New Request – Chaser/Tracer

Tomorrow Begins Today

Ulster Bank

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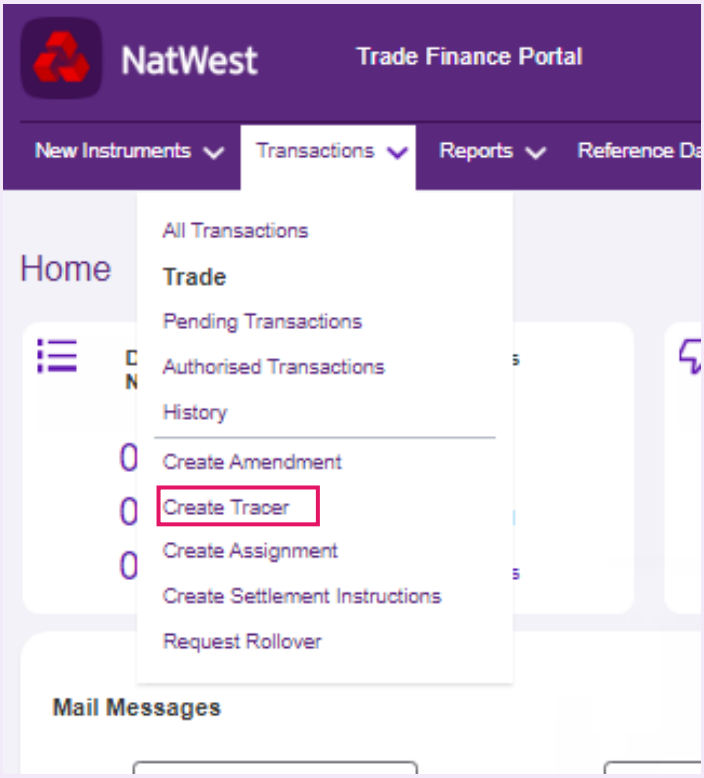
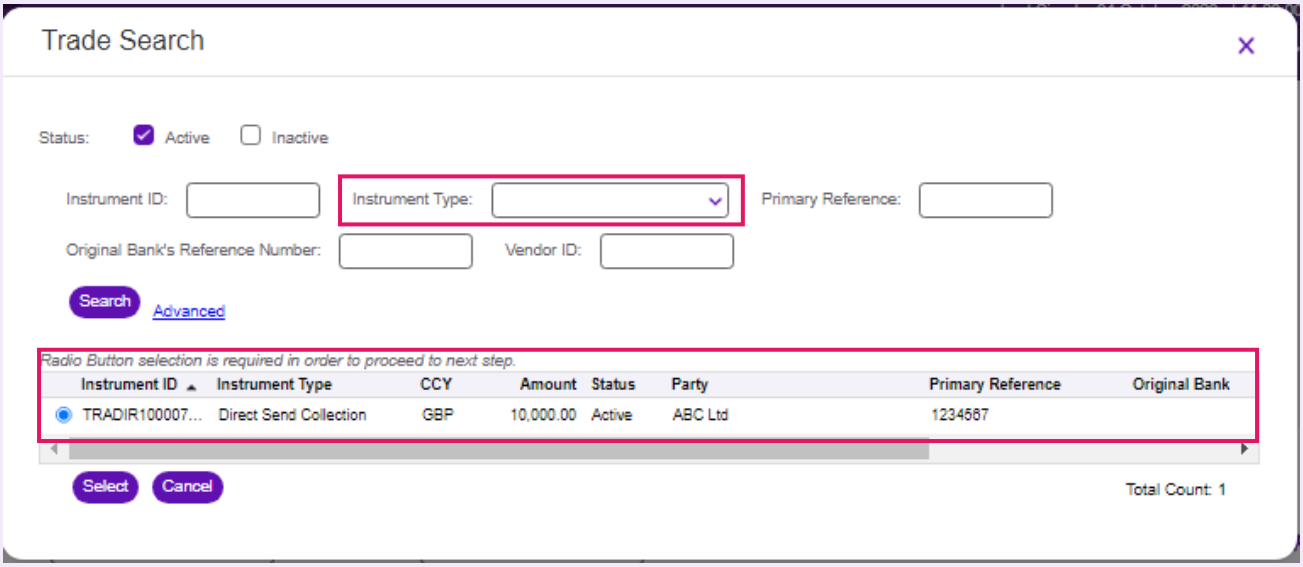
Introduction

Log into the Trade Finance Portal.

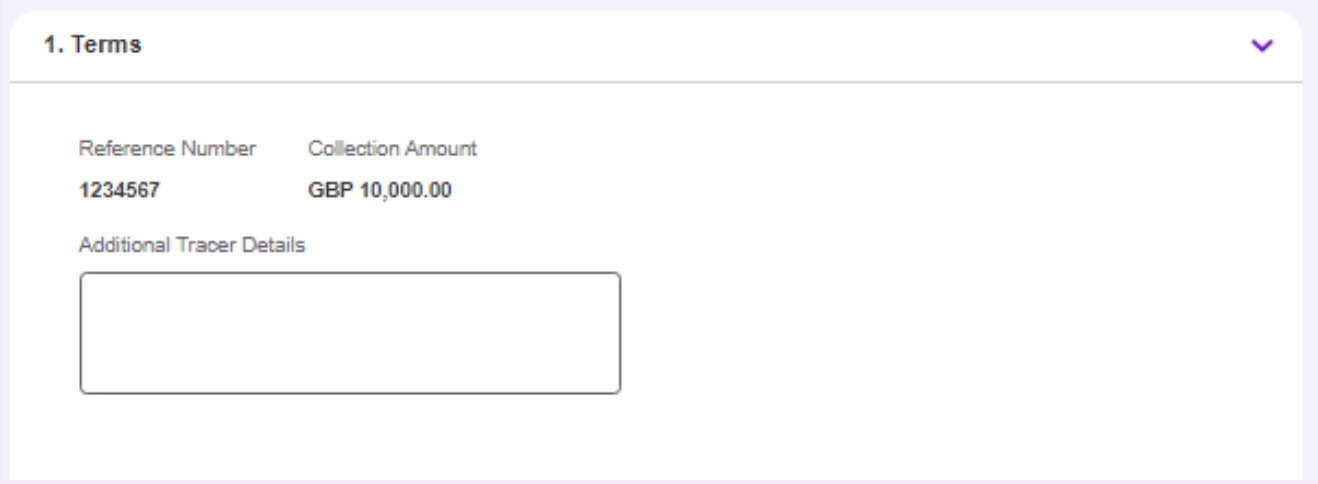
To initiate a new Tracer for a transaction, from the home screen select ‘Transactions’ then ‘Create Tracer’:



Select the “Instrument Type”, then select the instrument from the list:

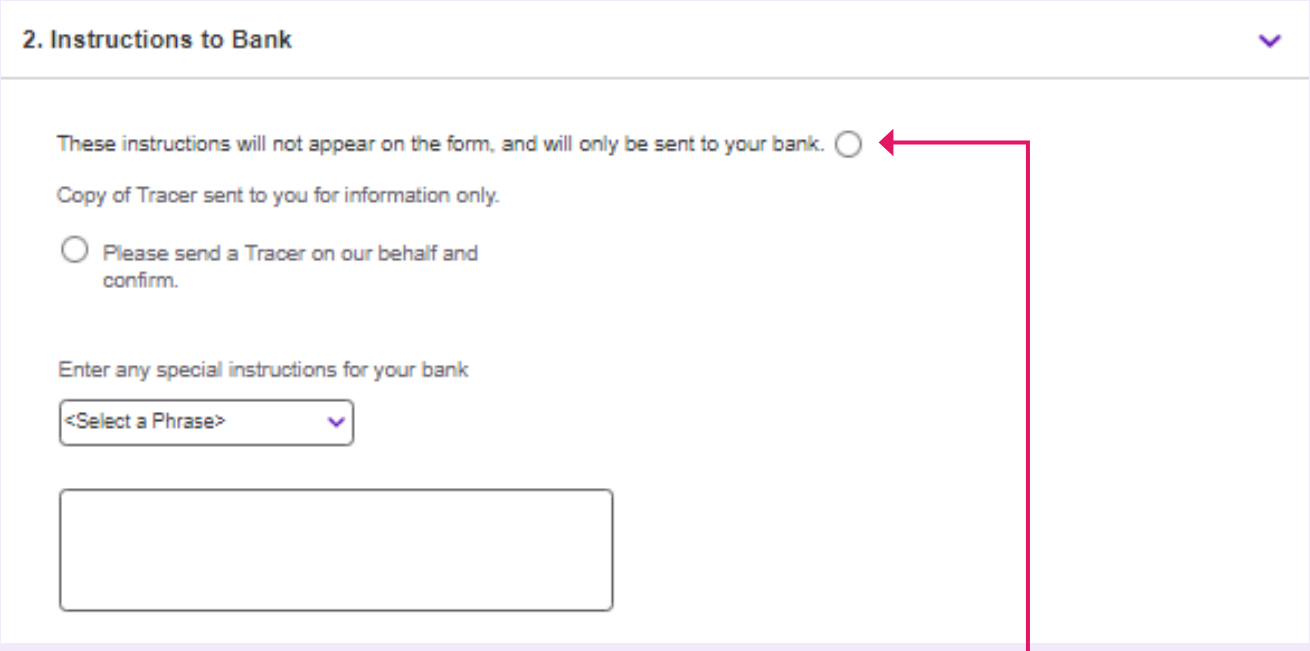


Terms



Complete the field with what tracer is required, this wording will be sent to the correspondent bank.

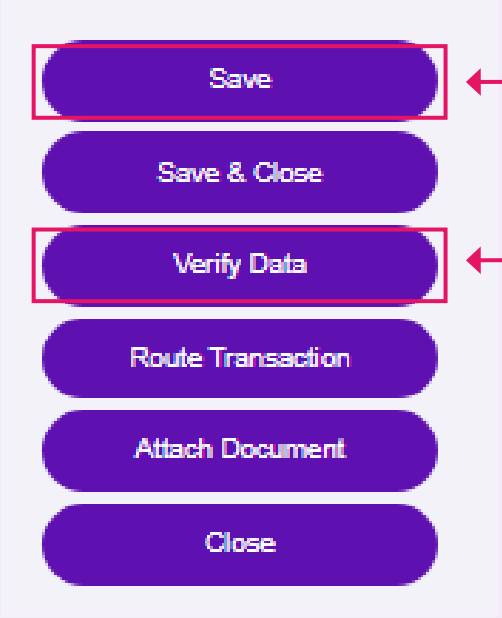
Instructions to Bank



Indicates that the tracer copy is being sent for information purposes only, with no action required from the bank.

Authorisation

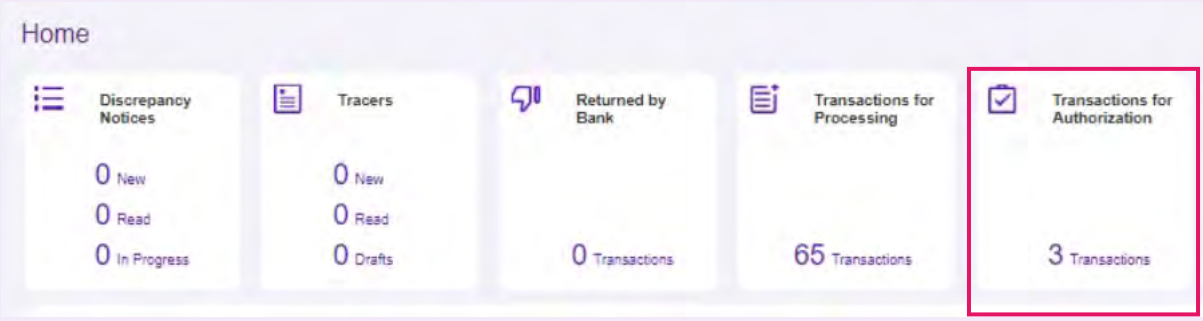
To send the request to a Checker:



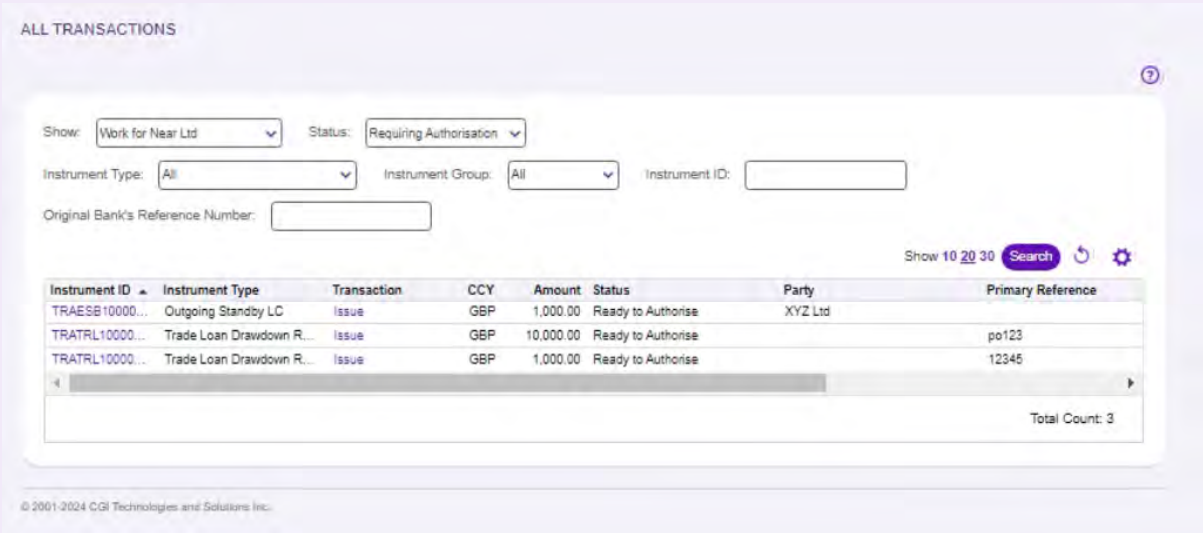
1. Select Save in the first instance so that the changes you wish to be made can be seen.
2. Select Verify Data to move into the Authorise queue.

Checker:

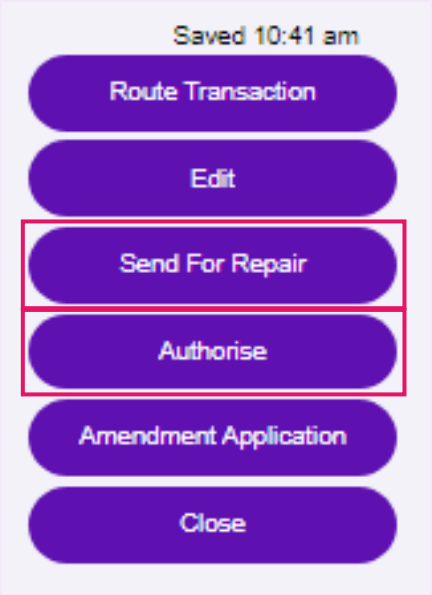
Then the Authoriser will need to go into the portal and select the below queue:



This will then take you to the below screen, where you will need to select the correct transaction:



To open the transaction for approval, click on “Issue” next to the reference number.



1. If the request needs to be sent back to the maker for an update select this.
2. If you are happy with the request then select authorise and it will be sent to the bank for processing.