



# 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

1. English version – Slide 4
2. Spanish version – [Slide 13](#)
3. Portuguese version – [Slide 23](#)

## 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.

If you are using a personal email address, we strongly recommend activating your email provider's MFA as an additional layer of security.

Google Play

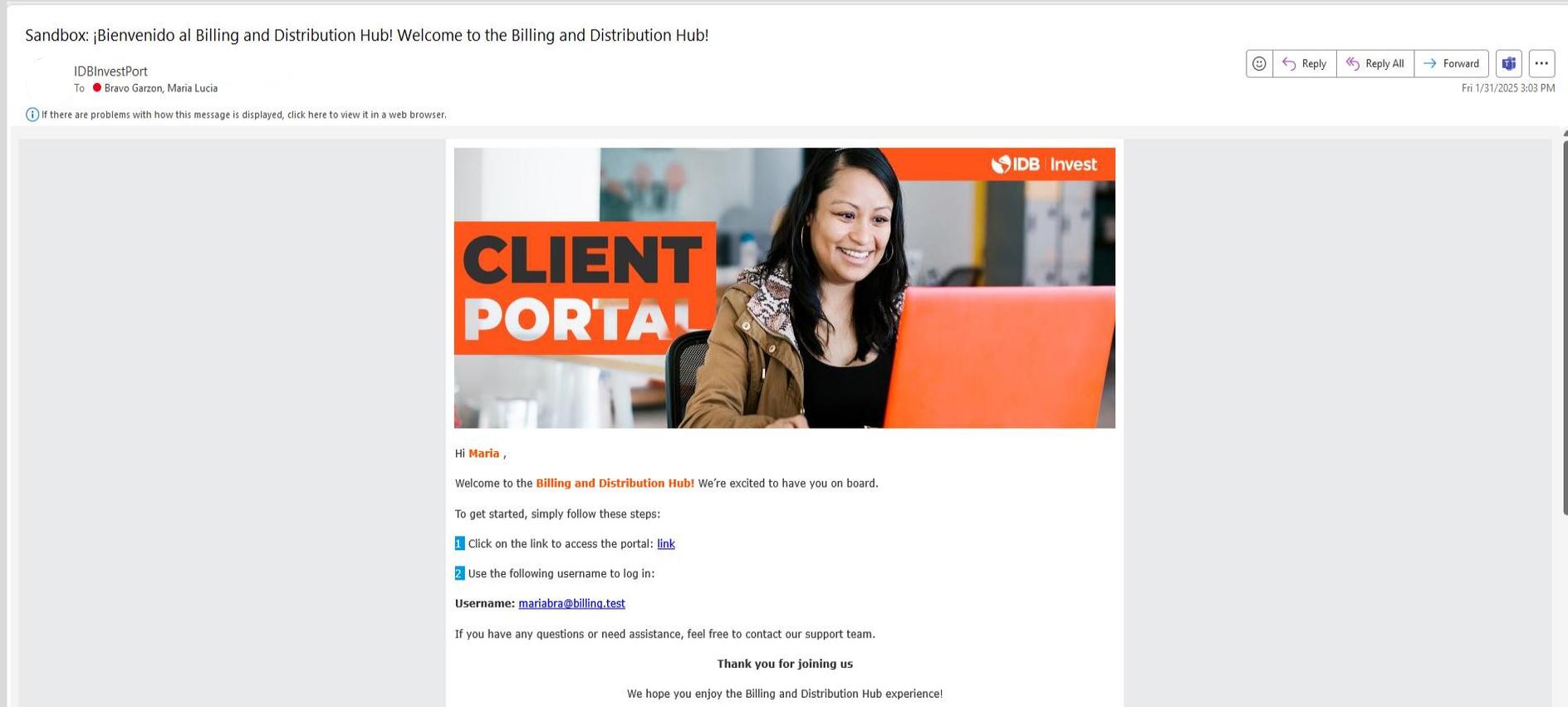


App Store



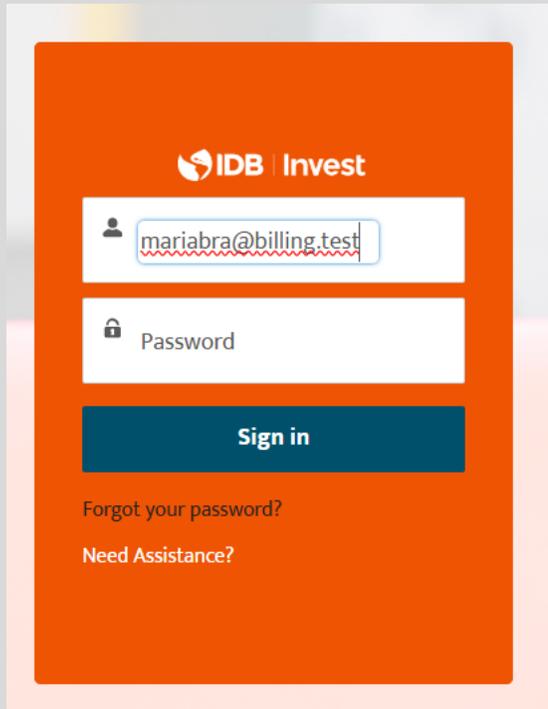
## 1. Login

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

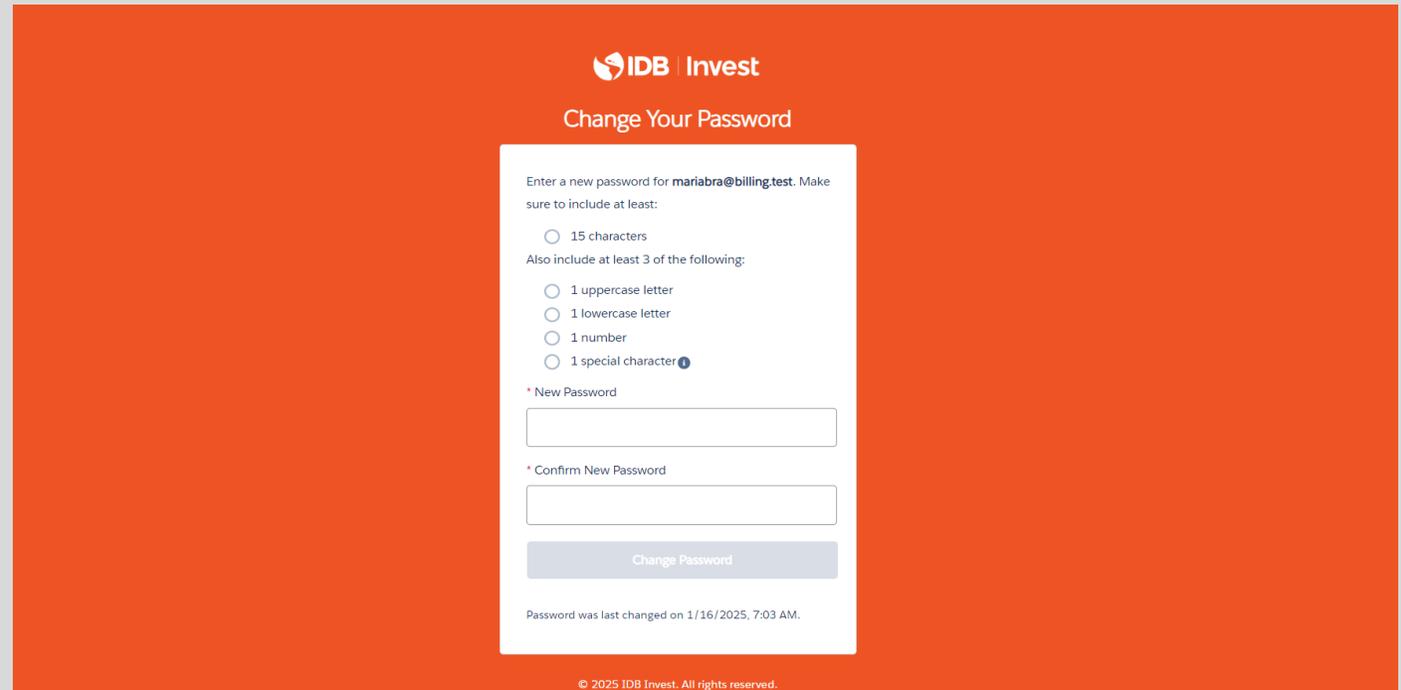


## 1. Login

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.



The screenshot shows the IDB Invest sign-in page. At the top is the IDB Invest logo. Below it is a white input field containing the email address 'mariabra@billing.test'. Underneath is another white input field with a lock icon and the label 'Password'. A dark blue button with the text 'Sign in' is positioned below the password field. At the bottom of the page, there are two links: 'Forgot your password?' and 'Need Assistance?'.



The screenshot shows the 'Change Your Password' page. At the top is the IDB Invest logo and the title 'Change Your Password'. The main content area is white and contains the following instructions: 'Enter a new password for mariabra@billing.test. Make sure to include at least:'. Below this are four radio button options: '15 characters', '1 uppercase letter', '1 lowercase letter', '1 number', and '1 special character'. A section titled '\* New Password' has a white input field. Below that, a section titled '\* Confirm New Password' also has a white input field. A grey button labeled 'Change Password' is at the bottom of the form. At the very bottom of the page, it says 'Password was last changed on 1/16/2025, 7:03 AM.' and a copyright notice '© 2025 IDB Invest. All rights reserved.'

## 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.

These Terms of Use (the "Terms") are a binding legal agreement between you, the end user, and the law firm, business or entity you represent ("you"), and Inter-American Investment Corporation ("IDB Invest", "we" or "us"), an international organization established by its member countries pursuant to the Agreement Establishing the Inter-American Investment Corporation, and a member of the Inter-American Development Bank Group ("IDB Group"). For more information, please visit [www.idbinvest.org](http://www.idbinvest.org).

These Terms apply to and govern your use of and access to IDB Invest's online legal procurement and matter management system and vendor portal, currently at [legalprocurement.idbinvest.org](http://legalprocurement.idbinvest.org) and any associated versions of the site operated by IDB Invest, whether through the Web or a mobile app (as the same may be modified from time to time, the "Portal"). The Portal includes features and functionality that permit the creation, management and exchange of information, documents and communications regarding the selecting, retaining and managing of Counsel in relation to potential and existing financing transactions and other corporate or institutional matters involving IDB Invest (as it may be modified from time to time, the "Functionality"). Access or use of the Portal does not guarantee that any proposed legal services engagements will be entered into or approved by IDB Invest.

These Terms explain how you may use the Portal and the legal terms and conditions that apply to such use. Additional legal notices and terms may apply to specific services, materials, features and content referenced or made available in the Portal. These Terms also include a Privacy Notice, a link to which is provided below. We recommend that you keep a copy of these Terms for future reference and visit the Portal periodically for updates. Please contact us at [GCL-invoices@iabg.org](mailto:GCL-invoices@iabg.org) for information about these Terms. These Terms do not modify or supersede the terms of any signed agreements between you and IDB Invest.

By clicking "I AGREE", you agree to abide by and be legally bound to these Terms, as they may be modified by the IDB Invest from time-to-time and posted on the Portal at [legalprocurement.idbinvest.org](http://legalprocurement.idbinvest.org).

If you will be using the Portal as part of your employment by or on behalf of or with data or materials of a law firm or any individual legal practitioner who employs you or who has contracted with you or for whom you are an agent or representative in regards to a potential legal representation of IDB Invest (a "Law Firm"), these Terms apply to such Law Firm and to each user accessing the Portal on its behalf, including you. You must notify such Law Firm on whose behalf you are using the Portal of these Terms and obtain their authorization for you to agree to these Terms, and/or to use the Portal and exchange data and materials on their behalf.

IDB Invest may, but is not obligated to, independently verify an individual user's authorization to act on behalf of a Law Firm and assumes you have all necessary authorization to act and to use this Portal on behalf of such Law Firm. You will violate these Terms if you lack the authorization to use the Portal.

These Terms contain waiver provisions that, to the extent permitted by applicable law, could waive your right to a jury trial when making claims under these Terms or relating to the Portal. Please review Section 15 carefully for more details about applicable law and jurisdiction.

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I agree and accepted the conditions of this document
 

Next

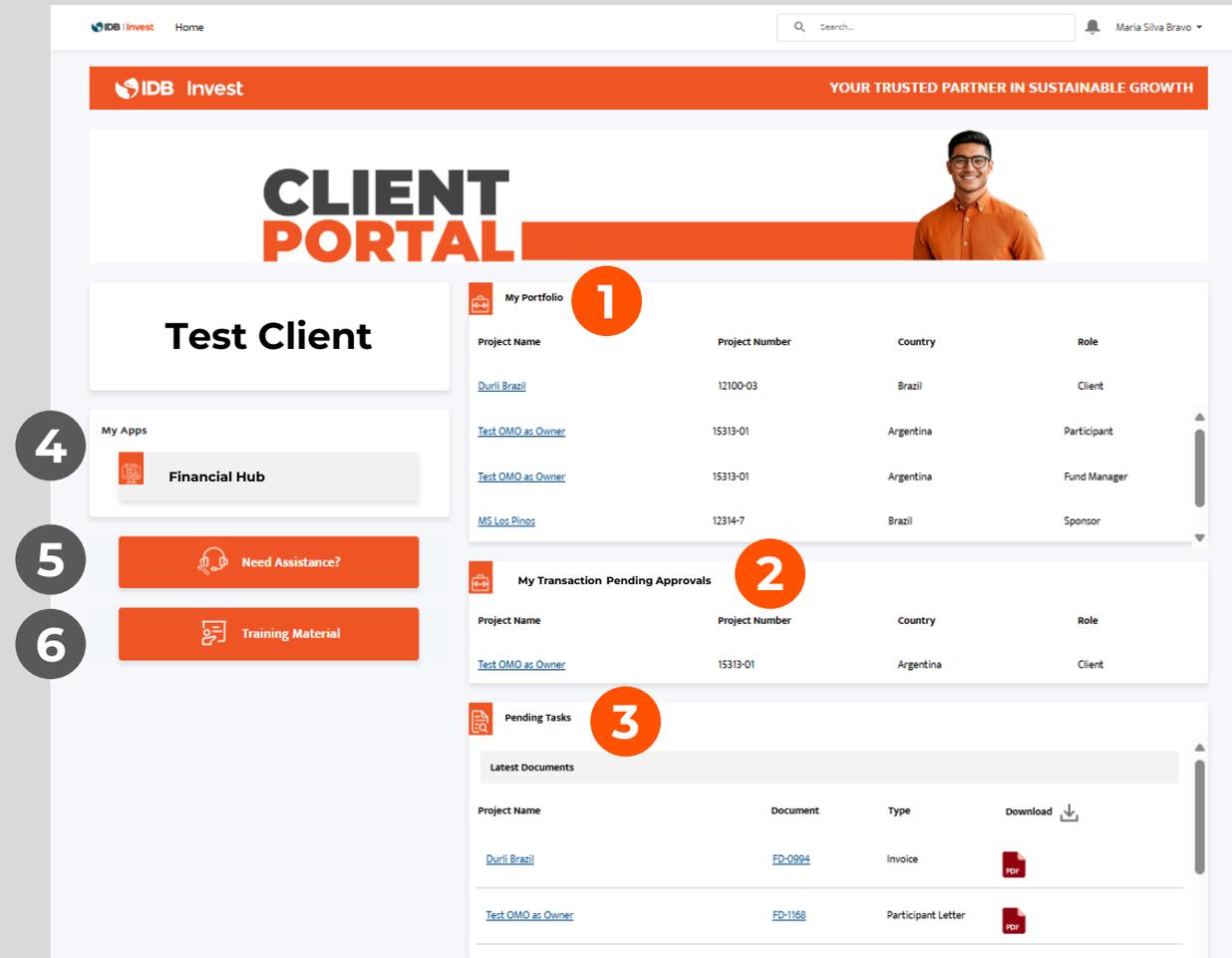
## 2. Home

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.

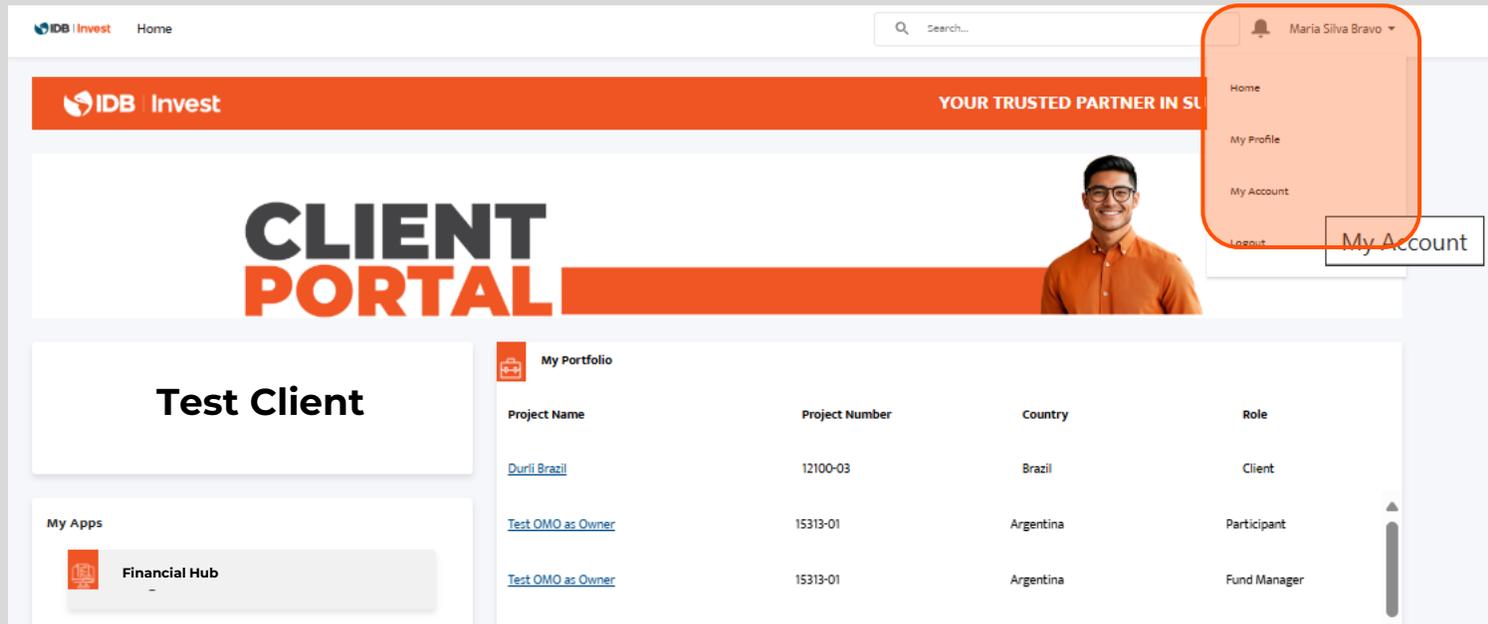
At this point, your account is fully active, and you can log in anytime using your credentials.

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 displays the IDB Invest Client Portal interface. At the top, there is a navigation bar with 'Home', 'Invoice', and 'Rate Reset Notifications' links, and a user profile icon. A red circle with the number '1' highlights the 'Recertify Access' button in the account management section.

**Account Management Section:**

- Account: Test Account Stakeholder 20241217
- Buttons: Recertify Access, Grant Access, Remove Access
- Account Record type: Organization
- Account Owner: Daichi Tsuchihashi

**Contacts Section:**

Contacts (2) [New]

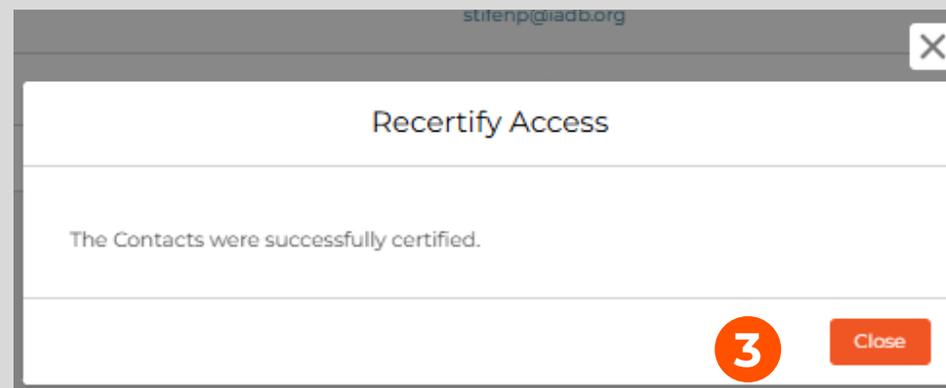
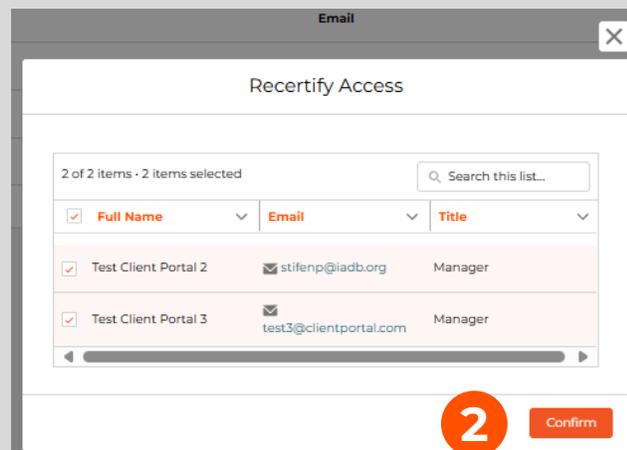
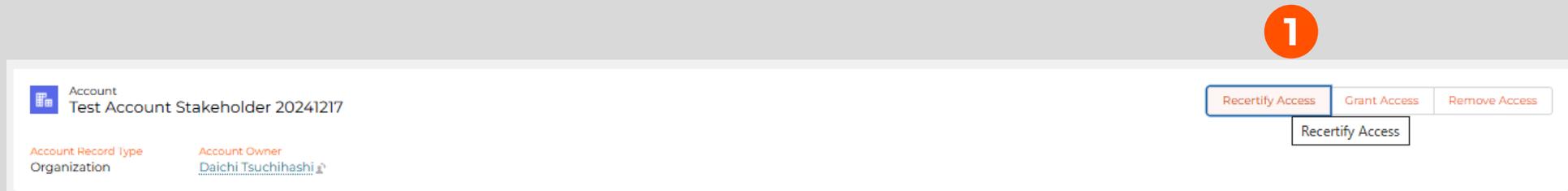
Contact Name	Title	Email	Portal Access/Roles
Test Client Portal	CEO	mariabra@iadb.org	Billing and Distribution Hub (General); Billing and Distribution ...
Test Client Portal 2	Manager	stifep@iadb.org	Billing and Distribution Hub (General)

View All

### 3. 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.



## 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.

Si estás utilizando una dirección de correo electrónico personal, te recomendamos activar la Autenticación Multifactor (MFA) proporcionada por tu proveedor de correo electrónico como una capa adicional de seguridad.

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.

Sandbox: ¡Bienvenido al Billing and Distribution Hub! Welcome to the Billing and Distribution Hub!

IDBInvestPort  
To: Bravo Garzon, Maria Lucia

☺ Reply Reply All Forward 📧 ...  
Fri 1/31/2025 3:03 PM

🔗 If there are problems with how this message is displayed, click here to view it in a web browser.



Hi **Maria**,

Welcome to the **Billing and Distribution Hub!** We're excited to have you on board.

To get started, simply follow these steps:

- 1 Click on the link to access the portal: [link](#)
- 2 Use the following username to log in:

**Username:** [mariabra@billing.test](#)

If you have any questions or need assistance, feel free to contact our support team.

**Thank you for joining us**

We hope you enjoy the Billing and Distribution Hub experience!

## 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.

## 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 the user's name '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:

- My Portfolio (1):** A table listing projects with columns for Project Name, Project Number, Country, and Role.
 

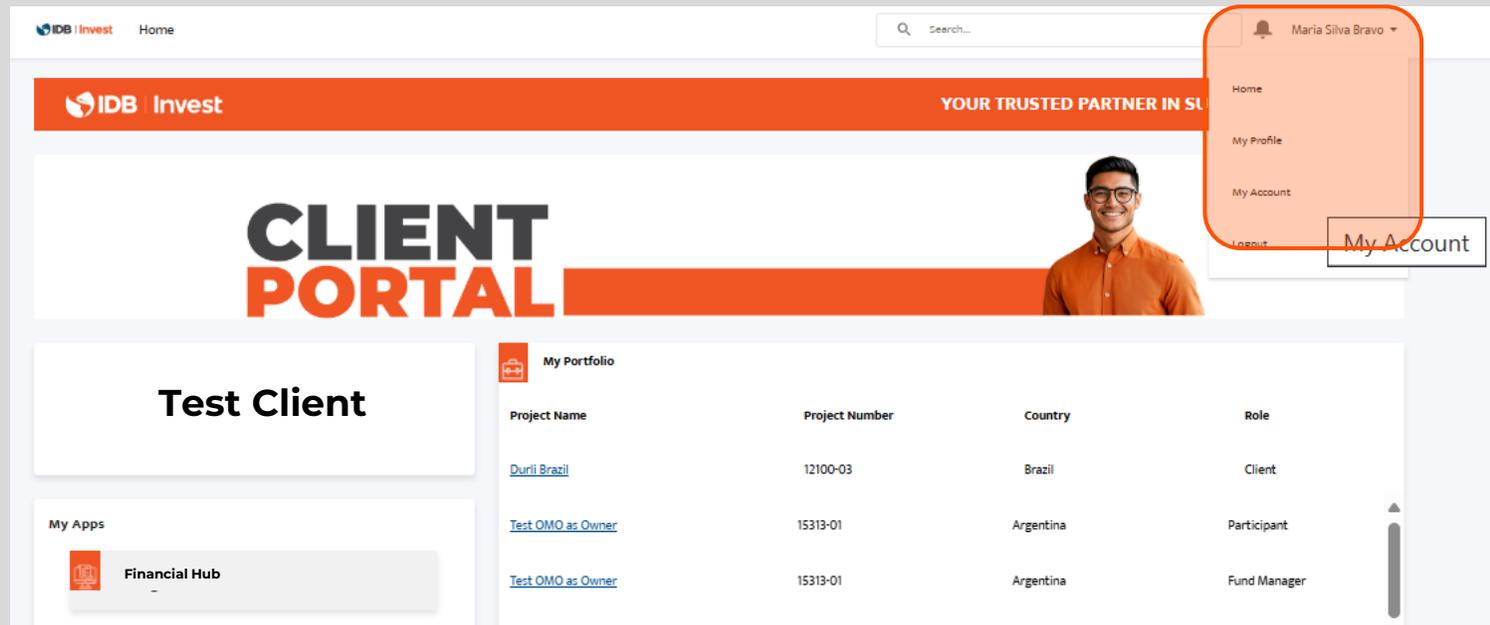
Project Name	Project Number	Country	Role
<a href="#">Duriil Brazil</a>	12100-03	Brazil	Client
<a href="#">Test OMO as Owner</a>	15313-01	Argentina	Participant
<a href="#">Test OMO as Owner</a>	15313-01	Argentina	Fund Manager
<a href="#">MS Los Pinos</a>	12314-7	Brazil	Sponsor
- My Transaction Pending Approvals (2):** A table listing pending transactions with columns for Project Name, Project Number, Country, and Role.
 

Project Name	Project Number	Country	Role
<a href="#">Test OMO as Owner</a>	15313-01	Argentina	Client
- Pending Tasks (3):** A section titled 'Latest Documents' with a table listing documents for download.
 

Project Name	Document	Type	Download
<a href="#">Duriil Brazil</a>	<a href="#">FD-0994</a>	Invoice	
<a href="#">Test OMO as Owner</a>	<a href="#">FD-1168</a>	Participant Letter	
- Test Client:** A section with the heading 'Test Client'.
- My Apps (4):** A section containing a button for 'Financial Hub'.
- Need Assistance? (5):** An orange button with a speech bubble icon and the text 'Need Assistance?'.
- Training Material (6):** An orange button with a document icon and the text 'Training Material'.

### 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.



### 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 in the top right corner of this section. Below the account details, there is a 'Contacts' section with a 'New' button and a table listing contacts.

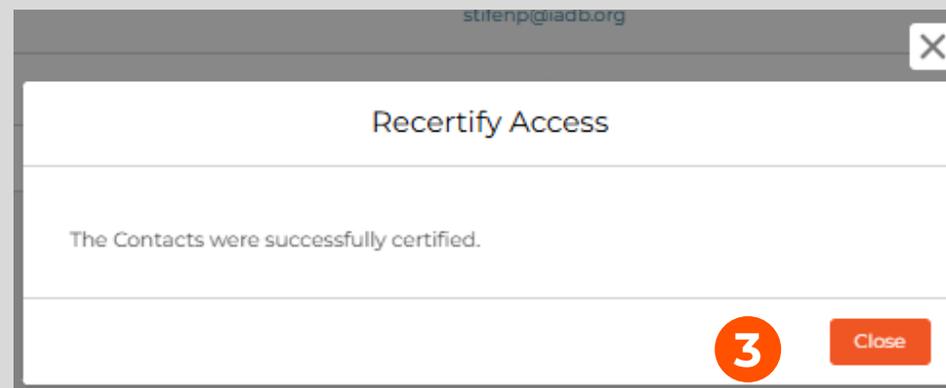
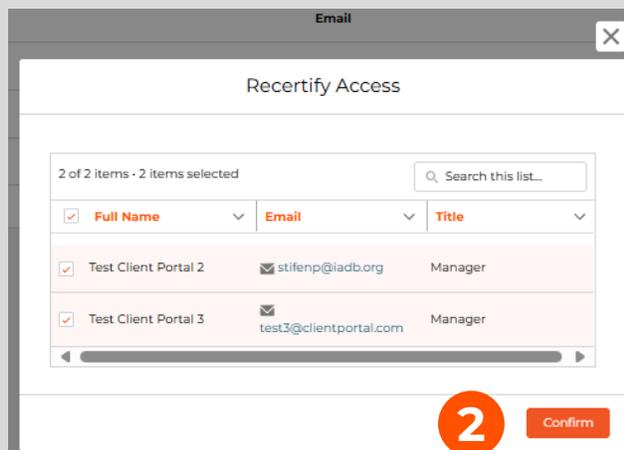
Contact Name	Title	Email	Portal Access/Roles
<a href="#">Test Client Portal</a>	CEO	<a href="mailto:mariabra@iadb.org">mariabra@iadb.org</a>	Billing and Distribution Hub (General); Billing and Distribution ...
<a href="#">Test Client Portal 2</a>	Manager	<a href="mailto:stifenp@iadb.org">stifenp@iadb.org</a>	Billing and Distribution Hub (General)

[View All](#)

### 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.



 ¡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.

Se estiver utilizando um endereço de e-mail pessoal (como Gmail, Yahoo, etc.), recomendamos ativar a Autenticação Multifator (MFA) oferecida pelo seu provedor de e-mail como uma camada adicional de segurança.

Google Play

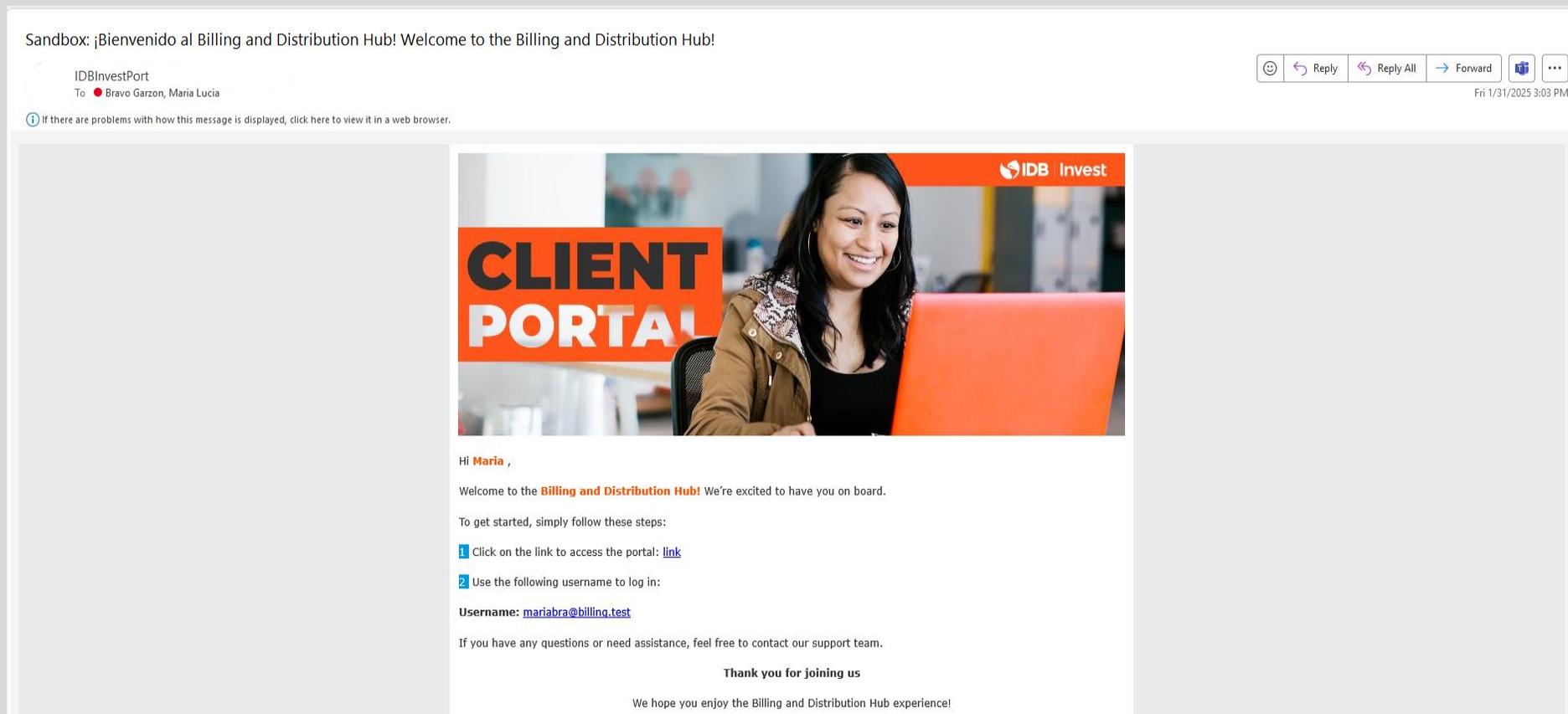


App Store



## 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.

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

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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IDB Invest may, but is not obligated to, independently verify an individual user's authorization to act on behalf of a Law Firm and assumes you have all necessary authorization to act and to use this Portal on behalf of such Law Firm. You will violate these Terms if you lack the authorization to use the Portal.

These Terms contain waiver provisions that, to the extent permitted by applicable law, could waive your right to a jury trial when making claims under these Terms or relating to the Portal. Please review Section 15 carefully for more details about applicable law and jurisdiction.

The Portal is operated and administered by IDB Invest from the United States of America. Access to the materials, services or Functionality on the Portal from any location where such content or access may be illegal is prohibited. When you access the Portal, you are solely responsible for compliance with local and national laws. Our services may not be used by any person or entity in any jurisdiction where the provision or use thereof would be contrary to applicable laws or regulations of any governmental authority.

**1. Registering and Using the Portal**

1. The Portal is mainly designed for the Law Firm's own internal purposes to facilitate the process of selecting, retaining, and managing Counsel for IDB Invest representation, and you agree not to disclose it, or any of its content, or use it for any other purpose. To use the full Functionality of the Portal, you will need to become a registered user by having the designated IDB Invest administrator (the "Administrator") create for you or enable you to create a user's account and profile (the user account, the "User Account").
2. The Administrator shall be solely responsible for creating user profiles and enabling user credentials based on the minimum necessary data viewing, uploading and other rights that are required based on the user's role in a legal services engagement, and for maintaining the number of user profiles to the minimum required to conduct business. Administrator users shall disable access immediately to any User Account with lost or compromised credentials or for users who no longer have a role in the engagement. The Law Firm has the obligation to immediately notify IDB

I agree and accepted the conditions of this document
 

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.

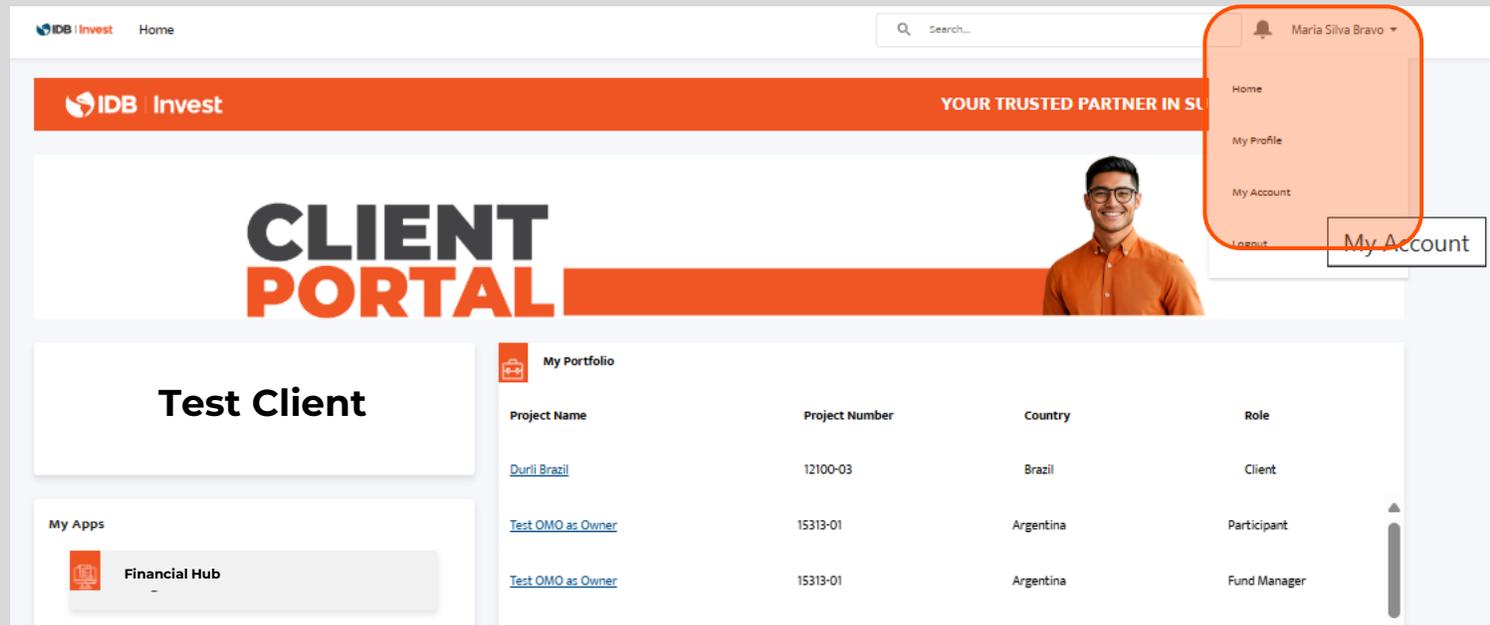
6. Para acessar os guias de treinamento, clique no botão "Training Material", que o redirecionará para a página onde esses documentos estão disponíveis.

The screenshot shows the IDB Invest Client Portal dashboard. At the top, there is a search bar and a user profile for Maria Silva Bravo. Below this is a navigation bar with the IDB Invest logo and the tagline "YOUR TRUSTED PARTNER IN SUSTAINABLE GROWTH". The main content area is titled "CLIENT PORTAL" and features a large image of a smiling man. Below the main header, there are several sections:

- My Portfolio (1):** A table listing projects with columns for Project Name, Project Number, Country, and Role. The table contains three rows of data.
- My Transaction Pending Approvals (2):** A table listing pending transactions with columns for Project Name, Project Number, Country, and Role. It contains one row of data.
- Pending Tasks (3):** 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.
- Test Client:** A section on the left side of the dashboard.
- My Apps (4):** A section containing a button for "Financial Hub".
- Need Assistance? (5):** An orange button with a speech bubble icon.
- Training Material (6):** An orange button with a document icon.

### 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.



The screenshot displays 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, showing options: Home, My Profile, My Account (highlighted with a white box), and Logout. Below the header, the main content area features a 'Test Client' section and a 'My Portfolio' table. The table lists projects with columns for Project Name, Project Number, Country, and Role.

Project Name	Project Number	Country	Role
<a href="#">Duri Brazil</a>	12100-03	Brazil	Client
<a href="#">Test OMO as Owner</a>	15313-01	Argentina	Participant
<a href="#">Test OMO as Owner</a>	15313-01	Argentina	Fund Manager

## 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, links for Home, Invoice, and Rate Reset Notifications, and a user profile icon. Below the navigation bar, the account information is shown: 'Account Test Account Stakeholder 20241217'. To the right of the account name, there are three buttons: 'Recertify Access', 'Grant Access', and 'Remove Access'. A red circle with the number '1' highlights the 'Recertify Access' button. Below the account information, there is a section for 'Contacts' with a 'New' button. A table lists the contacts with columns for Contact Name, Title, Email, and Portal Access/Roles.

Contact Name	Title	Email	Portal Access/Roles
<a href="#">Test Client Portal</a>	CEO	<a href="mailto:mariabra@iadb.org">mariabra@iadb.org</a>	Billing and Distribution Hub (General); Billing and Distribution ...
<a href="#">Test Client Portal 2</a>	Manager	<a href="mailto:stifep@iadb.org">stifep@iadb.org</a>	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"

#### Contacts

Contacts (2) 1 [New](#)

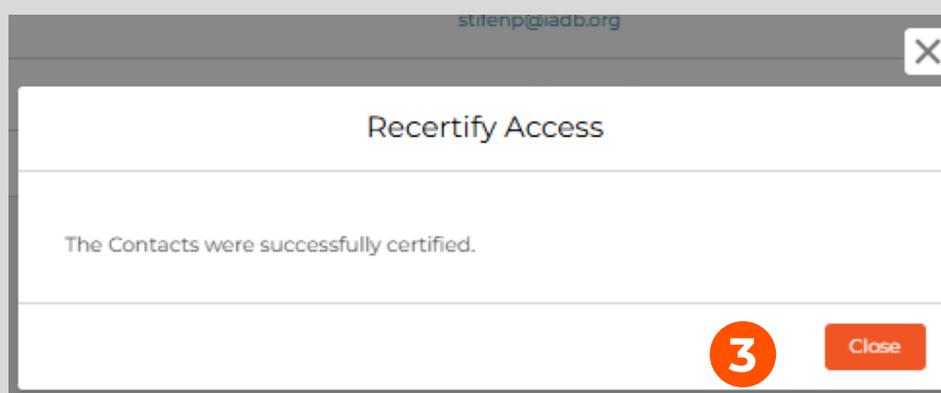
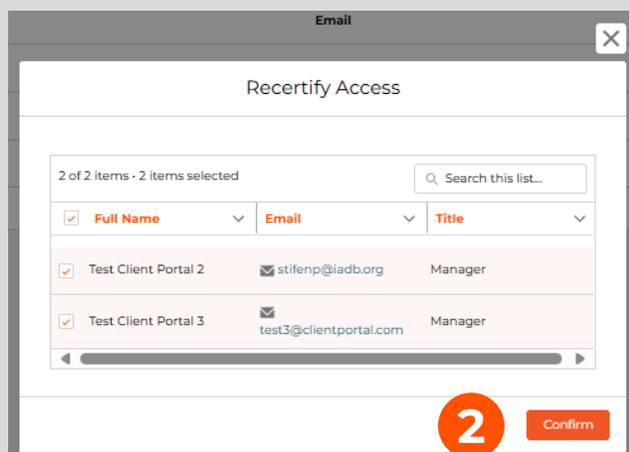
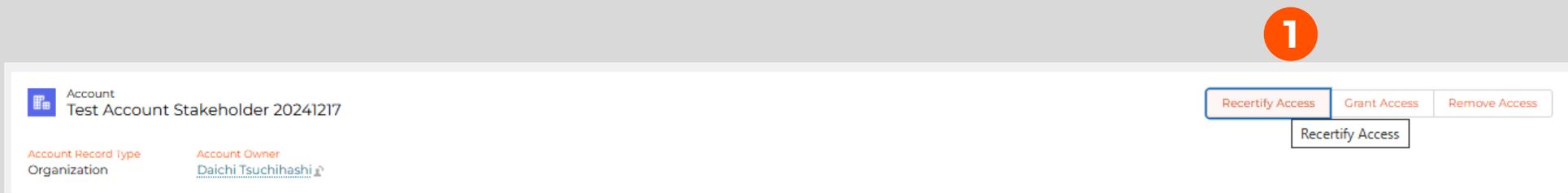
Contact Name	Title	Email	Portal Access/Roles
<a href="#">Test Client Portal</a>	CEO	<a href="mailto:mariabra@iadb.org">mariabra@iadb.org</a>	Billing and Distribution Hub (General);Billing and Distribution ... <input type="checkbox"/>
<a href="#">Test Client Portal 2</a>	Manager	<a href="mailto:stifep@iadb.org">stifep@iadb.org</a>	Billing and Distribution Hub (General) <input type="checkbox"/>

[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



@idb invest

[www.idbinvest.org](http://www.idbinvest.org)

