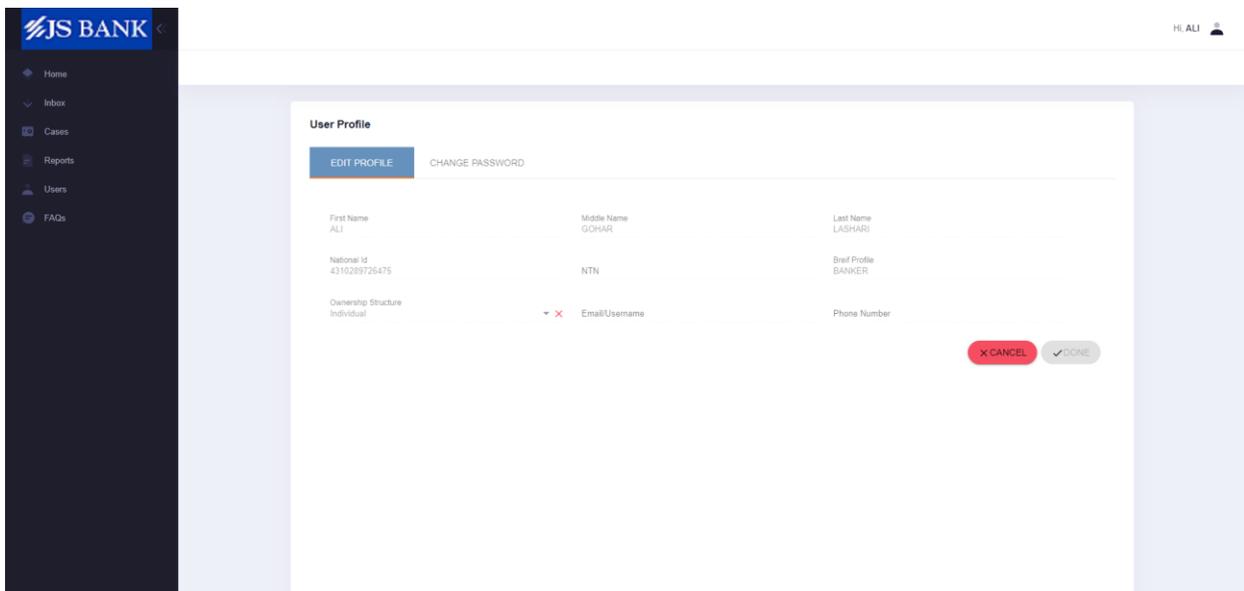
- You can update your password by giving Old Password and setting New Password.
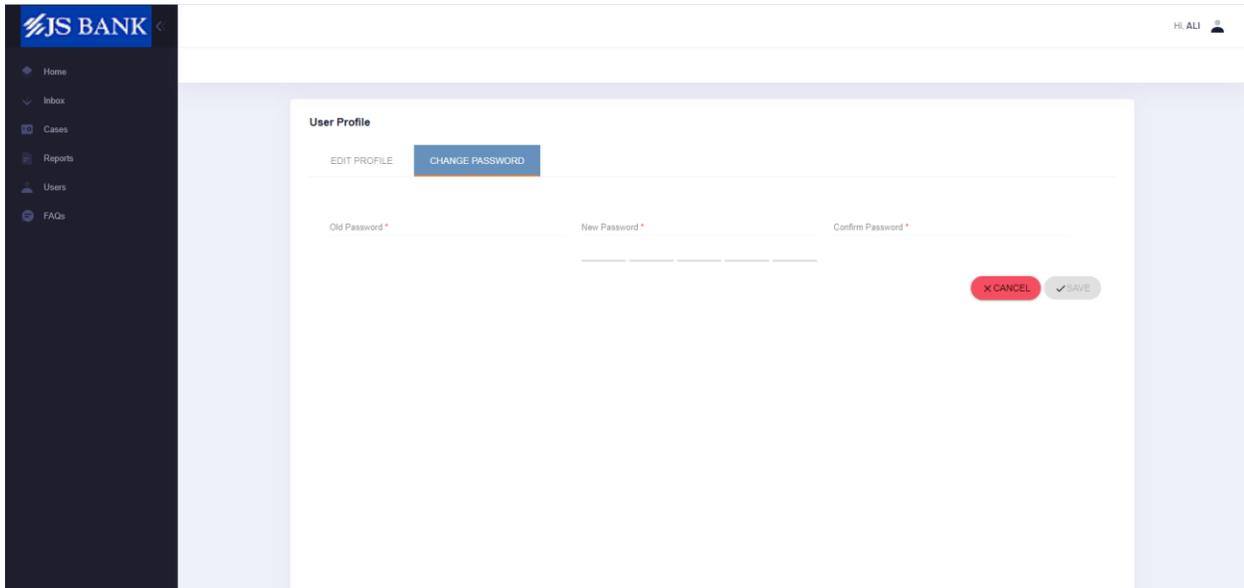
How to RESET my password if Forgot?

You can reset your password from login screen if forgotten.

- Click Forgot Password link from login screen
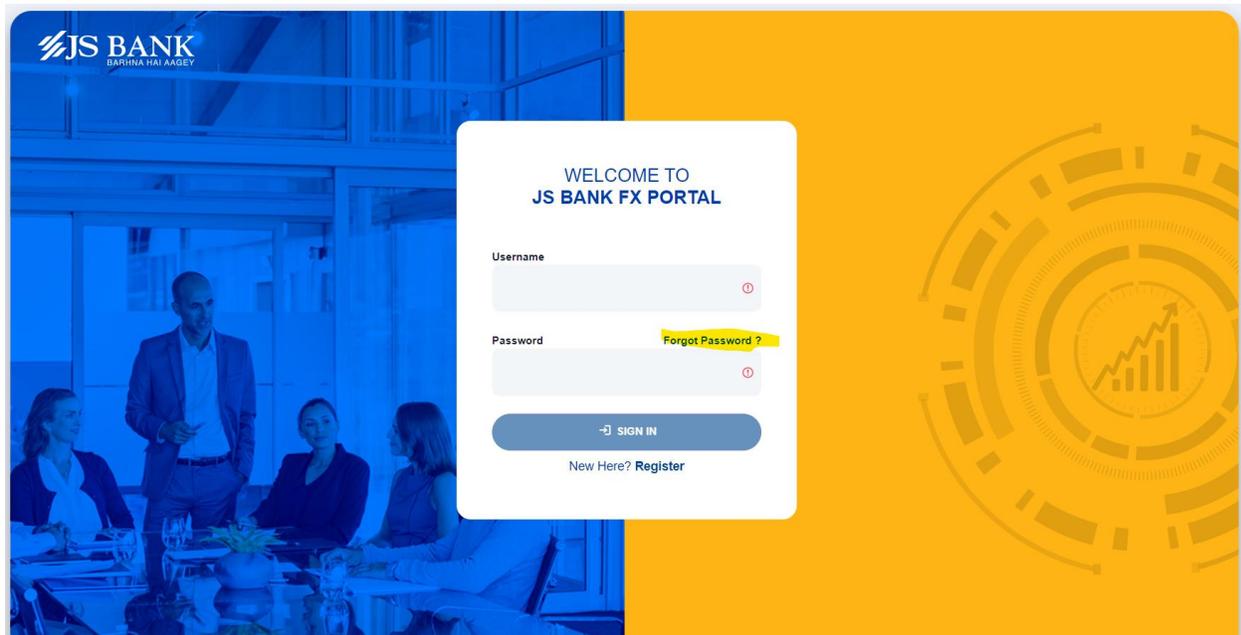
- Provide username and clicks NEXT
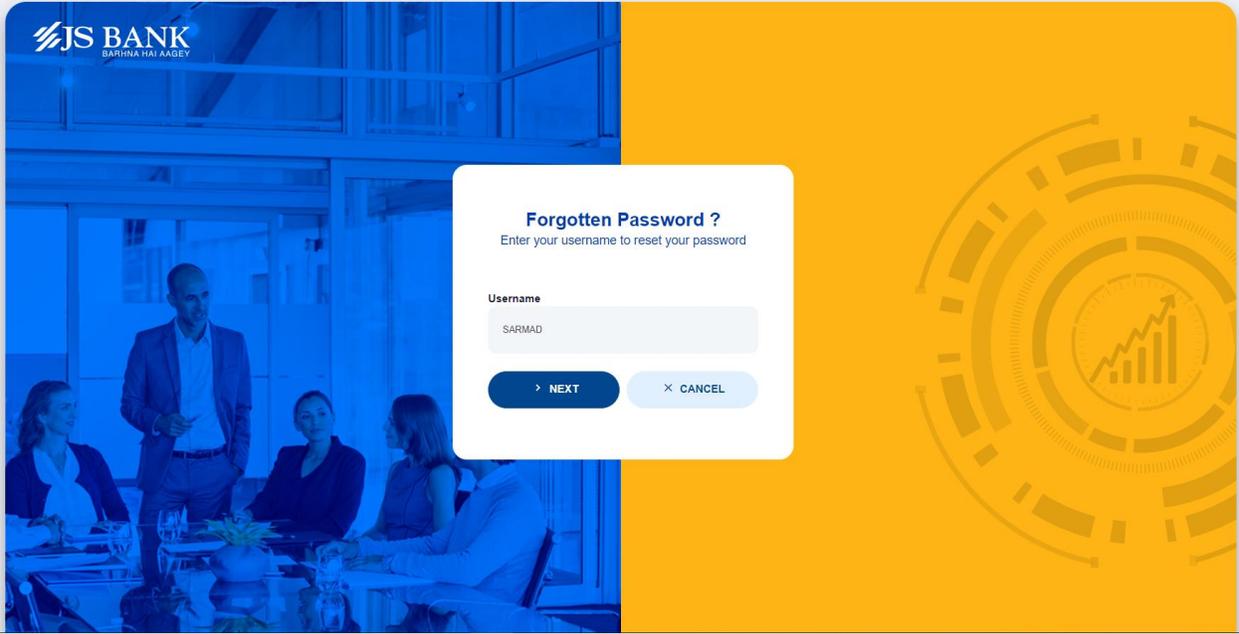
- OTP will be generated on your registered email address
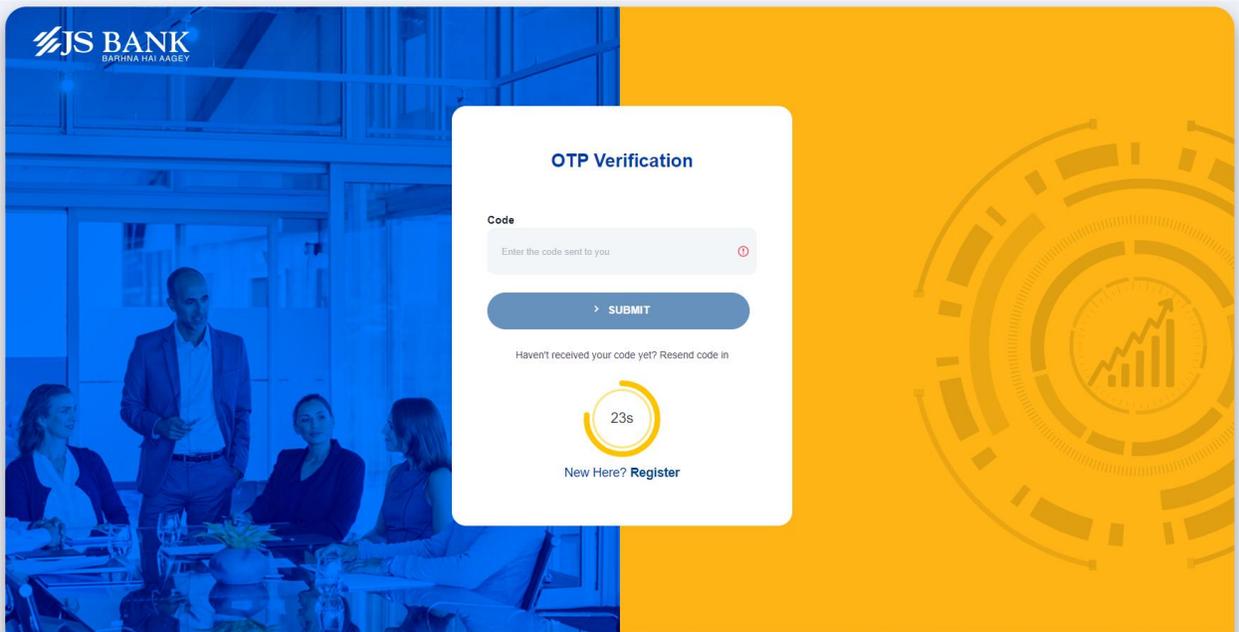
- Enter OTP PIN and Submit
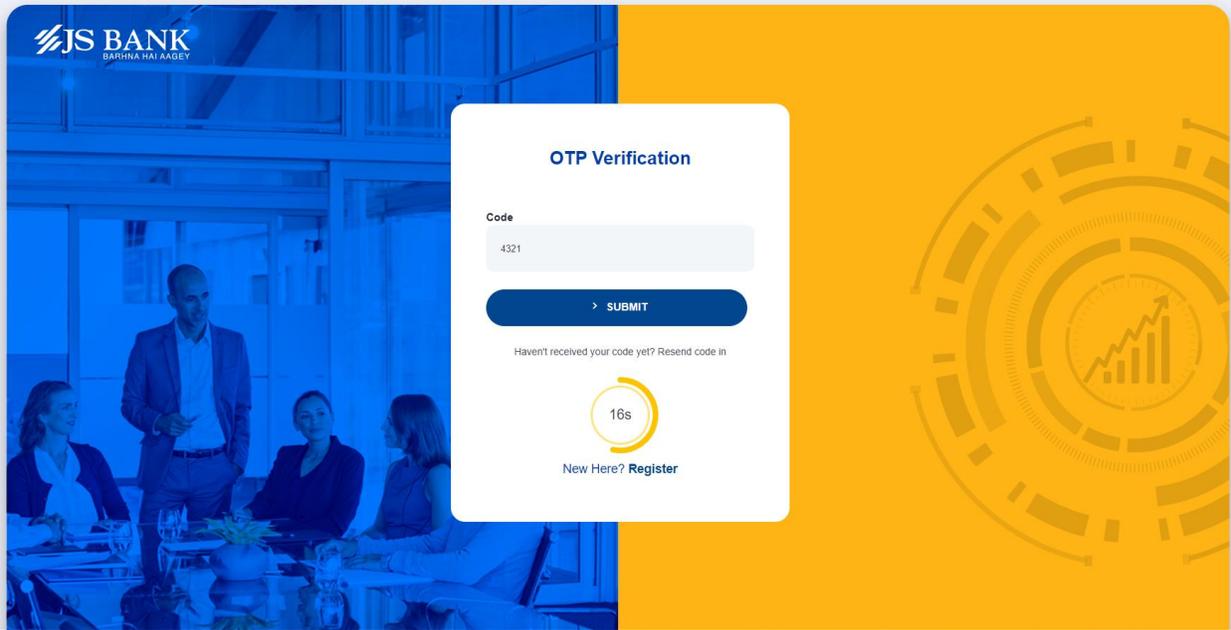
- You can now set New Password from Change Password screen.
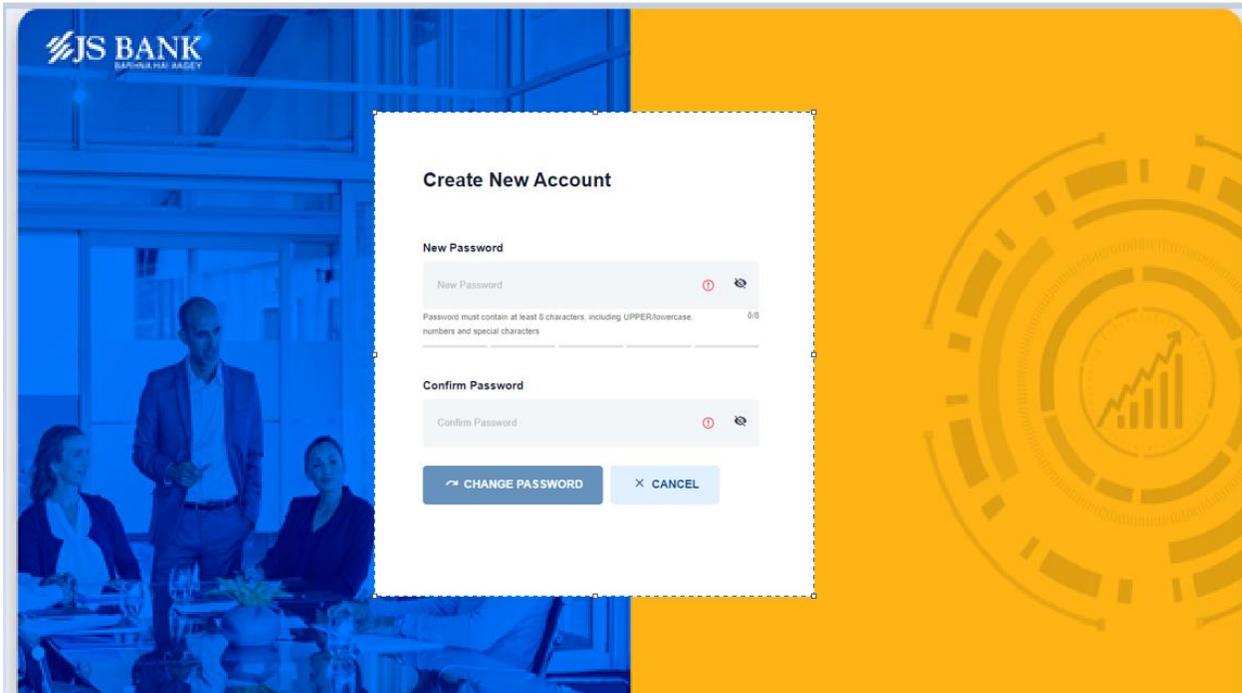
- In case of violating any password rule, you will be notified.
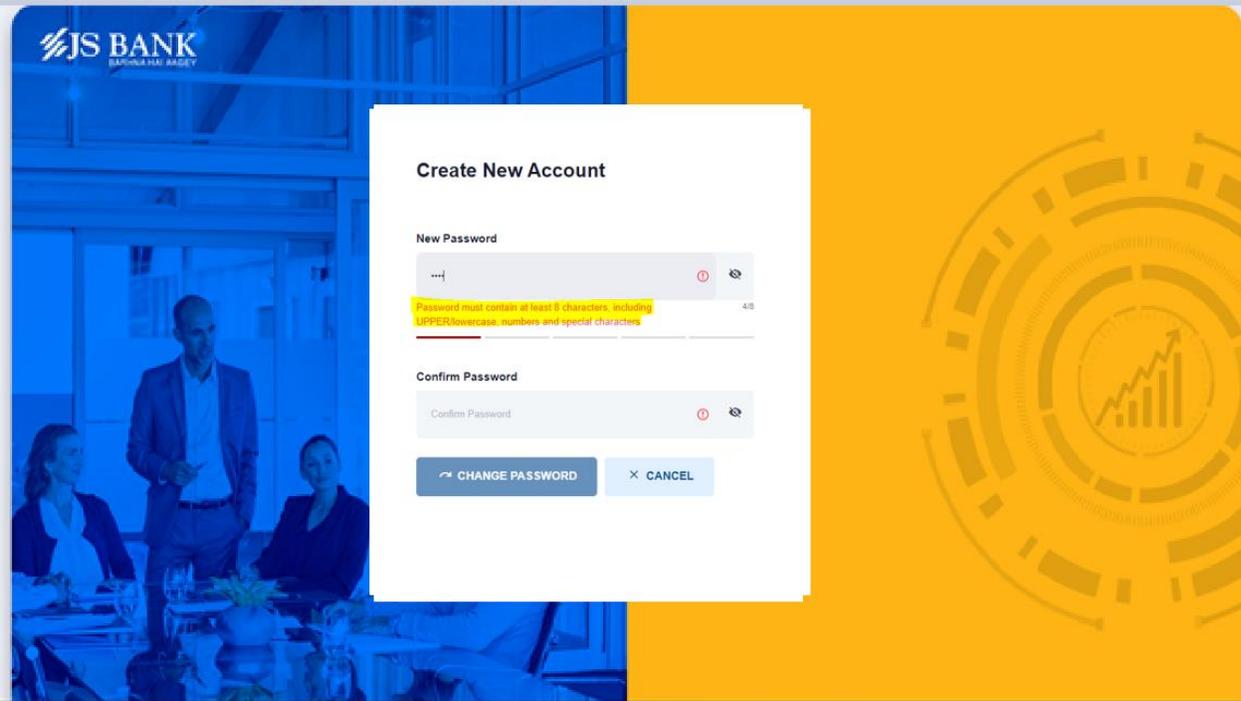
- Confirm Password should be same as New else show error.
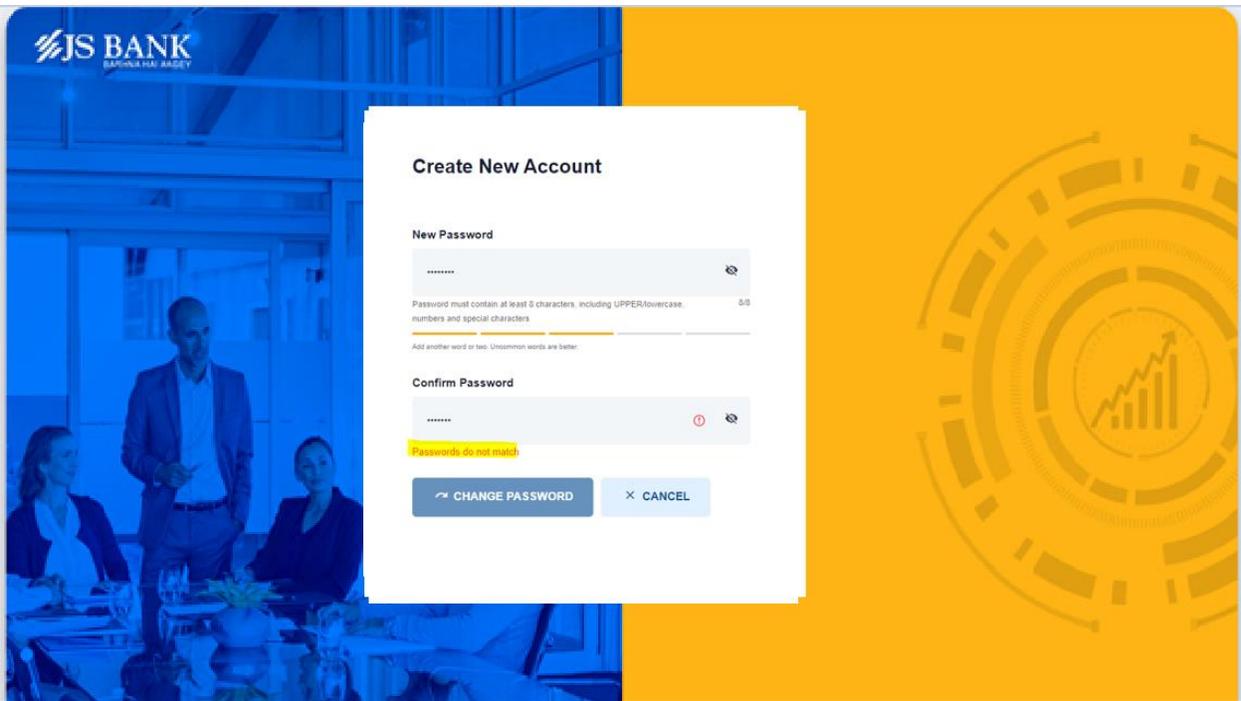
- You can view entered password by clicking on 'EYE' icon
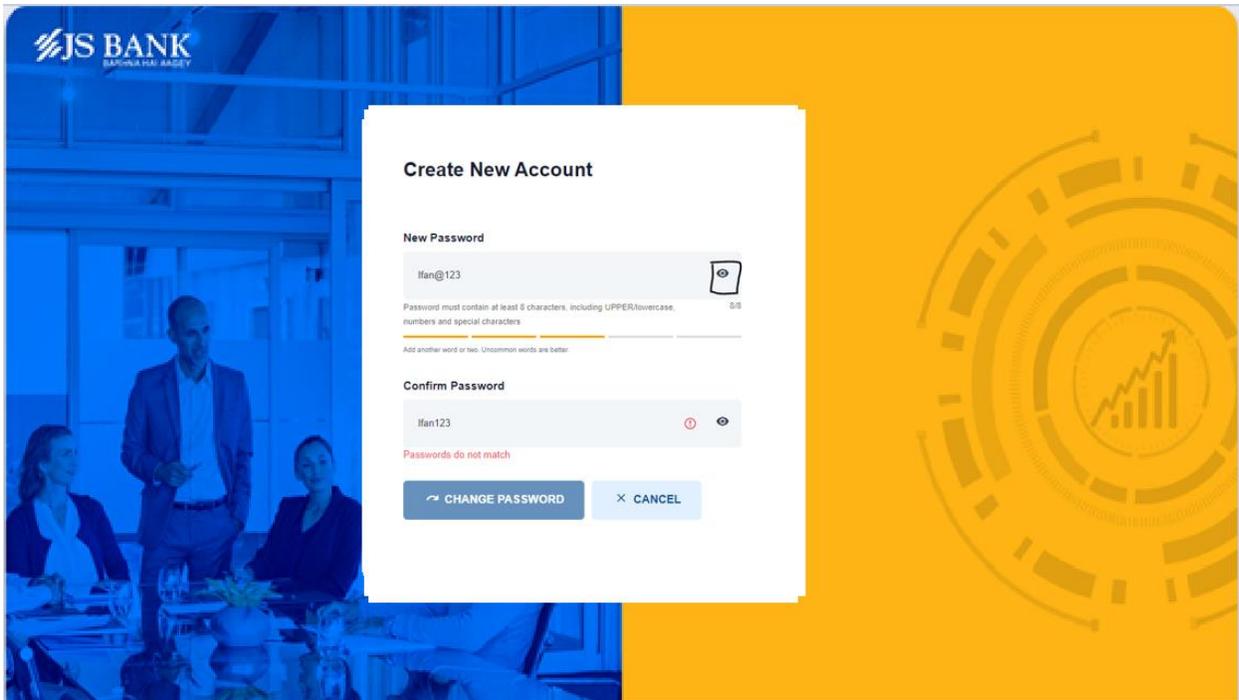
- Enter valid Passwords and click CHANGE PASSWORD → Success message is shown and navigates back you to Login screen.