

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

3



FIDReC About Us Processes Resources Register Submit Enquiry Sign in

Sign in Verify Account

Sign in with a local account

* Username

* Password

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.

Please note that OTP will expire in 5 minutes.

Sign in

Forgot password? Forgot username?

1

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

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.

Enter your OTP

Code

Verify

Please check your registered email for OTP. If you need new OTP please click [here](#)



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

3

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



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

4

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.



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	 <ul style="list-style-type: none"> View Details Deactivate  Edit

8 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.

Edit new contact x

Salutation *
Mr

Name * Phone *
TEST CEO +6512345678

Email Department
testficeo01@outlook.com —

Designation Fax No
CEO —

CEO Receive broadcast emails?

Primary Contact

Submit

9 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.



Add new contact

Salutation *

Name *

Phone *

Email *

Department

Designation

Fax No

CEO
 Primary Contact
 Receive broadcast emails?

10 To add more members to your Financial Institution, click to access a form that will ask you to provide the details of your new member.

11 Fill in the details and then click 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.



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

12

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.



FIDReC Dashboard | Invoices | My Financial Institution | Pierre ▾

Home > PFI

Your details have been updated! X

Business Details

Company Name * PFI	Company Registration No. * 546456546
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Business Address

Floor/Unit * 77	Block/Building * 44
City * Singapore	Street * 21 ST
Postal Code 6345324	State/Province * Singapore
Country * SINGAPORE [X] [Q] <small>Please click on the search icon to select.</small>	

13

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!