# User Forum

**PURPOSE**

This document describes the procedures for accessing and navigating the CS Lucas User Forum

**WHY IS THIS IMPORTANT?**

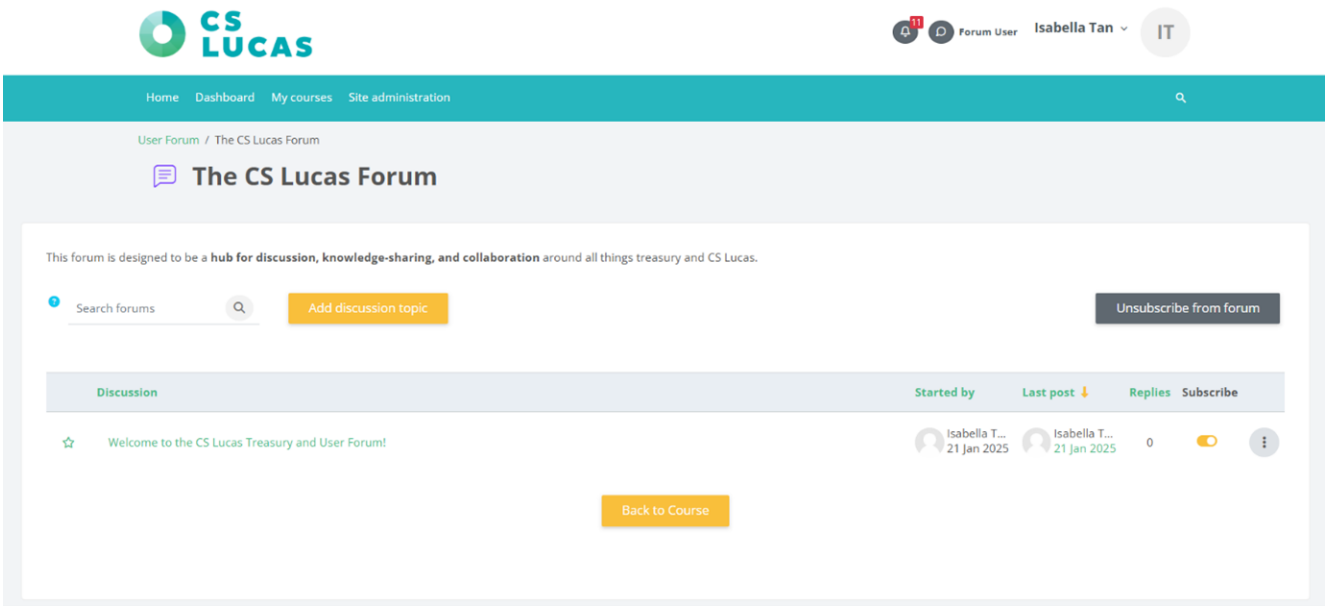
This forum is designed to be a hub for discussion, knowledge-sharing, and collaboration around all things treasury and CS Lucas.

**PROCEDURE**

**Registering for the User Forum**

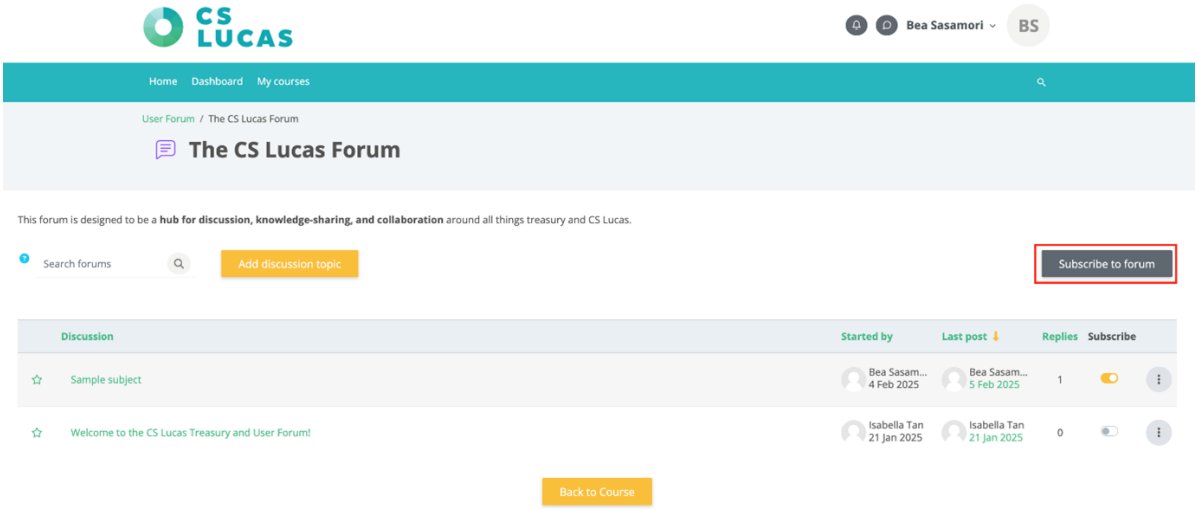
1. Please notify the CS Lucas team that you would like to join the CS Lucas Treasury Forum. The details we will need to enrol you are the following:
    1. Name
    2. Email address
2. Once we have your details, the CS Lucas team will add you to the forum.
3. When you are added, you will receive an email from no_reply@cslucas.com which will include your credentials for logging into the system
4. Please follow the instructions as per the email to access the system
5. When you are on the system you will have access to the "CS Lucas User Forum"

**Navigating your Forum Dashboard**

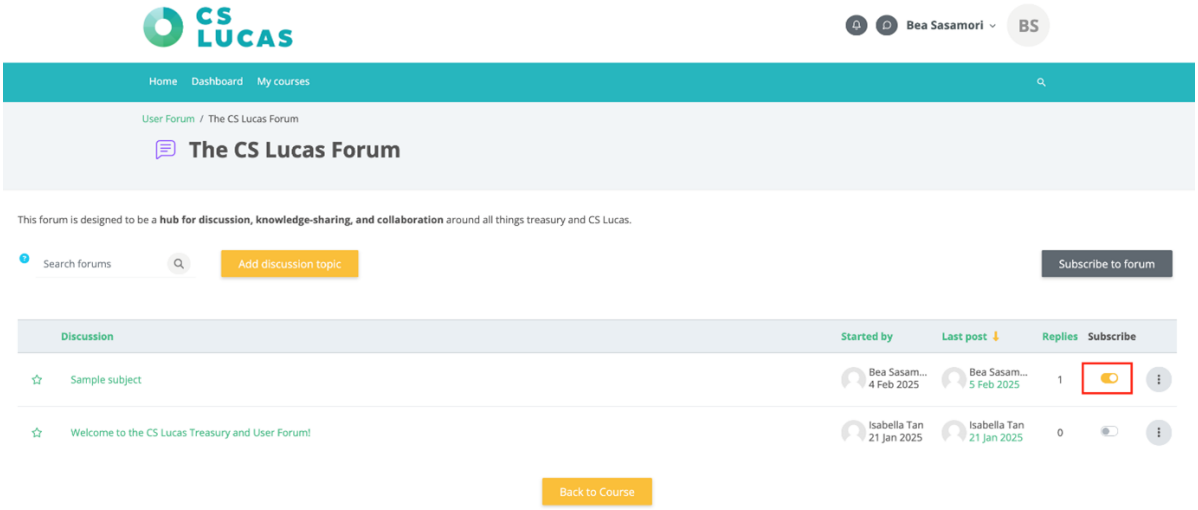



Your forum dashboard provides an overview of discussions and helps you stay updated on topics of interest. Here's how you can make the most of it:

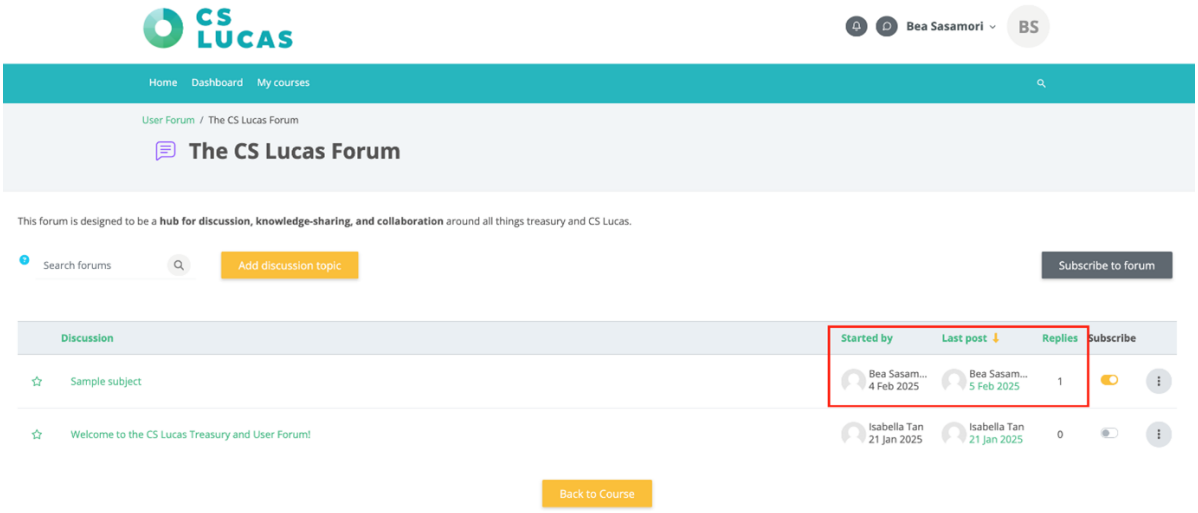
1. **Subscribe to Forum Updates** – Click on **"Subscribe to forum"** to receive notifications when new topics are posted in the forum.



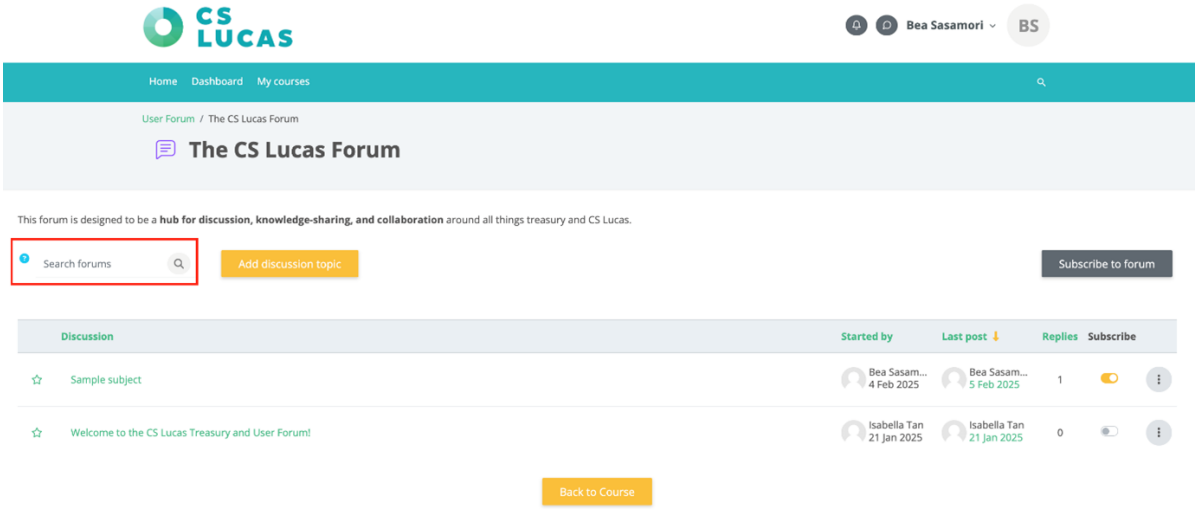

2. **Subscribe to Topics** – By default, you are **subscribed** to topics you create or respond to, so you'll be notified of any replies but if you're interested in a particular discussion, toggle **"Subscribe"** under that topic to receive updates whenever new replies are posted.



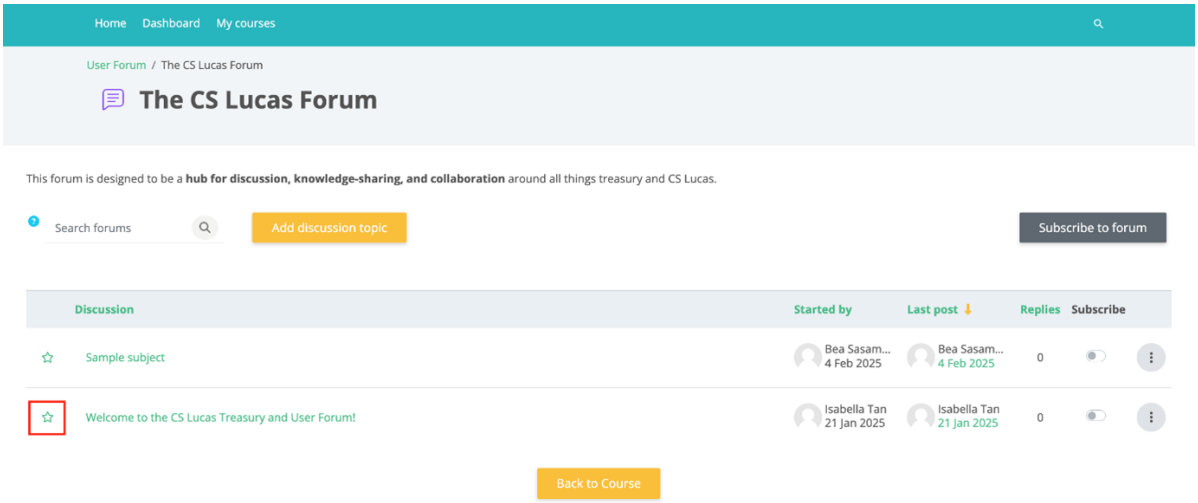

3. **Topic Information** – Each topic displays:
   a. When it was started and when the last post was made
   b. Who created the topic and who posted last
   c. The **reply counter**, which shows how many responses the topic has received.




4. **Search for Topics** – Use the **search bar** to find existing discussions before creating a new post. This also helps avoid duplicate threads and makes it easier to find relevant information.

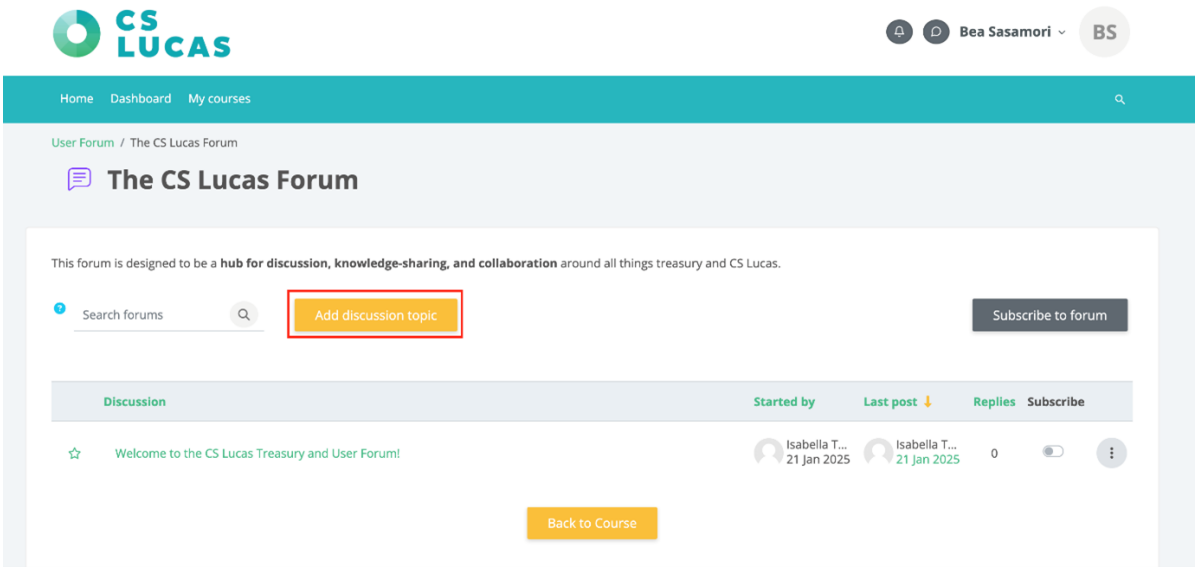



5. **Favourite Important Topics** – Click the **star icon** on the left-hand side of a topic title to mark it as a favorite. All **favourited** topics will be pinned at the top of your forum dashboard for quick access.

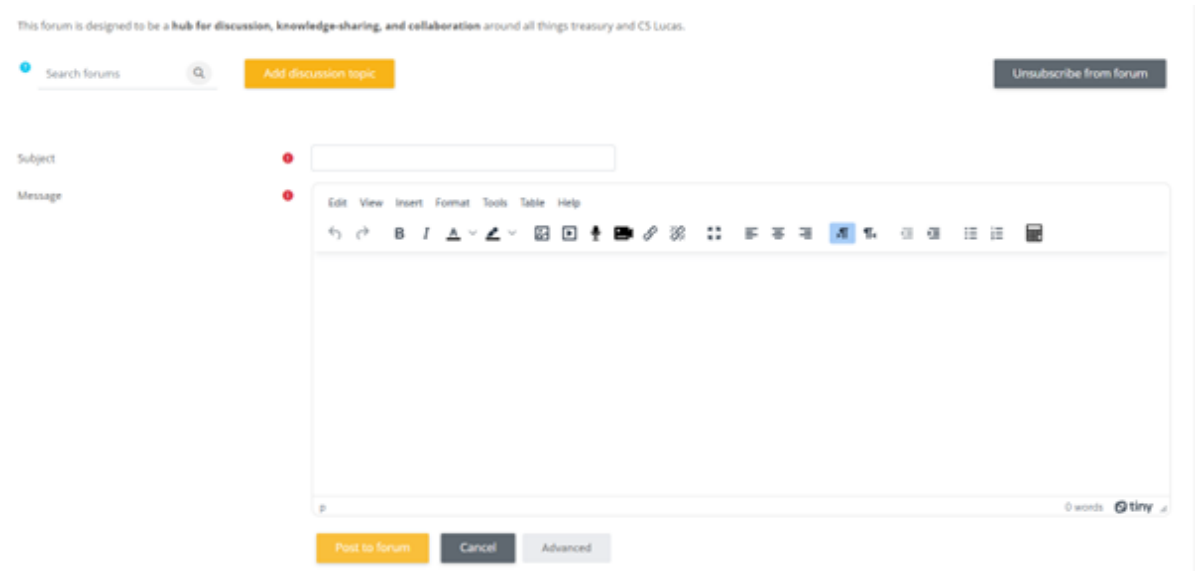



## Creating a New Topic

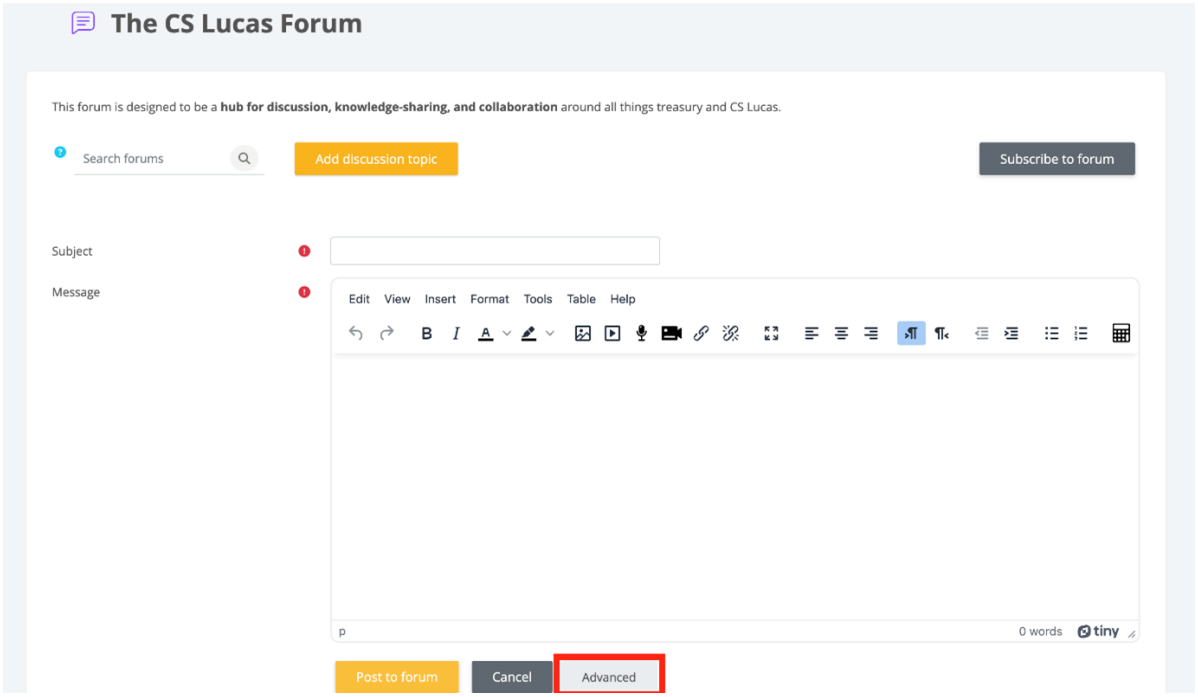
1. Click on the **“Add discussion topic”**



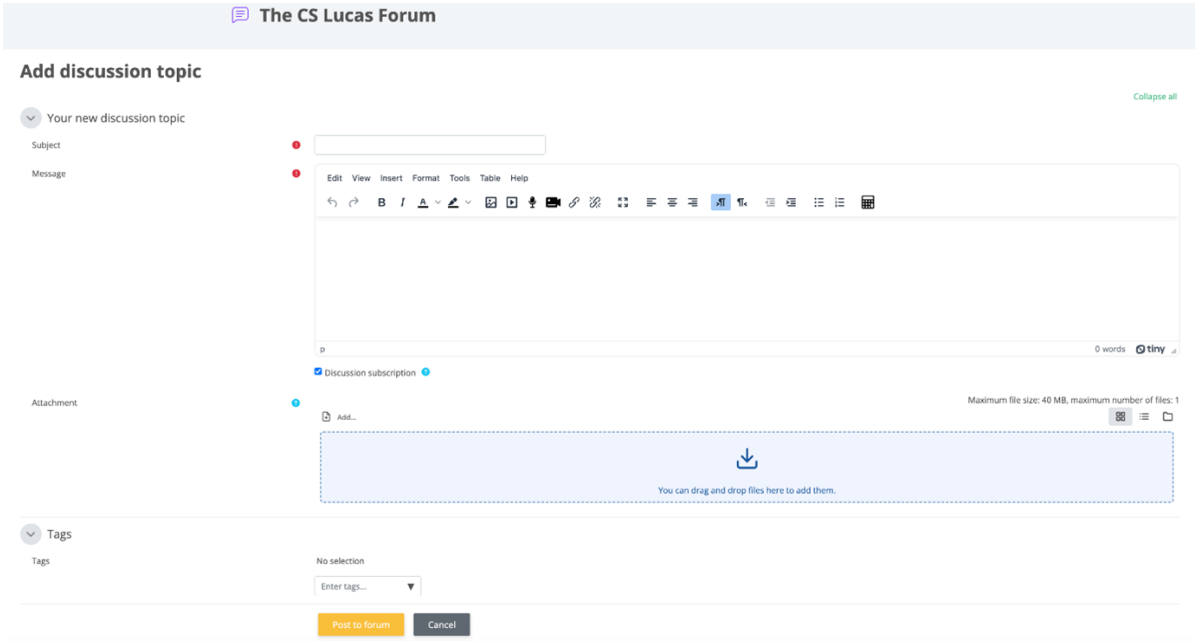

2. Enter the **Subject** (title of your topic) and **Message** (content of your post).



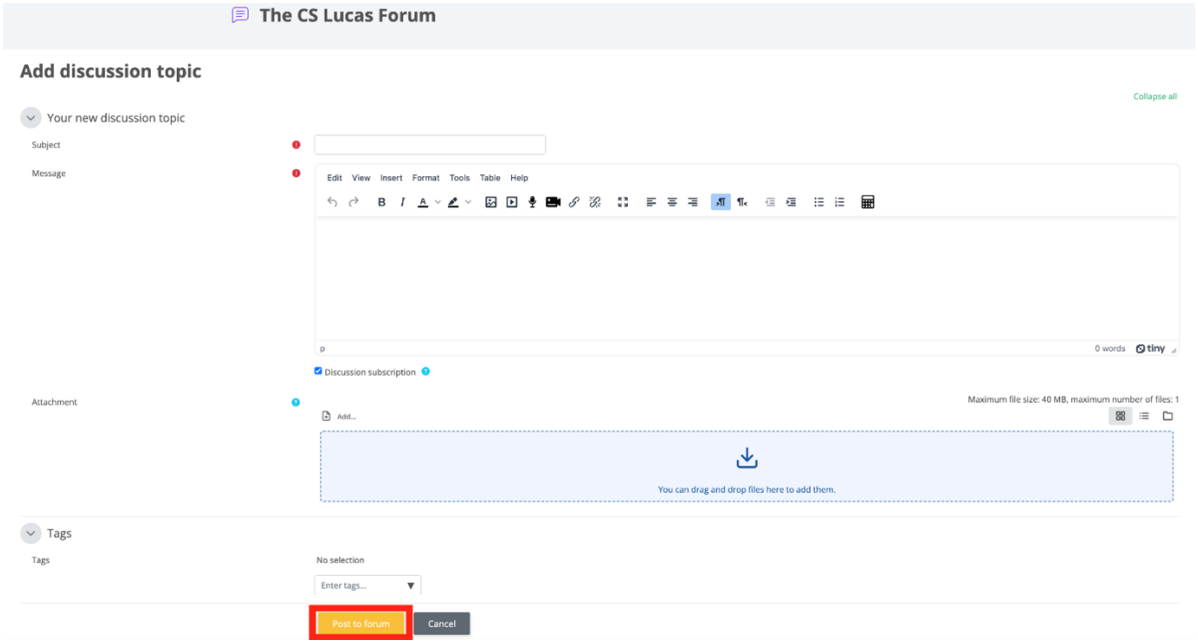

3. If you wish to **attach files or images** (e.g., screenshots), click on the **“Advanced”**



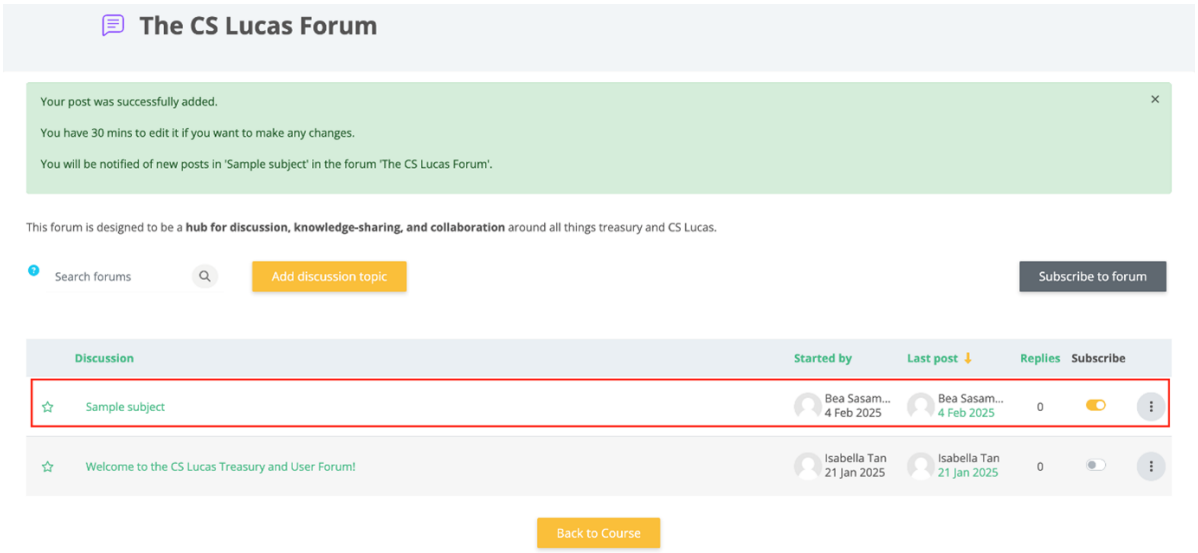

4. In the advanced settings, you can:
   a. **Upload attachments** under the “Attachment” field
   b. **Add tags** to your post for easier searchability.




5. Click **“Post to forum”** to publish your discussion.

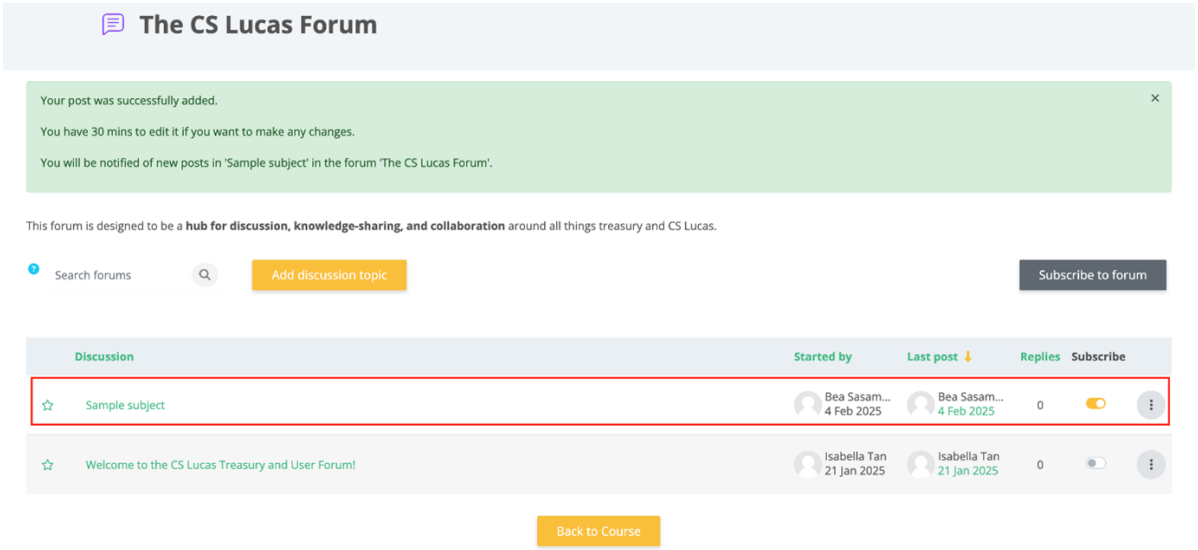



6. Your post will now be visible on the homepage, and you will be **automatically subscribed** to receive notifications when someone replies.

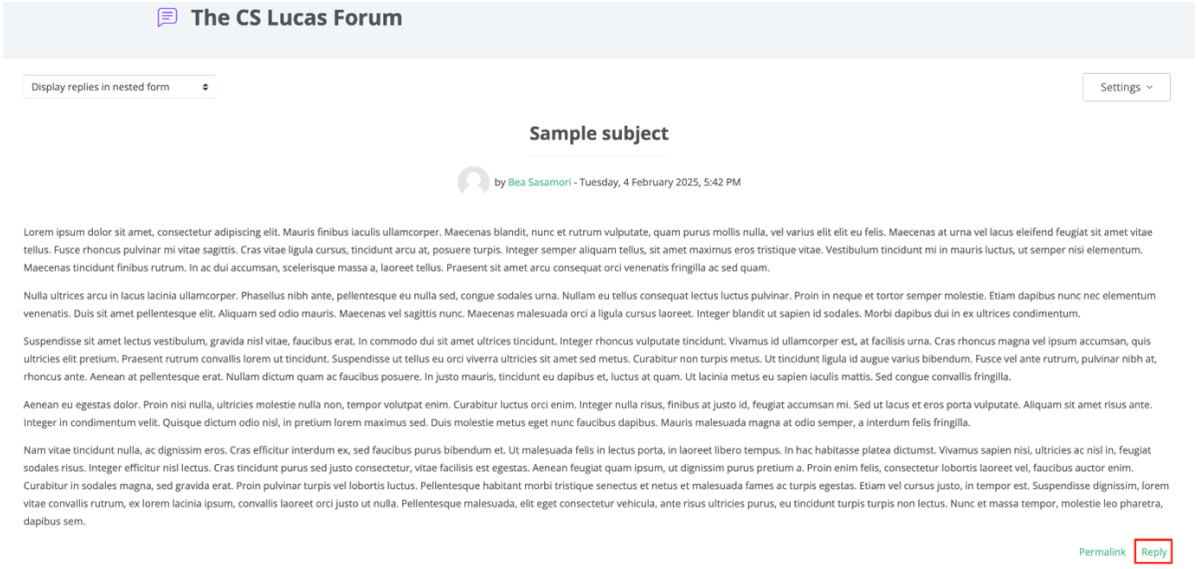



## Responding to a Topic

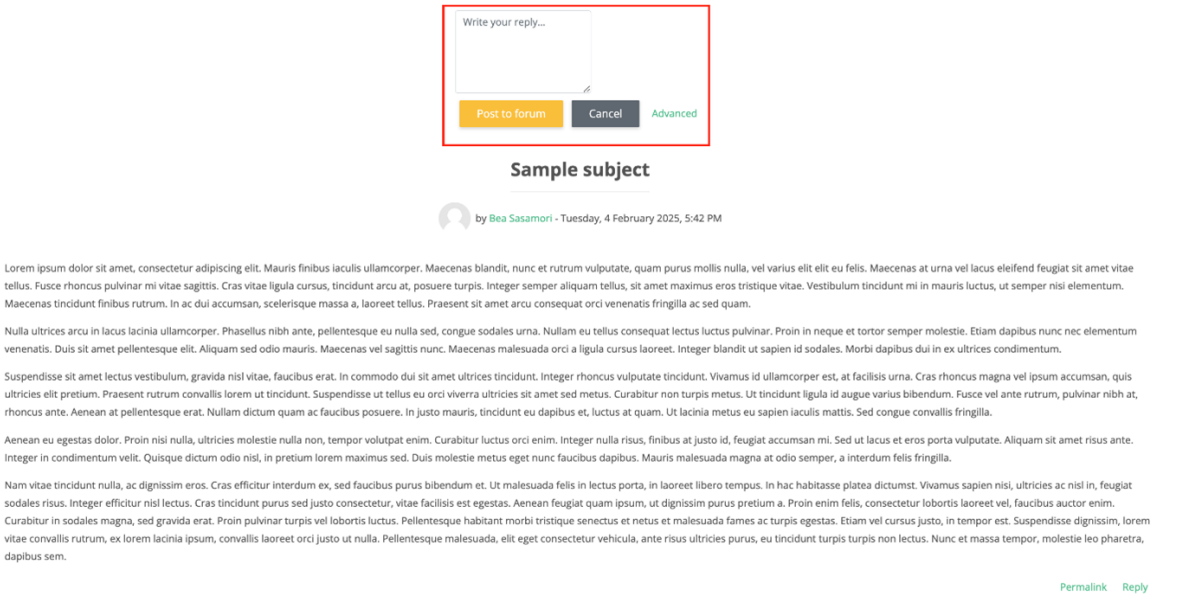
1. Open the topic you wish to reply to.



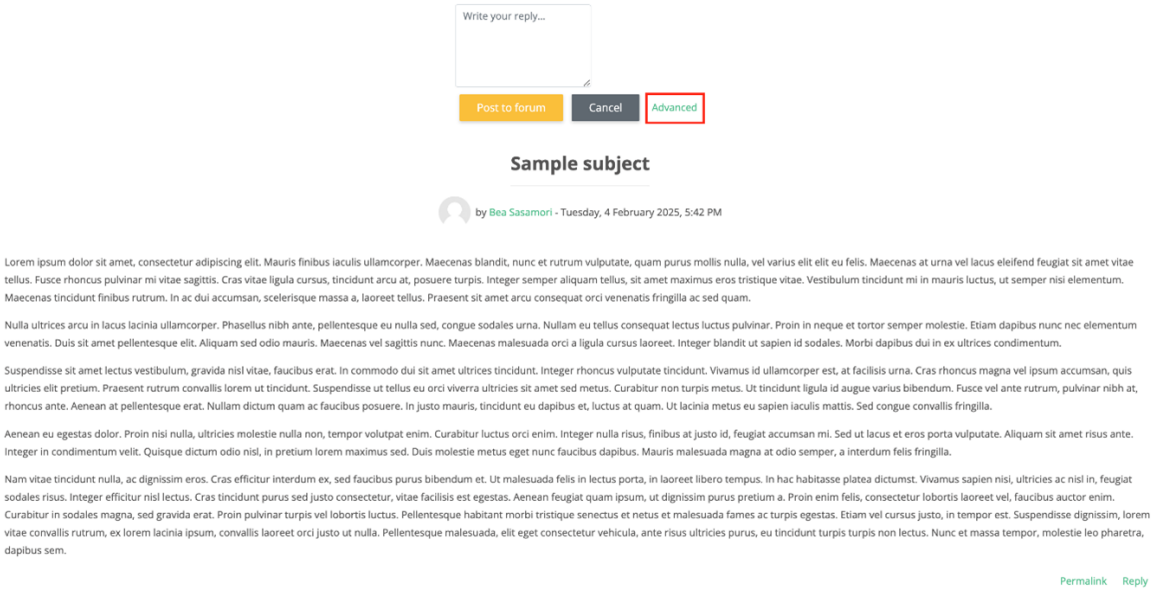

2. Click on **“Reply”** under the post.



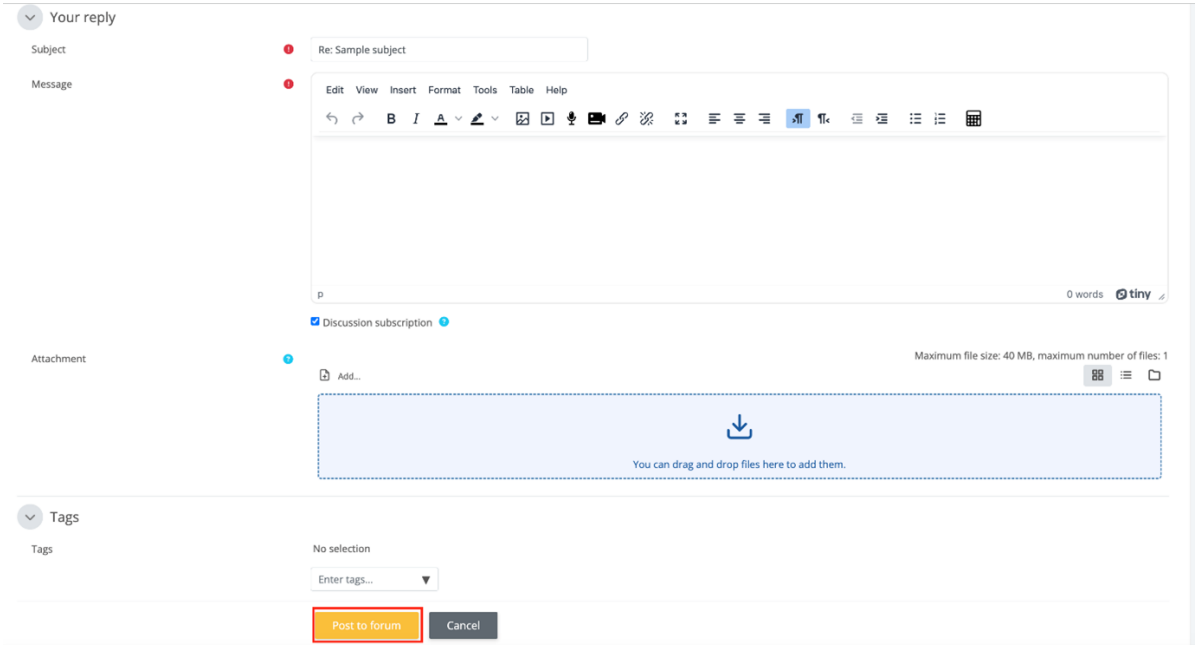

3. Type your response in the message field.



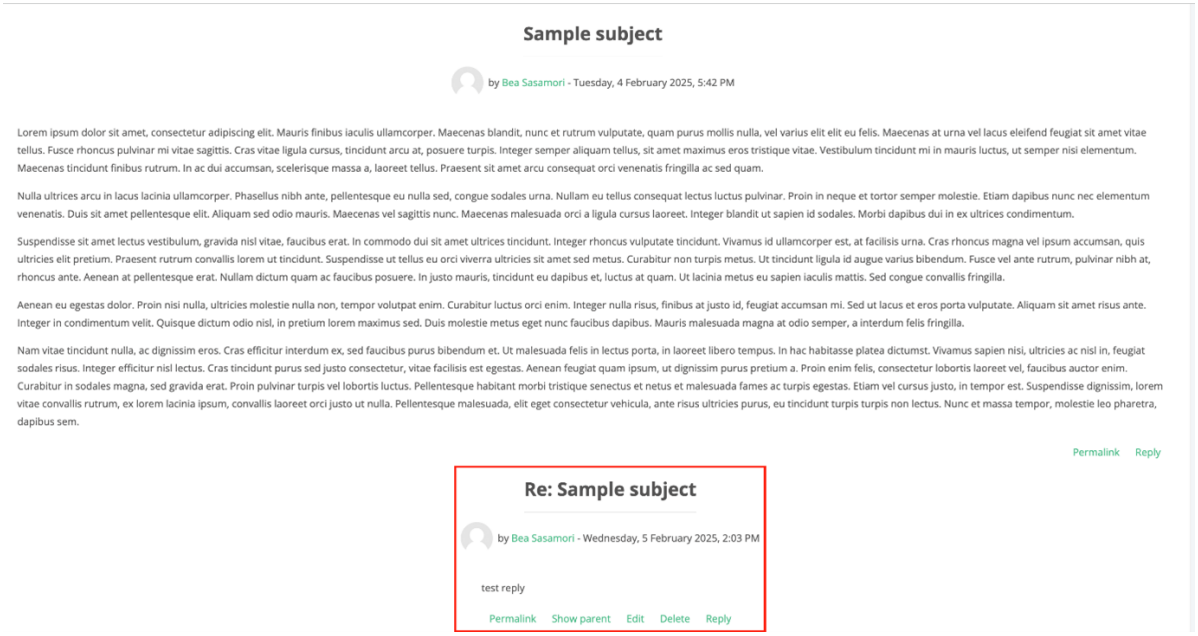

4. [Optional] click **“Advanced”** to attach files or add formatting & tags.




5. Click **“Post to forum”** to publish your response.



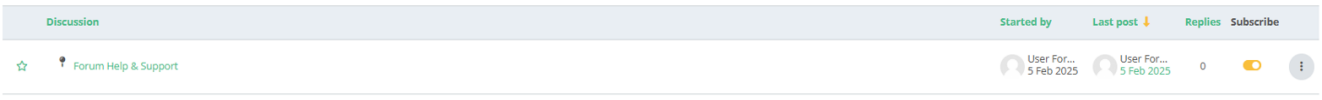

6. Your reply will appear at the bottom of the topic as a response.




7. If you want to reply to a specific response within the thread, click the **"Reply"** button under that particular response to keep the discussion organized.

## Forum Guidelines

1. Be respectful and professional in discussions.
2. Stay on-topic and provide helpful responses.
3. Avoid posting duplicate questions—search before starting a new thread.
4. Use clear and concise language to improve readability.
5. Report any inappropriate content to moderators.

## Need Help?

If you encounter any issues or need further assistance, contact your dedicated Account Executive or post in the **Help & Support** section of the forum.