

Straight2Bank Web Document Manager

User Guide

28 Jan 2021
Version 1.0

1. Introduction

This guide provides a brief guide for Standard Chartered Bank's client to use the Document Manager product for communicating with the Operations Team in Pakistan e.g. sharing of Export document and other communication in place of using the email option.

1.1. What is Document Manager?

Document Manger helps you create and exchange trade documents electronically with your trading partners. Using Document Manger, you can prepare the complete set of trade documents and send them electronically over the internet to your trading partners.

Complete details of all the trade documents sent and received by you using Document Manger are saved and this information can be used later to track the documents.

1.2. How does Document Manager work?

With traditional printed documents, client fill-in a paper form with trade data and then send it via post, email or fax to your trading partner.

With Document Manager, client fill-in electronic documents with your trade data and then send it securely over the Internet to your trading partner. Trade documents are delivered instantly and an electronic copy of the same is stored in the system.

1.3. What is the benefit for me?

With electronic documents you can save precious time because data is automatically filled-in to the document fields. This also minimizes typing errors. Documents are delivered instantly to the recipients thereby accelerating overall trade cycle. Tracking your trade activities becomes much easier because all related documents can be grouped together.

1.4. How do I access this service?

Your company needs to subscribe to Document Manager to use this service.

1.5. Topics covered

The following features are covered in this section:

List of Standard Trade Documents

- Creation of Document
- Manage/Send Documents
- Track Documents

1.6. List of Standard Trade Documents

Document Manger lets you create these Trade Documents are many but for this product you are requested to use

- Generic Memorandum

2. Creation of Document

2.1 When do I use this?

Use Document Manger, to create and send your trade data electronically. If required you can attach files to any trade document e.g. Request for Quote, Quotation, Purchase Order and Order Confirmation.

Note: You can also create a new document from a template (e.g. Creating and Managing Templates) or with the copying function (e.g. Copy a Document).

3. Complete the document fields with relevant information.

Trade Finance > Document Manager > Create Documents > Memorandum

Memorandum * Indicates Mandatory Field

Document No. * : Owning Department * :

Recipients * :

Version : 1 Label :

Status : DRAFT Created On : 07/01/2020 15:32:33

Logo : [View Document Logo](#)

Main Information Attachments

Memo Details

Document Date * :

Reference :

From :

To :

Subject :

Content :

Date Entry Format : DD/MM/YYYY

- i Enter **Document Number***.
- ii To enter **Recipients*** of the trade document, click on the symbol to display the list of recipients. Select the recipients of the document. Click **OK**.

Recipients

Name :

Id :

Results :

90 - PDFDELIVERY	<input type="button" value="▶"/> <input type="button" value="◀"/>	Selected items :
703139 - SUPPLIER VPP CO LTD		701272 - SELLER ONE LTD
100418477EI - Stand Alone		
100418477E - Stand Alone		
100418477IF - Stand Alone		
100418477I - Stand Alone		

- i Under Memo Details select the **Document Date:**
- ii Update the **Subject: & Content:**

Memorandum * Indicates Mandatory Field

Document No. * : Owing Department * :

Recipients * :

Version : 1 Label :

Status : DRAFT Created On : 07/01/2020 15:32:33

Logo : [View Document Logo](#)

Main Information Attachments

Memo Details

Document Date * :

Reference :

From :

To :

Subject :

Content :

Date Entry Format : DD/MM/YYYY

1. Click on attachment tab and Choose File need to be attached. Multiple per File can be Choose by this manner. Once all the Files been selected click **Add Attachments**.

Trade Finance

Memorandum * Indicates Mandatory Field

Document No. * : Owing Department * :

Recipients * :

Version : 1 Label :

Status : [View Document Logo](#) Created On :

Logo :

Main Information **Attachments**

Attach any supporting documents with this Finance application here.

Attachment : No file chosen

Attachment : No file chosen

Attachment : No file chosen

Note: Size of all attached files should not exceed 10 MB.

No Attachments

Date Entry Format : DD/MM/YYYY

2. Verify document attached correctly and then click send tab to release document to Cash/Trade ops

Trade Finance > Document Manager > Create Documents > Memorandum

Memorandum * Indicates Mandatory Field

Document No. * : Owning Department * :

Recipients * :

Version : 1 Label :

Status : Created On :

Logo :

Attachments

Attach any supporting documents with this Finance application here.

Attachment : No file chosen

Attachment : No file chosen

Attachment : No file chosen

Note: Size of all attached files should not exceed 10 MB.

<input type="checkbox"/>	Straight2Bank Web Document Manager.docx	07/01/2020 15:47:58
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Date Entry Format : DD/MM/YYYY

After all relevant information has been filled.

- i. Select **Save** to store the electronic trade document created.
- ii. Select **Send** to send the electronic trade document created to Pakistan Operation team.
- iii. Select **Save as Template** to store the document as a template.

3. Manage/Send Documents

If you manager to update all information correctly and if you want to release the document to Pakistan Operations Team. Select **Send** option.

Trade Finance

Trade Finance > Document Manager > Create Documents > Document Confirmation

Document Response

Document Trade Document Number submitted for send

System will show message: Document successfully submitted or send

4. Track Documents

4.1 When do I use this?

When you want to change the information in a document that has already been sent, use this function to track the document and make the amendment in needed.

Note: Only documents that have been sent can be amended (edited).

4.2 Step by Step Navigation

1. Select **Transactions > Document Manager> Track Documents** under **Trade Finance**.

Edit Hint Q&A | Change Password | Contact Us | Logout

Cash Management	Trade Finance	Securities Services	Global Market	
Reports Transactions	Reports Transactions	Reports Transactions	Reports Transactions	Info & Services

Welcome To Standard Chartered

Straight2Bank Message Center

Straight2Bank Messages inform you of messages that have occurred.

Document Manager	>	Home
Trade Static Reference	>	Create Documents
Authorise	>	Manage Documents
Trade Banking	>	Group Documents
		Track Documents

Transaction Statistics

Show : Payment

2. This window will show all the document created or received by your company electronically.

Trade Finance

Trade Finance > Document Manager > Manage Documents

Manage Documents

Manage your documents here. Use the "View" and "Action Filter" dropdowns to filter the documents in your view. Use the "Style" and "Display" dropdowns to control how you view your documents. [Click here to learn how to view and edit documents.](#)

View : Action Filter : Style : Display : Documents Tools :

⚡ This view shows the list of ALL documents.

	Document No.	Document Version	Type	Owning Dept Name	Company Label	Sender Name	Created Date
<input type="checkbox"/>	Trade Document Number	1	GEN_MEMO	Default		UAE BUYER SELLER LTD	07/01/2020 15:53:38
<input type="checkbox"/>	TEST123	1	GEN_MEMO	Default		UAE BUYER SELLER LTD	07/01/2020 12:17:39
<input type="checkbox"/>	DUCABTEST123	1	GEN_MEMO	Default		UAE BUYER SELLER LTD	07/01/2020 10:05:38
<input type="checkbox"/>	DUCAB123456789	2	GEN_MEMO	Default		UAE BUYER SELLER LTD	06/01/2020 15:53:13
<input type="checkbox"/>	DUCAB123456	1	GEN_MEMO	Default		UAE BUYER SELLER LTD	06/01/2020 15:36:53
<input type="checkbox"/>	IFNB 200105-2	1	GEN_INV	Default		UAE BUYER SELLER LTD	02/01/2020 20:00:00
<input type="checkbox"/>	IFNB 200105-1	1	GEN_INV	Default		UAE BUYER SELLER LTD	01/01/2020 20:00:00
<input type="checkbox"/>	IFNB 1210-1	2	GEN_INV	Default		UAE BUYER SELLER LTD	09/12/2019 20:00:00
<input type="checkbox"/>	IFNB 1210-2	2	GEN_INV	Default		UAE BUYER SELLER LTD	08/12/2019 20:00:00
<input type="checkbox"/>	NMC TEST 1	1	GEN_INV	Default		UAE BUYER SELLER LTD	29/10/2019 20:00:00

Show : All | Selected (0) Record 1 to 10

More Actions...

3. Click on Document No. to check the status e.g. SENT

Trade Finance

Trade Finance > Document Manager > Create Documents > Memorandum

Memorandum * Indicates Mandatory Field

Document No. :	Trade Document Number	Owning Department :	Default
Recipients :	701272-SELLER ONE LTD		
Version :	1	Label :	
Status :	SENT	Created On :	07/01/2020 15:53:38
Logo :	View Document Logo		

Main Information | Attachments

Memo Details

Document Date :	07/01/2020
Reference :	
From :	
To :	
Subject :	Test Export Document
Content :	Hi team, Please check attached document for my Company XYZ Trade Document Number . Thanks Afsar Khalil

More Actions...

4. Pakistan Operations Team will get an email notification of new document in their queue once these steps are completed.

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