

Custodial Integrator SaaS Training Videos

The videos linked below describe how to use Custodial Integrator for Portfolio Center SaaS (CI SaaS).

[General overview of daily file creation](#) – This video explains the best practices for producing the CI SaaS data files.

[Downloads Dashboard](#) – This video covers the features and functionalities contained within the “Downloads Dashboard” tab.

[Auto Security Translations](#)– This video describes the “Auto Security Translations” message.

[New Account\(s\)](#) – This video describes the “New Account(s)” message.

[Duplicate Identifiers](#) – This video describes the “Duplicate Identifiers” message.

[Failed Aggregation](#) - This video describes the “Failed Aggregation” message.

[Security Translations](#) – This video covers the features and functionalities contained within the “Security Translations” tab.

[Account Translations](#) – This video covers the features and functionalities contained within the “Account Translations” tab.

[More Actions](#) – This video details the “Export Configurations” and “Export Files Using Custom Dates” options.