Efficience
DESIGNED AND DEVELOPED BY THE KEY

Tutorial
Create a Client

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Create a Client

In Efficience, a client can be either a physical person or a company. A "Client" represents any person (physical or moral), who has a link with a portfolio. It could be the account holder, the beneficial owner, the power of attorney, or any other person who has a legal relation to a portfolio.

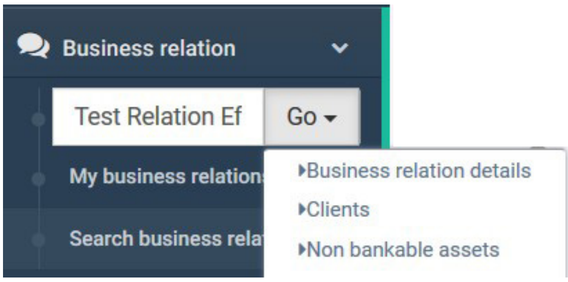
To create a Client - Overview:

1. Open the business relation of the future client.
2. Create the client master card.
3. Fill in the form.

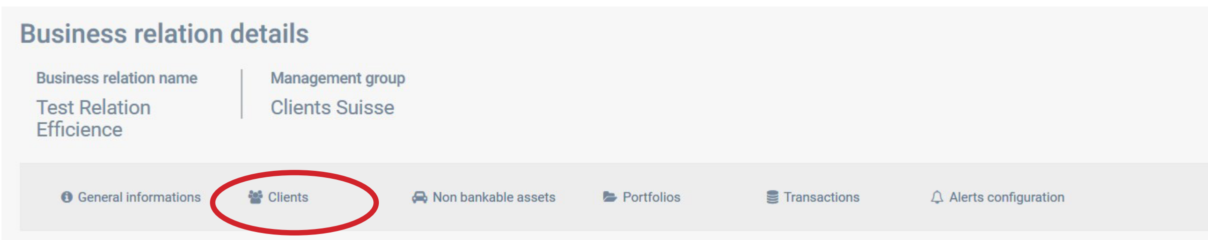
To create a new client, the business relation should have been created first. Please refer to the tutorial "To create a new Business Relation".

To create a Client - Details:

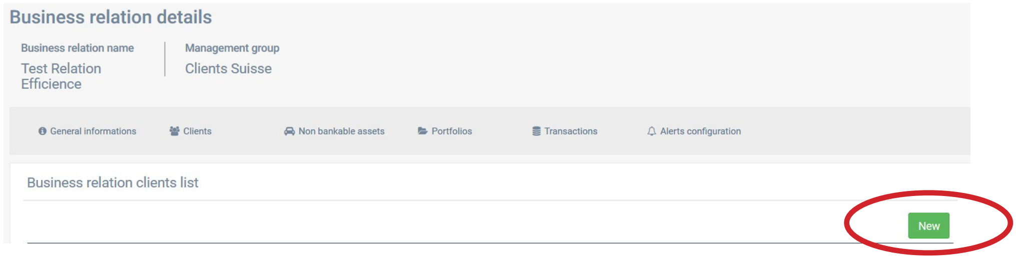
1. On the left menu, search the "Business Relation", which the client will be classified in.
2. Select "Client" in the drop-down menu, which appears on the "Go" button.



It is also possible to access this screen through the "Business Relation" dashboard, and then click on "Clients".

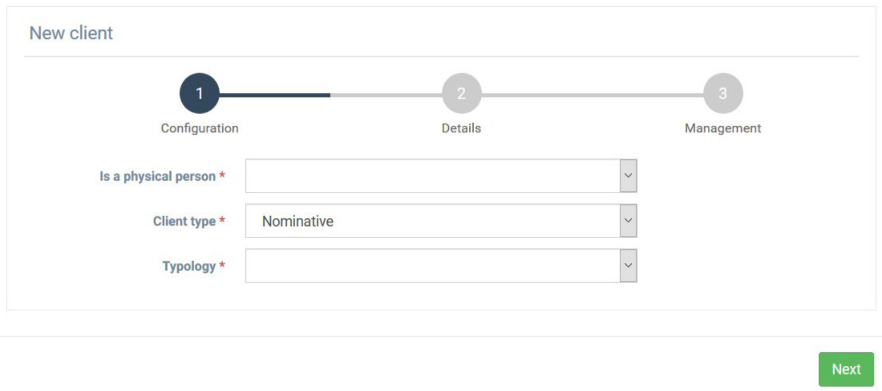


3. Click on "New".

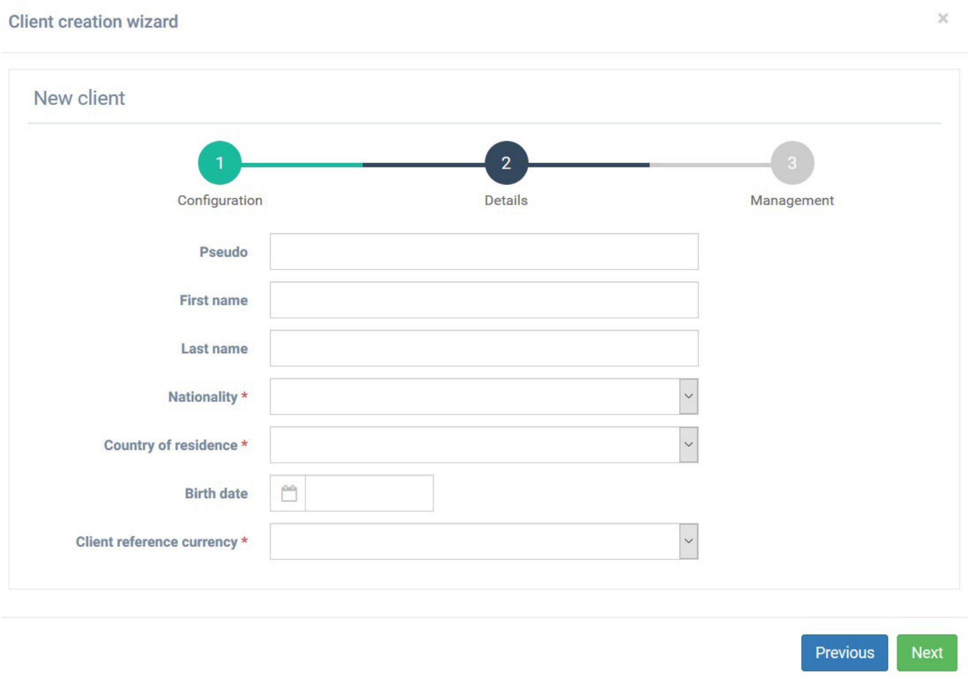


4. Fill in the form. There will be three forms to complete.

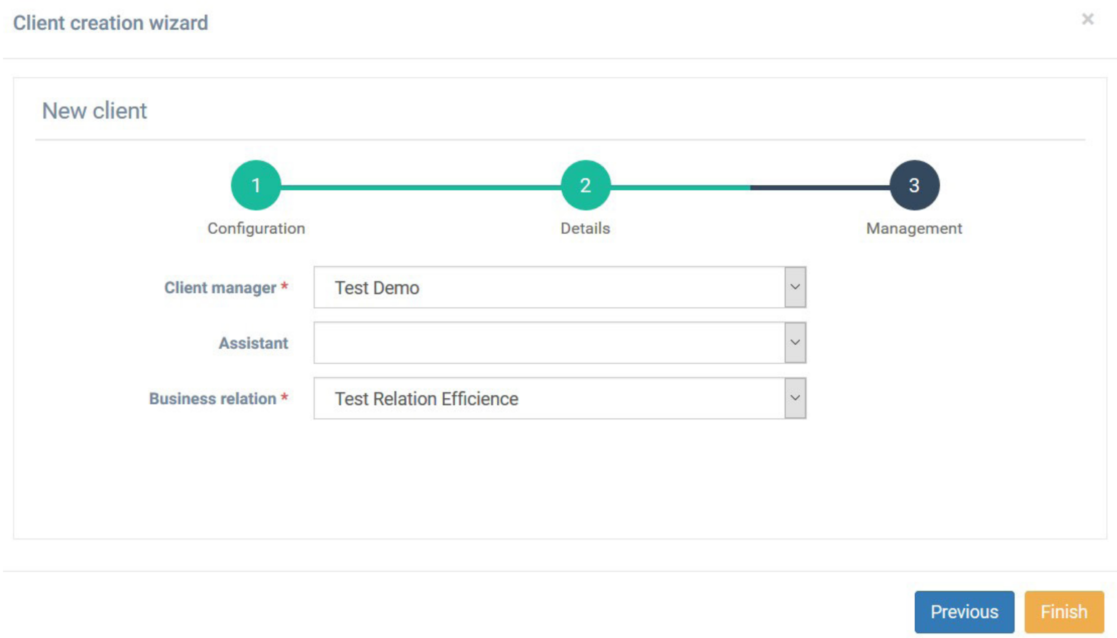
   On the first screen:
   - Is a physical person: Yes/No.
     If the client is a physical person, select Yes, if the client is a company, select No.
   - Client Type: Numeric/Nominative.
     If you don't want to fill the name of the client, select "Numeric". Then only a pseudo will be asked by the program. Afterwards, this pseudo will be used in all reports (related to the client) provided by Efficience.
   - Typology: Client/Other
     If the client is the account holder, or the beneficial owner, select "Client".
     If he has a power of attorney, a right of inspection, or any other role, select "Other".



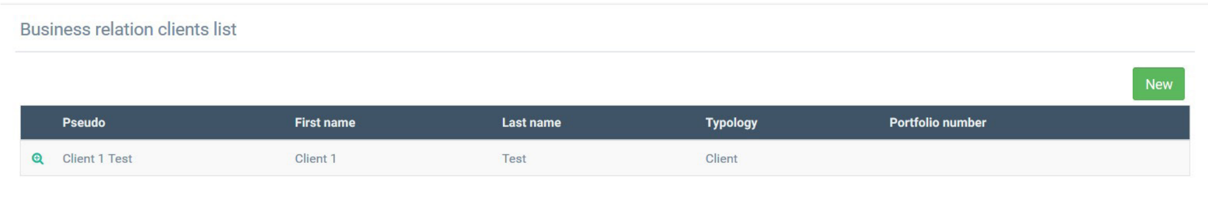
When the form has been completed, click on “Next”. On the second screen “Details”, you will have to fill in key information related to the client (e.g. pseudo, nationality, country of residence, currency related to the client).



On the last screen (“Management”), you have to check that the information is correct (manager, assistant, and business relation). By default, that information is the same as the one completed at the “Business Relation” level. If everything is correct, click on “Finish”.



When the button “Finish” has been clicked, the client is added to the list.



If there are other people in the business relation (e.g. joint account, power of attorney, other members of the family who are clients, etc.), you can create new client master card by clicking on “New” (on the left side of the screen).