## **USER MANUAL FOR THE REPORT SOFTWARE**

1) Please click on this hyperlink to be redirected to the Login page. Login (solidarity.in)



3) The User Name to login & access the reports is the Client code that appears on your monthly/quarterly/yearly statement . For e.g.: The client code for Mr Manish Gupta's account held with us is MGUPTAPRU01



Account: 100053 - MANISH GUPTA Inception Date: 04/09/2017



## 4) Click on Forgot Password



- 5) The one time password (OTP) to login will go to the registered email address (i.e. the email address where you have received this notification). Once you enter the OTP, you will have to reset the password. The password should have at least 1 upper case, 1 lower case, 1 special character & should be a minimum 8 characters. In case you have forgotten your password, you may simply enter the Username & click on Forgot password to reset your password.
- 6) Please note that the system is 2FA enabled, this means you will need your password & an OTP each time you log into the system to view/download your reports. The OTP will be sent to your registered email address.



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|----------------------------------|---------------------|
| tered Email io<br>Ilease click C | d. If you<br>Cancel |
|                                  |                     |
| Resend                           | OTP in 4            |
| in                               |                     |
|                                  | Resend              |

7) Once you have logged into the software, you will be able to access various reports through the "Reports" tab. All your reporting requirements are available through this portal & available for download in various formats.

|              | SOLIDARITY<br>INVESTMENT MANAGERS |                    |                         |   |  |
|--------------|-----------------------------------|--------------------|-------------------------|---|--|
|              |                                   |                    |                         |   |  |
| Dashboard    | Repo                              |                    |                         |   |  |
|              |                                   |                    |                         |   |  |
| Portfolio    | Reports                           | Report Executions  |                         |   |  |
| .11          |                                   |                    |                         |   |  |
| Performance  |                                   | Report             | Portfolio Fact Sheet    | k |  |
| Allocations  |                                   | As on Date         | 21/10/2022              |   |  |
| Transactions |                                   | Scope              | Owner   MANISH GUPTA  * |   |  |
| Reports      |                                   | Expenses Selection | After expenses          | ~ |  |

8) The data is available on the portal from the inception of your account with us & is updated on a daily basis by 12pm (with a 24-hour lag).

