

# The IsraTransfer Online Client Access User Guide

Thank you for signing up for IsraTransfer  
Online Client Access.

Below you will find helpful information, as well as links to tutorial videos designed to make your experience as easy and convenient as possible.

## Logging In

The first thing you will need to do is log into the portal using your username and password. Note, your email address is your username:

[Log In Now](#)

Password: If this is your first time using the portal and you do not remember your password or would like to change it at any time, please click the button below to receive a "reset password" email. Once you receive the email, click on the link in it and you will be taken to a web page prompting you to enter a new one.

[Reset My Password](#)

# View and Edit Your Personal Information

Once you are logged into the portal you will be able to view and edit your personal information, including your name, birthday, phone number, mailing address, uploading documentation, and more.

To do so simply:

- Navigate to the top right hand corner of the screen where your name is displayed and click on it.
- Click on "Edit Profile" You will then be offered several options for editing.
- Click "Save Changes" once you have completed your edits

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

For a visual demonstration of how to edit your personal information, please click the button below for our brief tutorial video.

[Editing Your Personal Information Tutorial](#)

# Requesting Live Quotes & Placing Trades

Live exchange rate quotes can be requested and funds traded using online client access during the specified times listed below:

- Monday through Thursday - 9:00 AM and 5:30 PM Israel Standard Time (IST)
- Friday - 9:00 AM through 11:00 AM Israel Standard Time (IST).

To do so:

- Log into the portal using your username and password.
- Select either the "Convert My Money" button in the middle of the screen OR "Convert My Money" from the menu on the left-hand side.
- Next, select both the currency you wish to sell and currency you wish to buy from each of the drop-down menus in the middle of the screen.
- You will then be presented with the option to either buy or sell currency.
- Enter either the amount of the currency you wish to buy or the currency you wish to sell. The amount of currency available for conversion will be displayed for your convenience.
- Select the "Get Rate" button to receive a live quote for you to exchange your currency.

- You will then be presented with an exchange rate along with the option to either confirm your trade or to cancel.
  - Please note that the quote will only remain valid for 20 seconds, after which time it will expire and refresh to a new rate.
  - The new rate will also only remain valid for 20 seconds, after which time it will expire again, and process will repeat for a third time.
  - If you have not confirmed your trade by the end of the third, 20 second window, your transaction will be cancelled and you will be required to enter a new rate quote request in order to trade your funds.

The screenshot displays the 'TRADE' section of the IsraTransfer portal. A progress bar at the top indicates three steps: 'GET A QUOTE' (active), 'CONFIRM QUOTE', and 'TRANSFER FUNDS'. Below this, a green progress bar shows the quote expires in 15 seconds. The main content area displays the trade details: 'AMOUNT SOLD' of 50,000.00 USD, a 'RATE' of 3.4505 NIS/USD, and 'AMOUNT BOUGHT' of 172,525.00 NIS. A checkbox for 'I agree to the terms and conditions' is present. At the bottom, there are two buttons: 'Confirm Trade' (green) and 'Cancel and Return' (grey). The left sidebar contains navigation links for 'MY BALANCES', 'TRADE' (selected), 'Convert My Money', 'Trade History', 'TRANSFERS', 'Make a Transfer', 'Transfers History', 'BENEFICIARIES', 'Create', 'View', 'STATEMENTS', 'RATE ALERTS', 'Set an Alert', 'View / Cancel', and 'INSTRUCTIONS'. The top right corner shows a 'Portal User' link.

AMOUNT SOLD	RATE	AMOUNT BOUGHT
50,000.00 USD	3.4505 NIS/USD	172,525.00 NIS

- Make sure to accept the "Terms & Conditions" before selecting the "Confirm Trade" button.
- To cancel a trade, simply click the "Cancel" button. Once your trade is executed a confirmation screen will be displayed with all of your order details.
- Please note that once a trade is confirmed it cannot be cancelled.
- If you would like to then place a transfer request, simply click the green "Make a Transfer" button displayed on the confirmation screen.
- To view your past trade confirmations select the "Trade History" button in the menu on the left-hand side of the screen.
- An itemized summary of your trade history will be displayed on the screen along with the options to either view each individual trade confirmation, or to download a PDF copy of it to your computer.

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

For a visual demonstration of how to edit your personal information, please click the button below for our brief tutorial video.

[Trading My Funds Tutorial](#)



# Placing Transfer Requests & Selecting Beneficiaries

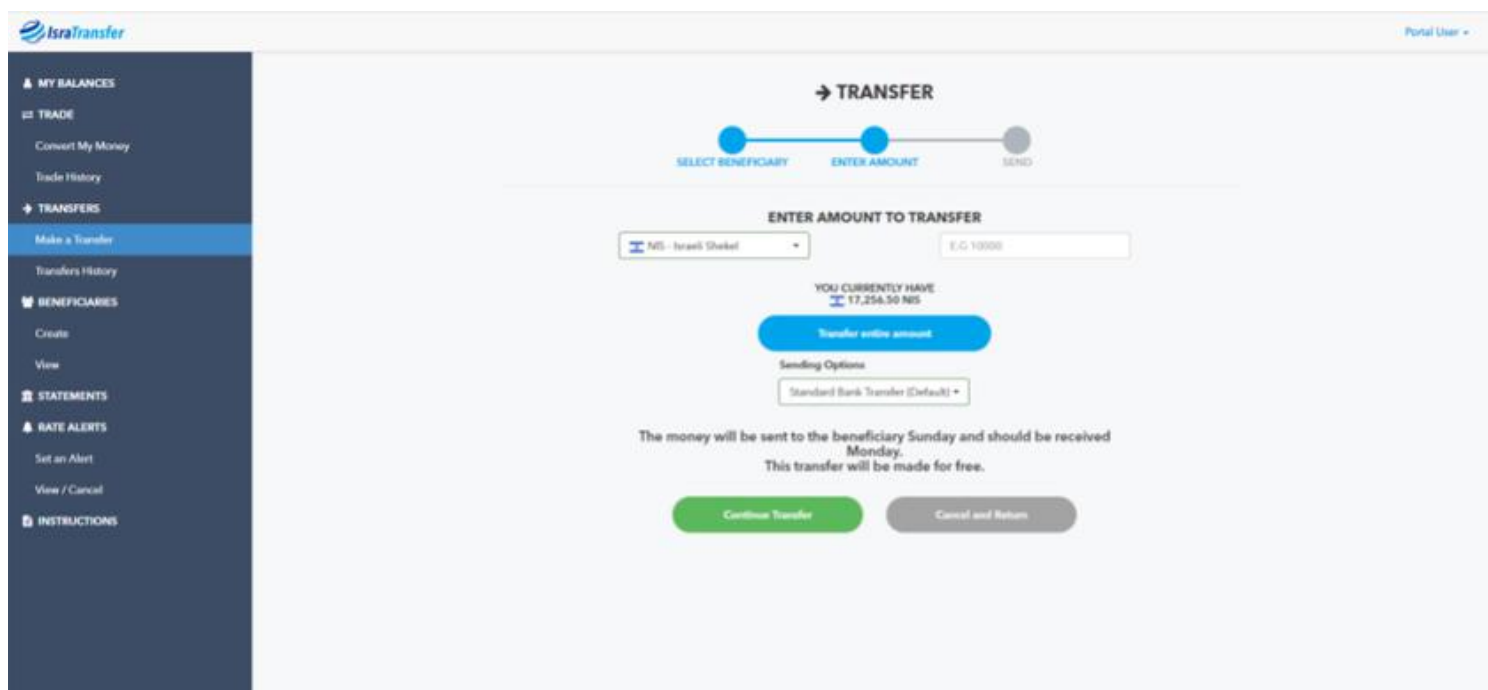
Transfer requests can be made anytime using the online system.

To do so:

- Log into the portal using your username and password.
- Select either the "Transfer My Money" button in the middle of the screen OR "Make a Transfer" from the menu on the left-hand side.
- Next, you will be asked to select a beneficiary for where you would like your funds sent.
  - Beneficiaries you have previously saved can be found in the drop-down box displayed on the screen or by selecting "View" under "Beneficiaries" in the menu on the left-hand side of the screen.
  - New beneficiaries can be created by selecting the "Add a New Beneficiary" button displayed on the screen or by selecting "Create" under "Beneficiaries" in the menu on the left-hand side of the screen .
  - Other options, including requesting a shovar payment or bank check, are also available on this screen.

The screenshot displays the IsraTransfer web portal interface. On the left is a dark blue sidebar menu with options: MY BALANCES, TRADE (Convert My Money, Trade History), TRANSFERS (Make a Transfer, Transfers History), BENEFICIARIES (Create, View), STATEMENTS, RATE ALERTS (Set an Alert, View / Cancel), and INSTRUCTIONS. The 'Make a Transfer' option is highlighted. The main content area is titled 'TRANSFER' and shows a progress bar with three steps: SELECT BENEFICIARY (active), ENTER AMOUNT, and SEND. Below the progress bar, it asks 'WHO ARE YOU MAKING A TRANSFER TO?' and provides a 'Choose beneficiary' dropdown menu, an 'OR' separator, and an 'Add new beneficiary' button. Another 'OR' separator follows, leading to the question 'DO YOU NEED US TO:', with buttons for 'Pay a shovar' and 'Create a bank check'. The top right corner shows 'Portal User' with a dropdown arrow.

- Select the amount of currency you would like to transfer. The total amount available will be displayed on the screen for your convenience.



- You can either continue to complete your transfer, or cancel and return to the main menu.
- Finally, select the "Make a Transfer" button displayed on the final confirmation screen that will then be displayed to complete your transfer.
- Once submitted your transfer will now show in your transfer history that will be displayed on the screen.

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

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[Transfer My FundsTutorial](#)





# Set and Edit Custom Rate Alerts

Custom rate alerts can easily be created using the portal. Clients can elect to have these notifications sent out either via SMS text message, email, or both.

To do so:

- Log into the portal using your username and password.
- To create a new rate alert, select "Create new alert" under the "Rate Alert" section in the menu on the left-hand side of the screen.
- Next, select both the currency you wish to buy and the currency you wish to sell, and your desired exchange rate from the drop-down boxes displayed on the screen.
- Finally, select the method in which you would like to be notified, either SMS text message, email, or both, by clicking the respective check-boxes displayed on the screen.
- Click the green "Set Rate" button to complete your request and save the alert.
- Existing alerts can be viewed and/or edited by selecting the "View/Cancel" option in this same section.
- Selecting the "edit" (pencil) icon will take you to a screen where you can modify the currency and exchange rate level at which you would like to be notified, as well as the way in which you would like it sent to you.
- Click "Set Rate" to save any changes made.

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

For a visual demonstration of how to edit your personal information, please click the button below for our brief tutorial video.

[Set and Edit Rate Alerts Tutorial](#)

## Viewing Your Balances

Viewing your currency balances can be done anytime using the portal.

To do so:

- Log into the portal using your username and password.
- Balances can be viewed in two ways:
  - By selecting the blue "See My Balances" displayed on the home screen.
  - By selecting "My Balances" displayed in the menu on the left-hand side of the screen.
- A screen displaying your currencies and their respective amounts will then be displayed on the along with options to place either trade or transfer requests.

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

For a visual demonstration of how to edit your personal information, please click the button below for our brief tutorial video.

[View Your Balances Tutorial](#)

## Viewing Your Trade History

Viewing your currency balances can be done anytime using the portal.

To do so:

- Log into the portal using your username and password.
- To view statements, choose "Statements" from the menu displayed on the left-hand side of the screen.
- Next, choose the type of currency that you would like to see a statement for from the drop-down box, along with your desired date range. This will generate a list of past transactions.
- Click the blue "Download" button displayed on the right-hand side above the list to save a PDF copy to your computer.

Please note, if you are accessing the portal on a mobile device these options can be found by selecting the square icon with horizontal lines displayed inside of it found at the top right hand corner of your screen.

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[View Your Trade History Tutorial](#)

For more information about IsraTransfer Online Client Access, including frequently asked questions and more, visit our knowledge base now.

[Online Client Access Knowledge Base](#)



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