

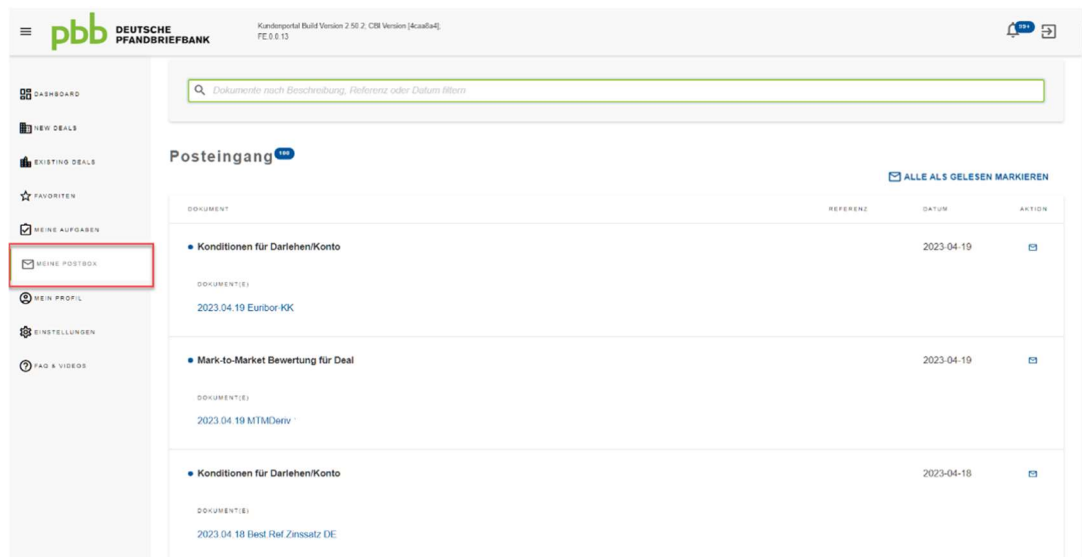
Release Notes – Kundenportal 2023/04

On April 28, 2023, we released new functionalities in the customer portal. As a major milestone, the portal now features a mailbox where you can access and download communication from pbb, such as interest fixing confirmations and account statements.

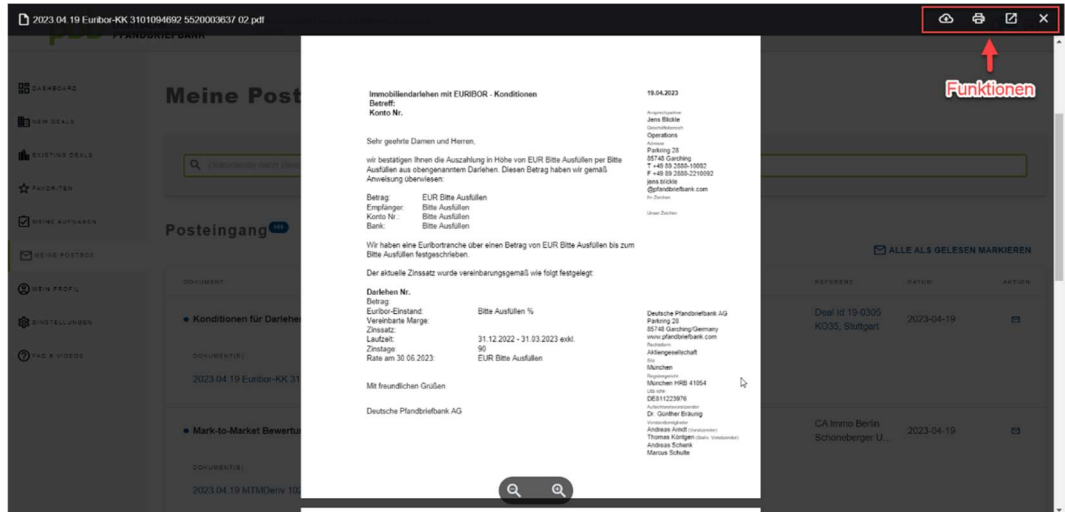
The most important new functions are:

1. Your Postbox:

- By default, users with the 'executive' role will have access to the postbox. Users with the 'executive' role can also grant other users in the transaction team access to the postbox. To do this, please go to the "Customer" tab in the "Manage Team" window.
- Documents in your postbox will remain available for future reference throughout the life of the deal. You can, but do not have to print or save them.
- A convenient search bar at the top of your postbox quickly guides you to the documents you are looking for.
- A counter clearly shows the number of new documents in your postbox, so you will not miss any of them.



- A simple click on a document opens a preview window. You can then conveniently decide whether you want to print or save the document, using the function buttons in the top bar of the window.



This preview function works throughout the portal, e.g. for tasks and requirements, for documents in pdf format and pictures in common formats such as jpg. Documents in other formats can be downloaded and opened using the standard browser functions, as has been the case in the past.

2. KYC and Annual Accounts tasks now show the name of the concerned legal entity, for ease of reference.
3. The color logic in the “Tasks” tab is now identical to the logic in the “Requirements” tab:
 - open and due tasks are displayed in red;
 - tasks in status “review” are in yellow, even when they are not yet due;
 - open tasks that are not due, are in white.
4. When you invite someone to a deal, or assign extended customer rights, the portal will give a visual confirmation that it has sent an invitation to this new transaction team member.