Corporate Services Providers Dashboard

User guide for the DIFC Portal

A single dashboard that gives you visibility of your client accounts, key information, pending actions and upcoming filing obligations.

Who it is for	Corporate Services Providers registered in DIFC
Applies to	CSP Portal users

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About this guide

This guide explains how to use the Corporate Services Providers (CSP) dashboard on the DIFC Portal. It is written for the people who use the portal on behalf of client entities: CSP super users and portal users.

Each section describes what a part of the dashboard does, what you will see on screen and what you can do next. Screen images are included throughout so that you can match the instructions to what is in front of you.

The portal is updated from time to time. The screens you see may therefore differ slightly from the images in this guide.

Terms used in this guide

The following terms are used throughout this guide.

Term	What it means
CSP Super user	A CSP portal user who can see every entity that has appointed the firm as CSP or registered agent, and who can manage access for other users.
CSP Portal user	A CSP portal user who has been given access to one or more specific accounts.
Managed account	A registered entity that has appointed your firm as CSP or registered agent, or that has granted you portal access.

Overview of the dashboard

The CSP dashboard supports you with the day-to-day activity on the accounts you manage and the filings you need to submit on the portal. It brings your client entities, wallet balance, notices, deadlines and pending actions together on a single screen, so that you can see what needs attention without searching through separate modules.

The dashboard has seven main features. The numbers in the list below match the numbers on the screen image that follows.

1. Register a new entity in DIFC or apply for a corporate action or filing.
2. Summary of key information for the accounts you manage.
3. The main navigation menu

4. Stakeholder data alerts.
5. The compliance calendar.
6. A consolidated view of all requests and pending actions.
7. Logged in Portal user.

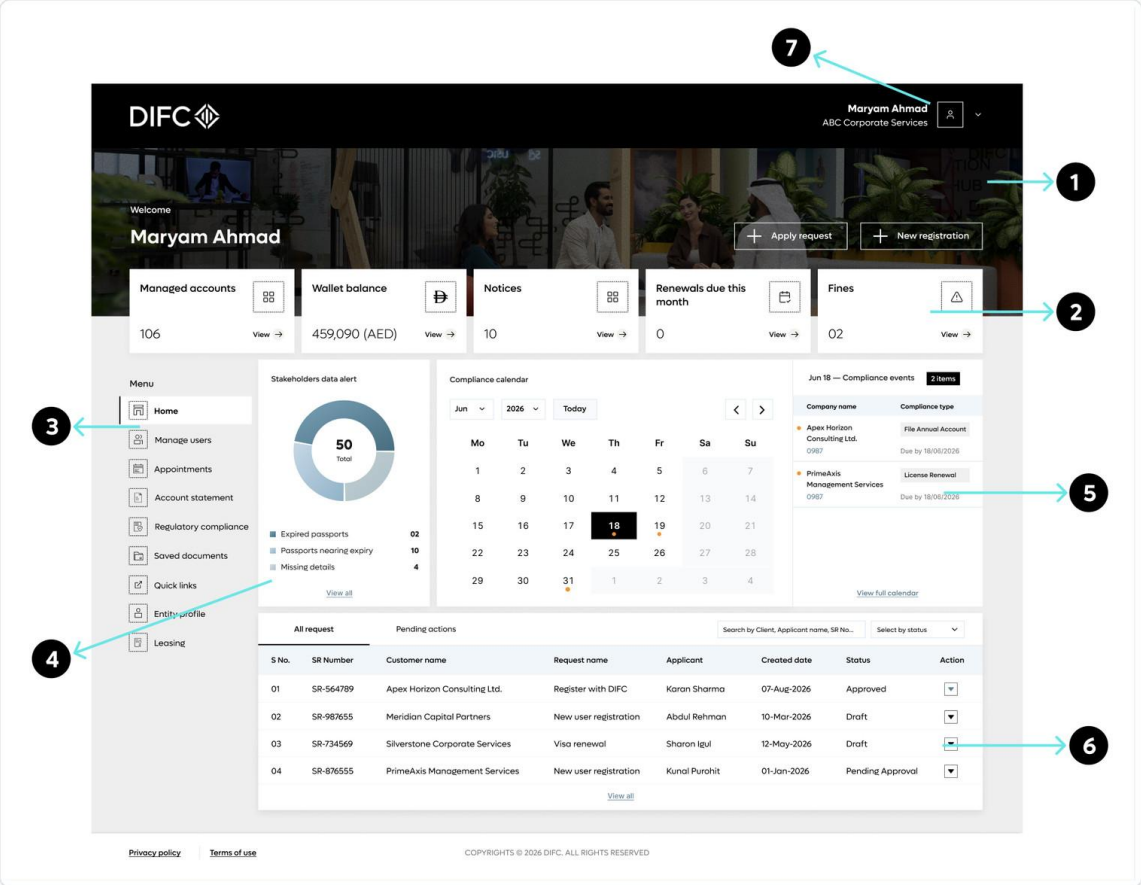

Figure 1: The CSP dashboard, with the seven main features numbered.

1. Registering an entity and applying for a request

You can set up a new entity through "New registration" or submit a corporate action or a filing for any entity you manage through "Apply request".

Register a new entity or trust

Select New registration to begin. Choose Entity or Trust, enter the proposed entity name, select the proposed entity type, then select Continue.

If you choose Entity, the portal creates a Register with DIFC application. If you choose Trust, the portal creates a Register a Trust application.

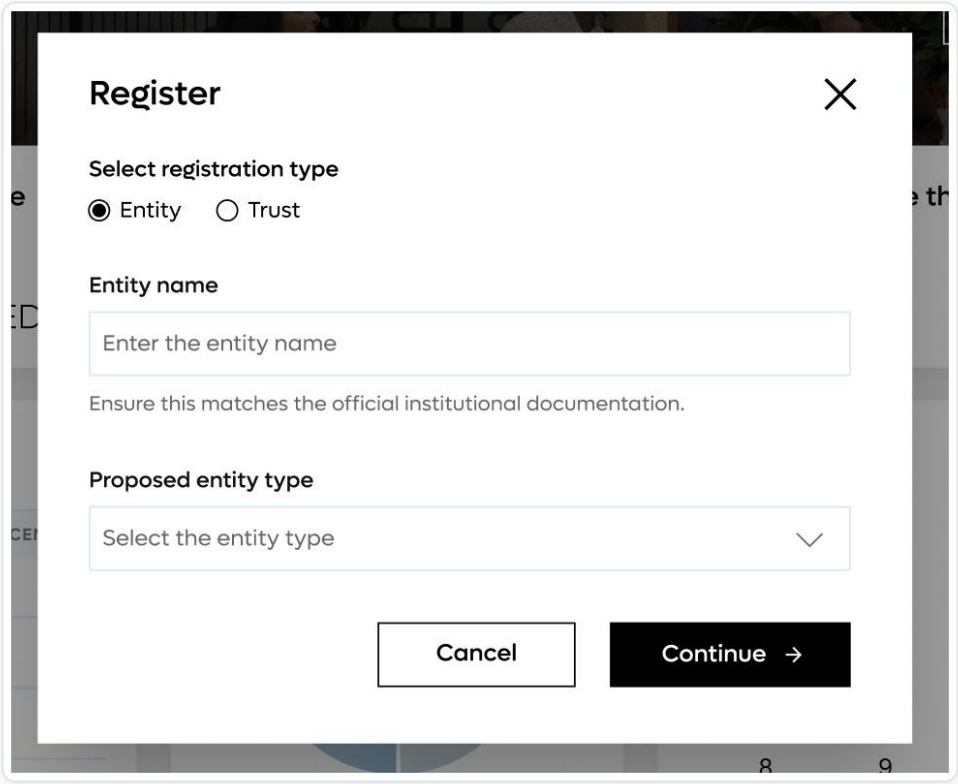

Figure 2: Starting a new registration for an entity or a trust.

Apply for a corporate action or filing

Select Apply request. The portal then asks you to choose the entity you are applying for.

The list only shows entities that have appointed you as their CSP or registered agent, or that have granted you portal access. If an entity you expect to manage is missing, ask your CSP super user to check the access you have been given. If you are a CSP super user and you cannot view the entity, request the entity to appoint your firm as CSP or registered agent.

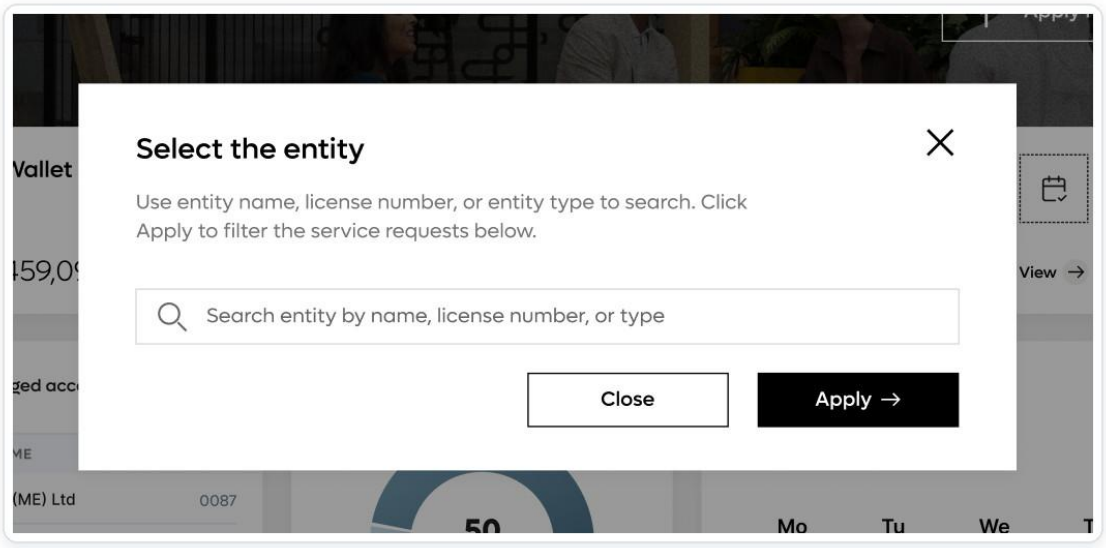

Figure 3: Selecting the entity you are applying for.

Once you have selected the entity, choose the corporate action or filing you need. Requests are grouped by category so that you can find the right one quickly.

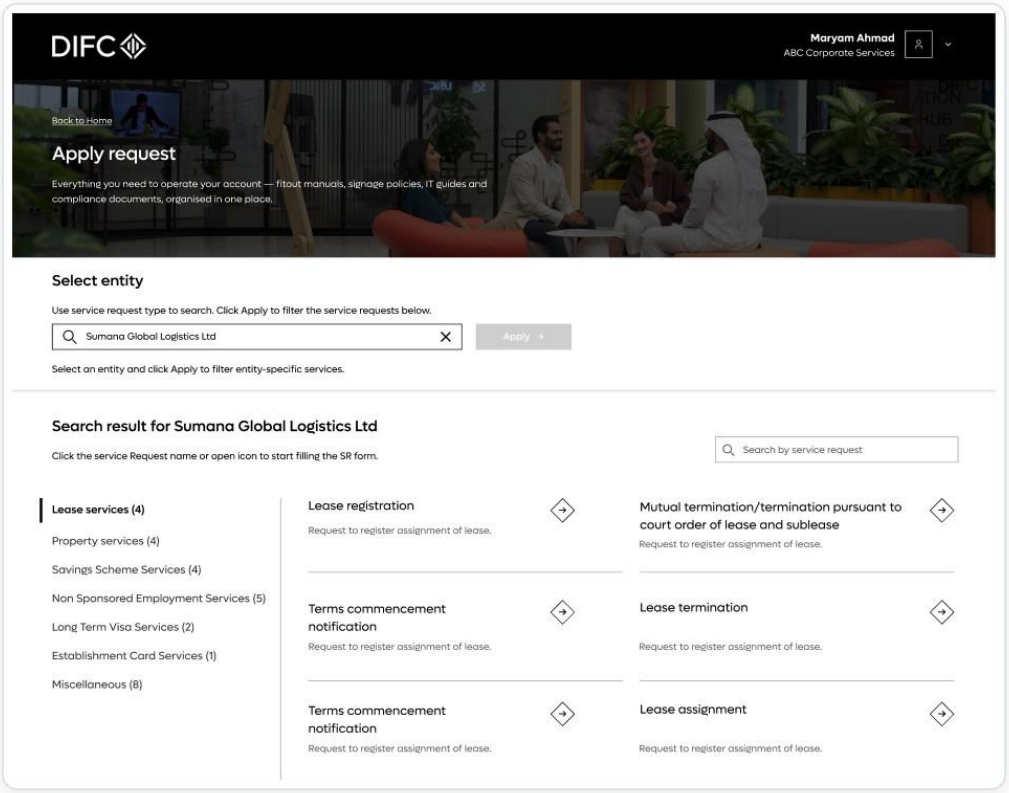

Figure 4: Choosing a corporate action or a filing

2. Summary of key information for the account you manage

The summary cards give you an at-a-glance view of key account information and activity, so that you can identify what needs action and go straight to the detail. Each card shows a count or a value, with a View link to the full list.

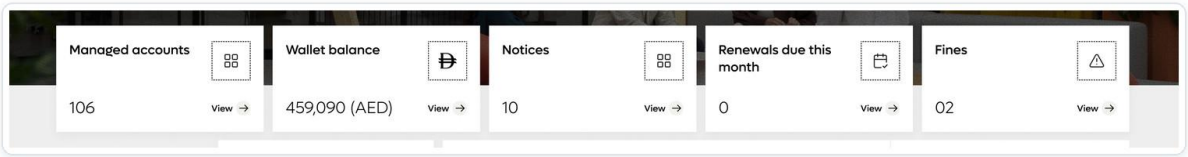

Figure 5: The summary cards at the top of the dashboard.

Managed accounts

This section lists the registered entities you manage. What you see depends on your level of access.

- If you are a super user for the CSP account, you see every entity that has appointed your firm as CSP or registered agent, together with every entity that has added you as a portal user.
- If you are not a super user, you only see the accounts you have been added to as a portal user.

Select View on the Managed accounts card to open the full list. It shows the entity name, registration number, registration date, license renewal date and status. Licenses that are overdue, or due to expire within one month, are highlighted in red so that you can find them quickly.

Wallet balance

This section shows the funds available in your CSP account. Select View to top up the balance, or to see the payments you have made through the CSP account.

You can pay directly from the CSP wallet for any registration or corporate action you submit on behalf of an account you manage.

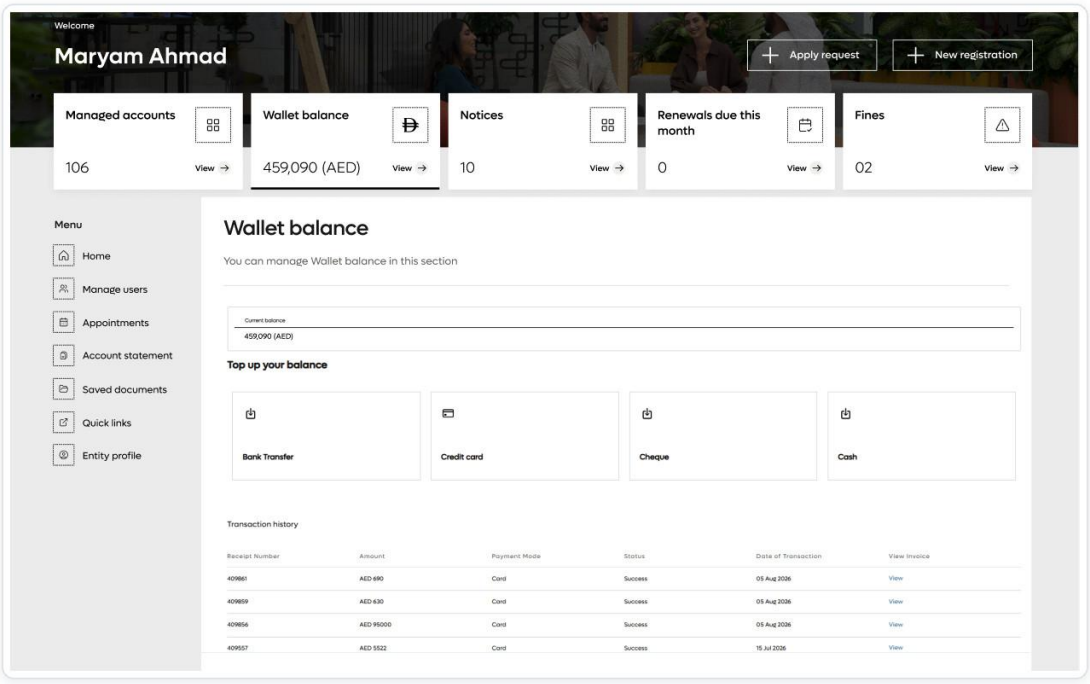

Figure 6: The wallet balance and the payments made through the CSP account.

Notices

This section shows how many notices need attention across all the entities you manage. These include, but are not limited to, preliminary notices of fines. Select View to open the full list.

The list gives the key details for each notice, including the reason, the date it was issued and the deadline to object, so that you can review it and act in time.

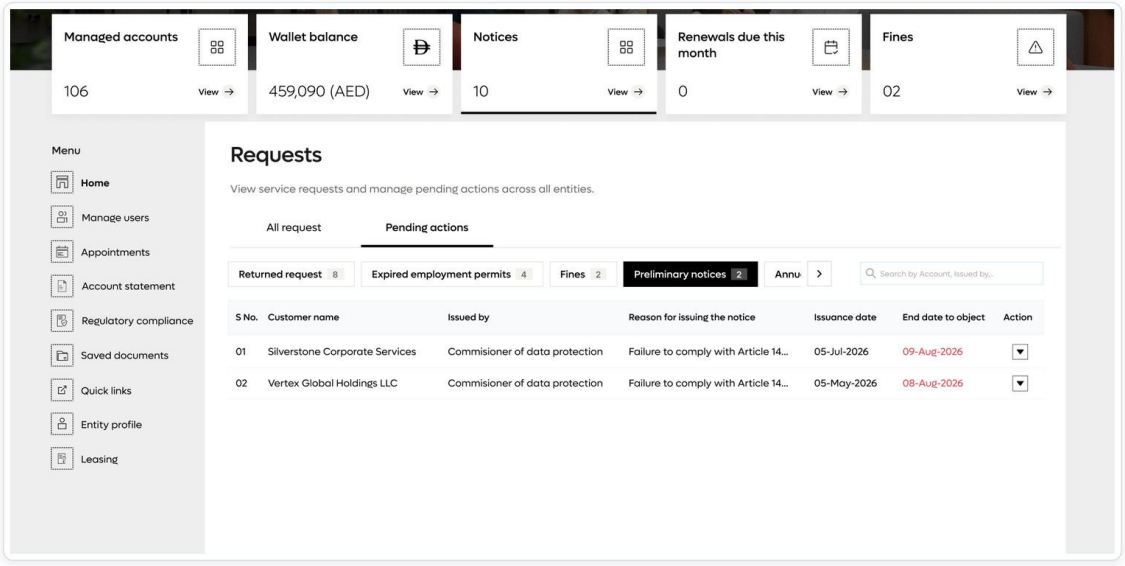

Figure 7: The list of notices awaiting action.

Renewals due this month

This section shows how many licenses are due for renewal in the current calendar month. Select View to open the full list.

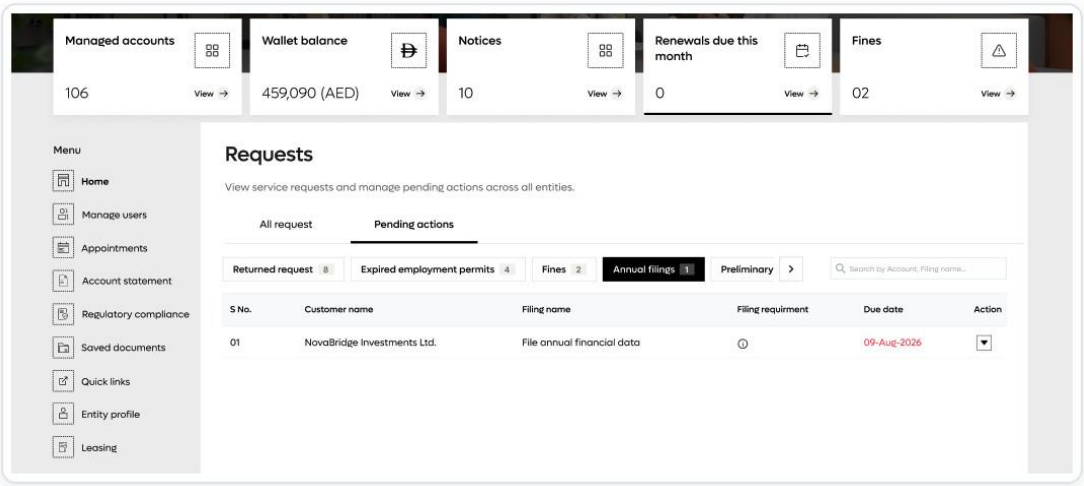

Figure 8: Licenses due for renewal in the current month.

Fines

This section shows how many fines have been issued to the entities you manage. Select View to open the full list.

The list gives the key details for each fine, including the issuer, the reason, the date it was issued, the payment deadline and the amount.

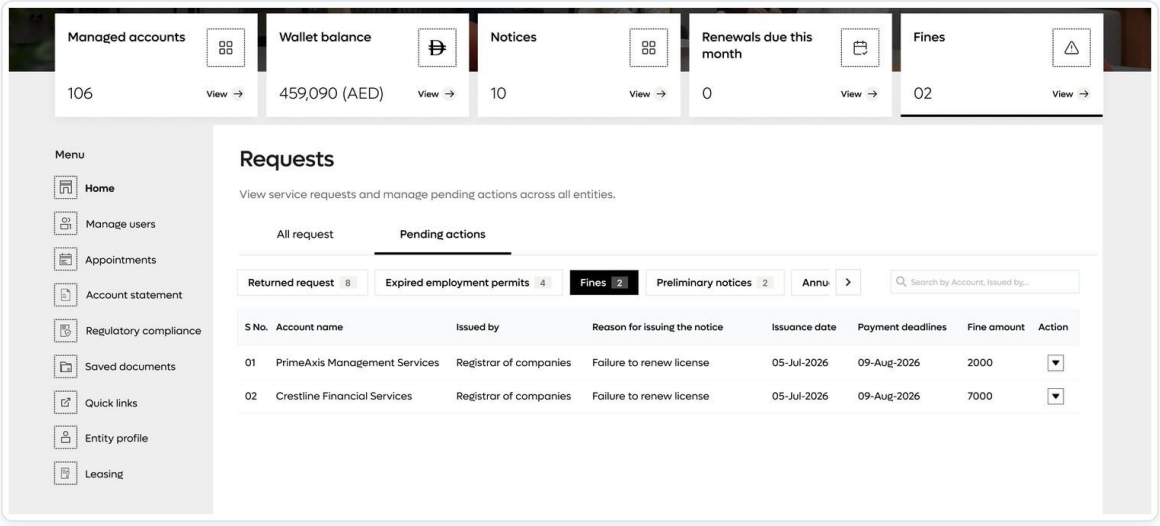

Figure 9: The list of fines issued to managed entities.

3. Using the navigation menu

The navigation menu on the left of the screen is available throughout the portal and takes you directly to the main modules. The module you are working in is highlighted, so that you always know where you are. Select any item in the menu to open it.

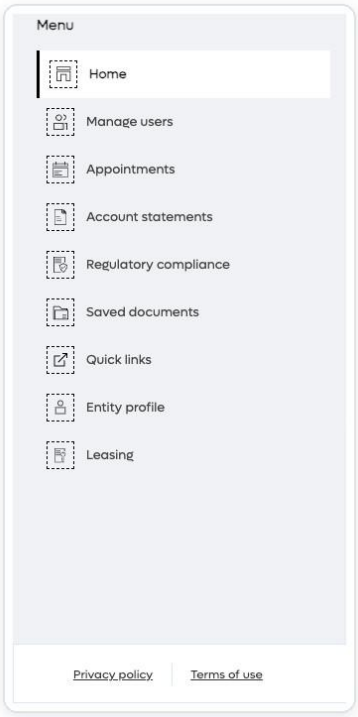

Figure 10: The navigation menu.

Home

The Home screen takes you the main CSP dashboard where you see a summary of key alerts and information for the entities you manage.

Manage users

This section is available to CSP super users only. It allows a super user to manage access for other users in the firm across their registered client entities.

As a super user you can:

- add a new portal user and give them access to the client entities they need. This step does not require additional approval from the client entities.
- manage existing users and the entities they can access
- update user details and access permissions as required

You can only assign access to entities that have appointed your firm through the portal as their CSP or registered agent.

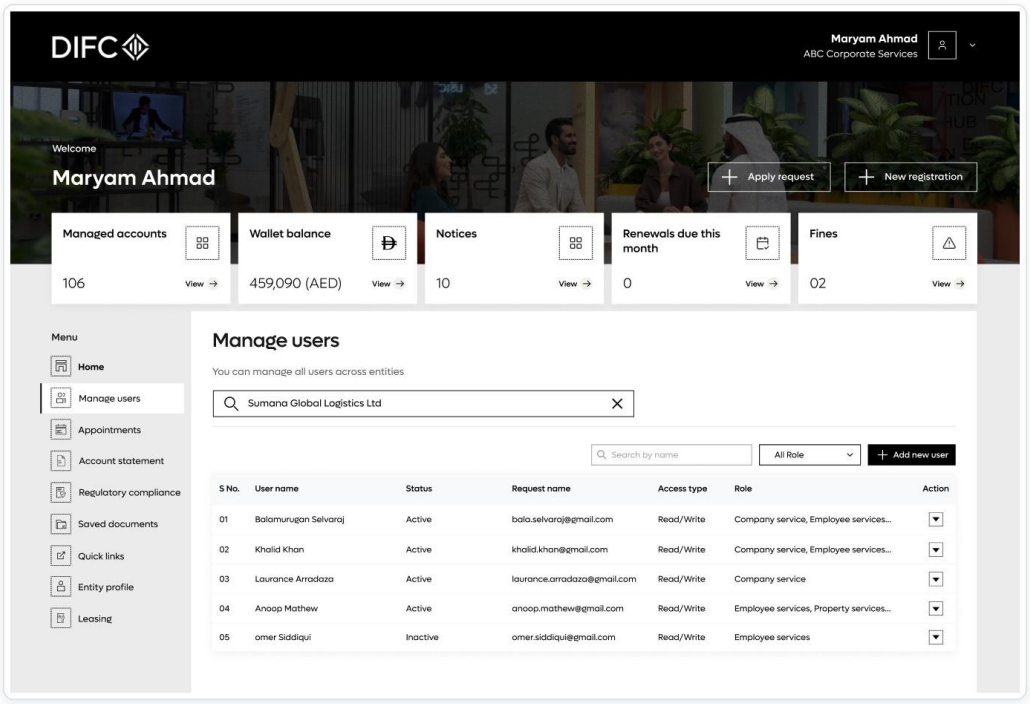

Figure 11: Managing portal users and the entities they can access.

Appointments

Use Appointments to book a meeting with Company Services, Government Services or Property Services, and then choose a date and time that suits you.

If you have Employee Services access, you can also reschedule medical appointments and Emirates ID biometrics appointments. Select the entity from the lookup, then reschedule any appointments it has.

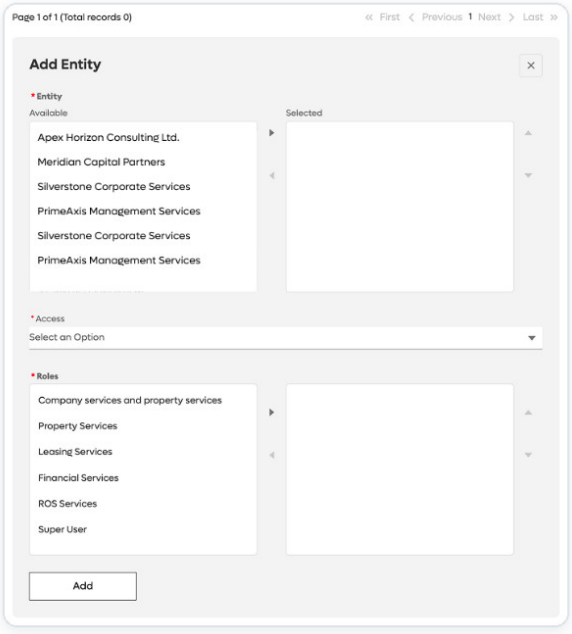

Figure 12: Booking and rescheduling appointments.

Account statement

This section lets you generate a statement for a chosen period, either for your CSP entity or for any account you manage. Select the entity, enter the From and to dates, then select View statement.

You can download the statement as an Excel or a PDF file. Statements cover a maximum period of one year and do not include transactions made on the current day.

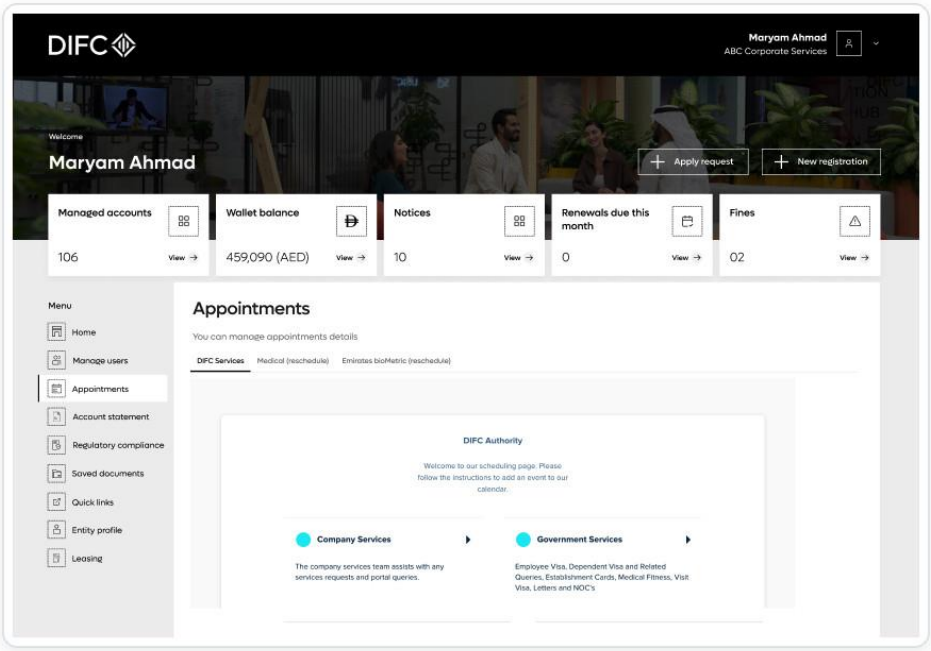

Figure 13: Selecting an entity and a date range for a statement.

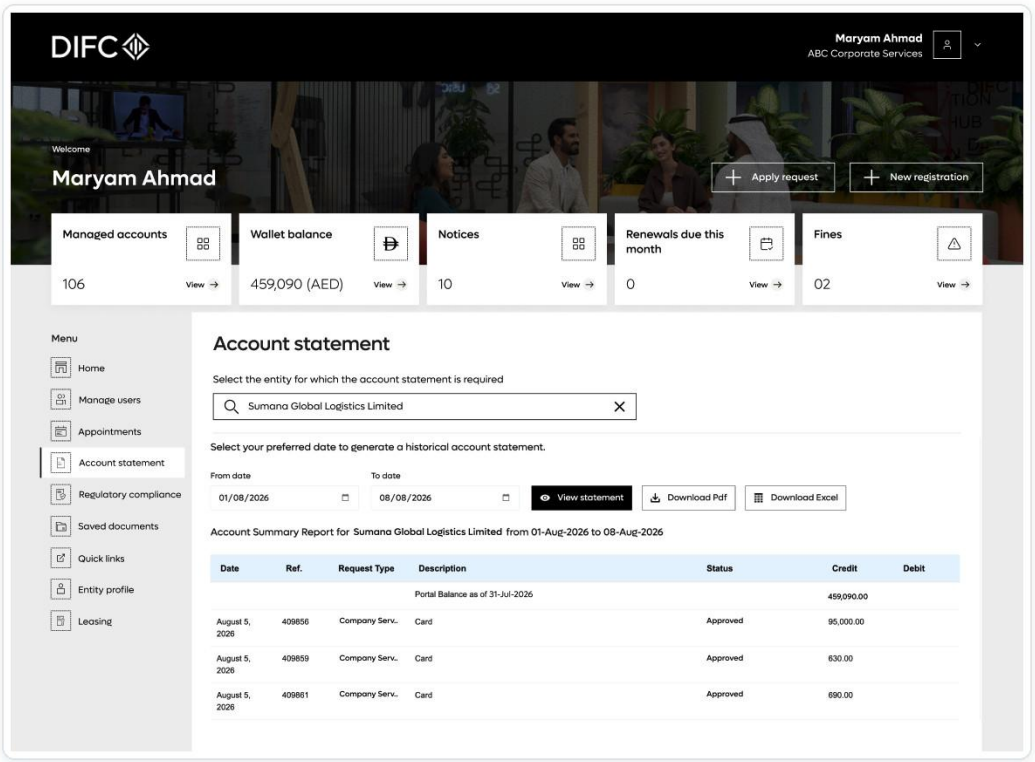

Figure 14: The statement produced for the selected period.

Regulatory compliance

This section lists the assessments, forms and templates that support you with your regulatory compliance requirements.

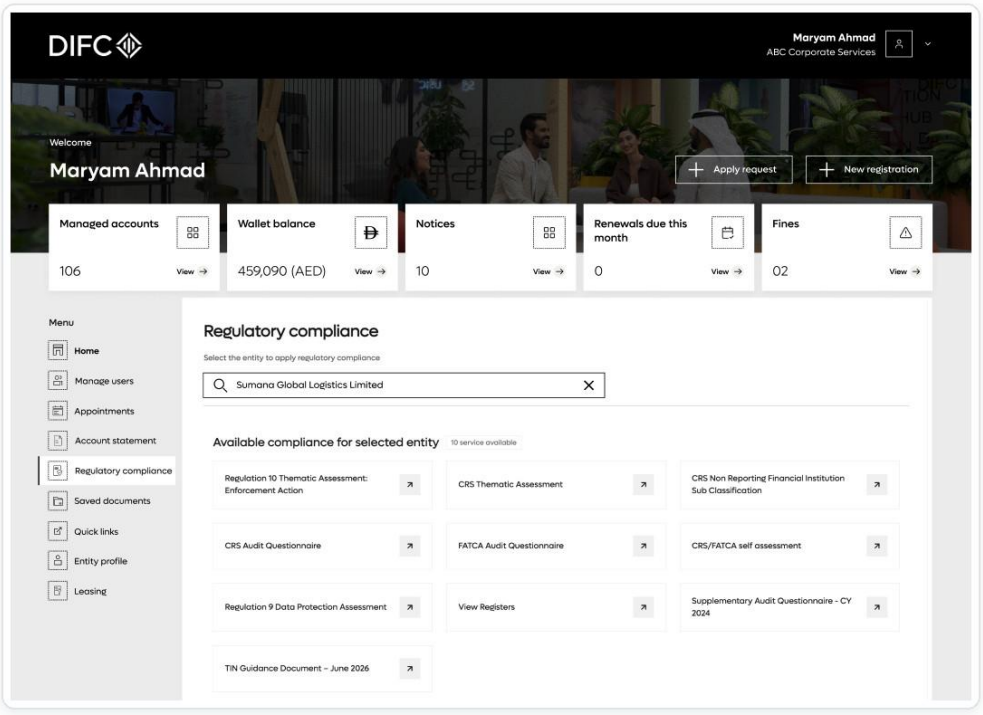

Figure 15: Regulatory compliance assessments, forms and templates.

Saved documents

This section stores the registration documents for the entity you select. Use the entity selector to switch between document sets and select the eye icon on a document to open it.

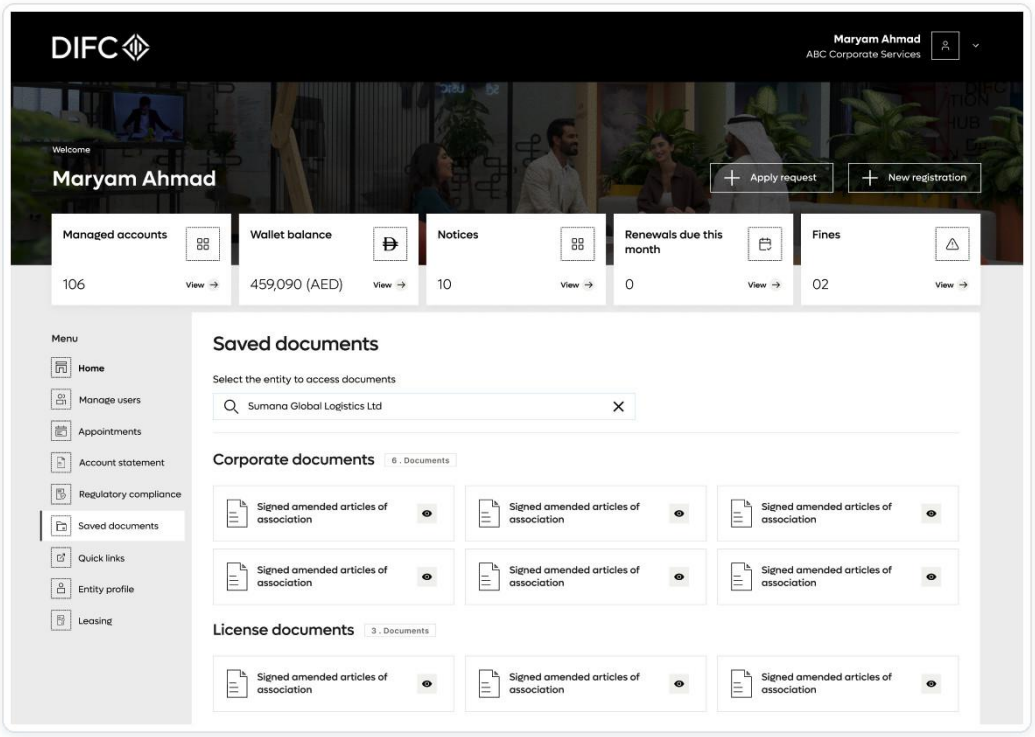

Figure 16: Saved registration documents for the selected entity.

Quick links

This section is a categorised library of guides and reference articles. Use the category filters and the search box to find what you need. Each card takes you directly to the article.

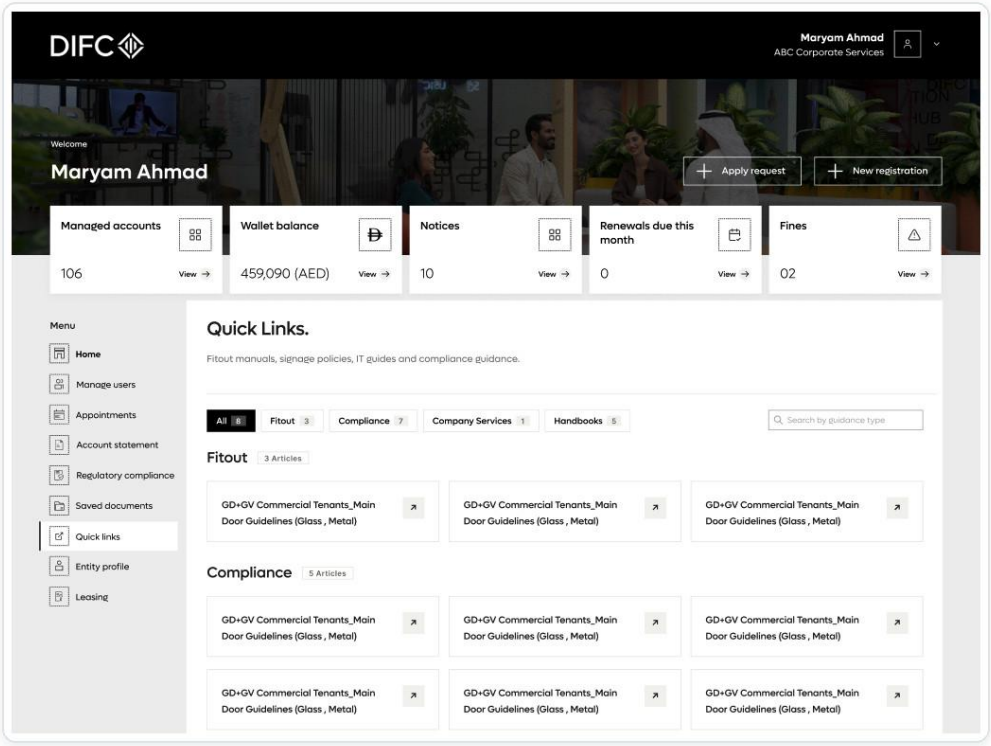

Figure 17: The quick links library.

Entity profile

This section shows the detailed information held for the entity you select.

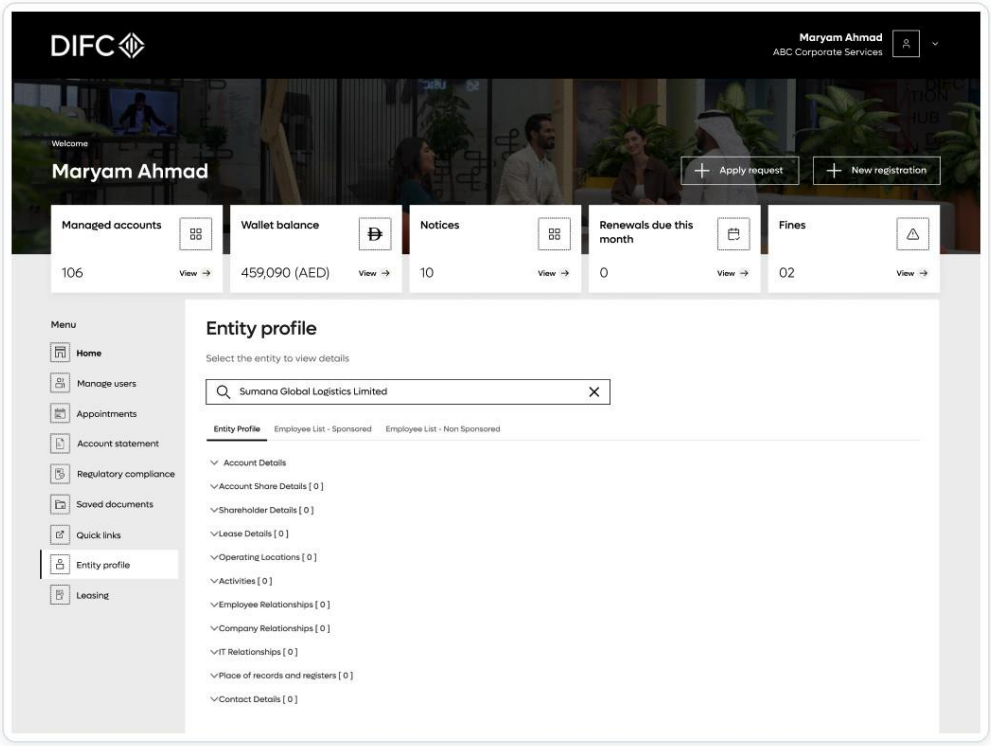

Figure 18: The profile of a selected entity.

Leasing

This section shows every lease on record for the entity you select, with its current status: active, expired or cancelled. The action menu on an active lease opens the next steps you can take.

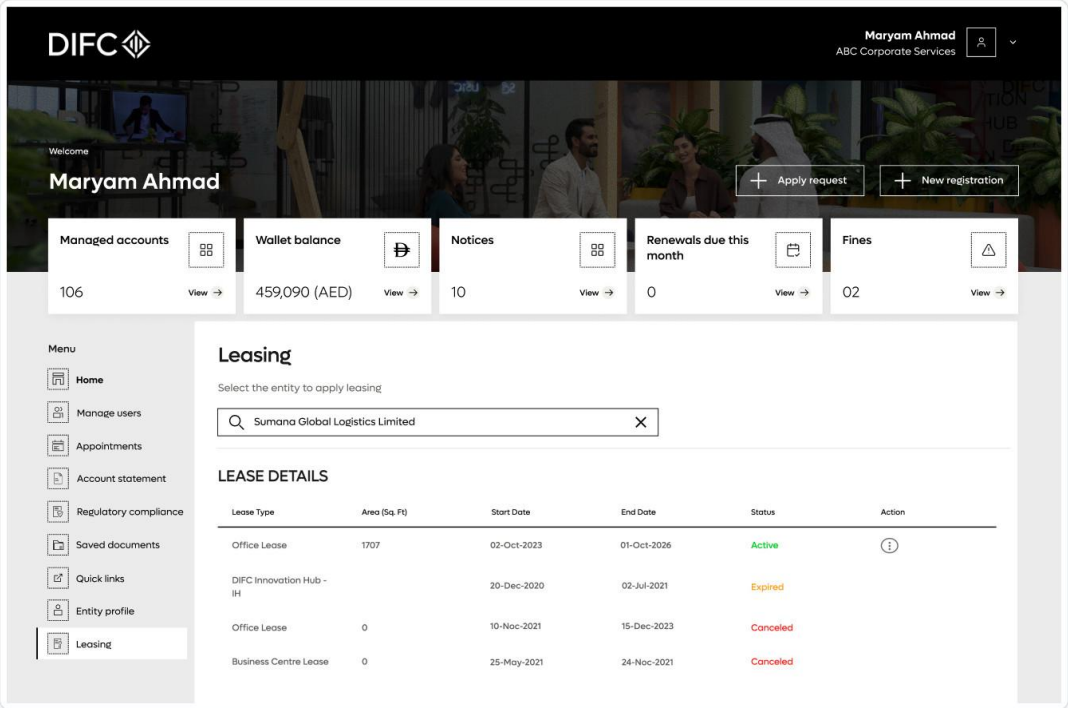

Figure 19: Leases held by the selected entity.

4. Stakeholder data alerts

A summary of the stakeholders whose records need updating, for example because a passport has expired or because details are missing. Select View to see the full list.

5. Compliance calendar

A calendar view of the filings due on each day. Select a date and the filings due on that day appear to the right of the calendar.

6. Service requests and pending actions

A standard portal feature that lists every request you have submitted already, request returned or saved as a draft, together with the pending actions that need attention, across all the entities you manage.

7. Logged in Portal user

This is standard functionality that shows the name of the logged in portal user and the CSP name. You can click on this icon to update your details.

If something does not look right

If an entity you expect to manage does not appear in your lists, check with your CSP super user that you have been given portal access to it. If a license renewal date, a notice or a fine does not match your own records, use the View link on the relevant card to open the full details before you take any action.

For further support, please call us on 04 362 2222 or email us on portal@difc.ae.