



AFB MEMBER PORTAL

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INFORMATION AND FAQ'S ON HOW TO MAKE THE MOST FROM THE AFB MEMBER PORTAL



REGISTRATION ON THE AFB CRM AND ACCESSING THE MEMBER PORTAL

A. HOW TO LOG INTO THE AFB MEMBER PORTAL

- Visit the AFB Website – www.foreignbanks.org.uk
- Click on the Member Log In icon (circled in red below)



- A log in pop up window will appear – complete all details.

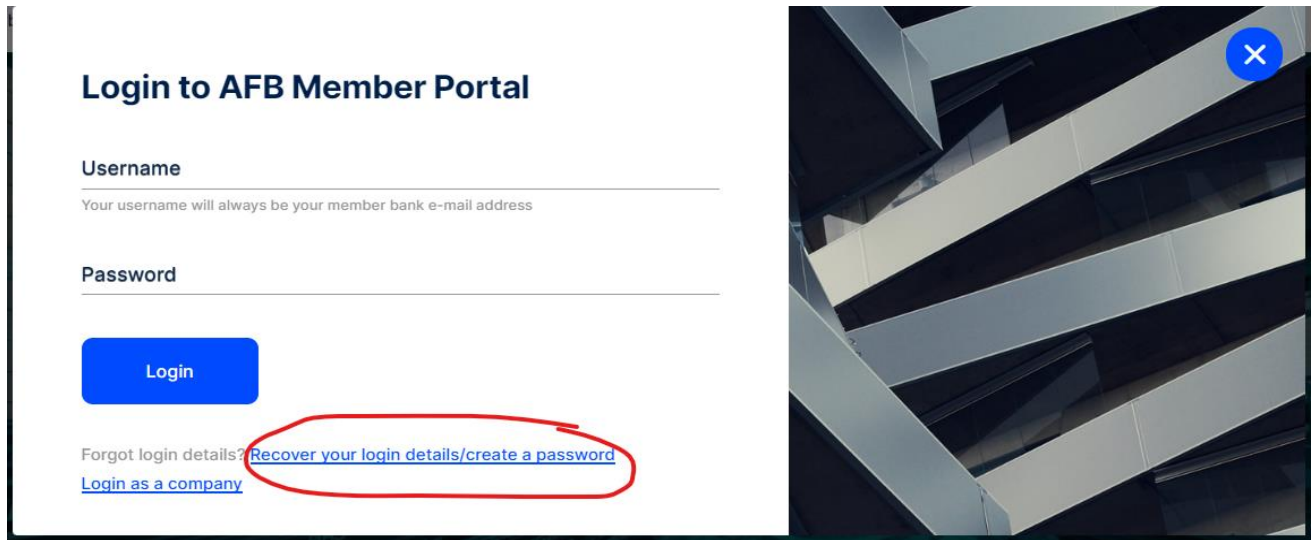
B. LOGGING INTO THE PORTAL FOR THE FIRST TIME (CONTACT RECORD ON CRM ALREADY EXISTS)

- Visit the AFB Website – www.foreignbanks.org.uk
- Click on the Member Log In icon (circled in red below)



- A log in pop up window will appear

- Your work email address is your Username
- Click on Recover your login details/create a password (circled in red below)



- Follow the instructions on the screen
- Emails with the link to reset your password may take a few minutes and may get caught in spam so please do check this.
- Any issues, email secretariat@foreignbanks.org.uk

C. LOGGING INTO THE PORTAL FOR THE FIRST TIME WHERE NO CURRENT CONTACT RECORD EXISTS

- Visit the AFB Website – www.foreignbanks.org.uk
- Click on the Register icon (circled in red below)



- Complete the Member Portal Registration Form
- Ensure you choose your correct bank from the dropdown list under Bank Name (start typing and options will appear)
- Your registration will be approved by the AFB and you will receive a welcome email once complete.

- You will then be able to log into the member resource area, book events and member portal.
- Any issues, email secretariat@foreignbanks.org.uk

FREQUENTLY ASKED QUESTIONS

MEMBER PORTAL

1. Can I change my email address once I'm registered?

- Go to the AFB website at [Home - AFB \(foreignbanks.org.uk\)](http://foreignbanks.org.uk)
- Log in to your account
- Go to 'Members Portal'
- Under 'My Profile' click on 'Change Email' below your email address – fill in your old email address and new email address and click 'Update'

Please note that this is the email address you need to use to login to your profile area. If you change it, you will receive an email with a link to validate your new account email. You will need to click on the secure link to complete the process before you can login again.

2. How do I set/manage my interests to ensure I receive relevant communications from AFB?

- Go to the AFB website at [Home - AFB \(foreignbanks.org.uk\)](http://foreignbanks.org.uk)
- Log in to your account
- Go to 'Members Portal'
- Under 'My Profile' click on 'Platform/Interest' – tick the boxes next to the interest fields to ensure you receive information on the correct topics.

3. How do I know if I am booked on an event?

- Go to the AFB website at [Home - AFB \(foreignbanks.org.uk\)](http://foreignbanks.org.uk)
- Log in to your account
- Go to 'Members Portal'
- Under 'My Profile' click on 'Events'. A full list of your event bookings can be found on this page.

4. If my bank is a member of AFB – do I still need to register separately?

- Yes – if you not registered with the AFB, you are still required to create a profile in order to be able to register yourself and/or your colleagues to AFB events and view documents on the resource library.

5. Which email address shall I use when I register on the AFB website?

- Your primary work email address – please note personal email addresses are not accepted. After registration – this email address becomes your username when you next log in.

6. How do I notify AFB of any changes to individual contact records?

- Please send us an email to secretariat@foreignbanks.org.uk with the details – if you or colleagues move to a new member bank – we can amend profiles and to keep their interest fields and past event or committee membership records.

7. How do I notify AFB of any changes in the member banks name or of an address change?

- Please send us an email to secretariat@foreignbanks.org.uk with the details and we will make the changes for you.

8. How do I subscribe/unsubscribe to the AFB newsletter?



- Our monthly newsletter, called the AFB Round up is sent out on the first Thursday of each month to all our registered members automatically. No separate registration is necessary if you wish to no longer receive the newsletter, you can unsubscribe by clicking on the 'Unsubscribe' link at the end of the email.

The monthly Round up can also be found on the AFB website in the News section [here](#)



TRAINING AND EVENTS

D. HOW TO BOOK A PLACE AT AFB EVENTS AND TRAINING PROGRAMMES

- Go to the AFB website at [Home - AFB \(foreignbanks.org.uk\)](https://foreignbanks.org.uk)
- Log in to your account, [see here](#)
- Go to 'Practice and Events' / 'Events and Training Calendar' menu point
- Visit the [Events and Training Calendar](#)
- Choose relevant event or training course
- Click on Book event button at the top of each page
- Follow booking instructions

Please enter the attendee details in the form and press the 'Save Attendee' button to register the attendee for this event. You can register multiple attendees for events. When the first attendee has been registered and saved, use the 'Add more attendees' button to register additional people. The 'Add more attendees' button will appear after you have saved each delegate.

In the form you have an option to select 'I am attending' to populate your information in the form. This box is ticked by default so if you are not attending and you wish to register a colleague, please untick the checkbox. To add a delegate from your organisation, complete the Last Name field and a list of relevant individuals should appear, you should choose the correct person and click Save Attendee.

To note, if the name does not appear, it's likely that this individual is not registered with the AFB and you should email secretariat@foreignbanks.org.uk

You can reserve a place for people within your organisation even if you haven't confirmed who should attend. Please choose the 'Name of attendee is not known yet' tickbox.

To note, you can only register individuals who are part of your organisation. You will only be able to see 'I am attending myself' option if aren't already registered as attendee on the event.

FREQUENTLY ASKED QUESTIONS

1. Where can I view the list of AFB Events and Training Courses available for booking?

- View the [AFB Events and Training Calendar](#)

2. How do I register a colleague onto an event?

- To add a delegate from your organisation, complete the Last Name field and a list of relevant individuals should appear, you should choose the correct person and click Save Attendee.
- The name of the colleague should come up in field as soon as you start to type, choose the individual and the details should be populated automatically.
- If no name is suggested, the individual is not yet registered in the AFB database/website. In this case the person can either be [registered on the website](#). Once the registration is confirmed and authorised by AFB staff the booking can be completed. Alternatively, please send an email to secretariat@foreignbanks.org.uk with a request for the person to be registered.

3. How do I know if my booking has been successful?

- A confirmation email is automatically generated and sent to the email address of the booker.

Booked events can also be checked on the Members Portal of the attendees under My Profile / Events.

Should you not receive a confirmation email or you unable to find a record on the member portal, please email secretariat@foreignbanks.org.uk to check.

4. How will receive event joining instructions and what should I do if I don't receive?

- Joining instructions are sent out twice before events; two working days before the event and the day before the event.
- If you don't receive joining instructions, please check you spam or junk folder. If you are still unable to locate, please email secretariat@foreignbanks.org.uk as soon as possible. The AFB does not take responsibility for the non-arrival of joining instructions.

5. I have booked a virtual event but I'm unable to access Zoom due to my firm's IT policy. What should I do?

- Please click on the registration link in the joining instructions and after registering – the automated response will contain both the Zoom link and the dial in options – you can simply dial in by phone. Alternatively, the Zoom link can be sent to a personal email address from where it can be accessed without any problems.

6. How do I access the event slide deck and recording after each event?

- The slide deck and recordings are shared with all registered attendees. For events with no additional attendance fee, the slide deck and recordings can be found either in the Resource Library or on the Past Events page. You will need to log in to view.

7. I can no longer find the event or training course on the AFB website that I'd like to book, what can I do?

- The event is now closed and no longer open for bookings.
- Should you wish to book a place, send an email to AFB at secretariat@foreignbanks.org.uk and we will try and accommodate your request if there are places.

8. I have added my name to the waiting list, what happens next?

- Once an event is fully booked, the AFB operates a waiting list for members who are interested in attending. If a place becomes available, the AFB team will contact you via email.

9. I am no longer able to attend an event or training course, what should I do?

- Please let us know as soon as possible by emailing secretariat@foreignbanks.org.uk. Please ensure you make a note of the [AFB Event Booking Terms and Conditions](#) regarding cancellations and refunds. To note, the AFB does accept substitutions should you been unable to attend, please ensure you provide details when you contact us.



RESOURCE LIBRARY

This Resource Library includes Expert Panel Output Papers, Briefing Papers, Surveys, Policy Consultation Responses, Submissions and other publications of interest to the AFB membership.

Webinar recordings are only accessible to members, but may be shared internally across your organisation. They should not be circulated to third parties. Please note the webinar recordings do not constitute legal, tax, accounting, investment or financial advice.

You will need to log in to the AFB Member Portal to view content.

You can access the Resource Library [here](#)

FREQUENTLY ASKED QUESTIONS

1. What's the best way for me to find a file?

- On the Resource Library homepage, you can choose one of the AFB Platforms, Policy & Regulatory Affairs or AFB Documentation. Each section provides an overview to help with your selection.
- You can also select by file type and date

constitute legal, tax, accounting, investment or financial advice.

Platforms

☰ Type ▾

📅 Date From ▾

📅 Date To ▾

