

Content

Profile configuration in progress

It may take a few hours after you receive your credentials before your account is fully configured. During that time you may see the following warning message after logging in:

“ The configuration of your profile is in progress.

Please try again later or contact your relationship manager if the issue persists.

Please reach out to your relationship manager if the message persists for more than a day.

Empty holdings or transactions pages

If the holdings and/or transactions pages appear empty (with a message *No records to display*) after logging in, verify that you have selected a valid portfolio and as of date in the upper right corner. If that is the case, please refresh the page by pressing F5 (on desktop) or "pull to refresh" (on mobile).

Please reach out to your relationship manager with a screenshot of the application if the issue persists.

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