



Live more,
Bank less

DBS IDEAL

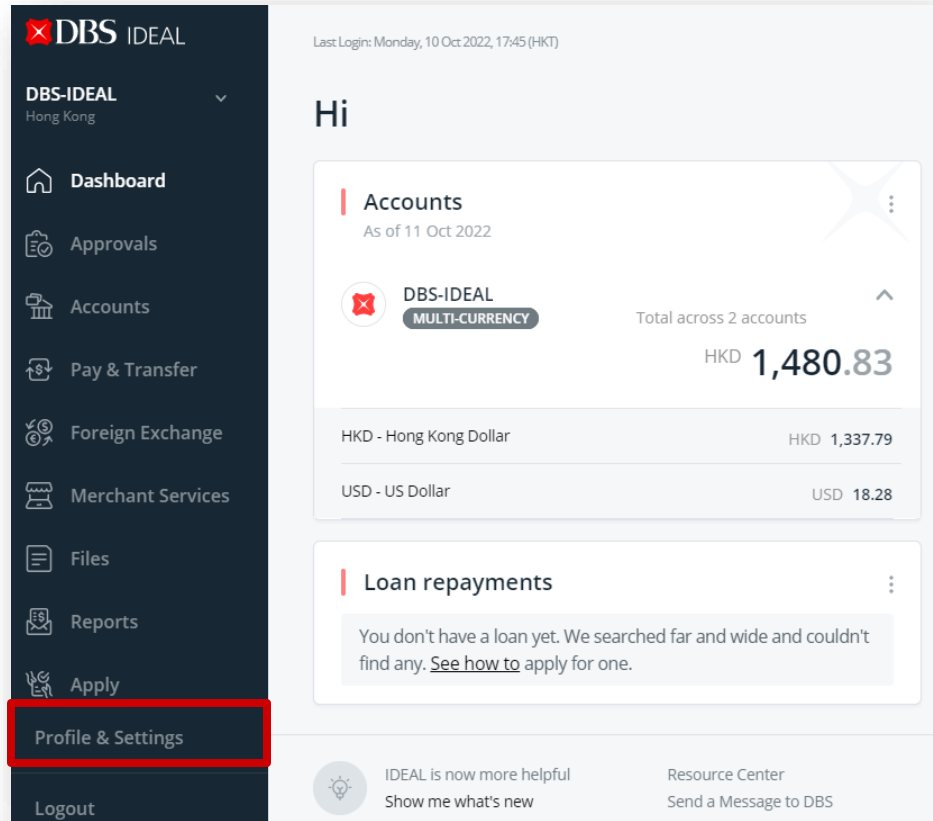
Changing your mobile number



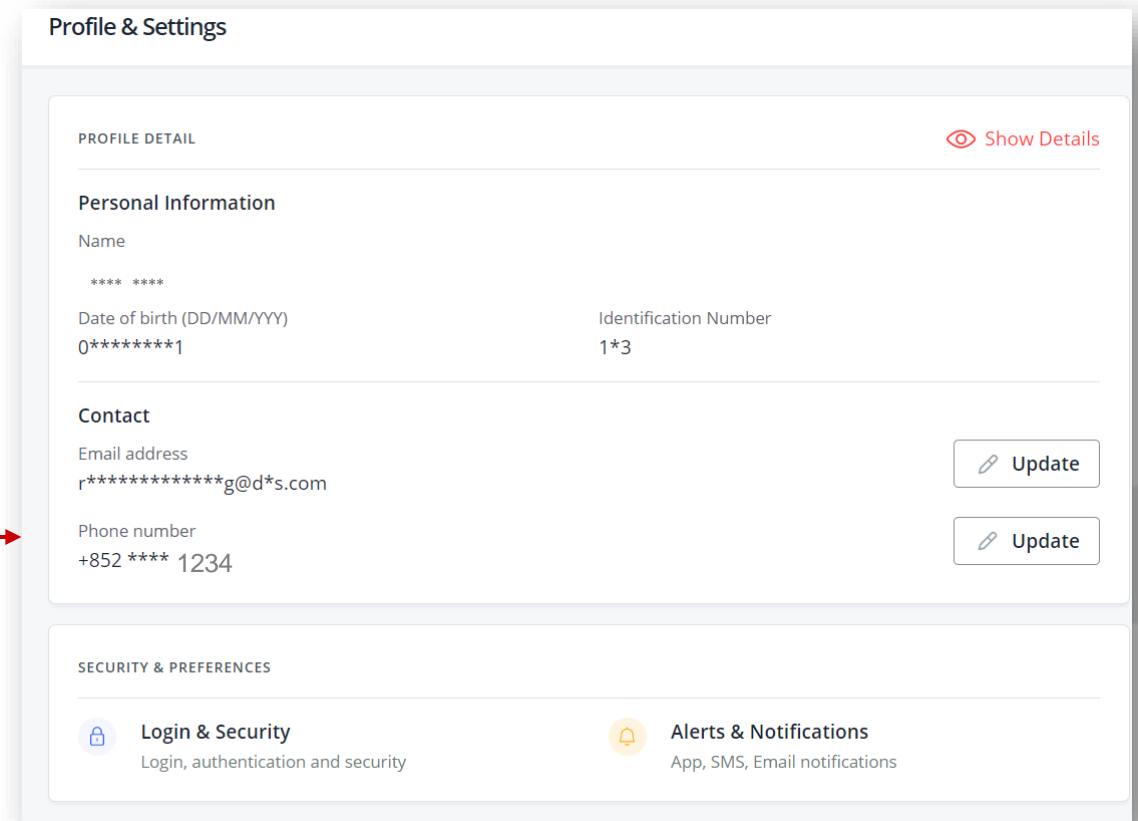
Change your mobile number on IDEAL

Change your Mobile number on IDEAL

1. Click on **Profile & Settings** in the main menu



The screenshot shows the DBS IDEAL dashboard. The left sidebar contains a main menu with the following items: Dashboard, Approvals, Accounts, Pay & Transfer, Foreign Exchange, Merchant Services, Files, Reports, Apply, Profile & Settings (highlighted with a red box), and Logout. The main content area displays the user's name 'Hi', the last login time 'Monday, 10 Oct 2022, 17:45 (HKT)', and a summary of accounts with a total balance of HKD 1,480.83. Below this, there is a section for loan repayments with a message stating 'You don't have a loan yet. We searched far and wide and couldn't find any. See how to apply for one.'



The screenshot shows the 'Profile & Settings' page. The 'PROFILE DETAIL' section includes a 'Show Details' link. Under 'Personal Information', the fields are: Name (masked with asterisks), Date of birth (DD/MM/YYYY) (0*****1), and Identification Number (1*3). Under 'Contact', the fields are: Email address (r*****g@d*s.com) with an 'Update' button, and Phone number (+852 **** 1234) with an 'Update' button. The 'SECURITY & PREFERENCES' section includes 'Login & Security' (Login, authentication and security) and 'Alerts & Notifications' (App, SMS, Email notifications).

Change your Mobile number on IDEAL

2. Click “Update” to change your Phone number

Profile & Settings

PROFILE DETAIL [Show Details](#)

Personal Information

Name
**** **

Date of birth (DD/MM/YYYY) Identification Number
0*****1 1*3

Contact

Email address
r*****g@d*s.com [Update](#)

Phone number
+852 **** 1234 [Update](#)

SECURITY & PREFERENCES

[Login & Security](#)
Login, authentication and security

[Alerts & Notifications](#)
App, SMS, Email notifications

Update your phone number

New phone number

+852 ▼ | **** **

- I/We also acknowledge that the Bank will be updating its records with the details herein which would replace any existing details which the Bank may have in its records.
- 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 office holders or employees in connection with the provision of banking products and services to me/us.

[Cancel](#) [Verify](#)

Change your Mobile number on IDEAL

3. Enter new contact

Enter new phone number and country code (if changed), then click “**Verify**”

Update your phone number

New phone number

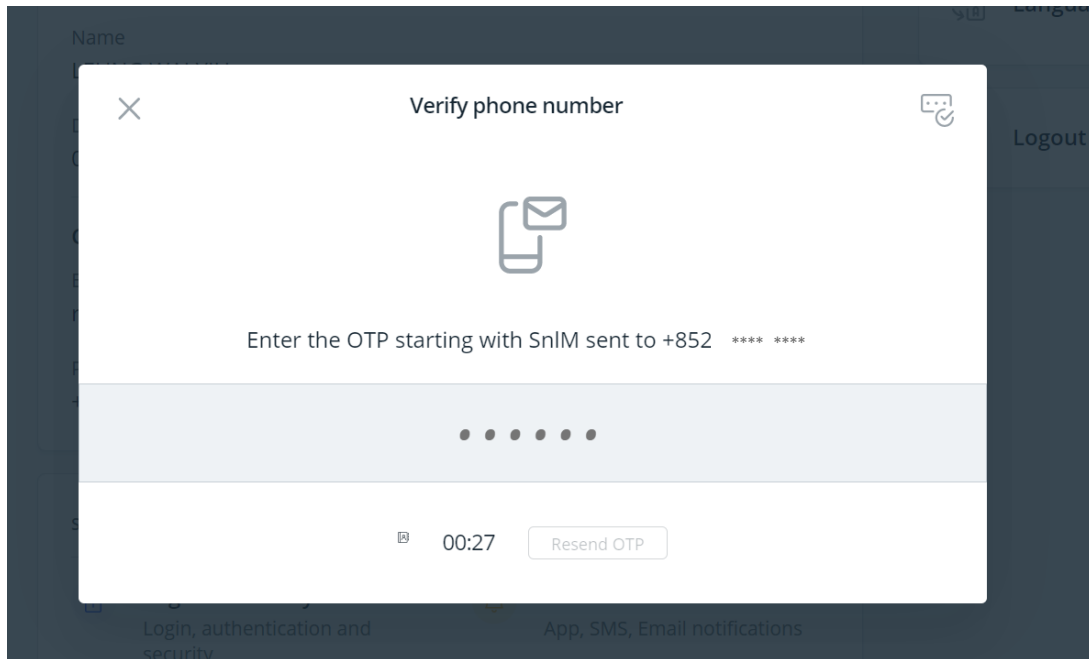
- I/We also acknowledge that the Bank will be updating its records with the details herein which would replace any existing details which the Bank may have in its records.
- In addition, the Bank may use and rely on any personal data provided by me/us, and may disclose such personal data to service providers, to communicate, authenticate or otherwise deal with me/us and my/our office holders or employees in connection with the provision of banking products and services to me/us.



Change your Mobile number on IDEAL

4. Verification

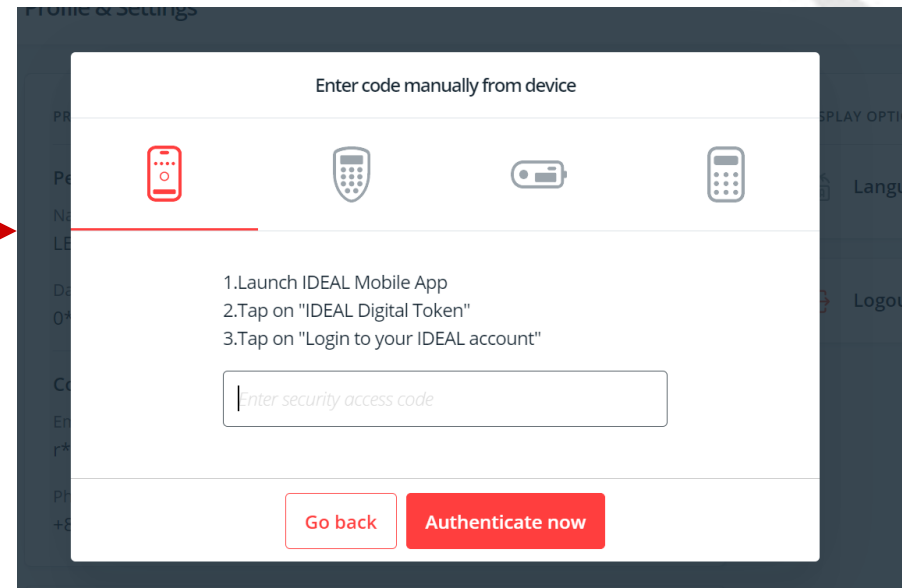
- a. Step 1: OTP will be sent via SMS to your new mobile number
- b. Step 2: Follow the steps on screen to authenticate.
After that, click **“Authenticate Now”**



Transaction approver

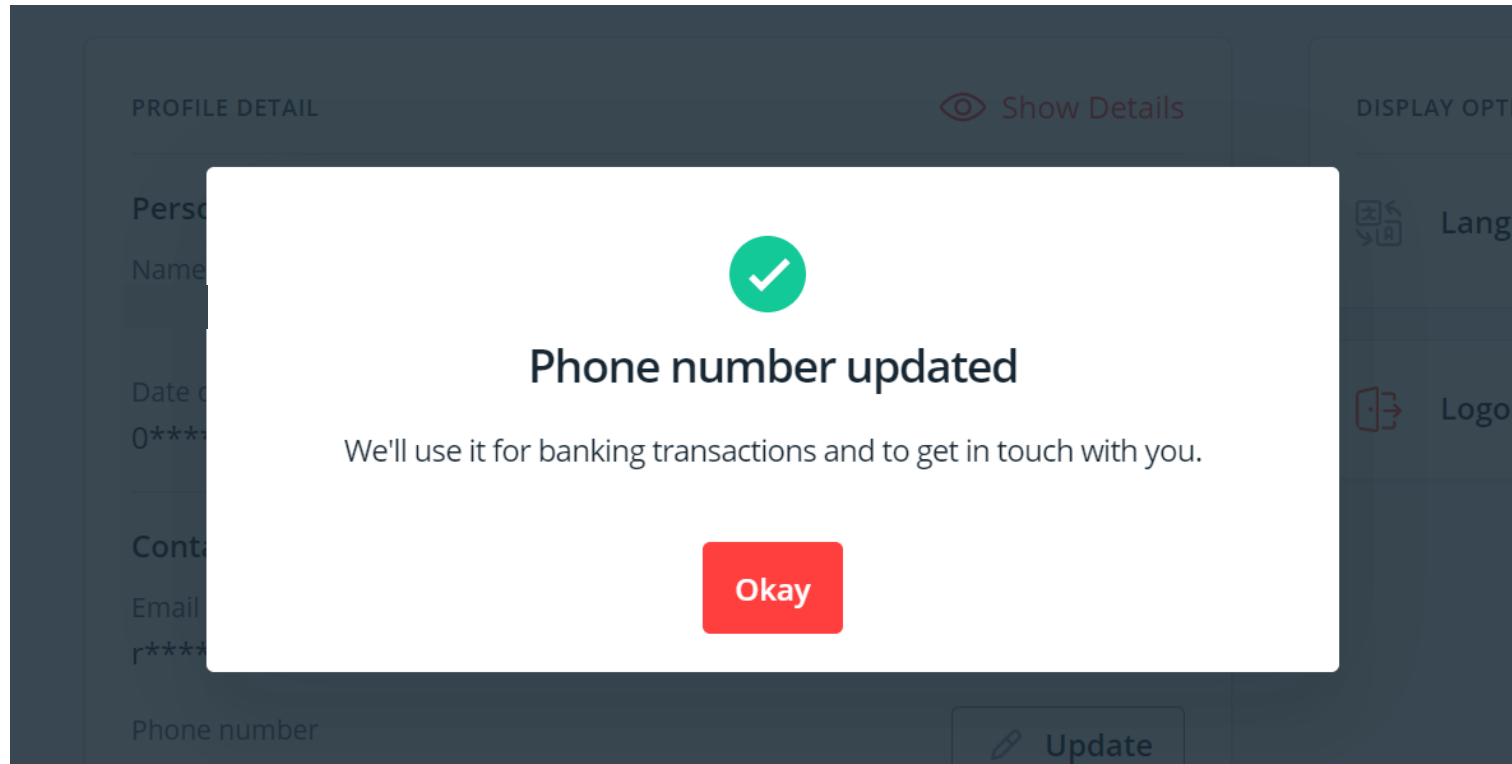


Transaction maker



Change your Mobile number on IDEAL

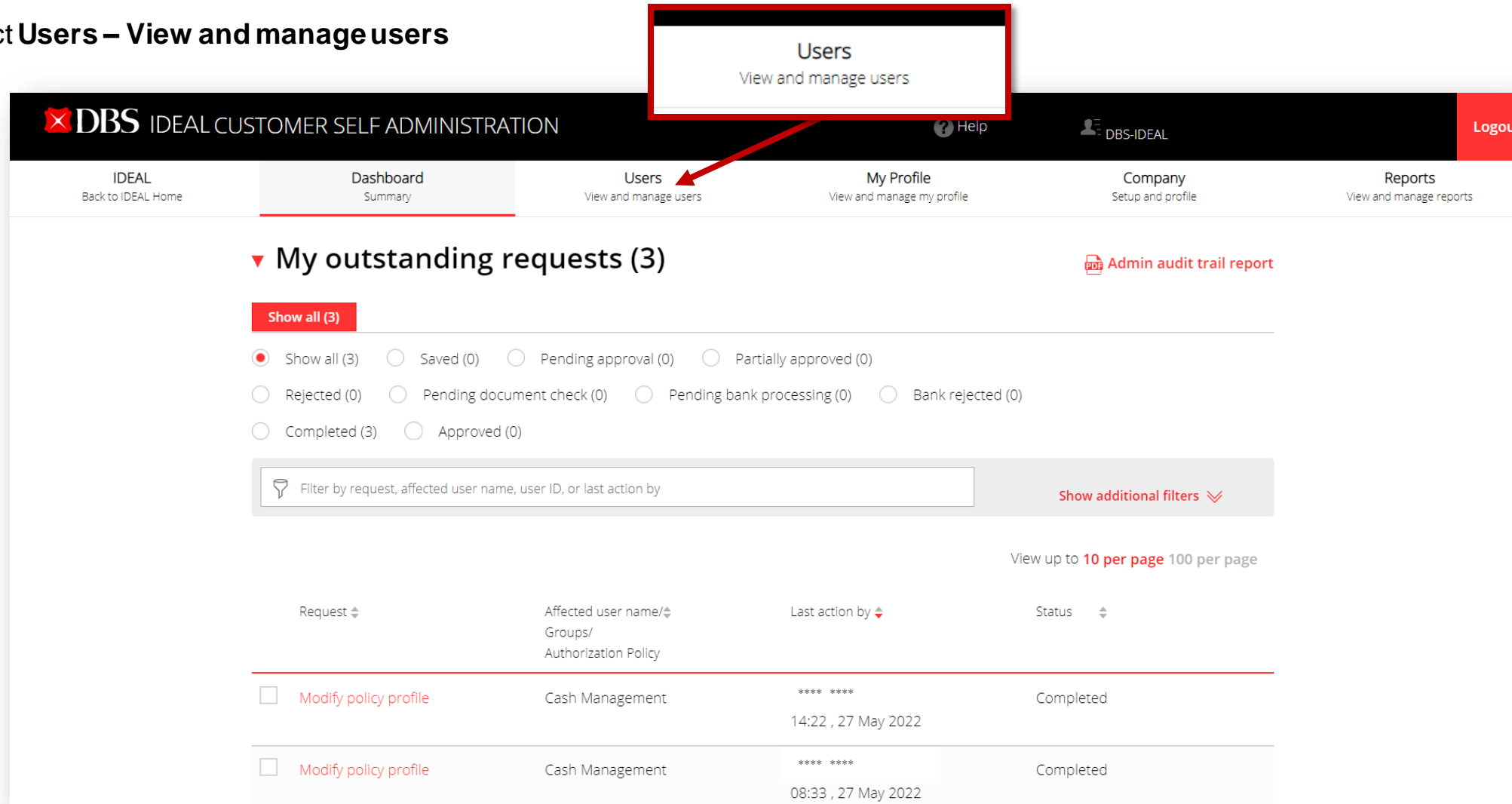
5. And it's Done!



Change your Mobile number via CSA

Change your Mobile number via CSA

1. Select Users – View and manage users



The screenshot displays the DBS IDEAL Customer Self Administration interface. The top navigation bar includes the DBS logo, the text 'IDEAL CUSTOMER SELF ADMINISTRATION', a 'Help' icon, 'DBS-IDEAL' branding, and a 'Logout' button. Below this, a secondary navigation bar contains several tabs: 'IDEAL' (Back to IDEAL Home), 'Dashboard' (Summary), 'Users' (View and manage users), 'My Profile' (View and manage my profile), 'Company' (Setup and profile), and 'Reports' (View and manage reports). The 'Users' tab is highlighted with a red box and an arrow pointing to it from a larger 'Users' menu item above. The main content area shows 'My outstanding requests (3)' with a 'Show all (3)' button and a list of radio buttons for filtering requests by status: Show all (3), Saved (0), Pending approval (0), Partially approved (0), Rejected (0), Pending document check (0), Pending bank processing (0), Bank rejected (0), Completed (3), and Approved (0). A search filter is present with the text 'Filter by request, affected user name, user ID, or last action by' and a 'Show additional filters' button. Below the filter, there is a table of requests with columns for Request, Affected user name/Groups/Authorization Policy, Last action by, and Status. The table shows two rows of 'Modify policy profile' requests, both completed.

| Request | Affected user name/Groups/Authorization Policy | Last action by | Status |
|--|--|-------------------------------|-----------|
| <input type="checkbox"/> Modify policy profile | Cash Management | **** * 14:22 , 27 May 2022 | Completed |
| <input type="checkbox"/> Modify policy profile | Cash Management | **** * 08:33 , 27 May 2022 | Completed |

Modifying Existing User Profiles

2. Search the existing user in the search bar, or click Show additional filters to find users

User Library
Manage your organization's users. You may add new users, suspend or delete existing users, or change their details.

[Create a new user](#) [Review user access](#)

[Show additional filters](#)

View up to **10 per page** 100 per page

| User | User ID | Roles | Account Status | Approval Status | Action |
|------|---------|--|----------------|-----------------|--------|
| | | Enquiry | Active | Approved | Action |
| | | Enquiry | Active | Approved | Action |
| | | Maker Approver -Group B... Admin Enquiry | Active | Approved | Action |
| | | Enquiry | Active | Approved | Action |
| | | Maker Approver -Group B... | Active | Approved | Action |

User Library
Manage your organization's users. You may add new users, suspend or delete existing users, or change their details.

[Create a new user](#) [Review user access](#)

[Hide additional filters](#)

Status

Group

Role

View up to **10 per page** 100 per page

| User | User ID | Roles | Account Status | Approval Status | Action |
|------|---------|--|----------------|-----------------|--------|
| | | Maker Approver -Group B... Enquiry | Active | Approved | Action |
| | | Maker Approver -Group B... Admin Enquiry | Active | Approved | Action |

Modifying Existing User Profiles

3. Click on **Action** and then **Edit** to access user modification page

View up to 10 per page 100 per page

| User | User ID | Roles | Account Status | Approval Status | Action |
|------|---------|---|----------------|-----------------|--|
| | RYAN | Maker Approver -Group B... Enquiry | Active | Approved |  Action |
| | RYAN | Maker Approver -Group B... Admin Enquiry | Active | Approved |  Action |
| | RYAN | Maker Approver -Group B... Enquiry | Active | Approved |  Action |

View up to 10 per page 100 per page

- Copy
- Edit**
- Delete
- Suspend
- Unlock a security device

Modifying Existing User Profiles

4. Modify user mobile number, then scroll to the bottom and click “Continue”

1. Input Details 2. Verify Details 3. Submit for

Step 1 : User Particulars

Full name (as in identity document/passport)

50 characters left

Contact details

Email address

27 characters left Used for one-time passwords

Mobile phone number

8 characters left Used for challenge code and one time passwords

Nationality/citizenship *****

Identity type **Identity number**

X - ID Document

Date of birth
2*****1

view custom reports

view payments (or payment templates)

view trade instruments(or trade instrument templates)

view trade and corporate actions

that the Bank will be updating its records with the details herein which would replace any existing details which the Bank may have in its

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

Cancel **Continue**

Modifying Existing User Profiles

5. Verify modified profile details and click on **Submit**

Edit a User

Edit an existing user and access to IDEAL.

1. Input Details **2. Verify Details** 3. Submit for Approval

[Edit](#)

Modifications

| | |
|-----------------|------------|
| Contact details | +852 ***** |
| | +852 ***** |

[View full user details](#)

[Cancel](#) [Save as draft](#) [Submit](#)

You will see your old phone number in PINK and new phone number in GREEN.

Modifying Existing User Profiles

5. Pending Approval user edition alert will pop up at the top of the page

The screenshot displays a web interface for user management. At the top, there are four navigation tabs: 'Dashboard Summary', 'Users View and manage users' (which is highlighted), 'My Profile View and manage my profile', and 'Company Setup and profile'. Below the navigation is a progress bar with three steps: '1. Input Details' (completed with a green checkmark), '2. Verify Details' (completed with a green checkmark), and '3. Submit for Approval' (current step, indicated by a black line). A red 'Print' icon is located in the top right corner. The main content area features the text 'Your request has been submitted' and a dark blue notification banner with a green checkmark icon, stating: 'User on 2023-02-21 has been modified successfully with status Pending Approval.' Below this is a section titled 'User particulars' containing a table with three rows of user information, all of which are redacted with asterisks.

| User particulars | |
|-------------------------|--------------------|
| Full name | **** ** |
| Contact details | **** ** **** ** |
| Nationality/citizenship | ***** |

Modifying Your own phone number in CSA

Modifying Your Own Profile

1. Select **My Profile** to view your own profile

DBS IDEAL CUSTOMER SELF ADMINISTRATION Help

[IDEAL](#) [Dashboard](#) [Users](#) **[My Profile](#)** [Company](#)
Back to IDEAL Home Summary View and manage users View and manage my profile Setup and profile

My Profile

Use this screen to view and manage instructions

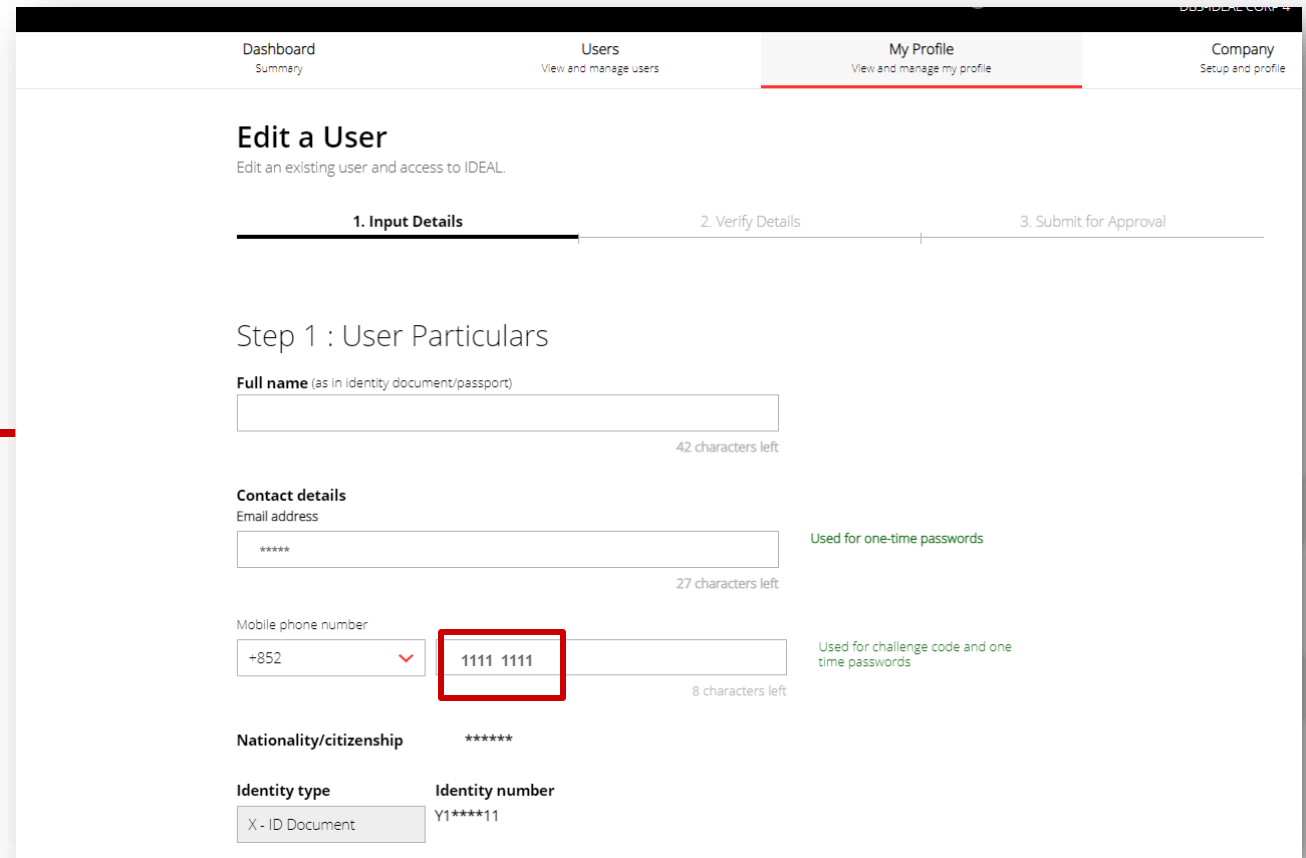
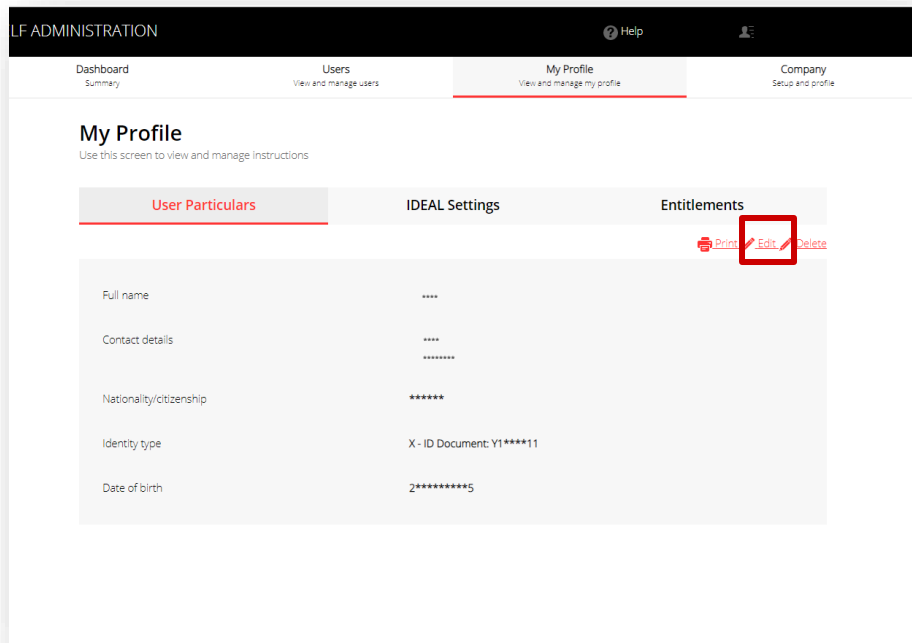
User Particulars IDEAL Settings Entitlements

[Print](#) [Edit](#) [Delete](#)

| | |
|-------------------------|----------------------------|
| Full name | **** |
| Contact details | . **** +852 ***** |
| Nationality/citizenship | ***** |
| Identity type | X - ID Document: Y1 ****11 |
| Date of birth | 2*****5 |

Modifying Your Own Profile

2. Click on **Edit** to modify your user particulars, IDEAL settings, or entitlements



Modifying Existing User Profiles

3. Verify modified profile details and click on **Submit**

Edit a User

Edit an existing user and access to IDEAL.

1. Input Details **2. Verify Details** 3. Submit for Approval

Modifications

[Edit](#)

Contact details

| | |
|------|-------|
| +852 | ***** |
| +852 | ***** |

[View full user details](#)

[Cancel](#) [Save as draft](#) [Submit](#)

You will see your old phone number in PINK and new phone number in GREEN.

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Modifying Your Own Profile

4. Pending Approval user edition alert will pop up at the top of the page

The screenshot displays a three-step progress bar at the top: '1. Input Details' (checked), '2. Verify Details' (checked), and '3. Submit for Approval' (active). A 'Print' icon is located in the top right corner. The main message reads 'Your request has been submitted'. Below this is a dark blue notification bar with a green checkmark icon, stating: 'User on 2022-08-04 has been modified successfully with status Pending Approval.' The 'User particulars' section is presented in a light grey box with the following details:

| | |
|-------------------------|---------------------------|
| Full name | |
| Contact details | ***** +852 ***** |
| Nationality/citizenship | ***** |
| Identity type | X - ID Document: Y1****11 |
| Date of birth | 2*****5 |