



# UNEP Finance Initiative

## UNEP FI Portal

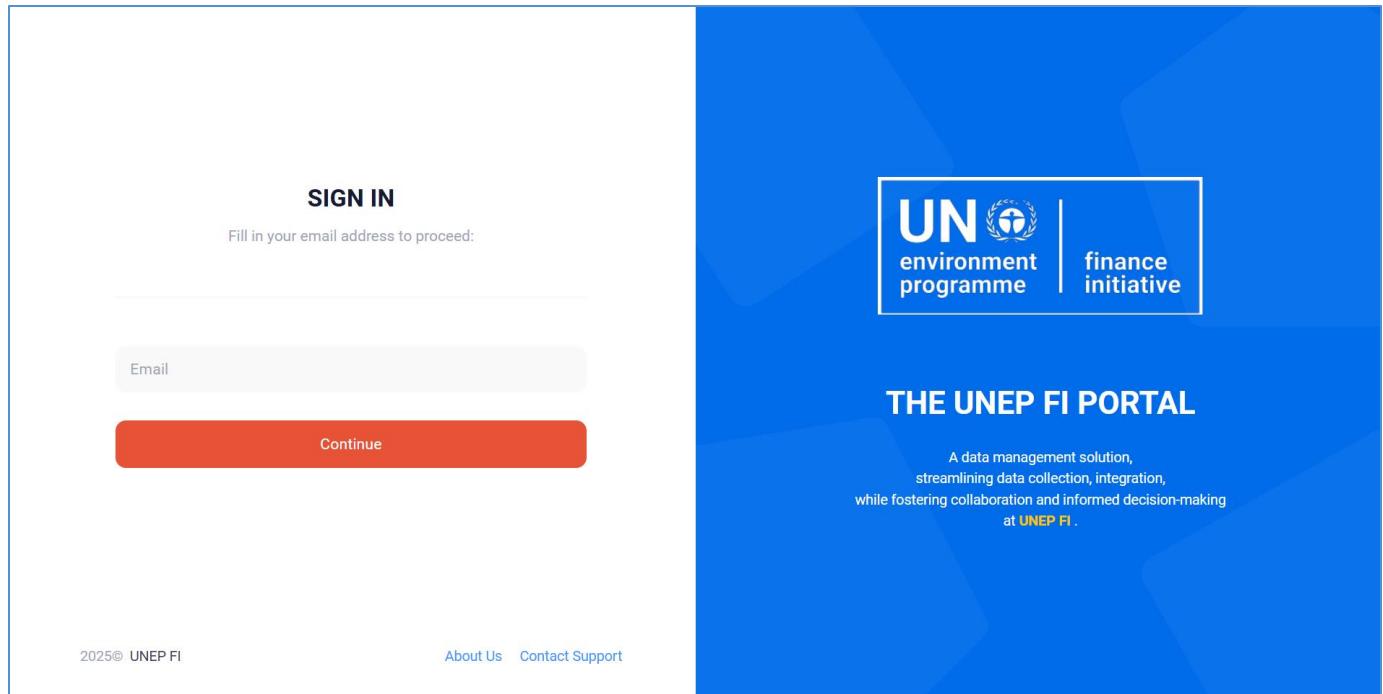


# Explore New Banking Portal Features

The new functionalities in the Portal are designed to enhance your membership experience

Now you can use the Portal to:

- **View your institution's engagement profile**, including participation in global and regional activities, your contacts, and communications received
- **Easily request to participate in workstreams, pilots, and communities of practice** through an automated system
- **Easily access region-specific opportunities**
- **Manage contact information and communication preferences** to ensure the right people in your organization receive relevant updates



The image shows a screenshot of the UNEP FI Portal. On the left, a sign-in form titled 'SIGN IN' asks for an email address to proceed. It features a red 'Continue' button. At the bottom, there are links for 'About Us' and 'Contact Support'. On the right, a summary slide with a blue background displays the UNEP FI logo and the text 'THE UNEP FI PORTAL' along with a description of the portal's purpose: 'A data management solution, streamlining data collection, integration, while fostering collaboration and informed decision-making at UNEP FI'.

Click [here](#) to navigate to the Portal, create your personal account and explore its current functionality

<https://portal.unepfi.org/login>

# Available supporting material

## User Guide

**UNEP FI PORTAL**

**User Guide**



### Executive Summary

The UNEP FI Portal (the Portal) is a self-service platform that allows UNEP FI members to view and manage their institution's profile and engagement information, to manage contacts directly and sign up for activities and programs.

### Access and Functionalities

The Portal is accessible through the [UNEP FI Members Area](#) or directly at this link [here](#), allowing members to:

- View your institution's profile and engagement
- View and request to join activities
- Manage contacts' information
- Manage your communication preferences.

By accessing these resources through one integrated location, you can streamline your experience, stay organized, and engage more effectively with the resources and opportunities available.

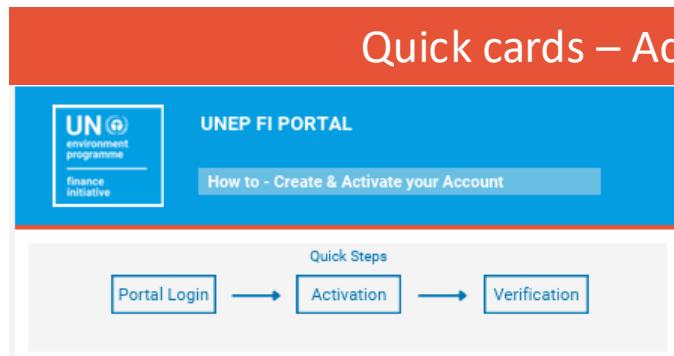
Staff from all UNEP FI members with a valid institutional address can register to use the Portal.

Access User Guide [here](#)

## Quick cards – Account and contacts

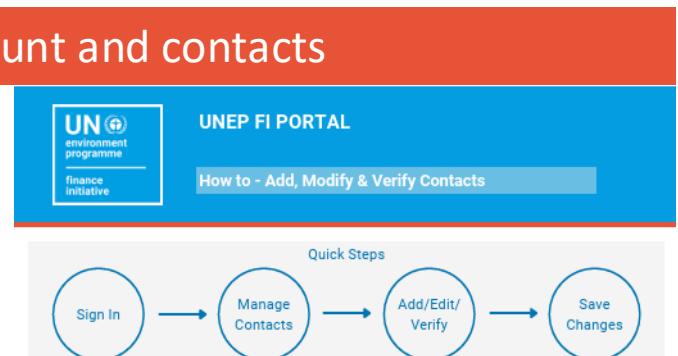
**UNEP FI PORTAL**

**How to - Create & Activate your Account**



**UNEP FI PORTAL**

**How to - Add, Modify & Verify Contacts**



**Sign In**

1. Navigate to the portal: <https://portal.unepfi.org>

**Provide your email**

2. Type your work email address. Click "Continue" and follow the instructions to Create an Account. Only institutional emails will be accepted.

**Activate your Account**

3. You will receive an activation email within seconds (check your spam as well). Click on the "Activate Account" button or copy-paste the link into your browser to complete activation.

**Request Verification**

4. From a colleague with existing access to the Portal. If you don't know anyone with active access, contact UNEP FI. Once verified, you will receive a confirmation email.

**Sign In**

1. To the Portal, using the email address and the password you've set up when creating your account. On the Welcome Page, click "Manage [Institution name] Contacts".

**Add a Contact**

2. Click "Add New Contact" on the upper right corner of the screen and complete the fields. Click "Save" at the bottom of the screen.

**Update a Contact**

3. In the list of contacts from your institution, look for the contact that you want to modify, scroll to right ('Actions') and click "Edit" to modify the necessary fields. Click "Save" at the bottom of the screen.

**Verify a Contact**

4. In the list of contacts from your institution, look for the contact that needs verification and click on the "Verify Contact" button.

Check the Complete User Guide [here](#)  
Link to portal: <https://portal.unepfi.org/> | Support: [signatory@unepfi.org](mailto:signatory@unepfi.org)

Access this card here

Check the Complete User Guide [here](#)  
Link to portal: <https://portal.unepfi.org/> | Support: [signatory@unepfi.org](mailto:signatory@unepfi.org)

Access this card here

# Available supporting material

## Quick cards – Engagement gateway

**UNEP FI PORTAL Engagement Gateway**

**Sign up for Global Activities**

**Quick Steps**

Portal Login → Explore Activities → Request to Join

**Sign In**  
1 To the Portal [here](#), using the email address and the password you've set up when creating your account.

**Select 'Sign Up to Global Activities'**  
2 Under the Engagement Gateway section, click on "Sign up to Global Activities" to access the catalogue of activities your institution is/has participated in and to enroll in new activities.

**Explore the Global Activities**  
3 Explore the catalogue of Global Activities available and click on "Request to Join" to enroll in your preferred activity.

**Submit Request**  
4 Select the Main Participant for the activity. You can also include "Other participants". Make sure the relevant people are registered as contacts. Then click 'Submit'.

Check the Complete User Guide [here](#)  
Link to portal: <https://portal.unepfi.org/> | Support: [signatory@unepfi.org](mailto:signatory@unepfi.org)

Access this card here

**UNEP FI PORTAL Engagement Gateway**

**View your engagement with UNEP FI**

**Quick Steps**

Portal Login → View Engagement Profile → Engagement Info

**Sign In**  
1 To the Portal [here](#), using the email address and the password you've set up when creating your account.

**Select View Profile**  
2 On the Homepage, Under the Engagement Gateway section, click on "View [institution's name] profile" to access your institution's engagement profile.

**View Engagement Profile**  
3 Your engagement profile is organised into six main sections, accessible through the navigation header: Membership, Global Activities, Region-specific support, Review Process, Contacts and Communications.

**Explore**  
4 The profile sections such as global activities, region support, progress statements, Review, Comms. etc.

Check the Complete User Guide [here](#)  
Link to portal: <https://portal.unepfi.org/> | Support: [signatory@unepfi.org](mailto:signatory@unepfi.org)

Access this card here