Pershing's NetX360+

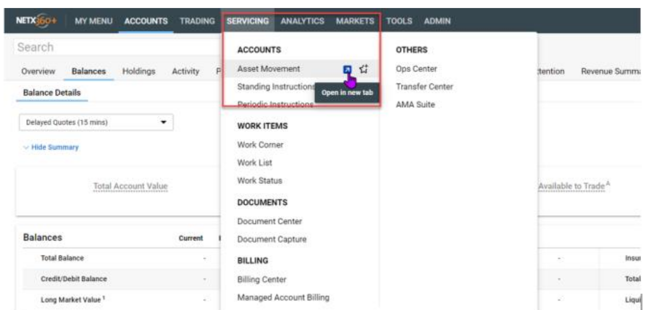
Top 5 questions answered

Pershing recently upgraded their system experience to a new web-based version called NetX360+. To address some of the most significant changes, guidance is provided below. If you have suggestions for future improvements, feedback can be submitted via NetX360+.

While Osaic partners closely with Pershing, NetX360+ changes are led by Pershing and are separate from our digital transformation roadmap. You'll hear more about strategic updates to our technology offerings soon (e.g., OneHub, new eQuipt, and Wealth Management Platform), simplifying your access to wealth management tools and helping you grow faster.

1. What is the multi-tab feature and how do I use it?

A new multi-tab feature allows you to multi-task and have 10 tabs open at once. To open multiple tabs, hover over the navigation item, and select Open in new tab.



Some multi-tab groupings are not yet available and opening tabs within the same function is not supported. For example, if you have Work Corner (within Group A) open, you will not be able to open another function within Group A (e.g., Account Profile), but you can open another tab within a function from Group B or Group C. Functions organized by Group status are below.

Group A	Group B	Group C

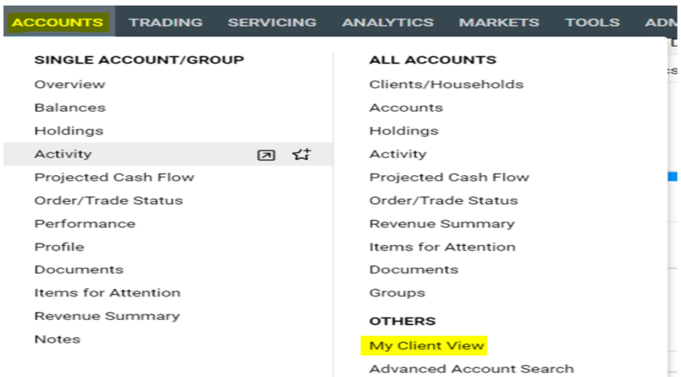
• Client Onboarding
• Service Center
• Work Corner
• Work List
• Work Status
  o Activity > Work status
  o COB > Work status
  o Notification Center Bell icon > View details
  o Notification Center Bell icon > Take action
  o Notification Center Summary > View Details
  o Notification Center Summary > Take action
  o Alerts Summary > View Details
  o Alerts Summary > Take action
  o Treasury Auctions > View orders
  o Global search > Account Search > Work status link
• Standing Instructions
• Periodic Instructions
• Account Profile
	• Asset Movement from the menu
	• Asset Movement when accessed from Balances > Actions button
		• Trade History
		• Online Balancing
		• RTTM Activity Monitor

2. How do I print my list of accounts?

Account lists can be exported into an Excel spreadsheet and printed from there. You can either export data from specified pages or export all data, although users cannot print lists directly from NetX360+.

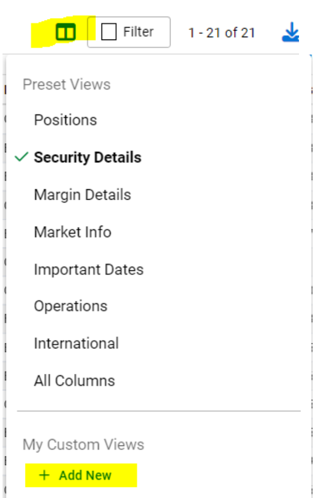
3. How do I access My Client View?

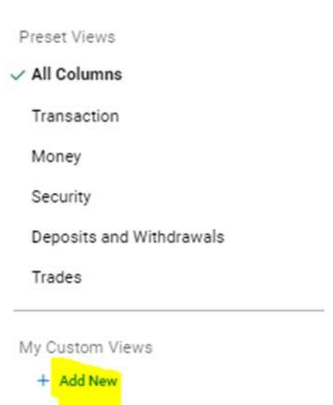
To access My Client View, navigate to the Accounts tab > OTHERS > My Client View. The shortcut to My Client View using CTRL + ALT + M is no longer active.



4. Can I customize my views?

You can customize tab views (e.g., Holdings, Activity, Projected Cash Flow, etc.) by clicking the grid icon, creating a new view, and naming it. There are also Preset Views for Holdings and Activity tabs (shown below) with column choices that can be customized.





5. Where can I access training resources?

NetX360+ training has been updated to reflect recent platform enhancements. The new course called **NetX360+ The New Web Experience** is available on Learning Corner.

If you have additional questions, Advisor Support is ready to assist.