

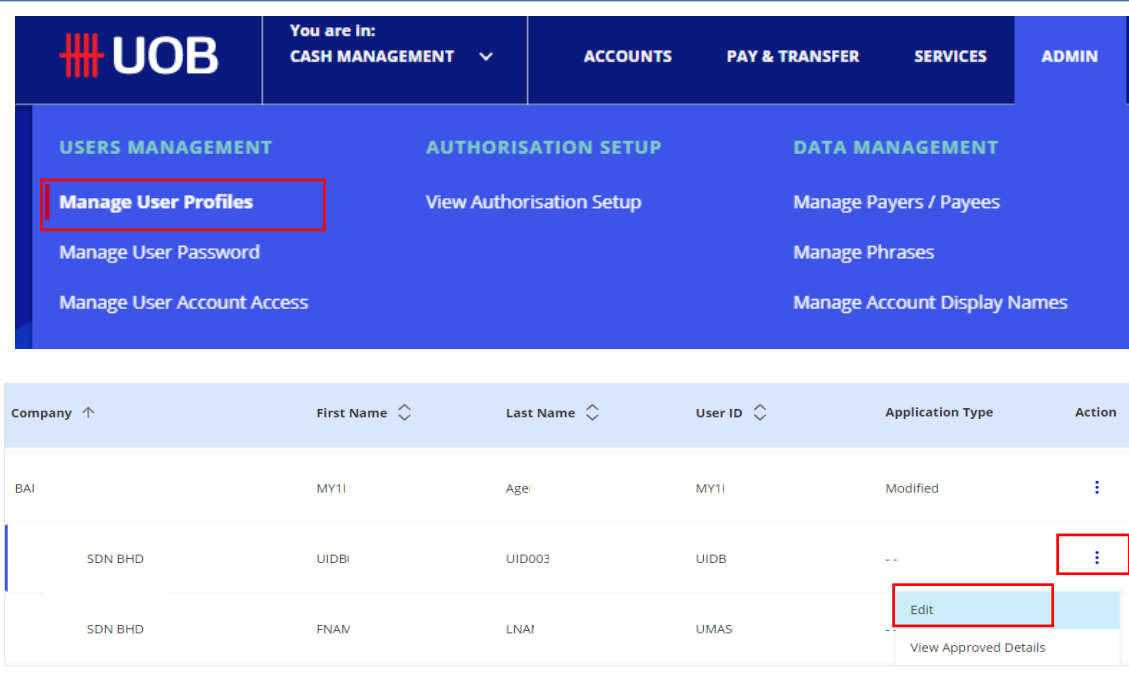
USER GUIDE: MERCHANT ACCOUNT LINKAGE VIA INFINITY

Important Notes:

- User access rights must be granted by Infinity Company Administrator (CA) for merchant ID to be linked
- Company Administrator needs to grant user profile access rights: 00 – All Account Access


A. Guide for Company Administrators in Infinity: Assigning Group Roles to User Profile

Step 1

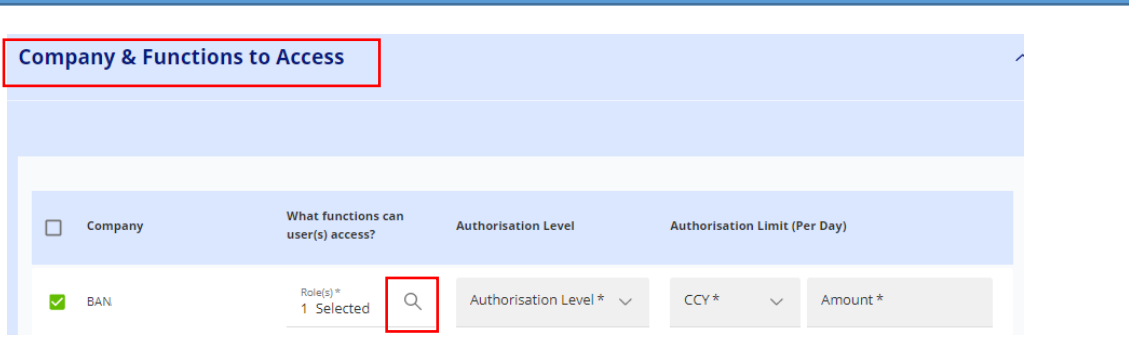


Company	First Name	Last Name	User ID	Application Type	Action
BAI	MY11	Agei	MY11	Modified	⋮
SDN BHD	UIDBI	UID003	UIDB	--	⋮
SDN BHD	FNAM	LNAI	UMAS		<input type="button" value="Edit"/> View Approved Details

a) From the top menu bar, go to “Admin” > “Users Management” > “Manage User Profiles”.

b) Select the User and click the  icon to edit.

Step 2



Company	What functions can user(s) access?	Authorisation Level	Authorisation Limit (Per Day)
<input checked="" type="checkbox"/> BAN	Role(s)* 1 Selected	Authorisation Level*	CCY* Amount*

a) At “Company & Functions to Access”, click “Roles”.

Step 3

What Roles/ Functions can user access?

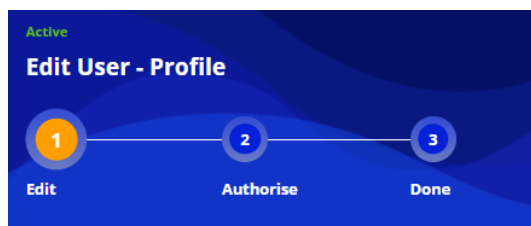
Role(s)
00

Select All

00 All Account Services

- a) Ensure the enquiry user is having "00 All Account Services". Tick the box and click "Apply". Thereafter scroll to the end of page and click "Next"
- b) If the user is already having the access, no further action required.

Step 3

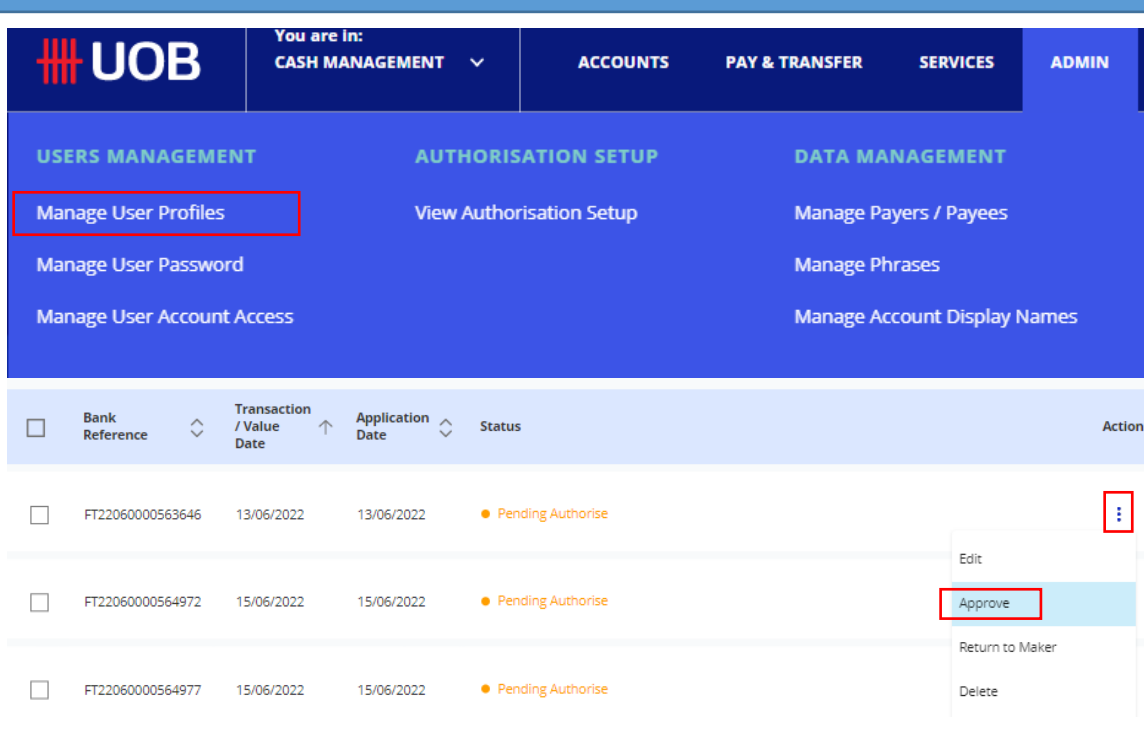


Please review and submit.

- a) Review the changes and scroll to the end of page to "Submit" for approval.

B. Guide for Company Administrators in Infinity: Approving the User Profile Setup

Step 1




The screenshot shows the UOB Admin interface. The top navigation bar includes 'UOB', 'You are in: CASH MANAGEMENT', and tabs for 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. Under 'ADMIN', there are three main sections: 'USERS MANAGEMENT', 'AUTHORISATION SETUP', and 'DATA MANAGEMENT'. In 'USERS MANAGEMENT', 'Manage User Profiles' is highlighted with a red box. Below this is a table of pending user profiles:

<input type="checkbox"/>	Bank Reference	Transaction / Value Date	Application Date	Status	Action
<input type="checkbox"/>	FT22060000563646	13/06/2022	13/06/2022	Pending Authorise	⋮
<input type="checkbox"/>	FT22060000564972	15/06/2022	15/06/2022	Pending Authorise	⋮
<input type="checkbox"/>	FT22060000564977	15/06/2022	15/06/2022	Pending Authorise	⋮

The context menu for the second row shows options: Edit, Approve (highlighted with a red box), Return to Maker, and Delete.

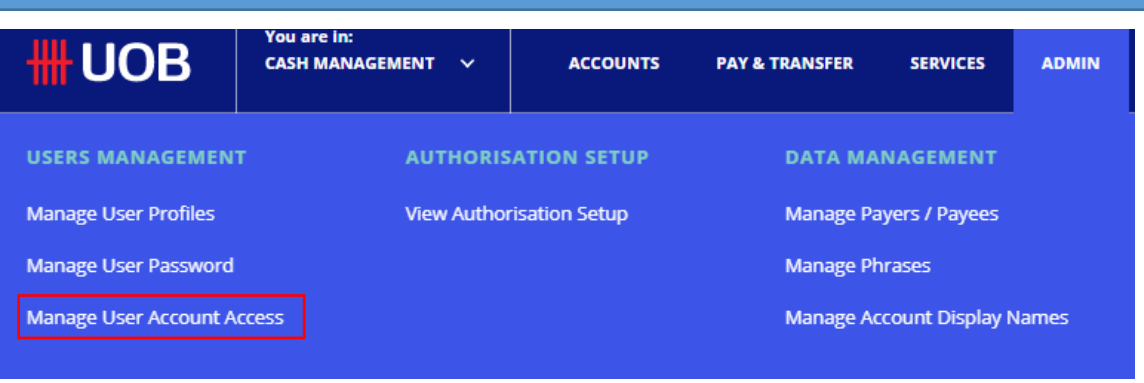
a) From the top menu bar, go to “Admin” > “Users Management” > “Manage User Profiles”.

b) Select the User and click the  icon to open User Account screen for approval.

c) Click “Approve” after confirming the User Account setup. Approver may approve using Infinity Secure or physical token by following the steps on screen.

C. Guide for Company Administrators in Infinity: Assigning Merchant IDs to User Account Access

Step 1



The screenshot shows the UOB Admin interface. The top navigation bar includes 'UOB', 'You are in: CASH MANAGEMENT', and tabs for 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. Under 'ADMIN', there are three main sections: 'USERS MANAGEMENT', 'AUTHORISATION SETUP', and 'DATA MANAGEMENT'. In 'USERS MANAGEMENT', 'Manage User Account Access' is highlighted with a red box.

a) Go to “Admin” and click “Manage User Account Access”.

Step 2

Manage User Account Access Export

Company User ID Application Type [Clear Filter\(s\)](#)

1014 Record(s)

Company ↑	First Name ⇅	Last Name ⇅	User ID ⇅	Application Type	Action
ABC PTE LTD 21	MYBRN11	MYBRN11	MYBRN11		⋮ Edit View Approved Details
ABC PTE LTD 21	MYBRN9	MYBRN9	MYBRN9		

- a) Look for the company to be granted with merchant account access, click the Action button and click "Edit".

Step 3

Merchant IDs to Access

✔ NAME: 1 (Default Company)

What Merchant IDs can the user access?

🔍

- a) Scroll to end of page to find "Merchant IDs to Access" and click "Merchant ID(s) *".

Step 4

What Merchant IDs can the user access?

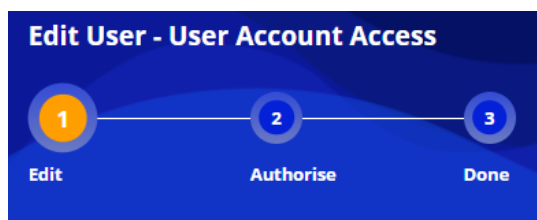
Search for Merchant ID(s)

Select All

77248

- a) Tick the Merchant ID the user may access and click "Apply".
- b) Scroll to the end of page and click "Next".

Step 5



Edit User - User Account Access

1 — 2 — 3

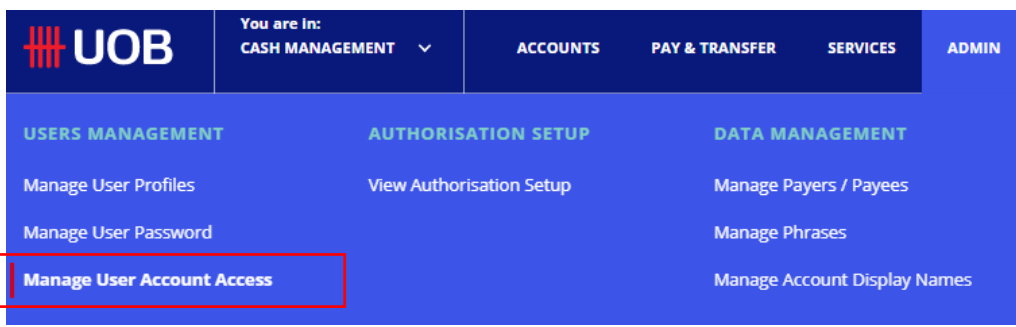
Edit Authorise Done

Please review and submit.

- a) Review the "User Account Access".
- b) After reviewing, scroll to the end of page and click "Submit" to proceed with approval.

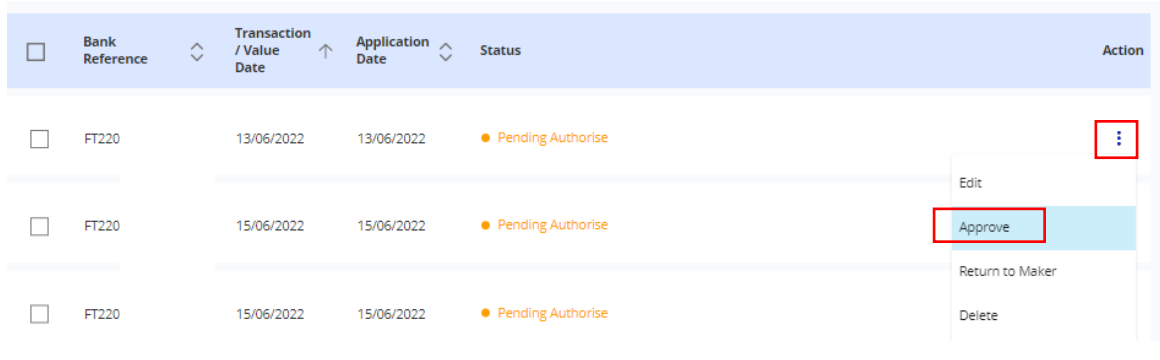
D. Guide for Company Administrators in Infinity: Approving the User Account Access


Step 1



c) Go to “Admin” and click “Manage User Account Access”.

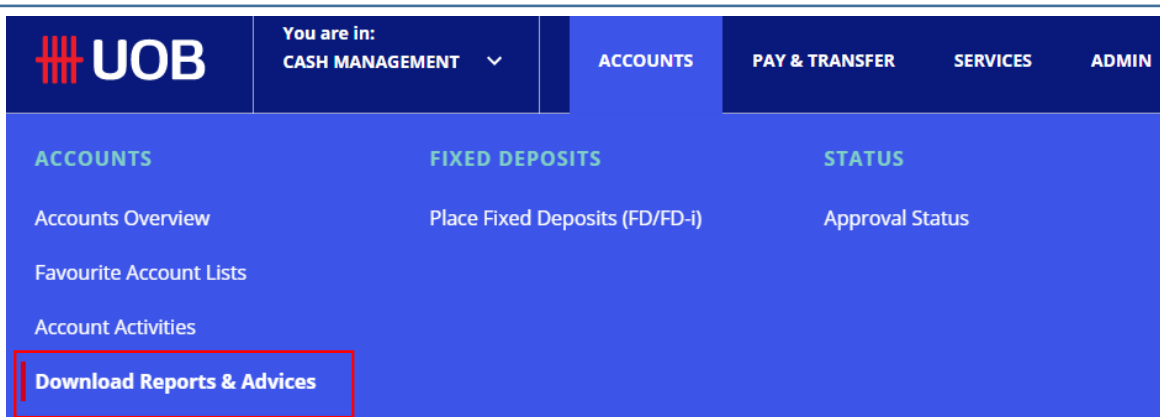
Step 2



a) Select the User and click the  icon to open User Account screen for approval.
b) Click “Approve” after confirming the User Account setup. Approver may approve using Infinity Secure or physical token by following the steps on screen.

E. How to View/ Download Merchant Report

Step 1



a) Under “Accounts” menu, click “Download Reports & Advices”.

Step 2

Download Reports & Advices

System Generated Reports

User Generated Reports

Debit / Credit Advices

Inward Remittances

Company

Account

Merchant ID

Report Name

Report Category


Report Type

Report Date: Last 30 days

Clear Filter(s)

1273 Record(s)

Customise View

Company	Account	Merchant ID	Report Name	Date	Downloads
NAME1 150001	0000000		C - T Sum Repr	06/07/2022	

- a) Under "System Generated Reports" menu, click "Merchant ID" to filter the report. User may also use other search criteria to filter.
- b) Click "Download" button to download the report.