

## BizChannel@CIMB Onboarding in Online Account Application **USER GUIDE**



## 1.0 BizChannel Onboarding

**1** Users will find this section at Step 5/9 of the online account application form.

2 Click on the "+" sign to expand the section.

tou are apprying for	O Yes 🔿 No	
SME Account		
/ ie	Email alerts Two hay soled more than 1 person	
	🕜 MR ABC	
1/9 Select accounts	SMS alerts	
2/9 About your business	MR ABC	
3/9 Directors and owners		
4/9 Authorised signatories	Receive alerts for transaction amounts above:	
§ 5/9 Contact persons	Avy amount 1,000 5,000 10,000	
6/9 Board resolution	Specific amount	
7/9 Declarations		
8/9 Upload documents	- • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • •
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	Package Option: View and Transact	
	Approval Mandate: Any 1 Approver	
	Authorise users	
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## 2.0 BizChannel Authorised Users Information

Please provide us with the following details:

- 1 The names of at least 2 persons (You will need to input at least one Maker and one Approver).
- 2 Your mobile numbers.
- Your email addresses.
- Iick to assign the Maker and Approver roles to the persons.
- <sup>3</sup> Under Full Name / Position, the dropdown box will show all directors/shareholders/authorised signatories/ authorised contact users as indicated in the online account opening form.
- <sup>6</sup> "Viewer" Role is populated for all users. For "Maker" and "Approver", if the same user needs to be selected, kindly input into 2 rows.

BizChannel Onboardi	ng					Ø
Package Option: View and Transact						
Approval Mandate: Any 1 Approver						
Authorised Users			3			
Full Name / Position		Mobile No.	Email Address	Role (Please tick (√) if applicable)		
(as per ID / Passport)				Viewer	Maker	Approver
MR ABC/DIRECTOR	×	91234567	CIMBTEST4@CIMB.COM	• 6 •		
MR XYZ/DIRECTOR	v	92345678	CIMBTEST4@CIMB.COM	•	0	
Select a person	v	Enter Mobile Number	Enter Email Address		0	O

Note:

• A security device will be issued to each User ID stated above.

• For the Transaction module (under the "Role" column), kindly select minimally 1 Maker and 1 Approver. Please note that separate User IDs are required for the 1 Maker and 1 Approver as individual transactions cannot be created and approved using the same User ID.

• Please note that in applying for the BizChannel Onboarding services herein, all accounts held with the Bank will be linked to BizChannel.