

DBS IDEALGuide to apply Loan access

Table of Content

- 1. Application Pack | Apply Loan Enquiry role
- 2. Application Pack | Apply Loan Transaction role
- 3. <u>Maintenance Form | Apply Loan Enquiry role</u>
- 4. Maintenance Form | Apply Loan Transaction role



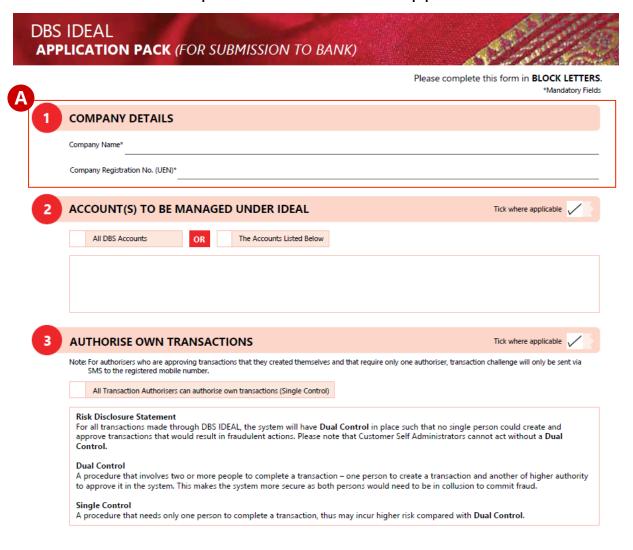
1 IDEAL Application Pack Apply for Loan access





DBS IDEAL | Application Pack | Apply Loan Enquiry role

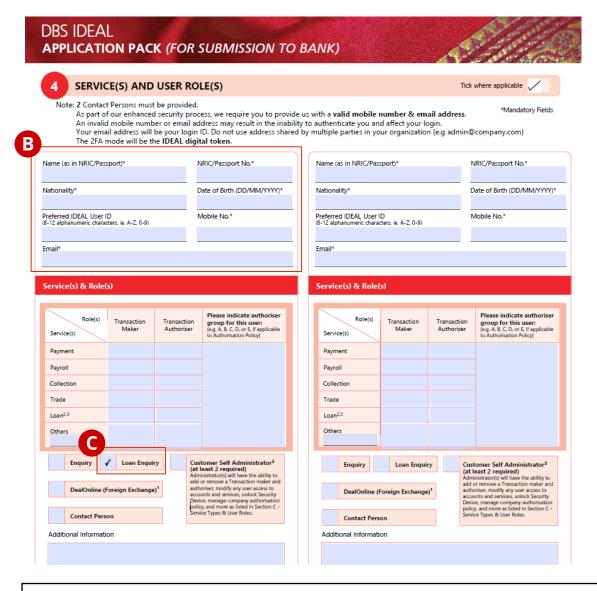
New to DBS IDEAL customer can submit a request via DBS IDEAL Application Pack





A. Complete "Company Details" section

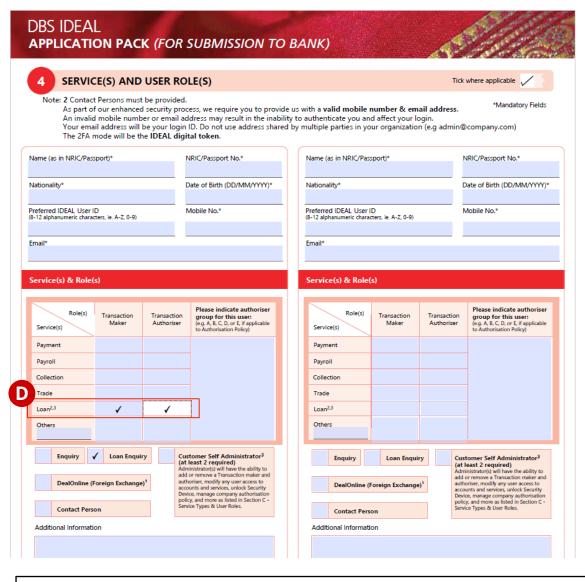
DBS IDEAL | Application Pack | Apply Loan Enquiry role



- B. Fill in user details, i.e. Name, NRIC, Nationality, DOB, and other required information
- C. Tick "Loan Enquiry"

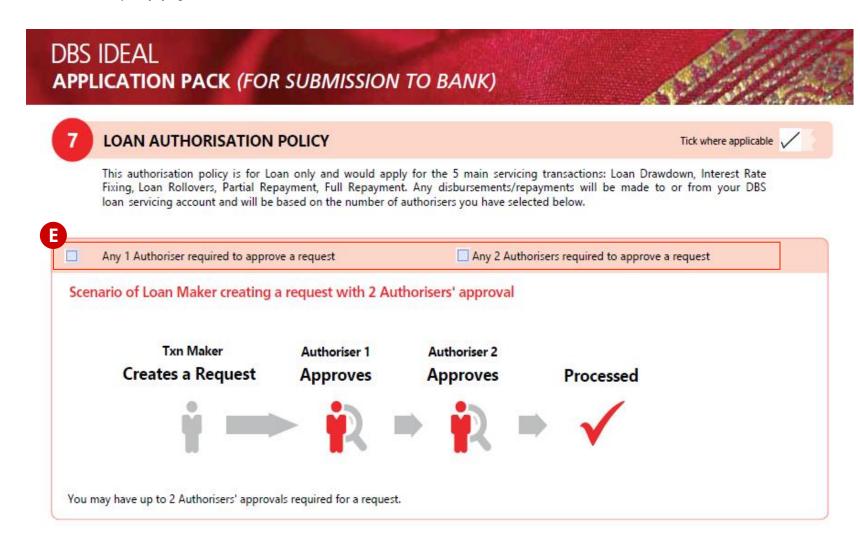


DBS IDEAL | Application Pack | Apply Loan Transaction roles





D. If you also wish to apply for loan transaction access, tick Loan "**Transaction Maker**" and/or "**Transaction Authoriser**" as required



E. If you are applying for loan transaction access, complete "Loan Authorisation Policy" section by selecting "Any 1 Authoriser required to approve a request" or "Any 2 Authorisers required to approve a request" accordingly.

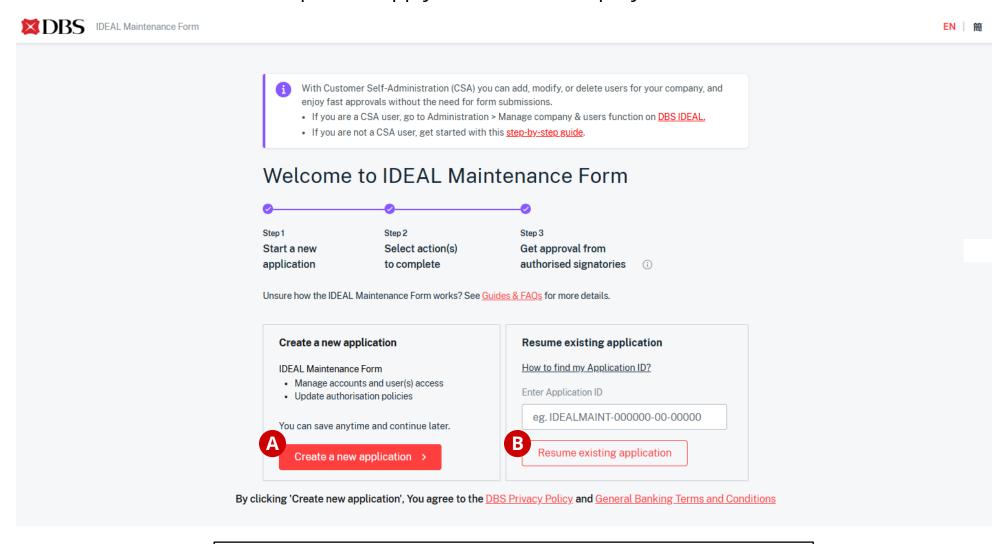


02 IDEAL Maintenance Form Apply for Loan access



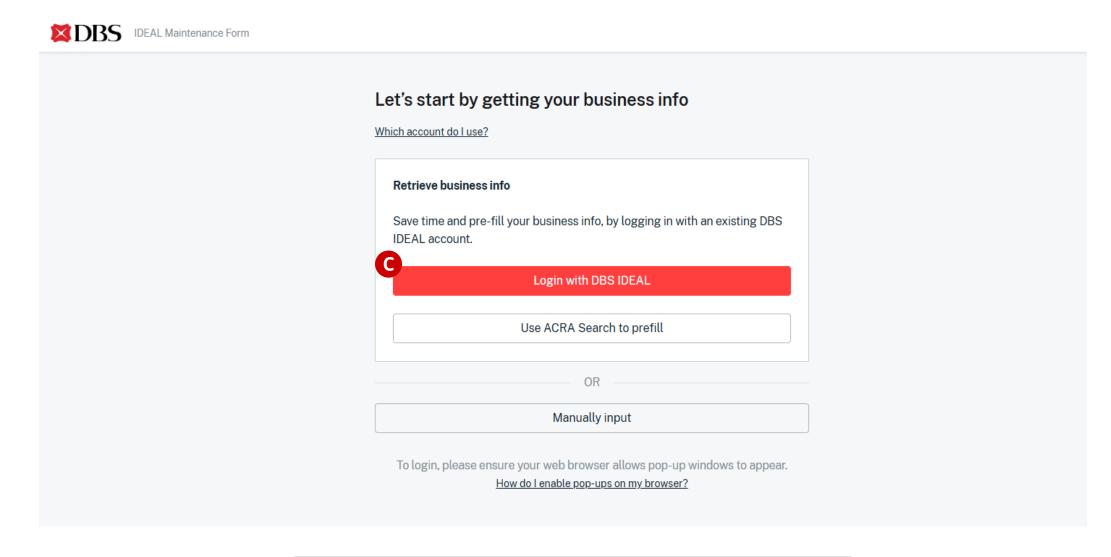


Existing IDEAL customer can submit a request to apply for the Loan Enquiry role via IDEAL Maintenance Form



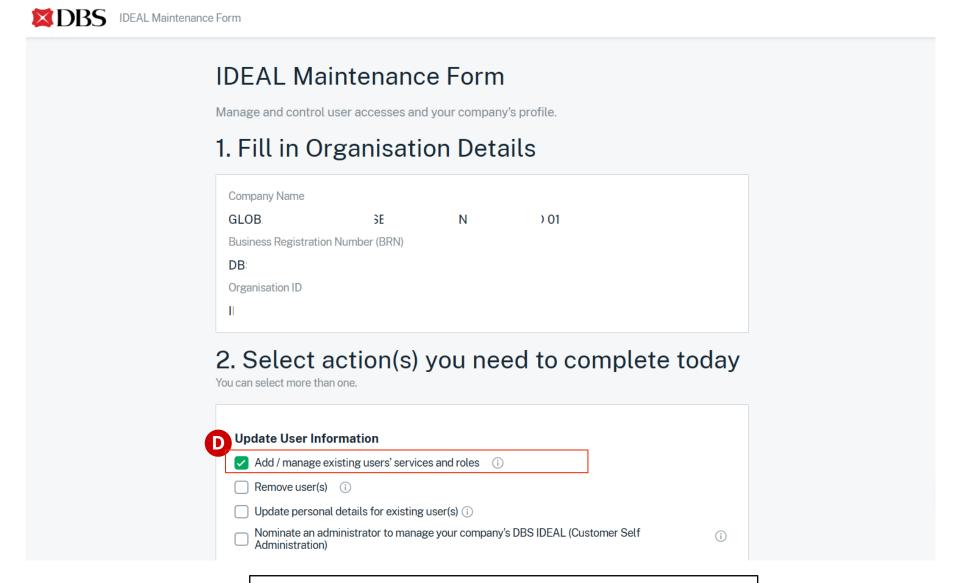
- A. Click "Create new application"
- B. OR Select "Resume existing application" to pick up where you left off





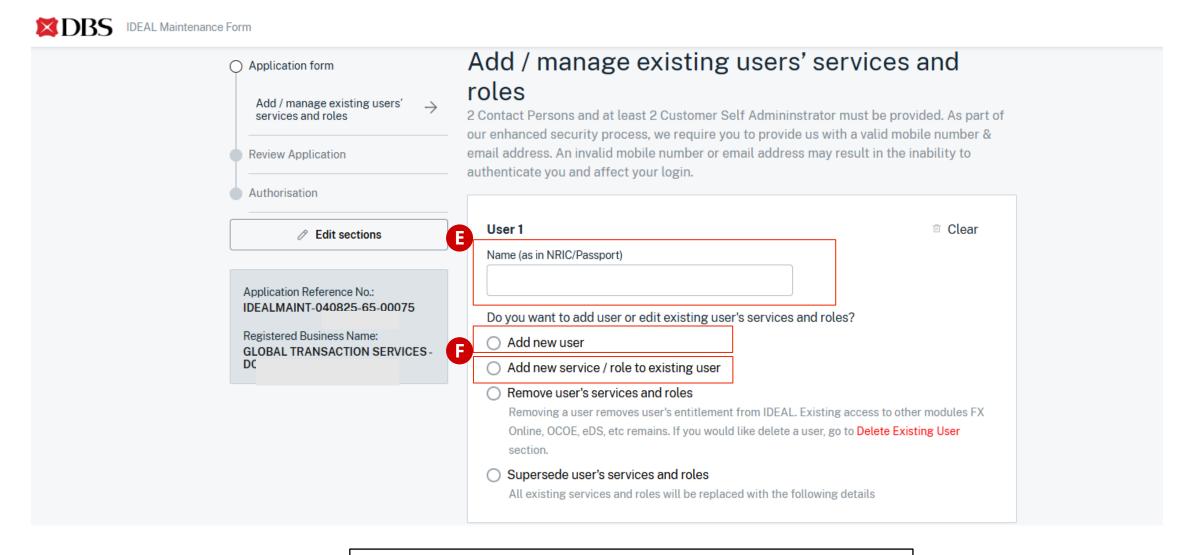
C. Select "**Login with DBS IDEAL"** for an end-to-end digital submission





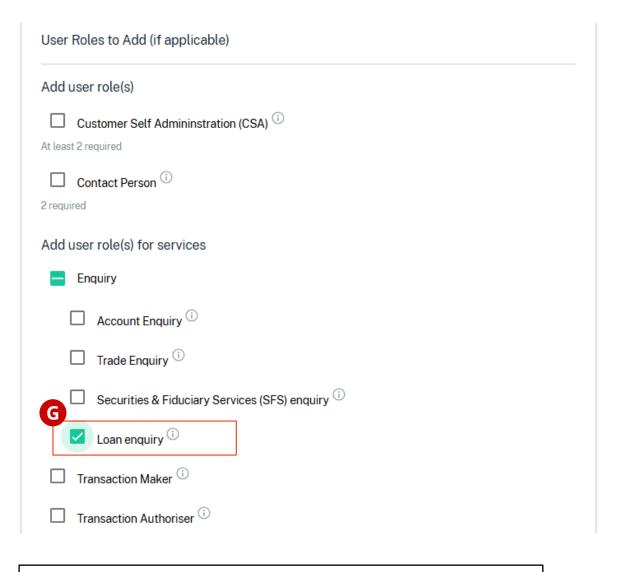


D. Select "Add/ manage existing users' services and roles"



- E. Input User Name
- F. Select "Add new user" or "Add new service/ role to existing user"

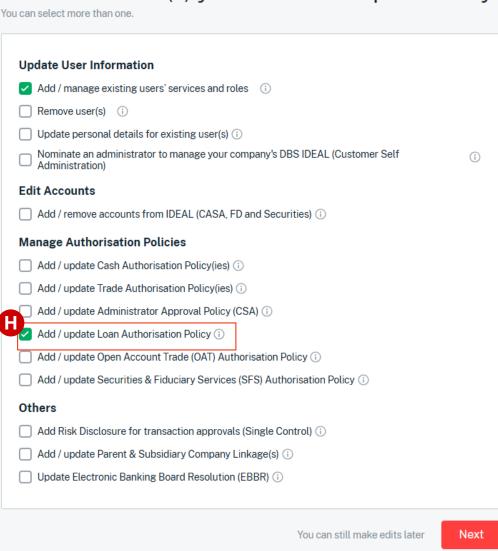






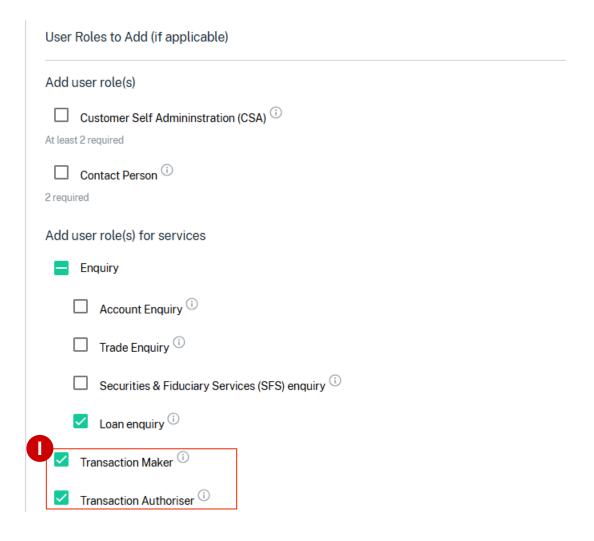


2. Select action(s) you need to complete today



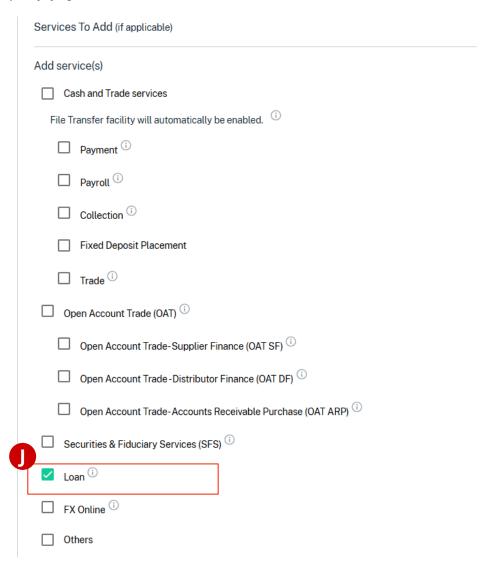


H. If you also wish to apply for loan transaction access, go back to Step 2 and select "Add/ update Loan Authorisation Policy". Click Next.



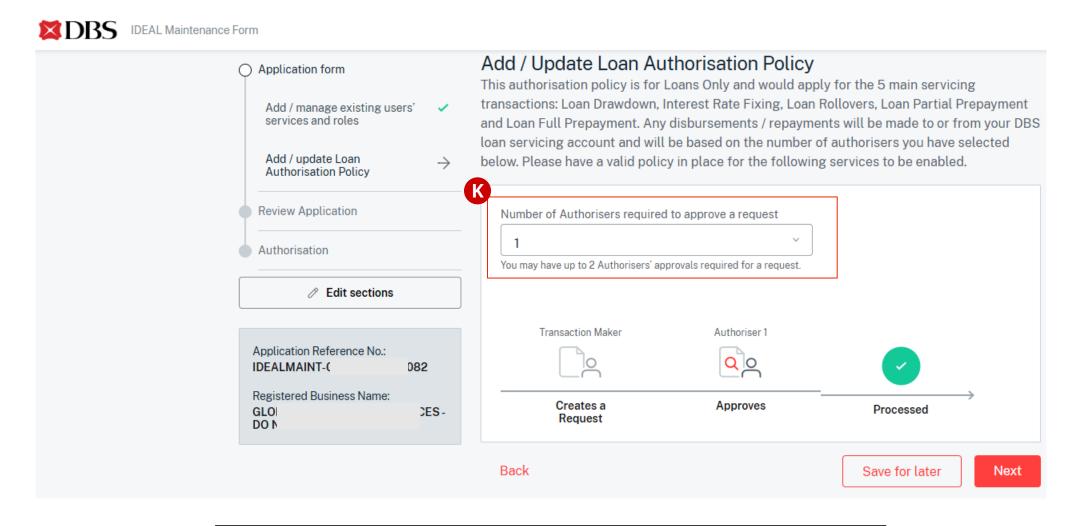
. Under "User Roles to Add (if applicable)", Select Loan "Transaction Maker" and/or "Transaction Authoriser" as required





Under "Services To Add (if applicable)" section, select "Loan"





K. Select "Number of Authorisers required to approve a request"

Complete the remaining steps to review your application and authorise its submission.



You are done! For more information:

Visit DBS Loan Services

New to DBS IDEAL? Sign Up here

Existing to DBS IDEAL? Apply Loan Enquiry via DBS IDEAL Online

Maintenance Form

More Quick Links to eGuide:

eStatement/ eAdvices

CSA Guide



