

IDEAL maintenance online form step by step guide

Steps to add new user(s)

Choose this option if you want to add new user or add/remove/supersede existing user's services and roles. Ensure that details provided are according to their ID documents, or else it might lead to delay in processing.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Add/Manage existing users' services and roles"
4. Fill in new user full name (as per NRIC/Passport)
5. Select add new user
6. Fill in user details (ID number & Nationality & Mobile number & Email address etc)
7. Fill in user roles (e.g. Customer Self Administration (CSA)/Enquiry/Transaction Maker/Transaction Approver)
8. Select the service to add (e.g. Cash & Trade/Open Account Trade)
9. Select which account access to grant the user
10. Preview new user access and acknowledge the Terms & Conditions
11. Select authorised signatories (Add approver if more than one approver is required)
12. Select authorisation method (IDEAL/DigiSign/Print & Send)

Steps to update personal details

Choose this option to update an existing user's personal details (e.g., Email, mobile number). For those who have access to IDEAL, a simpler way for you to update your Personal details is via IDEAL "Profile & Setting" tab.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Update personal details for existing user(s)"
4. Fill in Username, IDEAL User ID, New Email and New Mobile number (If email or mobile number remains the same, you may fill in accordingly)
5. Preview updated personal details and acknowledge the Terms & Conditions
6. Select authorised signatories (Add approver if more than one approver is required)
7. Select authorisation method (IDEAL/DigiSign/Print & Send)

Steps to delete existing user(s)

Choose this option to delete an existing user's profile. All services and user roles tagged to the user will be removed and the user's profile (IDEAL account) will be deleted. User will no longer be able to login to IDEAL. Ensure that details provided are according to their ID documents, or else it might lead to a delay in processing. If you are not sure of the Name/User ID, you may check with your company Customer Self Administration user (CSA) or download user setup report on IDEAL.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Remove user(s)"
4. Fill in Username, IDEAL User ID
5. Preview removed user(s) and acknowledge the Terms & Conditions
6. Select authorised signatories (Add approver if more than one approver is required)
7. Select authorisation method (IDEAL/DigiSign/Print & Send)

Steps to change cash authorisation policy(ies)

Choose this option to set transaction authorisation limit to your account(s) for different service(s).

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Add/Update Cash Authorisation Policy(ies)"
4. Select account(s) to change authorisation policy(ies)
5. Select account(s) currency to change authorisation policy(ies)
6. Select service(s) to change authorisation policy(ies)
7. Indicate transaction authorisation limits (Amount from, Amount to, authorisation requirements)
8. Preview authorisation policy(ies) and acknowledge the Terms & Conditions
9. Select authorised signatories (Add approver if more than one approver is required)
10. Select authorisation method (IDEAL/DigiSign/Print & Send)

Steps to update Electronic Banking Board Resolution (EBBR)

Choose this option if want to update EBBR or to nominate Authorised persons for EB Services.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Update EBBR"
4. Fill in company name and date for Certified True Extract of Resolutions Passed by the Board of Directors (if required)
5. Select the number of authorised persons
6. Fill in authorised person details (Full name, ID number, email, mobile number etc)
7. Preview updated EBBR and acknowledge the Terms & Conditions
8. Select authorised signatories (Add approver if more than one approver is required)
9. Select authorisation method (Print & Send)

Steps to add a new or manage/supersede existing user(s) to include trade service access

Choose this option if you want to add new trade user or manage/supersede existing user's services and roles. Ensure that details provided are according to their ID documents, or else it might lead to delay in processing.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Add/Manage existing users' services and roles"
4. Fill in the user full name (as per NRIC/Passport)
5. Select add new user or manage/supersede existing user's services and roles.
6. Fill in user details (ID number & Nationality & Mobile number & Email address etc)
7. Fill in user roles (e.g. Customer Self Administration (CSA)/Enquiry/Transaction Maker/Transaction Approver)
8. Select the Trade service to be added
9. Select which account access to grant this user
10. Preview user access and acknowledge the Terms & Conditions
11. Select authorised signatories (Add approver if more than one approver is required)
12. Select authorisation method (IDEAL/DigiSign/Print & Send)

Steps to add a new or manage/supersede existing user(s) to include FX online service access

Choose this option if you want to add new user or manage/supersede existing user's services and roles. Ensure that details provided are according to their ID documents, or else it might lead to delay in processing.

1. Click on "Create new application"
2. Login with IDEAL to retrieve your business information
3. Select "Add/Manage existing users' services and roles"
4. Fill in the user's full name (as per NRIC/Passport)
5. Select add new user or manage/supersede existing user's services and roles.
6. Fill in user details (ID number & Nationality & Mobile number & Email address etc)
7. Fill in user roles (e.g. Customer Self Administration (CSA)/Enquiry/Transaction Maker/Transaction Approver)
8. Select the "FX Online" service to be added (Ensure that you select at least one other service for this user for example Cash and Trade Service – Payment)
9. Select which account access to grant this user
10. Preview user access and acknowledge the Terms & Conditions
11. Select authorised signatories (Add approver if more than one approver is required)
12. Select authorisation method (IDEAL/DigiSign/Print & Send)

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