



CLIENT PORTAL

FINANCIAL HUB

RECERTIER
GUIDE



CLIENT PORTAL

FINANCIAL HUB

Log in



Simplify Your Billing Experience

Manage invoices and document distribution seamlessly in one place. Explore our portal

ADMINISTRATOR TRAINING MATERIAL



1. Login
2. Home
3. Users' management

To access the portal, you will need a Multi-Factor Authentication (MFA) app. Please download it before registering, as it is required for the process.

Google Play

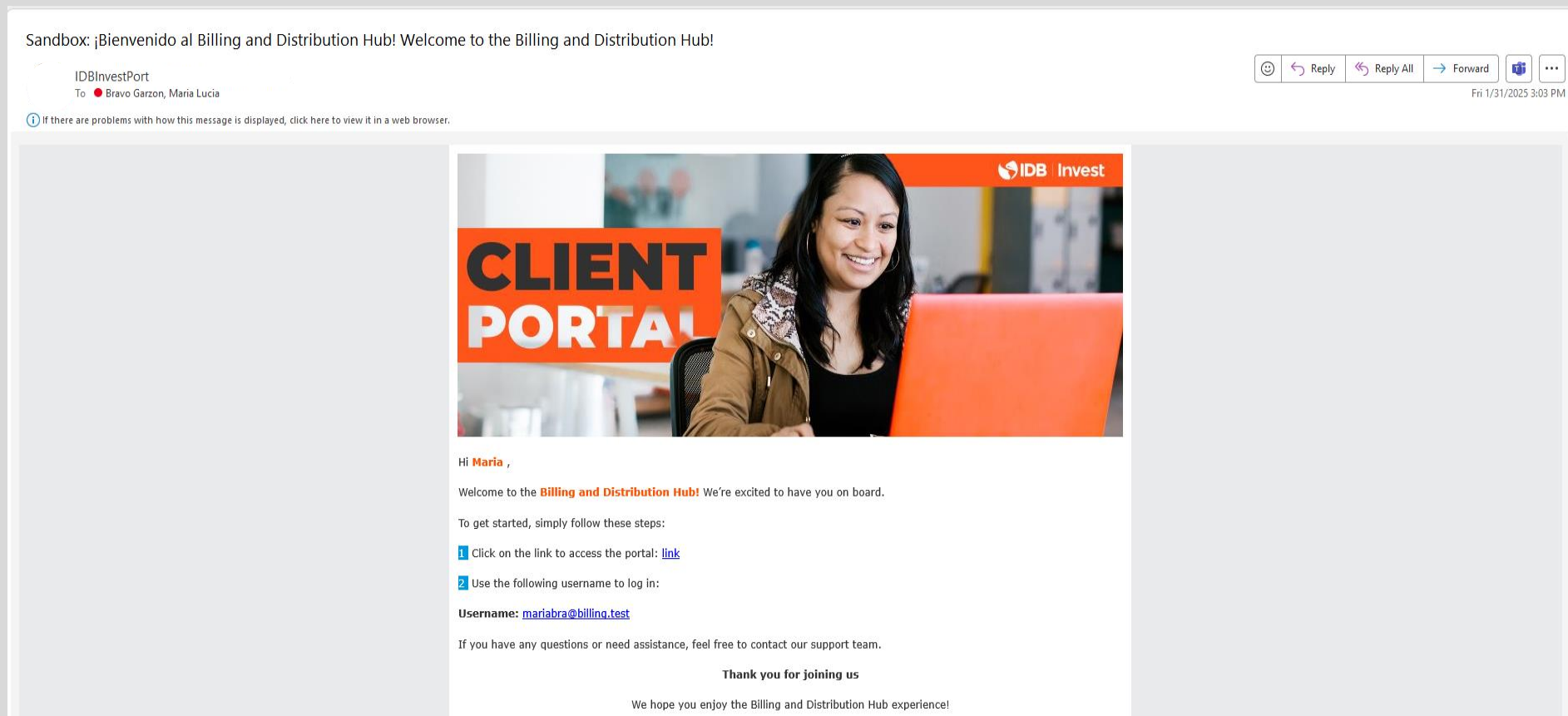


App Store



1. Login

You will receive a welcome email containing your username and a link to the Client Portal.



1. Login

When you click the link, you will be redirected to the Client Portal to create your password. Please follow the instructions to set up a secure password.

IDB | Invest

mariabra@billing.test

Password

Sign in

Forgot your password?

Need Assistance?

IDB | Invest

Change Your Password

Enter a new password for mariabra@billing.test. Make sure to include at least:

- 15 characters

Also include at least 3 of the following:

- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character

* New Password

* Confirm New Password


Change Password



Password was last changed on 1/16/2025, 7:03 AM.

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1. Login

Once your password is set, you will be automatically redirected to the Terms and Conditions page. Please read them carefully, and if you agree, check the box to accept and click the 'Next' button.


WE ARE YOUR TRUSTED PARTNER IN SUSTAINABLE GROWTH

Terms of Use
IDB Invest Legal Procurement and Matter Management System - Vendor Portal
Effective: CurrentDate

Welcome to our centralized platform for the hiring and management of external legal counsel ("Counsel"). We hope you find this vendor portal useful in communicating and exchanging information with us. Please let us know if you have any questions.

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[Next](#)

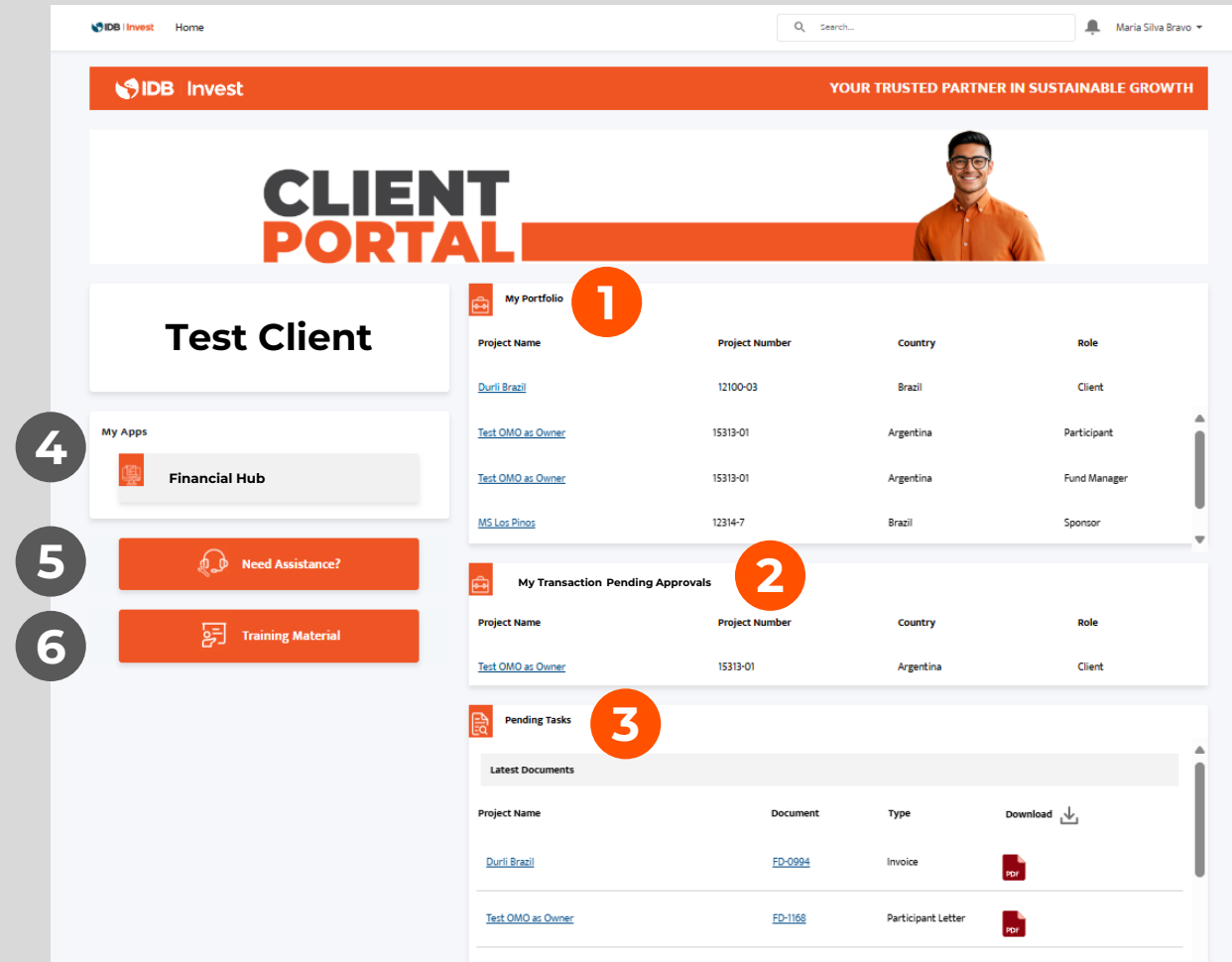
2. Home

Finally, you will be redirected to the Client Portal homepage, where you can view:

1. Your current portfolio
2. Your Transactions Pending Approval
3. Your pending tasks.

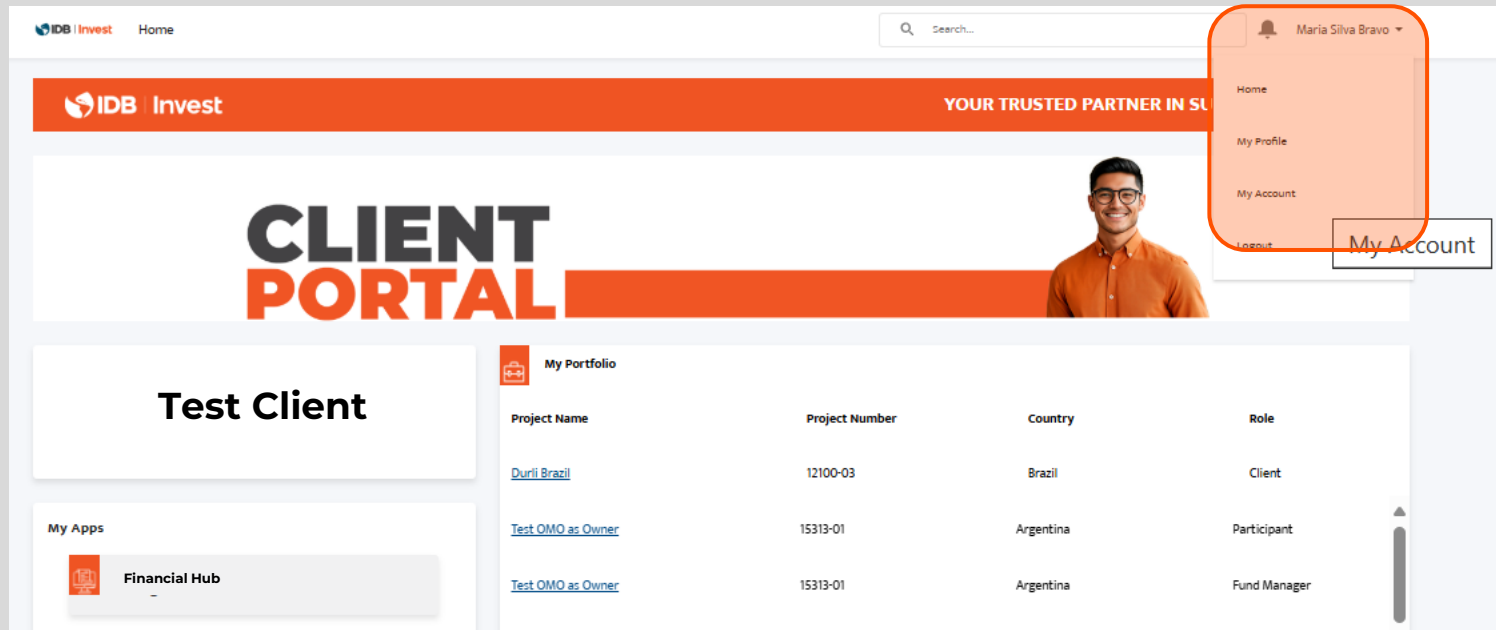
At this point, your account is fully active, and you can log in anytime using your credentials.

4. In the My Apps section, you will find the link to the Financial Hub.
5. If you need assistance, click the "Need Assistance?" button to create a support ticket.
6. To access training guides, click the "Training Material" button, which will redirect you to the webpage where these documents are available.



3. Users' management

To access your account, simply click on the user icon in the top right corner of the portal. A menu will appear—select '**My Account**' to view and manage your account details.



3. Users' management

Within your account, you can:

- 1. Recertify** the Administrator to ensure they maintain the appropriate access rights.

The screenshot shows the IDB Invest Client Portal interface. At the top, there is a navigation bar with 'Home', 'Invoice', and 'Rate Reset Notifications'. A red circle with the number '1' highlights the 'Recertify Access' button in the account management section. Below this, there is a 'Contacts' section with a table listing two contacts.

Contact Name	Title	Email	Portal Access/Roles
Test Client Portal	CEO	mariabra@iadb.org	Billing and Distribution Hub (General); Billing and Distribution ...
Test Client Portal 2	Manager	stifep@iadb.org	Billing and Distribution Hub (General)

3. Users' management - Recertify access

To recertify the Administrator access to the Financial Hub, follow these simple steps:

1. Click the '**Recertify**' button located in the top-right corner of the **Account** section.
2. A pop-up window will appear, displaying all contacts with portal access. Select the user whose access you want to recertify by checking the box, then click '**Confirm**'.
3. A confirmation pop-up will appear, indicating that the access has been successfully recertified.

1

Account
Test Account Stakeholder 20241217

Account Record type: Organization
Account Owner: Daichi Tsuchihashi

Recertify Access Grant Access Remove Access

Recertify Access

2

Recertify Access

2 of 2 items - 2 items selected

<input checked="" type="checkbox"/>	Full Name	Email	Title
<input checked="" type="checkbox"/>	Test Client Portal 2	stifenp@iadb.org	Manager
<input checked="" type="checkbox"/>	Test Client Portal 3	test3@clientportal.com	Manager

Confirm

3

Recertify Access

The Contacts were successfully certified.

Close

You're Ready to Use the Financial Hub!

Summary of What You've Learned:

- How to access and navigate the platform
- Recertify the Financial Hub Administrator

Next Steps:

- Explore the features and familiarize yourself with the platform
- Check out our **FAQs section** for more information

CLIENT PORTAL

FINANCIAL HUB

GUÍA DE
RECERTIFICADOR

VERSIÓN EN ESPAÑOL





1. Inicio de sesión
2. Home
3. Gestión de usuarios

Para acceder al portal, necesitarás una aplicación de Autenticación Multifactor (MFA). Por favor, descárgala antes de registrarte, ya que es un requisito para completar el proceso.

Google Play

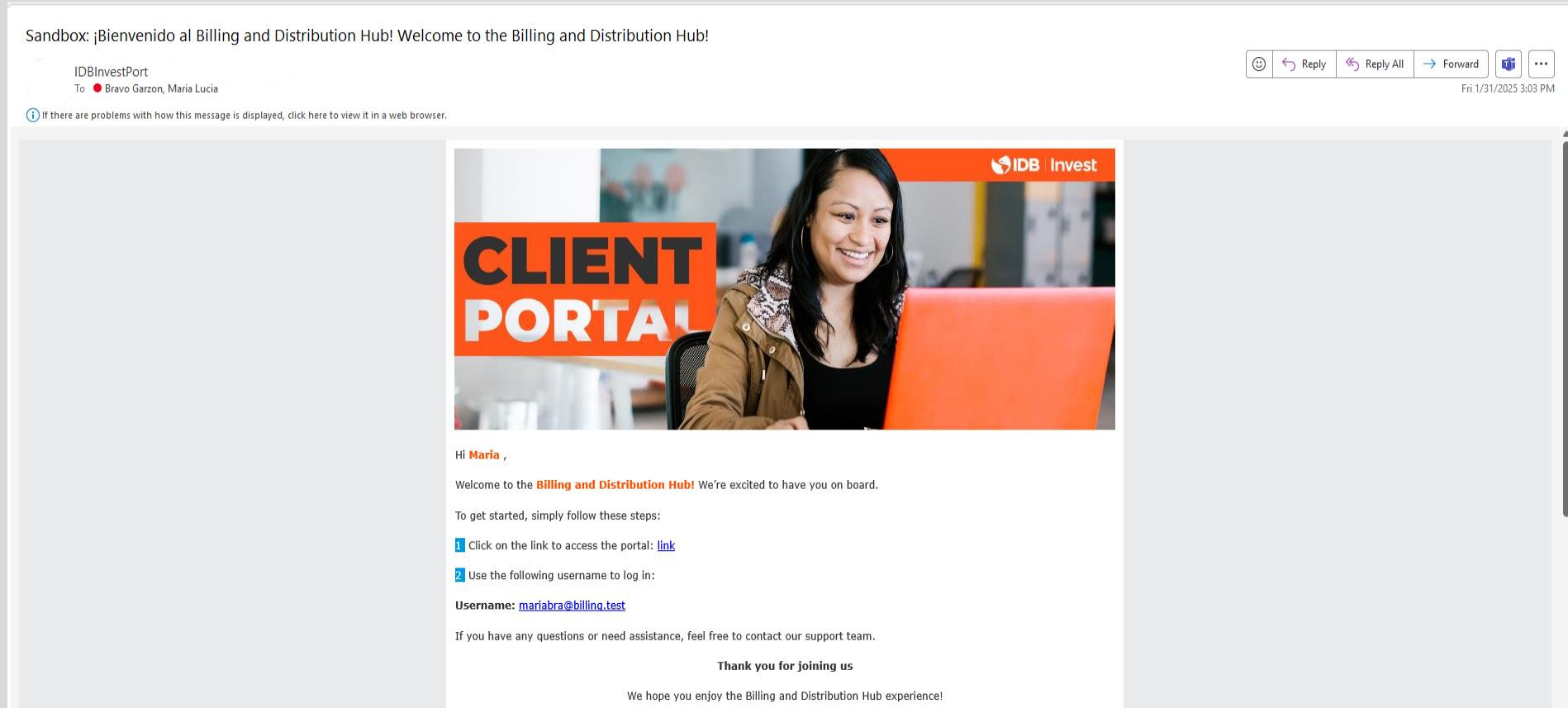


App Store



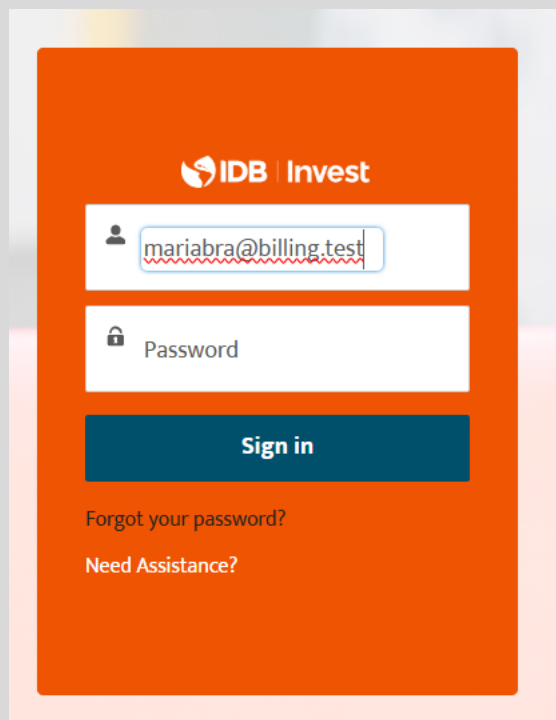
1. Inicio de sesión

Recibirás un correo de bienvenida con tu nombre de usuario y un enlace al Portal del Cliente.

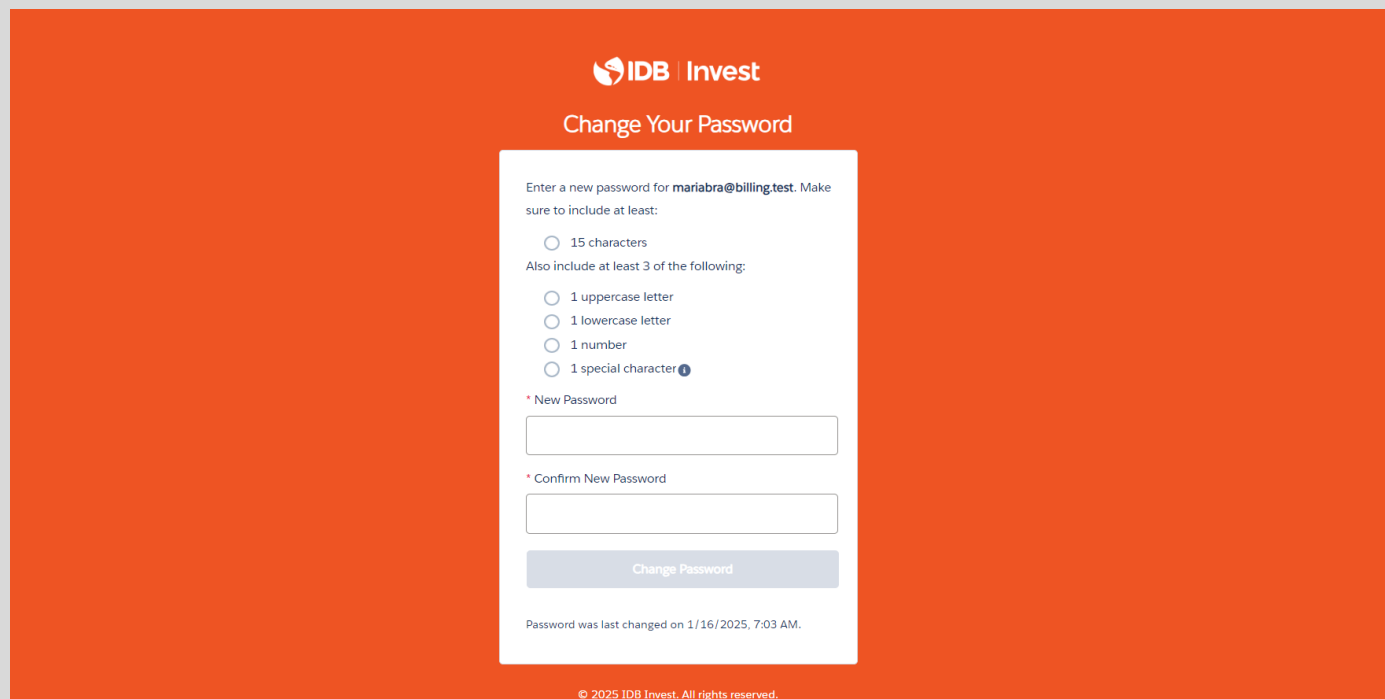


1. Inicio de sesión

Al hacer clic en el enlace, serás redirigido al Portal del Cliente para crear tu contraseña. Por favor, sigue las instrucciones para establecer una contraseña segura.




The sign-in form features the IDB Invest logo at the top. Below it, there are two input fields: the first for an email address, which contains 'mariabra@billing.test', and the second for a password, labeled 'Password'. A dark blue 'Sign in' button is positioned below the fields. At the bottom, there are two links: 'Forgot your password?' and 'Need Assistance?'.





The 'Change Your Password' form is set against an orange background. It includes the IDB Invest logo and the title 'Change Your Password'. The instructions state: 'Enter a new password for mariabra@billing.test. Make sure to include at least:'. Below this, there are four radio button options: '15 characters', '1 uppercase letter', '1 lowercase letter', '1 number', and '1 special character'. The form contains two required input fields: '* New Password' and '* Confirm New Password'. A grey 'Change Password' button is located below these fields. At the bottom, a status message reads: 'Password was last changed on 1/16/2025, 7:03 AM.' and a footer note says: '© 2025 IDB Invest. All rights reserved.'

1. Inicio de sesión

Una vez que hayas establecido tu contraseña, serás redirigido automáticamente a la página de Términos y Condiciones. Por favor, léelos con atención y, si estás de acuerdo, marca la casilla para aceptar y haz clic en el botón 'Next'.


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I agree and accepted the conditions of this document

Next

2. Home

Finalmente, serás redirigido a la página de inicio del Portal del Cliente, donde podrás ver...

1. Tu portafolio actual
2. Tus transacciones en proceso de aprobación
3. Tus tareas pendientes

En este punto, tu cuenta está completamente activa y puedes iniciar sesión en cualquier momento utilizando tus credenciales.

4. En la sección Mis Aplicaciones, encontrarás el enlace al Financial Hub.
5. Si necesitas ayuda, haz clic en el botón "Need Assistance?" para crear un ticket de soporte.
6. Para acceder a las guías de entrenamiento, haz clic en el botón "Training Material", que te redirigirá a la página web donde están disponibles estos documentos.

The screenshot shows the IDB Invest Client Portal Home page. At the top, there is a navigation bar with the IDB Invest logo, a search bar, and a user profile for Maria Silva Bravo. Below this is a banner with the text "YOUR TRUSTED PARTNER IN SUSTAINABLE GROWTH" and a large "CLIENT PORTAL" heading next to a photo of a man. The main content area is divided into several sections:

- Test Client:** A section for testing the client interface.
- My Apps:** A section containing a button for "Financial Hub" (callout 4).
- Need Assistance?:** A button for creating support tickets (callout 5).
- Training Material:** A button for accessing training documents (callout 6).
- My Portfolio (1):** A table showing the user's current portfolio.

Project Name	Project Number	Country	Role
Duriil Brazil	12100-03	Brazil	Client
Test OMO as Owner	15313-01	Argentina	Participant
Test OMO as Owner	15313-01	Argentina	Fund Manager
MS Los Pinos	12314-7	Brazil	Sponsor
- My Transaction Pending Approvals (2):** A table showing transactions pending approval.

Project Name	Project Number	Country	Role
Test OMO as Owner	15313-01	Argentina	Client
- Pending Tasks (3):** A section for pending tasks, including a table of latest documents.

Project Name	Document	Type	Download
Duriil Brazil	FD-0994	Invoice	
Test OMO as Owner	FD-1168	Participant Letter	

3. Gestión de usuarios

Para acceder a tu cuenta, simplemente haz clic en el ícono de usuario en la esquina superior derecha del portal. Aparecerá un menú; selecciona 'My Account' para ver y administrar los detalles de tu cuenta.

The screenshot shows the IDB Invest Client Portal interface. At the top right, a user profile icon for 'Maria Silva Bravo' is highlighted with an orange box. A dropdown menu is open, listing 'Home', 'My Profile', 'My Account', and 'Logout'. The 'My Account' option is highlighted with a white box. Below the header, the main content area features a 'Test Client' section and a 'My Portfolio' table.

Project Name	Project Number	Country	Role
Duri Brazil	12100-03	Brazil	Client
Test OMO as Owner	15313-01	Argentina	Participant
Test OMO as Owner	15313-01	Argentina	Fund Manager

3. Gestión de usuarios

Dentro de tu cuenta puedes:

1. Recertificar usuarios para asegurarte de que mantengan los derechos de acceso adecuados, usando el botón Recertify Access.

The screenshot shows the IDB Invest Client Portal interface. At the top, there are navigation links for Home, Invoice, and Rate Reset Notifications, along with a user profile icon. The main content area displays account information for 'Test Account Stakeholder 20241217'. A red circle with the number '1' highlights the 'Recertify Access' button. Below this, there is a 'Contacts' section with a table listing two contacts and their portal access roles.

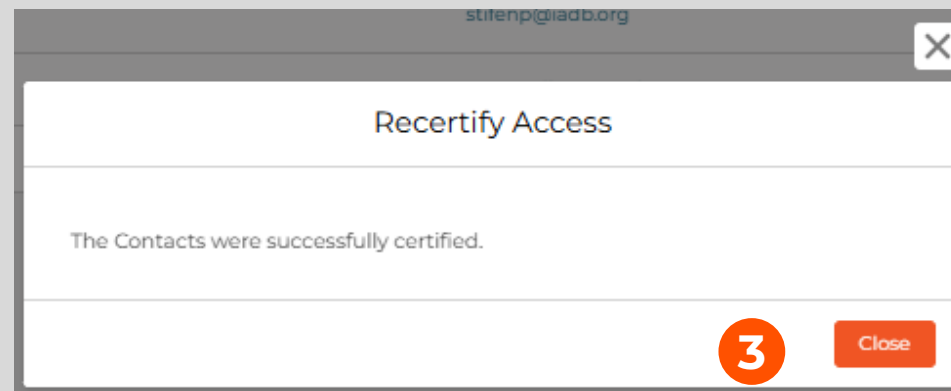
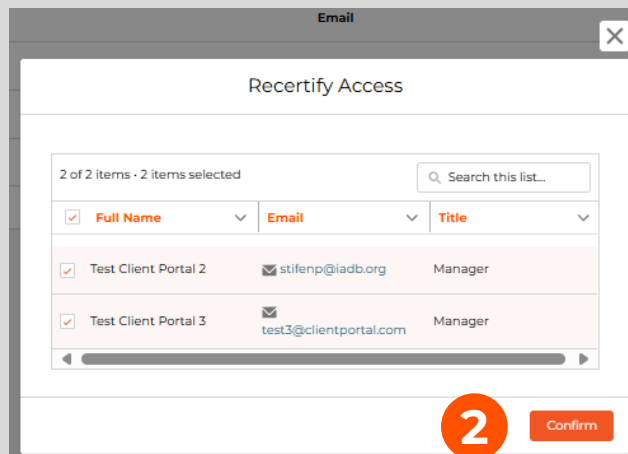
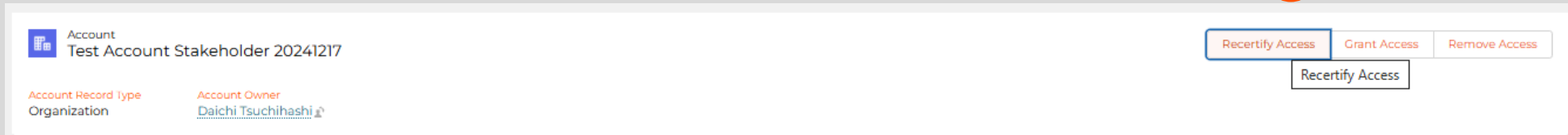
Contact Name	Title	Email	Portal Access/Roles
Test Client Portal	CEO	mariabra@iadb.org	Billing and Distribution Hub (General); Billing and Distribution ...
Test Client Portal 2	Manager	stifenp@iadb.org	Billing and Distribution Hub (General)

3. Gestión de usuarios – Recertificar acceso


Para recertificar el acceso del Administrador al Financial Hub, sigue estos sencillos pasos:

1. Haz clic en el botón **"Recertify"** ubicado en la esquina superior derecha de la sección de Cuenta.
2. Aparecerá una ventana emergente con todos los contactos que tienen acceso al portal. Selecciona el usuario cuyo acceso deseas recertificar marcando la casilla y luego haz clic en **"Confirm"**.
3. Se mostrará una ventana de confirmación indicando que el acceso ha sido recertificado exitosamente.

1



 **¡Estás listo para usar el Financial Hub!**

 **Resumen de lo que has aprendido:**

- Cómo acceder y navegar por la plataforma
- Recertificar el acceso del Administrador

 **Próximos pasos:**

- Explora las funciones y familiarízate con la plataforma
- Consulta nuestra sección de preguntas frecuentes (FAQs) para más información

CLIENT PORTAL

FINANCIAL HUB

GUIA DO USUÁRIO

VERSÃO EM PORTUGUÊS





1. Login
2. Pagina inicial
3. Gestão de usuários
4. Financial Hub

Para acessar o portal, você precisará de um aplicativo de Autenticação Multifator (MFA). Por favor, faça o download antes de se registrar, pois é um requisito para concluir o processo.

Google Play

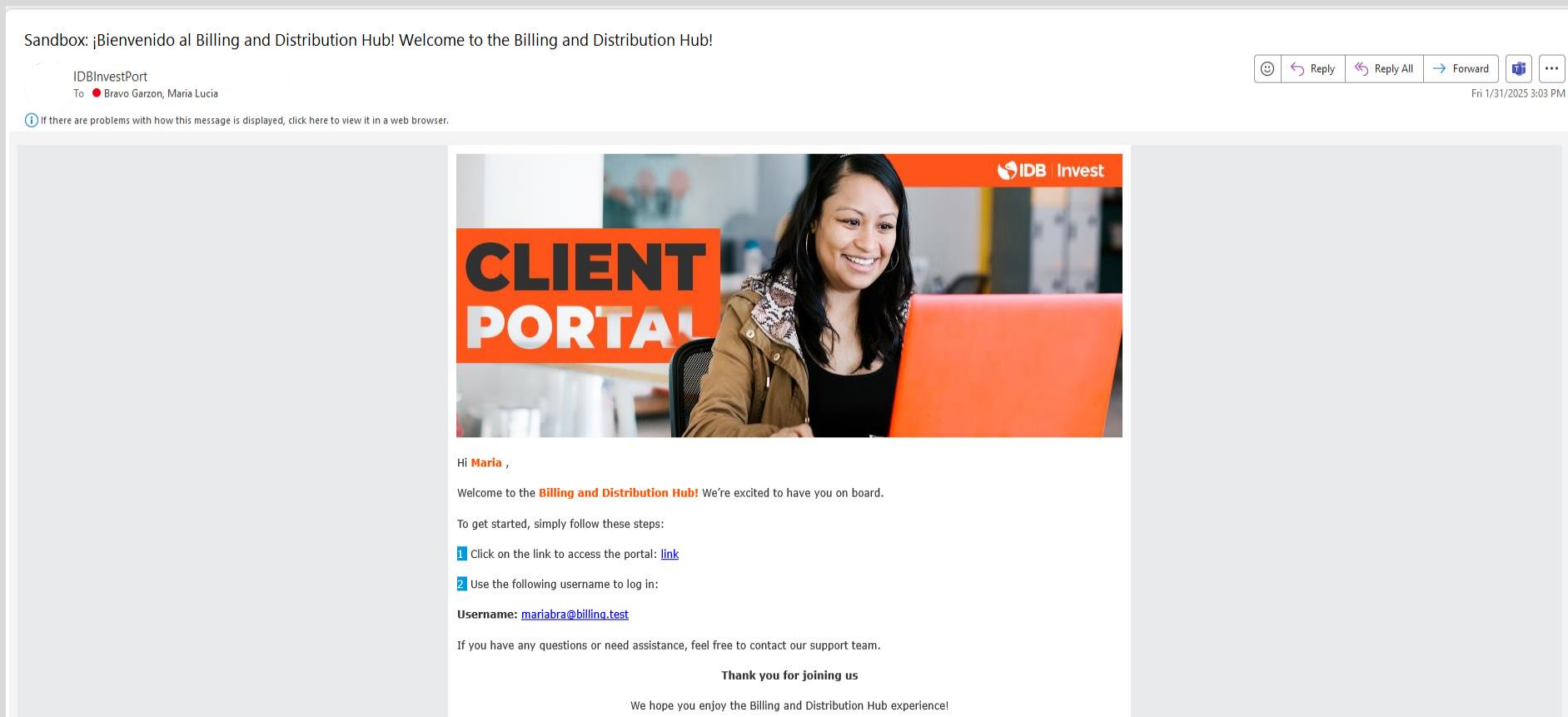


App Store



1. Login

Você receberá um e-mail de boas-vindas com seu nome de usuário e um link para o Portal do Cliente..






1. Login

Ao clicar no link, você será redirecionado para o Portal do Cliente para criar sua senha. Por favor, siga as instruções para definir uma senha segura.

1. Login

Uma vez que você tenha definido sua senha, será redirecionado automaticamente para a página de Termos e Condições. Por favor, leia atentamente e, se estiver de acordo, marque a caixa para aceitar e clique no botão 'Next'


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Next

2. Pagina inicial

Finalmente, você será redirecionado para a página inicial do Portal do Cliente, onde poderá ver...

1. Seu portfólio atual
2. Suas transações em aprovação
3. Suas tarefas pendentes

Neste ponto, sua conta está completamente ativa e você pode fazer login a qualquer momento usando suas credenciais.

4. Na seção Minhas Aplicações, você encontrará o link para o Financial Hub.

5. Se precisar de ajuda, clique no botão "Need Assistance?" para criar um ticket de suporte.

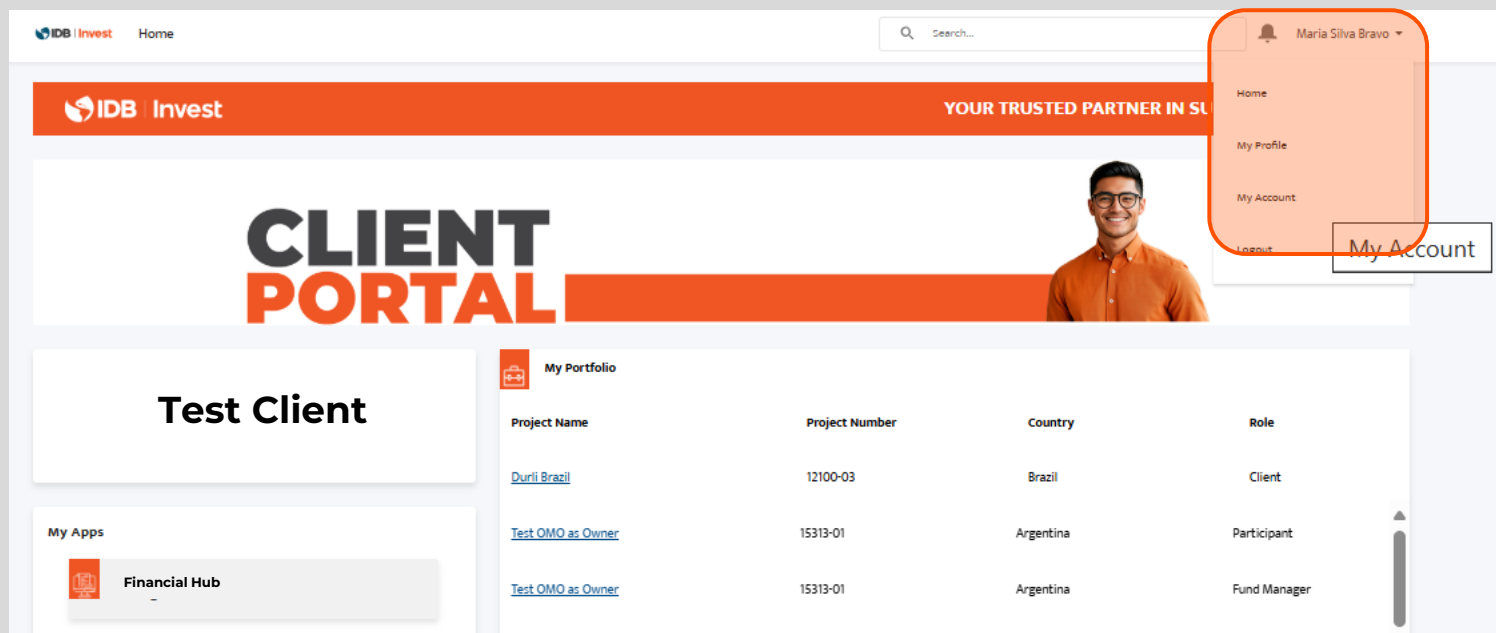
6. Para acessar os guias de treinamento, clique no botão "Training Material", que o redirecionará para a página onde esses documentos estão disponíveis.

The screenshot shows the IDB Invest Client Portal Financial Hub dashboard. At the top, there is a search bar and a user profile for Maria Silva Bravo. Below the header, the main content area is divided into several sections:

- 1. My Portfolio:** A table listing projects with columns for Project Name, Project Number, Country, and Role. The table contains three rows of data.
- 2. My Transaction Pending Approvals:** A table listing pending transactions with columns for Project Name, Project Number, Country, and Role. It contains one row of data.
- 3. Pending Tasks:** A section titled "Latest Documents" with a table listing documents. The table has columns for Project Name, Document, Type, and Download. It contains two rows of data.
- 4. My Apps:** A section containing a button for "Financial Hub".
- 5. Need Assistance?:** A button for requesting support.
- 6. Training Material:** A button for accessing training resources.

3. Gestão de usuários

Para acessar sua conta, basta clicar no ícone do usuário no canto superior direito do portal. Um menu aparecerá; selecione 'My Account' para visualizar e gerenciar os detalhes da sua conta.



3. Gestão de usuários

Dentro da sua conta, você pode:

1. Recertificar usuários para garantir que mantenham os direitos de acesso adequados, usando o botão **"Recertify Access"**.

The screenshot displays the IDB Invest Client Portal interface. At the top, there is a navigation bar with the IDB Invest logo, and links for Home, Invoice, and Rate Reset Notifications. A user profile icon is visible in the top right corner. Below the navigation bar, the main content area shows account details for 'Test Account Stakeholder 20241217'. The account record type is 'Organization' and the account owner is 'Daichi Tsuchihashi'. Three action buttons are present: 'Recertify Access', 'Grant Access', and 'Remove Access'. A red circle with the number '1' highlights the 'Recertify Access' button. Below the account details, there is a 'Contacts' section with a 'New' button. A table lists two contacts with their names, titles, emails, and portal access/roles.

Contact Name	Title	Email	Portal Access/Roles
Test Client Portal	CEO	mariabra@iadb.org	Billing and Distribution Hub (General); Billing and Distribution ...
Test Client Portal 2	Manager	stifep@iadb.org	Billing and Distribution Hub (General)

[View All](#)

3. Gestão de usuários

Para adicionar um novo usuário, basta clicar no botão "New" no canto direito da seção de Contatos. Uma janela pop-up aparecerá; por favor, preencha todos os campos obrigatórios e clique no botão "Save"

The screenshot displays the 'Contacts' section of the Client Portal. At the top left, there is a 'Contacts (2)' header with a purple icon. On the right side, there is a red circle with the number '1' and a 'New' button. Below this, a table lists two contacts. The table has four columns: Contact Name, Title, Email, and Portal Access/Roles. The first contact is 'Test Client Portal' with the title 'CEO' and email 'mariabra@iadb.org'. The second contact is 'Test Client Portal 2' with the title 'Manager' and email 'stifep@iadb.org'. Both contacts have 'Billing and Distribution Hub (General)' listed under Portal Access/Roles. A 'View All' link is located at the bottom right of the table.

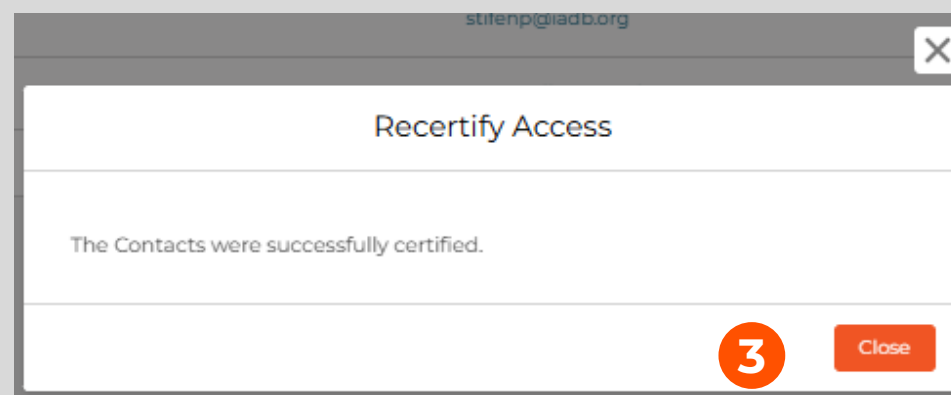
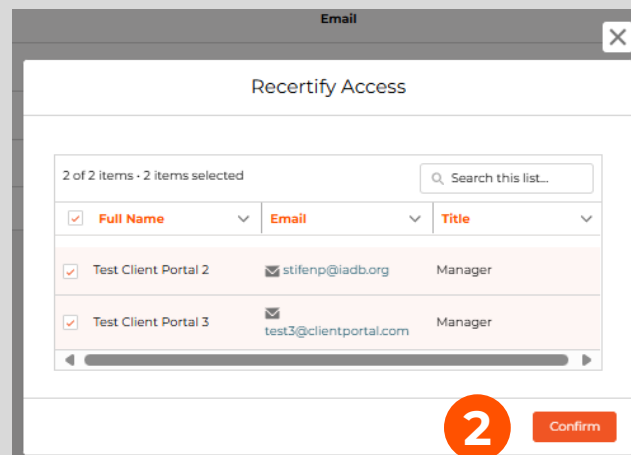
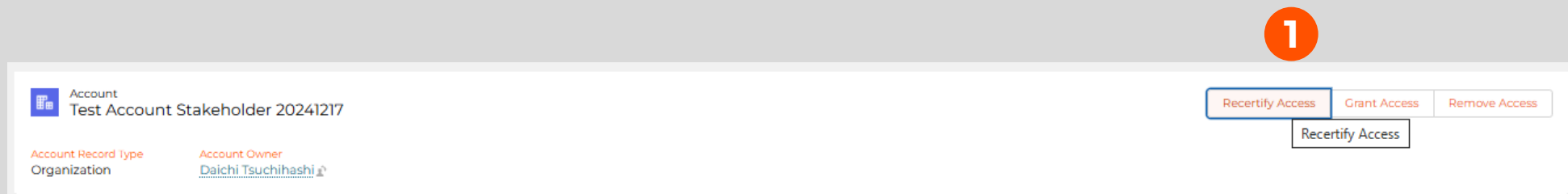
Contact Name	Title	Email	Portal Access/Roles
Test Client Portal	CEO	mariabra@iadb.org	Billing and Distribution Hub (General);Billing and Distribution ...
Test Client Portal 2	Manager	stifep@iadb.org	Billing and Distribution Hub (General)

[View All](#)

3. Gestão de usuários - Recertificar acesso

Para recertificar o acesso de um usuário ao Financial Hub, siga estes passos simples:

1. Clique no botão "Recertify Access" localizado no canto superior direito da seção de Conta.
2. Uma janela pop-up aparecerá com todos os contatos que possuem acesso ao portal. Selecione o usuário cujo acesso deseja recertificar marcando a caixa e clique em "Confirm".
3. Uma mensagem de confirmação aparecerá indicando que o acesso foi recertificado com sucesso.



Você está pronto para usar o Financial Hub!

Resumo do que você aprendeu:

- Como acessar e navegar na plataforma
- Confirmação de contatos-chave e funções

Próximos passos:

- Explore as funcionalidades e familiarize-se com a plataforma
- Consulte nossa seção de perguntas frequentes (FAQs) para mais informações

CLIENT PORTAL

USER GUIDE

More information



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