# RBC Global Trade<sup>TM</sup> Navigating the Home Page







Royal Bank

# About this guide

RBC Global Trade<sup>™</sup> allows you to issue, receive, amend and manage your trade instruments, such as Letters of Credit, Documentary Collections, Standby Letters of Credit and Guarantees online anytime, anywhere.

This guide will show you how to customize your home page.

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#### Home page button

RBC		<u>Home</u> (1)	(3) ? Help Logout G. Raymond
New Instruments - Transactions - Reports - Re	eference Data 👻		🔗 My Links 👻
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RBC is pleased to announce the launch of the	new RBC Global Trade p	latform:	
Please refer to the following job aid and videos to help y 	ou navigate the new syste	m. If you have any further ques	tions please contact the Trade Help D More
Mail Messages			Show 5 10 20 of 1
Show: Me (and Unassigned)  Read/Unread All	<b>•</b>		
Date & Time 🗸 Subject	Reference Assigned	To Party	Vendor ID
01 Nov 2016 04:30 Correspondence: BIL101389M - 1 Billing			
Notifications			Show 5 <u>10</u> 20 of 3

No matter where you are within the site, you can click the **Home** page button and you will be taken right back to the main Home page.

#### Help button

RBC	<u>Home</u>	☐ (1) ☐ (3)
New Instruments - Transactions - Reports - Reference Data -		🔗 My Links 👻
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Notifications		Show 5 10 20 of 3

Help is always close by.

For overall help on RBC Global Trade, you can click the **Help** button located beside the **Logout** button.

For help with a specific section or tab you are in, you can click the **question mark** located at the top right corner of the page.

#### **Messages from RBC**

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Notifications	Show 5 10 20 of 3

The first thing you will see on the Home page is a message from RBC<sup>®</sup>. Whenever RBC has an important announcement to make, you will find it in this section. You can click on the **More** button to see the whole message

#### **Customizing your home page**

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Notifications			Show 5 10 20 of 3

By clicking the **Settings** button, you can customize your home page so that you can see the sections you want, in the order that you want.

#### **Choosing displayed sections**

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New Instruments - Transactions - Reports - Reference	Data 👻			🔗 My Links 👻
Dashboard Preferences				?
Dashboard Customisation				
Step 1: Select the sections you wish to display on the Dashboard.		dify numbers and select the	Jpdate	Quick Links 👻
	button to re	e-order your sections.		Hide Tips
Display no sections on Dashboard	Selected	Item(s)		
	Order		-	H Save
Sections	1	Mail Messages	×	Q Preview
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Mail Messages	3	All Transactions	×	<b>F</b> ¦a Save & Close
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Check the boxes beside the sections you wish to see displayed. The sections you will see listed are based on your security rights.

Choose the order in which you want them displayed by entering a number beside each section.

Click Save & Close.

#### Mail Messages

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01 Nov 2016 04:30 Correspondence: BIL101389M - 1 Billing Notifications			Show 5 <u>10 20</u> of 3

When you click on Mail Messages, you will be able to access, create or view messages, including any discrepancy notices.

If you ever need to access your messages or notifications when you are not on the home page, you can click on the envelope icon or the dialogue icon at the top of the page.

#### **Customizing Mail Messages**

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Click the **Settings** button and a drop down list of your columns will appear. Check the columns you wish to see and uncheck the columns you do not wish to see.

#### Notifications

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Please refer to the follo	owing job aid and	videos to help you	navigate the new sy	stem. If you have any	further question	s please con	tact the Trade He	
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In the **Notifications** section, you will find notifications on transactions that RBC has either processed, cancelled or returned. You can click on them to view further details.

#### **Customizing Notifications**

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01 Nov 2016 (	04:30 Correspond	ence: BIL1013	8T - 1 Billing					
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01 Nov 201	EXP101149T		Export LC	Payment	BESCOM LTD.	USD	44,444.00 Processed	🔽 Date & Time
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726	Outgoing Stan		Issue		Started			
	Outgoing Stan		Issue		Started			
727					010100			

Click the **Settings** button and a drop down list of the columns in your **Notifications** section will appear. Check the columns you wish to see and uncheck the columns you do not wish to see.

#### **All Transactions**

Subject     Correspondence	- Read	I/Unread All								
Correspondence				-						
			Reference	Assign	ed To	Party		Vendo	r ID	
Create Tracers	ce: BIL101368	3T - 1 Billing								
oreate macers	: IDC101249	F - 1 Inward Collection				XYZ I	mporting			
Create Tracers	: IDC1012181	- 2 Inward Collection				Hong	Kong Zoo			
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Outgoing Guarant	ee l	ssue			Started					
Outgoing Standby	LC I	ssue			Started					
Direct Send Collect	ction <u>I</u>	ssue			Started					
Outgoing Standby	LC I	ssue			Started					
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USD       44,444.00       Processed         P100711T       Export LC       Payment       BESCOM LTD.       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Under **All Transactions**, you will be provided with links to all of your instruments directly from the home page.

#### **Customizing All Transactions**

Mail Messa	iges									Show 5 10	) <u>20</u> of <b>11</b>	٥
Show: Me (a	ind Unassigned)	- Read	d/Unread All		-							
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01 Nov 2016	04:30 Create Trac	ers: EXP100688	T - 0 Export Docum				Intern	ational Cosme	əti			
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	. ODC101281T	USD CHEQ	Export Collection	Payment Issue		test	CAD		Processed			
	. IDC101337T		Import Collection	Collect		TEST	CAD	343,000.00				
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By clicking on the **Settings** button, you can choose which columns you would like to see in your **All Transactions** section. Check the columns you wish to see and uncheck the columns you do not wish to see.

#### **New Instruments**

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Let's explore the menu bar.

By clicking on the **New Instruments tab**, you will be able to create a new trade transaction either from a blank form, a template, or you can copy from an existing instrument.

You will only be able to create a new instrument for products for which you have been set up.



#### Tip:

If you require access to another product, call us at 1-800-757-4525.

#### Transactions

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Under the **Transactions** tab, you will be able to see the status of your instruments and search previous instruments.

**Reports** 

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Under the **Reports** tab, you will be able to generate standard reports provided by the bank or custom reports based on your needs.

You can then save and print your reports.

#### **Reference Data**

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Under the **Reference Data** tab, you will be able to set up what you will need to use on a daily basis.

You will be able to set up users, set monetary thresholds for each user, and set security profiles for each user.



#### Tip:

This is probably the first thing you will want to do. You may want to refer to the Setting up Reference Data video or user guide for assistance.

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**My Links** gives you a quick way to access your daily tasks. Once you start using the service, you will have instant access to the tasks you perform most often, the five most recent instruments you have been working on, and access to key reports.

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Similar to other sections on your home page, if you click on the **Settings** button beside **Favourite Tasks**, you can choose the tasks that you would like to see on your home page.

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If you click on the **Settings** button beside **Favourite Reports**, you can customize the reports that will appear on your home page.

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