

# User Manual Manage your Financial Institution profile



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

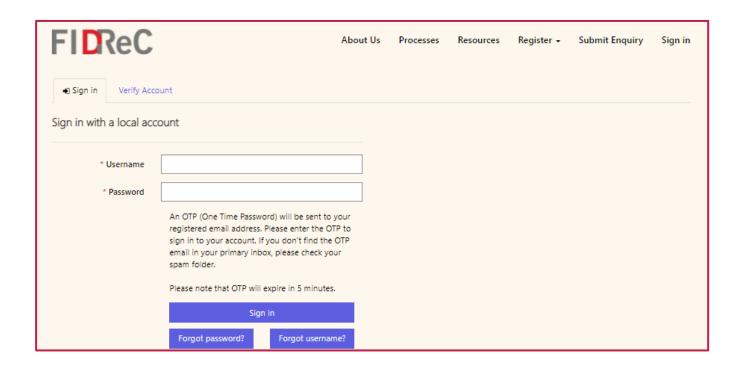


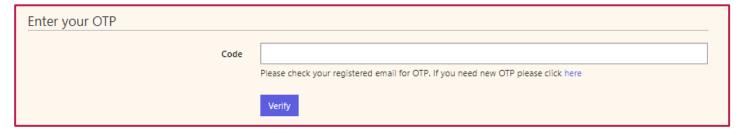
EDIT YOUR FINANCIAL INSTITUTION'S DETAILS

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

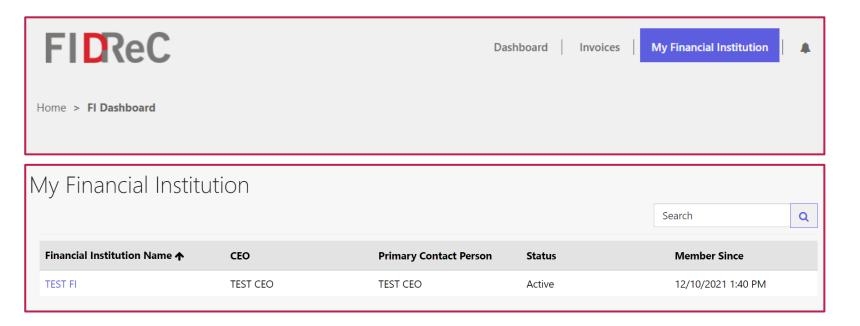
- To edit your account details, visit our website at <a href="https://www.fidrec.com.sg">www.fidrec.com.sg</a> and sign in.
- 2 Upon clicking 'Sign in' you will be prompted to input an OTP that will be sent to the email registered to your account.



#### 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.





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



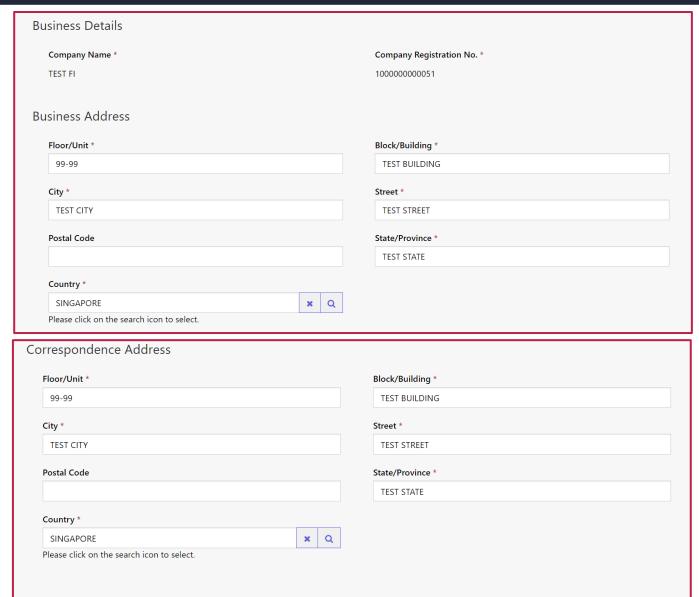


Public Helpline

Telephone \*

+65557654321





Email \*

testficeo01@outlook.com

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

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

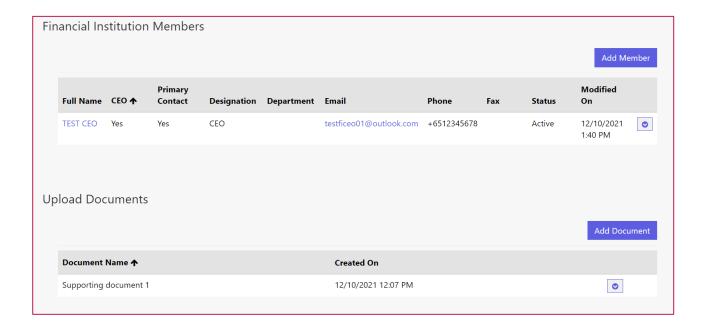


#### Some helpful tips:

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



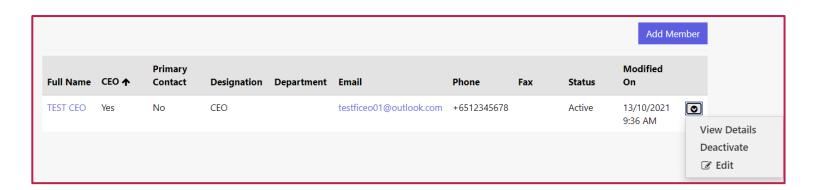


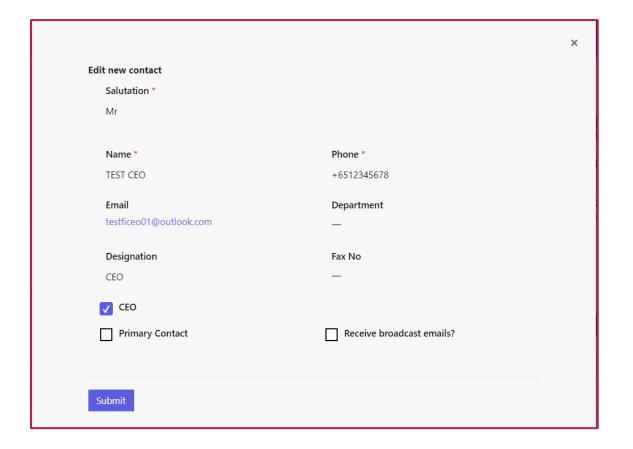


In the same page, you will be able to see Membership and GIRO details. These details are uneditable. Should there be any need to update them, please contact FIDReC to request for a change.

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.







- 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.
- 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.





d new contact Salutation *	
Salutation "	
Name *	Phone *
	Provide a telephone number
Email *	Department
Designation	Fax No
CEO	
Drimany Contact	Receive broadcast emails?
Primary Contact	

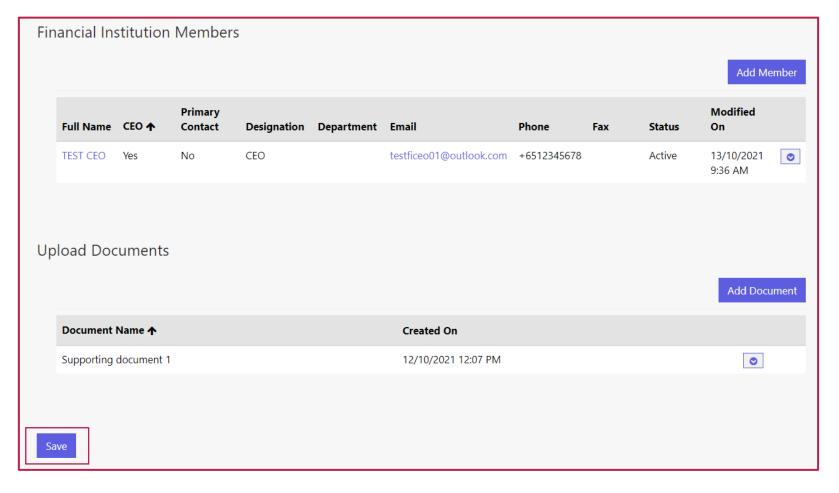
- To add more members to your Financial Institution, click Add Member to access a form that will ask you to provide the details of your new member.
- Fill in the details and then click submit to create the details of your new member.



#### 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.





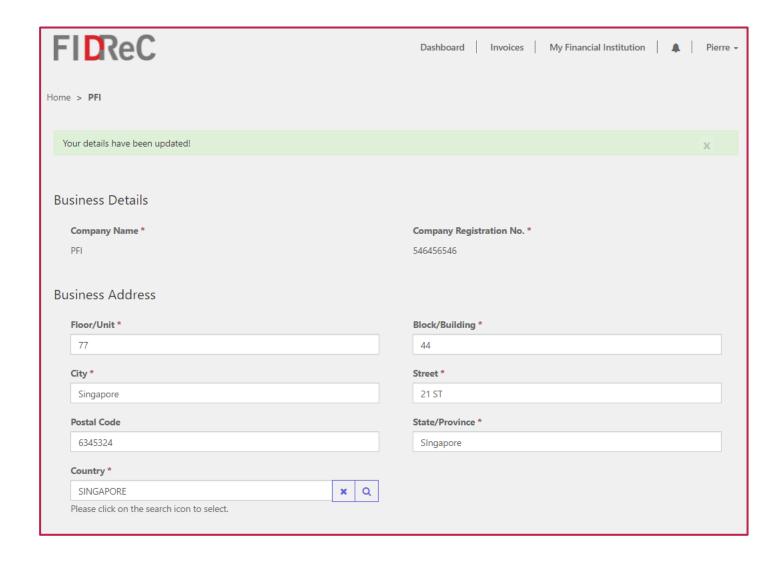
When you're done with all your edits, make sure to save your changes by clicking Save .



#### 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.

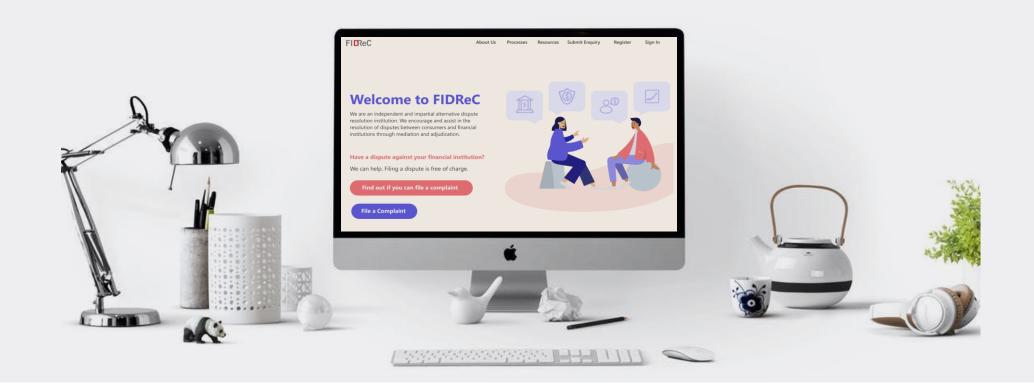




You will be shown a success message stating that "Your details have been updated".
You are all set! You have successfully changed your FI's details.







## Thank you!