

# User Manual

## Registering a FI account with FIDReC

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



REGISTER YOUR ACCOUNT BY  
SUBMITTING OUR ONLINE FORM

3



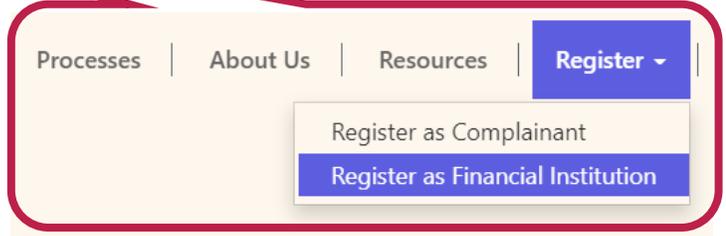
WHAT TO DO WHEN YOUR  
REGISTRATION IS RETURNED

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ACTIVATING YOUR ACCOUNT

14



1

To register an account with us, visit our website at [www.fidrec.com](http://www.fidrec.com). Select the **Register** option on the top menu, and click on **Register as Financial Institution**.

Home > FI > **Registration**

1 Business Details | 2 Contact Details | 3 Membership Details | 4 Upload Documents | 5 Summary | 6 Terms & Conditions

### Business Details

<p><b>Company Name *</b></p> <input type="text"/> <p><a href="#">MAS directory link</a></p>	<p><b>Company Registration No. *</b></p> <input type="text"/>
<p><b>Business Address</b></p>	
<p><b>Block / Building *</b></p> <input type="text"/>	<p><b>Floor / Unit *</b></p> <input type="text"/>
<p><b>Street *</b></p> <input type="text"/>	<p><b>Postal Code</b></p> <input type="text"/> <p>Please provide the postal code of your company</p>
<p><b>City *</b></p> <input type="text"/>	<p><b>State / Province *</b></p> <input type="text"/>
<p><b>Country *</b></p> <input type="text"/> <p>Please click on the search icon to select.</p>	

2

You will be redirected to this page: **The FI Registration form.**

1 Business Details 2 Contact Details 3 Membership Details 4 Upload Documents 5 Summary 6 Terms & Conditions

### Business Details

Company Name  \*

  
[MAS directory link](#)

Company Registration No. \*

### Business Address

Block / Building \*

Street \*

City \*

Country \*

    
Please click on the search icon to select.

Floor / Unit \*

Postal Code

  
Please provide the postal code of your company

State / Province \*

3

Once you are on the **FI Registration form**, there will be 6 sections for you to complete, starting with **Business details**.

Fill in all the details of your company, starting with its **Name** and **Company Registration No.** Then, fill in your **Business Address**.



### Some helpful tips:

Please ensure that you are filling in the name and UEN that is **registered with MAS**, to check, click on **MAS directory link** below the **Company Name** field to refer to the official database.

Correspondence Address

Same as Business Address

Block / Building \*

Street \*

City \*

Country \*  
  
Please click on the search icon to select.

Floor / Unit \*

Postal Code  
  
Please provide the postal code of your company

State / Province \*

**4** If your **Company's Correspondence Address** is the same as your **Business Address**, simply tick  **Same as Business Address** . Otherwise, enter your Correspondence Address in these fields.

**5** Click  to proceed to the next step. If you did not fill in all the mandatory fields, an error message will appear instead.

 **Some helpful tips:**  
If your company or correspondence address is not in Singapore, use this **lookup option** to select the correct country.

Country \*  
  
Please click on the search icon to select.

Home > FI > Registration

1 Business Details ✓ 2 Contact Details 3 Membership Details 4 Upload Documents 5 Summary 6 Terms & Conditions

### Contact Details

CEO

Salutation \*  
Mr

Name \*  
TEST CEO

Designation  
CEO

Fax No

Telephone No \*  
+6512345678

Email Address \*  
testficeo01@outlook.com

Department

Primary Contact Person

Same as CEO

Salutation  
Mr

Name  
TEST CEO

Designation  
CEO

Fax No

Telephone No  
+6512345678

Email Address  
testficeo01@outlook.com

Department

Public Helpline ⓘ

Telephone \*  
+65557654321

Email \*  
helpline@email.com

Previous Next

6 Fill in the information requested under the **Contact Details** section. If the CEO is also the Primary Contact Person, press

Same as CEO

7 If the **Primary Contact Person** is a different person, fill in the details of this individual manually. Once done, click **Next** to continue to the next stage.



**Some helpful tips:**

**Primary Contacts** will be the default liaison between FIDReC and your FI. The Primary Contact will be notified when there is a complaint filed against your FI. The Primary contact may then assign the case to other FI members to follow up. Other contacts may be added after registration.

1 Business Details ✓ 2 Contact Details ✓ 3 Membership Details 4 Upload Documents 5 Summary 6 Terms & Conditions

Membership Details

Category ⓘ \*

Please click on the search icon to select.

Sub-category ⓘ \*

Please click on the search icon to select.

Search

Category Code ↑	Category Name ↑
<input checked="" type="checkbox"/> A	Bank & Finance Companies
<input type="checkbox"/> B	Life & Composite Insurers
<input type="checkbox"/> C	General & Composite Insurers
<input type="checkbox"/> D	Capital Markets Services Licensees
<input type="checkbox"/> E	Licensed Financial Advisers & Insurance Intermediaries
<input type="checkbox"/> Elective	

Search

Category ID	Subcategory Name ↑
<input checked="" type="checkbox"/> A	All Banks
<input type="checkbox"/> A	Finance Companies
<input type="checkbox"/> A	Foreign Banks
<input type="checkbox"/> A	Local Banks
<input type="checkbox"/> A	Non-Bank Credit/Charge Card Issuers

**Not sure which category you belong to?**

You may access the [MAS directory](#) to view your institution's information in order to identify this category based on MAS' classification.

8

At the **Membership Details** section, you are required to select your Financial Institution's **Category & Sub-category**. First, under **Category**, click the  icon. A window containing all the selectable category codes will appear. Tick the appropriate Code & click .

9

Repeat the same process for **Sub Category**. Once done, click  to proceed to the next step.



**Some helpful tips:**  
If you are unsure of what category your FI belongs to, click on **MAS directory** to refer to the official database.

1 Business Details ✓ 2 Contact Details ✓ 3 Membership Details ✓ 4 Upload Documents 5 Summary 6 Terms & Conditions

### Upload Documents

You may choose to include any documents that you would like to include as part of your submission

[Add Document](#)

Document Name	Created On ↑
---------------	--------------

Document Name \*

Type of document \*

Other Supporting Documents

Attach a file \*

[Choose File](#) No file chosen

[Submit](#)

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

10

At this section, you may **upload supporting documents** as part of your FI Registration application. Click [Add Document](#) for the add document window to appear.

11

Fill in the Document name and Type of document. Then, click [Choose File](#) to upload the desired file from your computer. Click [Submit](#) to upload the document. Once done, click [Next](#) to proceed to the next stage.



**Some helpful tips:** You are able to make multiple uploads. You can also view the **edit** or **delete submission** options by clicking this [⌵](#) button.

12

In this **Summary** section, check that all the details you have filled up are correct. Otherwise, click [Previous](#) at the bottom of the page to navigate to the respective sections and edit the details as required.

13

Once you have verified that every detail and uploaded document are correct, click [Next](#) to progress to the last step.

1 Business Details ✓ 2 Contact Details ✓ 3 Membership Details ✓ 4 Upload Documents ✓ 5 Summary 6 Terms & Conditions

**Business Details**

Company Name \* TEST R Company Registration No. \* 1000000000051

**Business Address**

Block / Building \* TEST BUILDING Floor / Unit \* 99-99

Street \* TEST STREET Postal Code -

City \* TEST CITY State / Province \* TEST STATE

Country \* SINGAPORE

**Correspondence Address**

Same as Business Address

Block / Building \* TEST BUILDING Floor / Unit \* 99-99

Street \* TEST STREET Postal Code -

City \* TEST CITY State / Province \* TEST STATE

Country \* SINGAPORE

**Contact Details**

CEO

Salutation \* Mr

Name \* TEST CEO Telephone No \* +6512345678

Designation \* CEO Email Address \* testficeo01@outlook.com

Fax No - Department -

**Primary Contact Person**

Same as CEO

Salutation Mr

Name TEST CEO Telephone No +6512345678

Designation CEO Email Address testficeo01@outlook.com

Fax No - Department -

**Public Helpline**

Telephone \* +65557654321 Email \* helpline@email.com

**Membership Details**

Category \* A Sub-category Foreign Banks

Category Name \* Bank & Finance Companies

**Upload Documents**

You may choose to include any documents that you would like to include as part of your submission

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

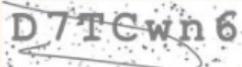
[Previous](#) [Next](#)

Home > FI > **Registration**

1 Business Details ✓ 2 Contact Details ✓ 3 Membership Details ✓ 4 Upload Documents ✓ 5 Summary ✓ 6 Terms & Conditions

Please acknowledge that you have read, understood and accept all the terms and conditions specified under the [Subscription Agreement](#), [Terms of Reference](#) and the [Privacy & Confidentiality Agreement](#)

I acknowledge and accept, on behalf of my institution, the terms and conditions under the Subscription Agreement, Terms of Reference and the Privacy & Confidentiality Agreement. \*



[Generate a new image](#)  
[Play the audio code](#)

Enter the code from the image

Home > FI > **Registration**

Thank you for registering with FIDReC !  
Your submission is currently under review. Our onboarding team will reach out to you soon.

**14** Click on **Subscription Agreement, Terms of Reference and the Privacy & Confidentiality Agreement** to read our terms and conditions. You can then acknowledge that you accept the terms, fill in the code from the image and click **Submit** .

**15** Upon Submission, you will receive a success message. Hang tight, our team will get back to you as soon as possible.



## New Subscription Request - REF#1002015- Request Returned

This message was sent with Low importance

SU

Service User01 <serviceuser01@fidrec.com.sg>

Tue 10/12/2021 12:47 PM

To: You

Dear User,

Thank you again for registering with FIDReC.

In order to process your subscription, we need some additional information and hence the form has been returned to you for amendments.

Please proceed to login using the following details and make the required changes on your form.

Please refer to this [link](#) to track your application.

Once the page has loaded, you can use the details below to access your application.

Application Number - 1002015

Phone Number - +6512345678

Email Id - testficeo01@outlook.com

Do feel free to contact [subscription@fidrec.com.sg](mailto:subscription@fidrec.com.sg) should you require any assistance.

---Please do not reply on this mail----

1

Take note of your **Application Number, Phone Number and Email Address** that you used in your registration.

2

Click on the [link](#) in “**Please refer to this link to track your application**” to be directed to the application form.



Track Application

\* Application Number

\* Phone Number

\* Email Id

[View Application](#)

Home > **Update Registration**

Reason for Return

Please update your details and re-submit your application.

Business Details

Company Name \*

Company Registration No. \*

3

Fill in your Application number, Phone Number and email address specified in the email. Next, click [View Application](#) .

4

You will be directed to the **Update Registration Form**. The **Reason for Return** will be stated here.



Fax No

Department

Public Helpline

Telephone \*

Email \*

Membership Details

Category \*

Sub-category \*

Category Name \*  
Bank & Finance Companies

Upload Documents

You may choose to include any documents that you would like to include as part of your submission

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

5

You are now able to make edits to all the information that you had submitted previously.

6

Make any updates required and then click the 'Submit' button at the bottom of the page. You will then see a success message. FIDReC will now review your updated submission and advise on next steps.



New Subscription Request - Please verify your account Inbox x

**Service User01** <serviceuser01@fidrec.com.sg> 1:28 PM (8 minutes ago) ☆ ↶ ⋮  
to me ▾

Thank you for subscribing to FIDReC. Your subscription has been successful.

Please click the registration link below and follow the steps to create your username and password.

OTP : 484997

[Registration Link](#)

New Subscription Request - REF#1001068 - Subscription Successful Inbox x

**Service User01** <serviceuser01@fidrec.com.sg> 1:28 PM (8 minutes ago) ☆ ↶ ⋮  
to me ▾

Dear User,

Thank you for subscribing to FIDReC.

There are 2 more steps before completing the subscription:

1. You are required to make a one-time initial subscription payment of "\$\$ XX" to FIDReC. You can choose from any of the available payment modes that are listed [here](#) to make your payment. Please ensure that you indicate your application number (in this email's subject line) within the transaction description, when making the payment.
2. You are required to send us your GIRO details, so that we can setup the recurring deduction of your future subscription fees. Please download the [GIRO Form](#), and send us the duly filled original GIRO form at the following address:

Financial Industry Disputes Resolution Centre Ltd  
36 Robinson Road  
#15-01  
City House  
Singapore 068877

1

Once your FI registration has been approved, an OTP will be sent to the registered email address. Please click on the **Registration Link** and ready your OTP to proceed with your registration process.

2

You will also be required to make a subscription payment and send over your GIRO details. This will be covered in another manual.



### Some helpful tips:

Do note that the OTP expires after 30 mins. Be sure to redeem your OTP before it expires. Please check your spam folder if you are not able to find the email.



3

Once you click on the registration link from your email, you will be directed to the OTP page. Enter your OTP and click on [Register](#) . An OTP is only valid for 30 minutes, after which you will need to request for a new one.

The screenshot shows a web interface for account activation. At the top left, there are two tabs: "Sign in" (with a left-pointing arrow) and "Verify Account" (which is selected). Below the tabs, the text "Please enter your OTP" is displayed. Underneath, there is a label "\* OTP" followed by a text input field. At the bottom of the form, there are two blue buttons: "Register" and "Resend OTP".



### Some helpful tips:

If your OTP has expired, you can click on [Resend OTP](#) to request for a new one. On the **Resend OTP** page, you will need to enter the same email address where you received your initial OTP.

The screenshot shows a web interface for requesting a new OTP. The title "Resend OTP" is at the top left. Below it, there is a label "\* Email" followed by a text input field. Underneath the input field, the text "Enter your email address to request a new OTP." is displayed. At the bottom of the form, there is a blue button labeled "Send".



[Sign in](#) [Verify Account](#)

Redeeming code: **513584**

Please set your username and password

\* Email

\* Username

\* Password ⓘ

\* Confirm password

**4** Once you click **Register** on the OTP page, you will be required to set your desired **Username** and **Password**. You can click on the ⓘ icon to view the password requirements.

**5** Once done, click on the  button to complete your registration process.



**Some helpful tips:**  
You can view the password that you have entered by clicking on the ⓘ icon.



**FIDReC** Dashboard Resources Invoices My Financial Institution 0 TEST CEO

Welcome TEST CEO

### My Cases

Cases Under Processing Search

Case Number ↑	Nature of Complaint	Complainant	Financial Institution	Case Manager	Sub Status	Due Date [FI]	Created On
There are no records to display.							

### My Tasks

Search

Date Created	Case Name	Subject	Due Date ↓	Activity Status ↓
There are no records to display.				

### My Appointments

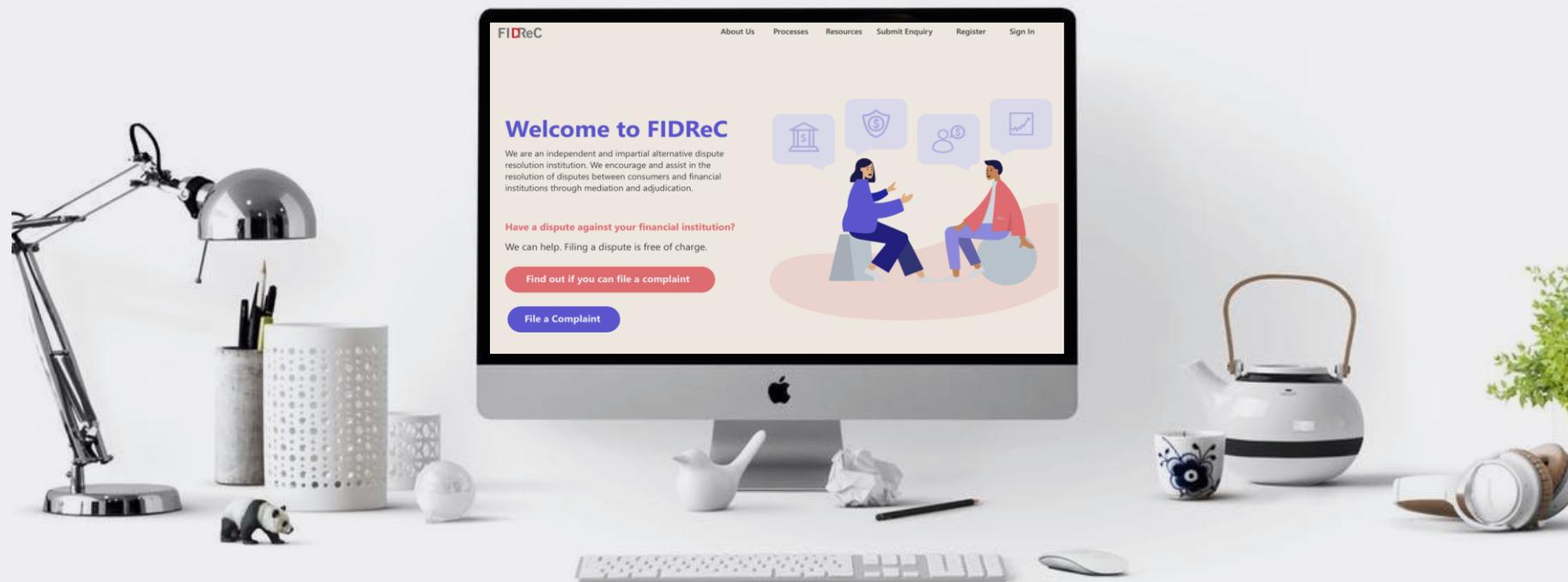
Search

Subject	Start Time	Appointment Type ↑	Case Name	Status
There are no records to display.				

6

You are all set! You can now view your personalized dashboard and view all your cases, tasks and appointments.





# Thank you!