

User Manual

Manage your Financial Institution profile

Within this tutorial, we will take a look at how you can...



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

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EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

The screenshot shows the FIDReC portal login interface. At the top, there is a navigation bar with links: About Us, Processes, Resources, Register, Submit Enquiry, and Sign in. Below the navigation bar, there are two tabs: 'Sign in' (selected) and 'Verify Account'. The main heading is 'Sign in with a local account'. There are two input fields: '* Username' and '* Password'. Below these fields, there is a text block explaining the OTP process: 'An OTP (One Time Password) will be sent to your registered email address. Please enter the OTP to sign in to your account. If you don't find the OTP email in your primary inbox, please check your spam folder.' Below this text, it says 'Please note that OTP will expire in 5 minutes.' There are three buttons: 'Sign in' (blue), 'Forgot password?' (blue), and 'Forgot username?' (blue).

The screenshot shows the FIDReC portal OTP verification interface. The heading is 'Enter your OTP'. There is a text label 'Code' next to a long input field. Below the input field, there is a text block: 'Please check your registered email for OTP. If you need new OTP please click [here](#)'. Below this text, there is a blue button labeled 'Verify'.

FIDReC

If you are the CEO or Primary Contact of a FI, you may edit the details of the FI via the FIDReC portal.

1 To edit your account details, visit our website at www.fidrec.com.sg and sign in.

2 Upon clicking 'Sign in' you will be prompted to input an OTP that will be sent to the email registered to your account.



Some helpful tips:

Your account will be locked if you input the wrong password 5 times. Use the 'Forgot password?' functionality to help recover your password.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

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Once you are logged in, click on **My Financial Institution**. Next, Click on the **Financial Institution's** Name to edit its details.

FIDReC

Dashboard

Invoices

My Financial Institution



Home > FI Dashboard

My Financial Institution

Search



Financial Institution Name ↑	CEO	Primary Contact Person	Status	Member Since
TEST FI	TEST CEO	TEST CEO	Active	12/10/2021 1:40 PM



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

Business Details

Company Name *

TEST FI

Company Registration No. *

1000000000051

Business Address

Floor/Unit *

99-99

Block/Building *

TEST BUILDING

City *

TEST CITY

Street *

TEST STREET

Postal Code

State/Province *

TEST STATE

Country *

SINGAPORE



Please click on the search icon to select.

Correspondence Address

Floor/Unit *

99-99

Block/Building *

TEST BUILDING

City *

TEST CITY

Street *

TEST STREET

Postal Code

State/Province *

TEST STATE

Country *

SINGAPORE



Please click on the search icon to select.

Public Helpline

Telephone *

+65557654321

Email *

testficeo01@outlook.com

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You will be directed to your profile page, which will show all the details that were provided during registration.

5

You are now able to edit and update information related to your Business & Correspondence Address and your public helpline.



Some helpful tips:

Please note that you will not be able to edit your **Company name & Registration number**, contact FIDReC if this information needs to be edited.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

Membership Details

Category *

A

Sub-Category

Foreign Banks

GIRO Details

Bank

—

Branch

—

Despatch address

—

Bank account name

—

Bank account no.

—

Financial Institution Members

Add Member

Full Name	CEO ↑	Primary Contact	Designation	Department	Email	Phone	Fax	Status	Modified On
TEST CEO	Yes	Yes	CEO		testficeo01@outlook.com	+6512345678		Active	12/10/2021 1:40 PM

Upload Documents

Add Document

Document Name ↑	Created On
Supporting document 1	12/10/2021 12:07 PM

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In the same page, you will be able to see Membership and GIRO details. These details are uneditable. Should there be any need to update them, please contact FIDReC to request for a change.

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Finally, you are able to create or edit users and add documents to your financial institution. New members added here will receive an email containing an OTP that they can use to activate their account and gain access to the FIDReC portal.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

										Add Member
Full Name	CEO ↑	Primary Contact	Designation	Department	Email	Phone	Fax	Status	Modified On	
TEST CEO	Yes	No	CEO		testficeo01@outlook.com	+6512345678		Active	13/10/2021 9:36 AM	
										<div>View Details Deactivate Edit</div>

×

Edit new contact

Salutation *

Mr

Name *

TEST CEO

Phone *

+6512345678

Email

testficeo01@outlook.com

Department

—

Designation

CEO

Fax No

—

☒ CEO

☐ Primary Contact

☐ Receive broadcast emails?

Submit

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You can edit the details of existing members in your Financial Institution by choosing 'Edit' in the dropdown menu next to the row displaying the member's name.

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You will be able to edit the role this member has in the organization and whether they should receive email broadcasts from FIDReC.



Some helpful tips:

The rest of the details (except email) can be edited by the member themselves through their own 'My Profile' page when they access the portal.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

Add new contact

Salutation *

Name *

Phone *

Provide a telephone number

Email *

Department

Designation

Fax No

☐ CEO

☐ Primary Contact

☐ Receive broadcast emails?

Submit

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To add more members to your Financial Institution, click [Add Member](#) to access a form that will ask you to provide the details of your new member.

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Fill in the details and then click [Submit](#) to create the details of your new member.



Some helpful tips:

Only 1 CEO or Primary Contact can be active for a Financial Institution at any given time. If you need to change these roles, be sure to uncheck it for the existing CEO/Primary Contact first.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

Financial Institution Members

Add Member

Full Name	CEO ↑	Primary Contact	Designation	Department	Email	Phone	Fax	Status	Modified On
TEST CEO	Yes	No	CEO		testficeo01@outlook.com	+6512345678		Active	13/10/2021 9:36 AM

Upload Documents

Add Document

Document Name ↑	Created On
Supporting document 1	12/10/2021 12:07 PM

Save

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When you're done with all your edits, make sure to save your changes by clicking **Save**.



Some helpful tips:

New members that you've created on the portal will only appear in the Financial Institution Members table once you save your changes.



EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

FIDReC

FIDReC

Dashboard | Invoices | My Financial Institution | | Pierre ▾

Home > PFI

Your details have been updated!

Business Details

Company Name *	Company Registration No. *
PFI	546456546

Business Address

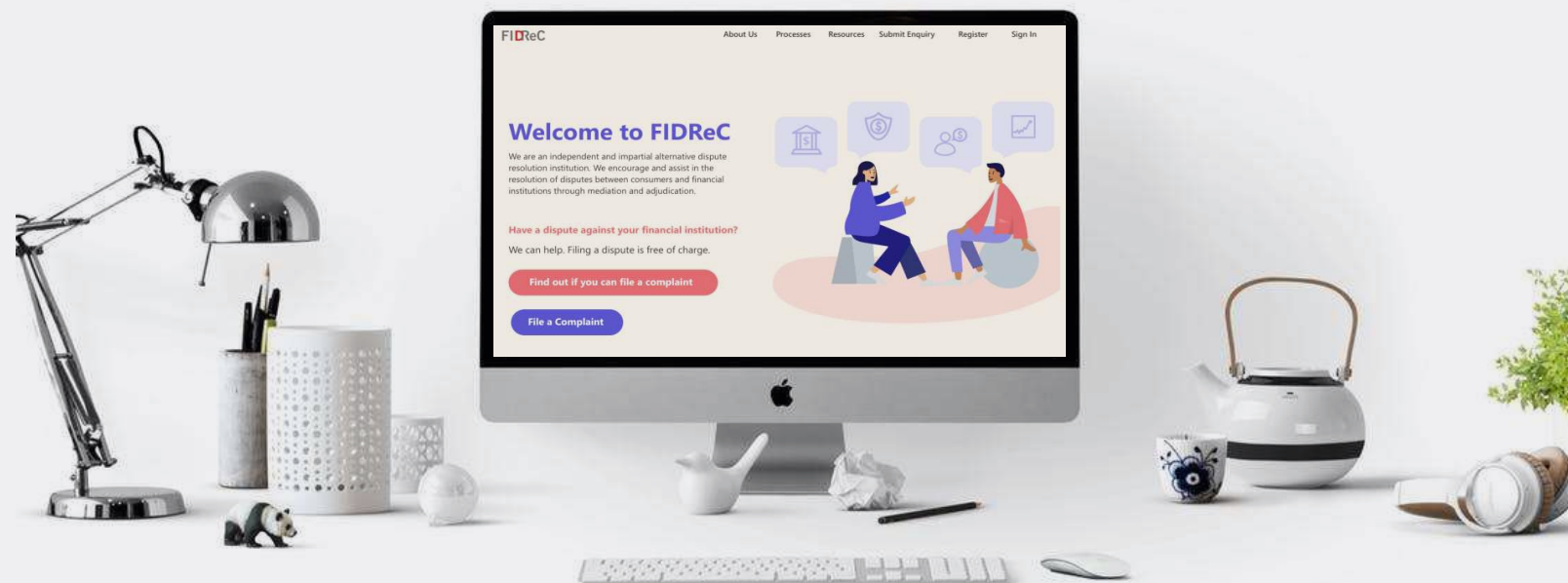
Floor/Unit *	Block/Building *
77	44
City *	Street *
Singapore	21 ST
Postal Code	State/Province *
6345324	Singapore
Country *	
SINGAPORE	

Please click on the search icon to select.

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You will be shown a success message stating that **“Your details have been updated”**. You are all set! You have successfully changed your FI’s details.





Thank you!