

Admin	- John Doe	Create New Account	Manage Accounts View Transactions Settings
	Client Name	Date	Activity
	John Kirkland	24/02/2025	Updated an account
	John Kirkland	24/02/2025	Updated an account
	John Kirkland	24/02/2025	Updated an account
	John Kirkland	24/02/2025	Updated an account
	John Kirkland	24/02/2025	Updated an account
	John Kirkland	24/02/2025	Created an account

Admin - John Doe			Search Add New Account
	Account ID	Client Name	Date Created
	1234	John Haaland	20/03/2021
	1234	John Haaland	20/03/2021
	1234	John Haaland	20/03/2021
	1234	John Haaland	20/03/2021
	1234	John Haaland	20/03/2021
	1234	John Haaland	20/03/2021

Agent - John Whitaker			Create Client Profile	Manage Profiles	View Transactions
	Client Name	Date		Activity	
	John Wick	23/10/2025		Updated profile	
	John Wick	23/10/2025		Updated profile	
	John Wick	23/10/2025		Updated profile	
	John Wick	23/10/2025		Updated profile	
	John Wick	23/10/2025		Updated profile	
	John Wick	23/10/2025		Created Profile	

Agent - John Whitaker

Create Client Profile			
First Name	Address line 1		
Last Name	Address line 2		
Date of Birth Gender	City		
Email	Country		
Phone	Postal Code		
	Save Cancel		

Admin - John Doe Search

Transaction ID	Amount	Status
1234	John Haaland	20/03/2021

View Details

Retry

Search