



Live more,
Bank less

DBS IDEAL Customer Self Administration (CSA) Registration Guide

Updated 10 June 2024

Easy Maintenance with DBS IDEAL

Customer Self Administration (CSA)

Do away with paper forms and manage user accesses and your company's profile on DBS IDEAL with ease.

DBS IDEAL Customer Self Administration allows you to:

- Add, modify or delete DBS IDEAL users
- Manage DBS IDEAL users' accounts and accesses to payment and reporting functions
- Manage security credentials
- Manage your company's profile on DBS IDEAL

Simply setup CSA authorisation policy and nominate Administrators and get started today!

The screenshot shows the DBS IDEAL Maintenance Form website. The browser address bar is highlighted with a red box and contains the URL <https://www.dbs.com.sg/ibg-eforms/sg/idealmaintenance>. A red circle with the number '1' is next to a text box that says: "Visit <https://www.dbs.com.sg/ibg-eforms/sg/idealmaintenance> to access the Online IDEAL Maintenance Form .". The main content area has a heading "Welcome to IDEAL Maintenance Form" and a progress bar with three steps: "Step 1 Start a new application", "Step 2 Select action(s) to complete", and "Step 3 Get approval from authorised signatories". Below the progress bar is a link to "FAQ". There are two main sections: "Create a new application" and "Resume existing application". The "Create a new application" section lists uses like "Manage accounts and user(s) access" and "Update authorisation policies", and includes a red-bordered button labeled "Create new application >". The "Resume existing application" section has a text input field for "Application ID" and a "Resume existing application" button. A red circle with the number '2' is next to a text box that says: "Click on 'Create new application'". At the bottom of the page, there is a footer with links for "Terms & Conditions", "Privacy Policy", "Fair Dealing Commitment", "Compliance with Tax Requirements", and copyright information for DBS Bank Ltd.

DBS IDEAL Maintenance Form

Let's start by getting your business info

Which account do I use?

Retrieve business info

Save time and pre-fill your business info, by logging in with an existing DBS IDEAL account.

3 Select "Login with DBS IDEAL" to verify your identity.

Use ACRA Search to prefill

OR

Manually input

To login, please ensure your web browser allows pop-up windows to appear.
[How do I enable pop-ups on my browser?](#)

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

Let's start by getting your business info

Which account do I use?

Retrieve business info

Save time and pre-fill your business info, by logging in with an existing DBS IDEAL account.

Login with DBS IDEAL

Use ACRA Search to prefill

OR

Manually input

To login, please ensure your web browser allows pop-up windows to appear.
[How do I enable pop-ups on my browser?](#)

4 Log in to DBS IDEAL using your preferred method (try QR Login!).

Securely log in with your DBS IDEAL account to continue.

Email **Organisation ID QR New!**

Organisation ID

User ID

PIN or Password

By proceeding, you consent to DBS disclosing to third parties your personal data required to process your requests.

Log in

Terms & Conditions | FAQ | Get In Touch | © 2023 DBS Bank Ltd

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

DBS IDEAL Maintenance Form

Let's start by getting your business info

Which account do I use?

Retrieve business info

Save time and pre-fill your business info, by logging in with an existing DBS IDEAL account.

Login with DBS IDEAL

Use ACRA Search to prefill

OR

Manually input

To login, please ensure your web browser allows pop-up windows to appear.
[How do I enable pop-ups on my browser?](#)

DBS - MARS Login

Authenticate with digital token +

Use your IDEAL mobile app to verify your identity. [Learn more](#)

Enter code manually

Authenticate now

5 Authenticate yourself using your IDEAL mobile app.

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

Cancel'. A red circle with the number '6' is next to the inset, and a white box below it says 'Verify your Identity using your digital token.'"/>

dbbs.com.sg/bg-eforms/sg/idealmaintenance

DBS IDEAL Maintenance Form

Let's start by getting your business info

Which account do I use?

Retrieve business info

Save time and pre-fill your business info, by logging in with an existing DBS IDEAL account.

Login with DBS IDEAL

Use ACRA Search to prefill

OR

Manually input

To login, please ensure your web browser allows pop-up windows to appear.
[How do I enable pop-ups on my browser?](#)

6

Authenticate with digital token +

Tap the notification on your registered IDEAL mobile device to verify your identity
Not Working? Please try again in 53 seconds... or [Cancel](#)

Verify your Identity using your digital token.

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

DBS IDEAL Maintenance Form

Apply for IDEAL Maintenance Form

Who is filling out this application?
[Redacted Name]

On behalf of company
[Redacted Company Name]

Next

7 Upon successful log in, your information will be automatically populated.

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

DBS IDEAL Maintenance Form

Apply for IDEAL Maintenance Form

1. Manage and control user accesses and your company's profile.
2. Assign administrator access to designated users, at no charge for greater flexibility and control on DBS IDEAL. Click [here](#) for more details.

1. Fill in Organisation Details

Company Name
[Redacted]

Business Registration Number (BRN)
[Redacted]

Organisation ID
[Redacted]

8 Your organisation information will be automatically populated.

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

You can select more than one.

Update User Information

- Add / manage existing users' services and roles ⓘ
- Remove user(s) ⓘ
- Update personal details for existing user(s) ⓘ
- Nominate an administrator to manage your company's DBS IDEAL ⓘ (Customer Self Administration)

Edit Accounts

- Add / remove accounts from IDEAL (CASA, FD and Securities) ⓘ

Manage Authorisation Policies

- Add / update Cash Authorisation Policy(ies) ⓘ
- Add / update Trade Authorisation Policy(ies) ⓘ
- Add / update Administrator Approval Policy (CSA) ⓘ
- Add / update Loan Authorisation Policy ⓘ
- Add / update Open Account Trade (OAT) Authorisation Policy ⓘ

Business Registration Number (BRN)
[Redacted]

Organisation ID
[Redacted]

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

You can select more than one.

Update User Information

- Add / manage existing users' services and roles ⓘ
- Remove user(s) ⓘ
- Update personal details for existing user(s) ⓘ
- Nominate an administrator to manage your company's DBS IDEAL (Customer Self Administration) ⓘ

Edit Accounts

- Add / remove accounts from IDEAL (CASA, FD and Securities) ⓘ

Manage Authorisation Policies

- Add / update Cash Authorisation Policy(ies) ⓘ
- Add / update Trade Authorisation Policy(ies) ⓘ
- Add / update Administrator Approval Policy (CSA) ⓘ
- Add / update Loan Authorisation Policy ⓘ
- Add / update Open Account Trade (OAT) Authorisation Policy ⓘ
- Add / update Securities & Fiduciary Services (SFS) Authorisation Policy ⓘ

Others

- Add Risk Disclosure for transaction approvals (Single Control) ⓘ
- Add / update Parent & Subsidiary Company Linkage(s) ⓘ
- Update Electronic Banking Board Resolution (EBBR) ⓘ

You can still make edits later

Next

9 Select "Nominate an administrator to manage your company's DBS IDEAL (Customer Self-Administration)" to grant new administrator entitlements.

10 Select "Add/ update administrator approval policy (CSA)" to setup CSA approval policy.

11 Click on the "Next" button to proceed.

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

Important information pertaining to Customer Self Administrator(s)(CSA)

Nominated Customer Self Administrator(s) will have the full power to administer and operate DBS IDEAL on behalf of the organisation, including:

- Add or remove a Transaction maker and authoriser
- Modify any user access to accounts and services
- Suspending and re-activate a User's IDEAL access
- Unlocking Security Device
- Requesting for a new Security Device
- Managing company profile in IDEAL
- Manage company authorisation policy

Important notes

Given the wide powers conferred on the appointed Customer Self Administrator(s), Customer Self Administrator(s) should be persons within the organisation with sufficient executive power and authority to take on the role and the organisation is responsible for ensuring that it has appropriate and adequate internal controls procedures and security measures in place to prevent any fraud, abuse or unauthorised acts/omissions by Customer Self Administrators.

For security reasons, at least 2 Customer Self Administrators must be appointed and any action initiated by one Customer Self Administrator must be approved by at least one other Customer Self Administrator. Hence,

- a) Customer Self Administrator cannot act alone to add/modify any setup.
- b) Dual control is always required for any actions performed. It is mandatory to provide a valid mobile number and submit a Certified True Copy of identification document for all Customer Self Administrators together with this application.

You will need to submit the Electronic Banking Board Resolution (EBBR) when signing up for Loan or Customer Self Administrator service.

[Back](#) [Next](#)

12 Read the important information regarding CSA, and click on "Next".

The screenshot shows the DBS IDEAL Maintenance Form interface. On the left, a navigation menu includes 'Application form', 'Review Application', and 'Authorisation'. The 'Application form' section is active, with sub-sections for 'Nominate an administrator (Customer Self Administration)' and 'Add / update Administrator Approval Policy (CSA)'. An 'Edit sections' button is visible. Below the menu, the 'Application Reference No.' is IDEALMAINT-110724-65-00058, and the 'Registered business name' is redacted.

Nominate an administrator to manage your company's DBS IDEAL (Customer Self Administration)

This page is to nominate a user as CSA for your company. If you want the user to view account balances and/or make payments, use the [Add User\(s\) or edit existing users' services and roles page](#) to nominate user as CSA and allow the user to view account balances and/or make payments.

User 1 Clear

Name (as in NRIC/Passport)
Full Name

ID Document type: Singapore NRIC | NRIC/Passport number: S9999999D

Nationality: Singapore

Date of birth: 10/07/2024

Is the CSA existing IDEAL user?
 Yes
 No

Preferred IDEAL User ID

Mobile number: +65 88888888

Email: email@email.com

13 For new IDEAL user: Provide user information and indicate a preferred IDEAL user ID. Ensure that information are provided correctly to receive first-time login welcome package

Nominate an administrator to manage your company's DBS IDEAL (Customer Self Administration)

This page is to nominate a user as CSA for your company. If you want the user to view account balances and/or make payments, use the [Add User\(s\) or edit existing users' services and roles page](#) to nominate user as CSA and allow the user to view account balances and/or make payments.

User 1 Clear

Name (as in NRIC/Passport)
Full Name

ID Document type: Singapore NRIC | NRIC/Passport number: S9999999D

Nationality: Singapore

Date of birth: 10/07/2024

Is the CSA existing IDEAL user?
 Yes
 No

Existing IDEAL User ID: USERID

Mobile number: +65 88888888

Email: email@email.com

14 For existing IDEAL user: Provide user information and indicate their IDEAL user ID. Ensure that information are provided correctly to prevent any delay in processing.

The screenshot shows a web browser window with the URL `dbz.com.sg/lbg-efoms/sg/idealmaintenance`. The page contains a registration form with the following fields and options:

- Application Reference No.:** IDEALMAINT-110724-65-00058
- Registered business name:** [Redacted]
- Name (as in NRIC/Passport):** Full Name
- ID Document type:** Singapore NRIC
- NRIC/Passport number:** S9999999D
- Nationality:** Singapore
- Date of birth:** 10/07/2024
- Is the CSA existing IDEAL user?:** Yes, No
- Existing IDEAL User ID:** USERID
- Mobile number:** +65 88888888
- Email:** email@email.com
- Is user an existing DBS/POSB customer?:** Yes, No
- Nominate another CSA:**
- Buttons:** Save for later, Next

Annotations on the form:

- 15:** A red circle next to the question "Is user an existing DBS/POSB customer?". A callout box points to the "No" radio button with the text: "Indicate if user is an existing DBS/POSB customer for bank processing purposes."
- 16:** A red circle next to the "Next" button. A callout box points to the button with the text: "Click on 'Next' to proceed."

Footer text: Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

17 To setup administration approval policy for your company, select the number of Customer Self Administrators (CSA) required to approve a request.

18 Click on "Next" to proceed.

are true, complete and accurate. When providing any personal data to the Bank, I/we confirm that I am/we are lawfully providing the data for the Bank to use and disclose for the purposes of:

- (1) providing products or services to me/us;
- (2) meeting the operational, administrative and risk management requirements of DBS Group; and
- (3) complying with any requirement, as DBS Group reasonably deems necessary, under any law or of any court, government authority or regulator. "DBS Group" means DBS Group Holdings Ltd and its affiliates.

In addition, the Bank may use and rely on any personal data provided by me/us, and may disclose such personal data to service providers, to communicate, authenticate or otherwise deal with me/us and my/our officer holders or employees in connection with the provision of banking products and services to me/us.

4. Should any Customer Self Administrator cease to be employed by the Organisation, I/we undertake to inform the Bank and the Organisation will submit the IDEAL Maintenance form to delete this Customer Self Administrator's user profile in IDEAL. I/We agree that the Organisation shall not hold the Bank liable for any act or omission by a Customer Self Administrator who ceases to be employed by the Organisation for which the Bank is not informed.

5. For partnership, the signatures of all partners are required. For a company which has furnished the Bank with a standalone Electronic Banking Board Resolution, the authorised signatories must be the current authorised signatories specified in that document. For a company which has furnished the Bank with a Board Resolution for the opening of the current account that covers Electronic Banking services, the authorised signatories must be any two directors or the current authorised signatories with the highest authorisation limit as specified in that document.

6. For Associations, Clubs & Societies, signatures of any two of existing/outgoing Chairman, Secretary or Treasurer are required.

I/We hereby confirm that I/we have obtained copies of the [TERMS AND CONDITIONS GOVERNING ELECTRONIC APPLICATIONS](#), which I/we have read, understood and accepted. By submitting this form, I/We hereby confirm that I/we have read, understood and agree to be bound by these terms (including the clause relating to the collection, processing, use and disclosure of personal data).

I understand and acknowledge the terms and conditions stated above

[Back](#) [Save for later](#) [Authorise Submission](#)

21 Read through the Terms & Conditions before providing us your acknowledgement.

22 Click on "Authorise Submission" to proceed.

Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

DBS IDEAL Maintenance Form

Application form

Review Application

Authorisation

Authorised Signatories

Edit sections

Application Reference No.: IDEALMAINT-110724-65-00058

Registered business name:

Get approval from authorised signatories

To update the contact info of authorised signatories, select 'Save for later' to continue this application later. Then contact BizCare on 1800 222 2200 to make the updates.

Authorised signer 1

Select

Authorisation Methods

Please ensure that you submit the following supporting documents to avoid delays in your IDEAL maintenance application. The IDEAL application is valid only within 3 months upon submission. If your supporting documents are not in English language, kindly ensure that it is translated to English by a suitable translator before submission.

For all new approvers / Customer Self Administration (CSA) users who are Singapore Citizens or Permanent Residents :

- Certified true copy of NRIC

For all new approvers / Customer Self Administration (CSA) users who are non-Singapore Citizens and non-Permanent Residents :

- Certified true copy of Passport
- Certified true copy Proof of Residential address within 3 months from the statement date e.g. Recent utility or phone bill, bank statement or correspondence from a government agency or National ID with residential address

For Clubs, Associations, Societies, Religious Organizations, Charities, MCST

- Minutes of Meeting (MOM), to be signed-off and duly certified (on all pages) by any two from existing Chairman/ Treasurer/ Secretary

If foreign incorporated:

- Original or Certified true Copy of Certificate of Incumbency (Dated within last one year) / Certificate of Registration / Annual return / Register of Directors

Original copy required, otherwise a copy certified true by the following external certifiers (i.e. not a company's employee):

Solicitor/Lawyer/Notary Public/Certified Public or Professional Accountant/Auditor/Chartered Secretary from a FATF member country OR a bank staff. Please refer to the list of FATF member countries [here](#).

23 Select/Input your company's Authorised signers according to your signing requirements. Ensure that their contact details are reflected correctly.

24 Read the supporting documents required for granting users with CSA entitlements.

For all new approvers / Customer Self Administration (CSA) users who are Singapore Citizens or Permanent Residents :

- Certified true copy of NRIC

For all new approvers / Customer Self Administration (CSA) users who are non-Singapore Citizens and non-Permanent Residents :

- Certified true copy of Passport
- Certified true copy Proof of Residential address within 3 months from the statement date
e.g. Recent utility or phone bill, bank statement or correspondence from a government agency or National ID with residential address

For Clubs, Associations, Societies, Religious Organizations, Charities, MCST

- Minutes of Meeting (MOM), to be signed-off and duly certified (on all pages) by any two from existing Chairman/ Treasurer/ Secretary

If foreign incorporated:

- Original or Certified true Copy of Certificate of Incorporation /Dated within last one year/ Certificate of Registration / Annual return / Register of Members

Original copy required, otherwise a copy of the original (for non-employee):
Solicitor/Lawyer/Notary Public/Certified Public Accountant/Chartered Accountant/ FIC member country OR a bank staff.

Select approval method

Print and send
Download this application as a PDF and print it for authorised signatories to sign before sending it to us.

25

Select "Print & Send" authorisation method. You are required to mail the form (signed with wet ink signature by authorised signatories) together with the certified true copy of the supporting documents to the bank for processing.

26

Click on "Next" to submit.

[Back](#)
[Save for later](#)
[Next](#)

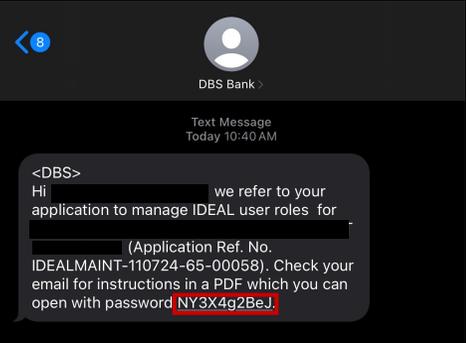
Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1

The screenshot shows a web browser window with the URL `dbb.com.sg/lbg-eforms/sg/download-pdf`. The page title is "DBS IDEAL Maintenance Form". At the top center, there is an information icon (i) and the heading "Submit signed PDF to DBS". Below this, a red-bordered box highlights the text: "Please allow us 7 working days to process your request (once it is received by us). Note that any transaction submitted during this time may still follow the previous approval policy." To the right of this box, callout 27 points to the text: "Your request will take an estimated 7 working days to process (once it is received by us), depending on complexity." Below the highlighted text, it says "An email with the application PDF has been sent to your email address" followed by a redacted email address. Further down, it says "Please refer to the application PDF for more details on the manual submission process, including where you can mail/ submit the form to". Below this, there are two buttons: "Download PDF" (highlighted with a red box) and "Exit". Callout 28 points to the "Download PDF" button and the text: "Download the PDF form here or from the email sent by dbseforms@dbb.com. If you cannot locate the email, please check your junk folder." Below the buttons, there is a feedback section: "How would you rate your overall experience today?" with five stars and the instruction "Tap on the stars to rate". A "Submit" button is located below the stars. At the bottom of the page, there is a footer with links: "Terms & Conditions | Privacy Policy | Fair Dealing Commitment | Compliance with Tax Requirements | ©2020 DBS Bank Ltd | Co. Reg. No. 196800306E | Version 1.0.1".

The screenshot shows an email interface at the top with a recipient 'Xavier <xav10112023@gmail.com>' and an attachment 'IDEALMAINT-110724...' (93 KB). Below the email is a mobile text message from 'DBS Bank' with the following content: '<DBS> Hi [redacted] we refer to your application to manage IDEAL user roles for [redacted] (Application Ref. No. IDEALMAINT-110724-65-00058). Check your email for instructions in a PDF which you can open with password NY3X4g2BeJ.' The email body contains the DBS logo, the slogan 'Live more, Bank less', the URL 'www.dbs.com.sg/sme', and the text 'Hi [redacted]'. Below this is a light grey box containing the text 'Application reference number: IDEALMAINT-110724-65-00058.' and a small icon of a person at a computer. At the bottom of the email body, there is a paragraph: 'We refer to your application to manage IDEAL user roles . To proceed, follow the instructions in the attached PDF. Enter the password sent by SMS to open the PDF. Kindly submit the application before Oct 09, 2024 to avoid expiry.'

29

Open the PDF form with the password received via SMS to your registered mobile device.



30

If you did not receive the SMS, you might need to update your IDEAL contact information.

IDEALMAINT-110724-65-00058165926303854926737.pdf
Page 5 of 8

DBS Live more, Bank less

Ideal Maintenance Form

Reference No: IDEALMAINT-110724-65-00058

Nominate an administrator to manage your company's DBS IDEAL (Customer Self Administration)

User1

Name (as in NRIC/ Passport) Full Name	
ID Document type Singapore NRIC	NRIC/ Passport Number S9999999D
Nationality Singapore	Date of birth 10/07/2024
Is the CSA existing IDEAL user? Yes	Existing IDEAL User ID USERID
Mobile number +65-88888888	Email email@email.com
Is user an existing DBS/ POSB Customer? No	

31 Review to ensure that all information is generated correctly.

724-65-00058165926303854926737.pdf



Live more,
Bank less

Ideal Maintenance Form

Reference No: IDEALMAINT-110724-65-00058

I/We hereby confirm that I/we have obtained copies of [TERMS AND CONDITIONS GOVERNING ELECTRONIC APPLICATIONS](#), which I/we have read, understood and accepted. By submitting this form, I/We hereby confirm that I/we have read, understood and agree to be bound by these terms (including the clause relating to the collection and disclosure of personal data).

I understand and acknowledge the terms and conditions stated above.

Signature
Date

32 Print this form and obtain wet ink signature from authorised signatories before mailing it together with the required supporting documents to the bank for processing.

Mail to:
 T&O-SG IBG Ops
 Corporate Account Services - Channel R&M
 2 Changi Business Park Crescent
 #04-06 DBS Asia Hub
 Singapore 486029

You are done! For more information:

Visit [IDEAL Online Maintenance Webpage](#)

OR [Customer Self Administration Module](#)

Signup for [Online training](#)

