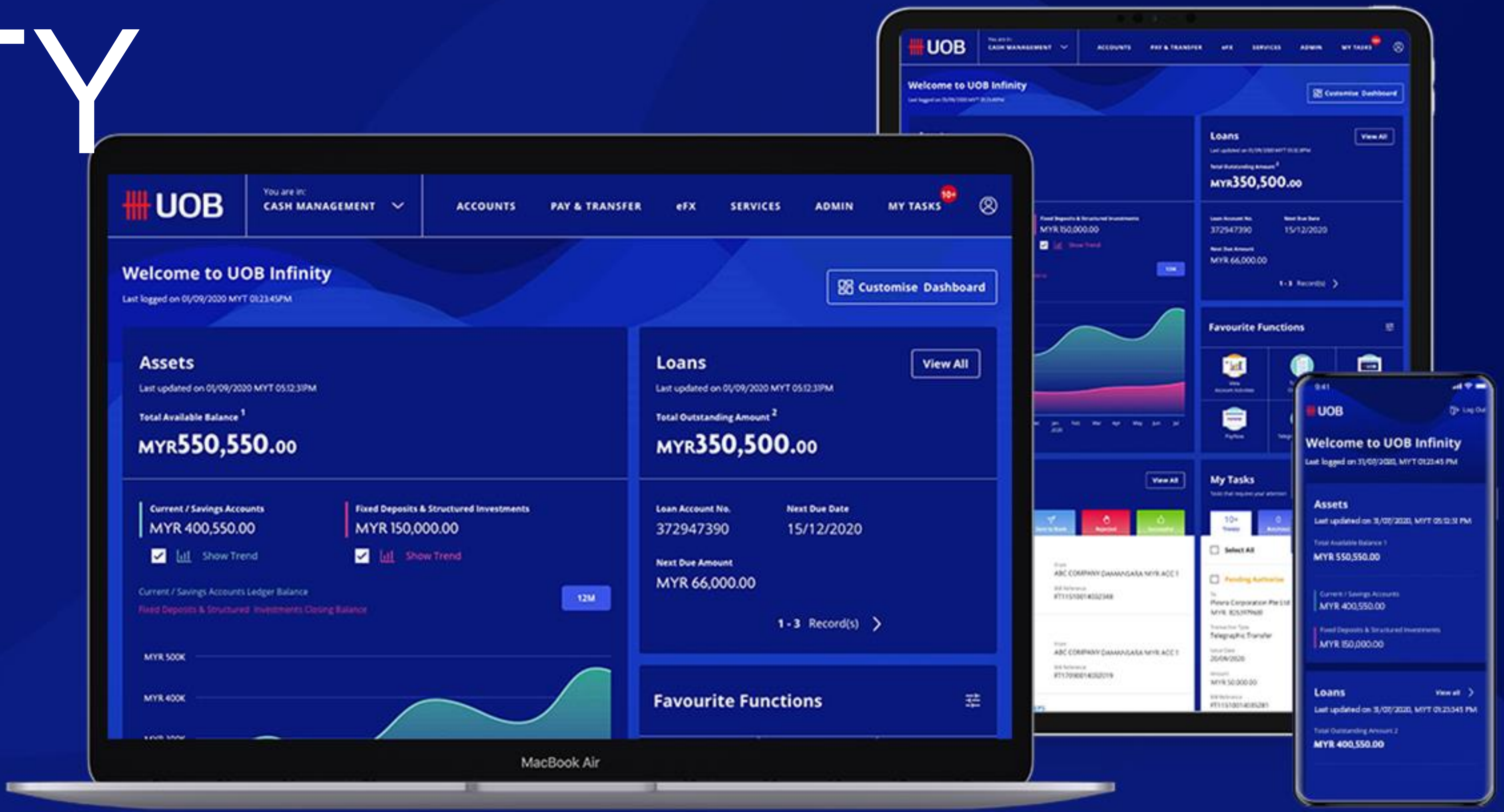
UOB INFINITY User Guide

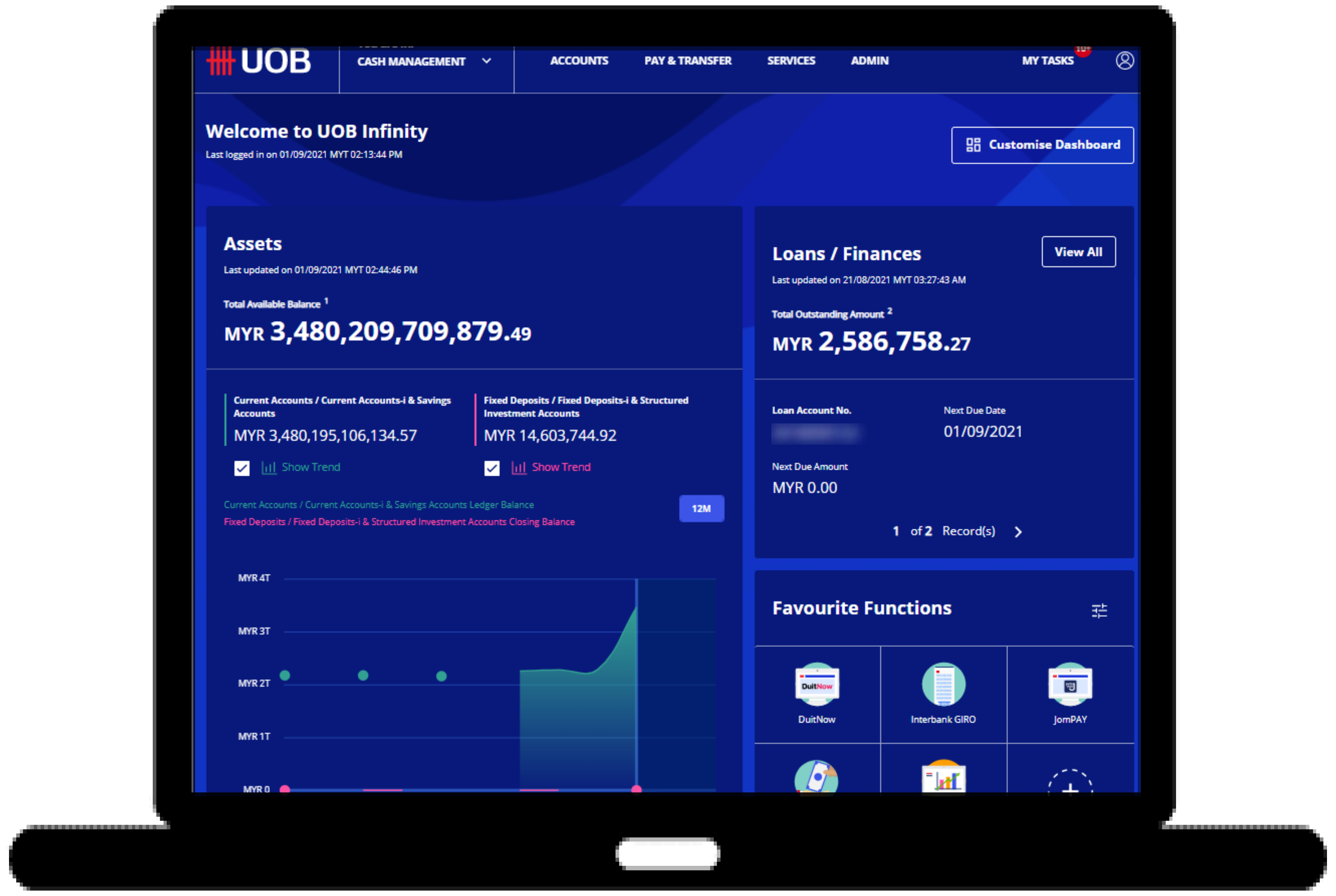


UOB

12.04.2025 (Ver 1.2)

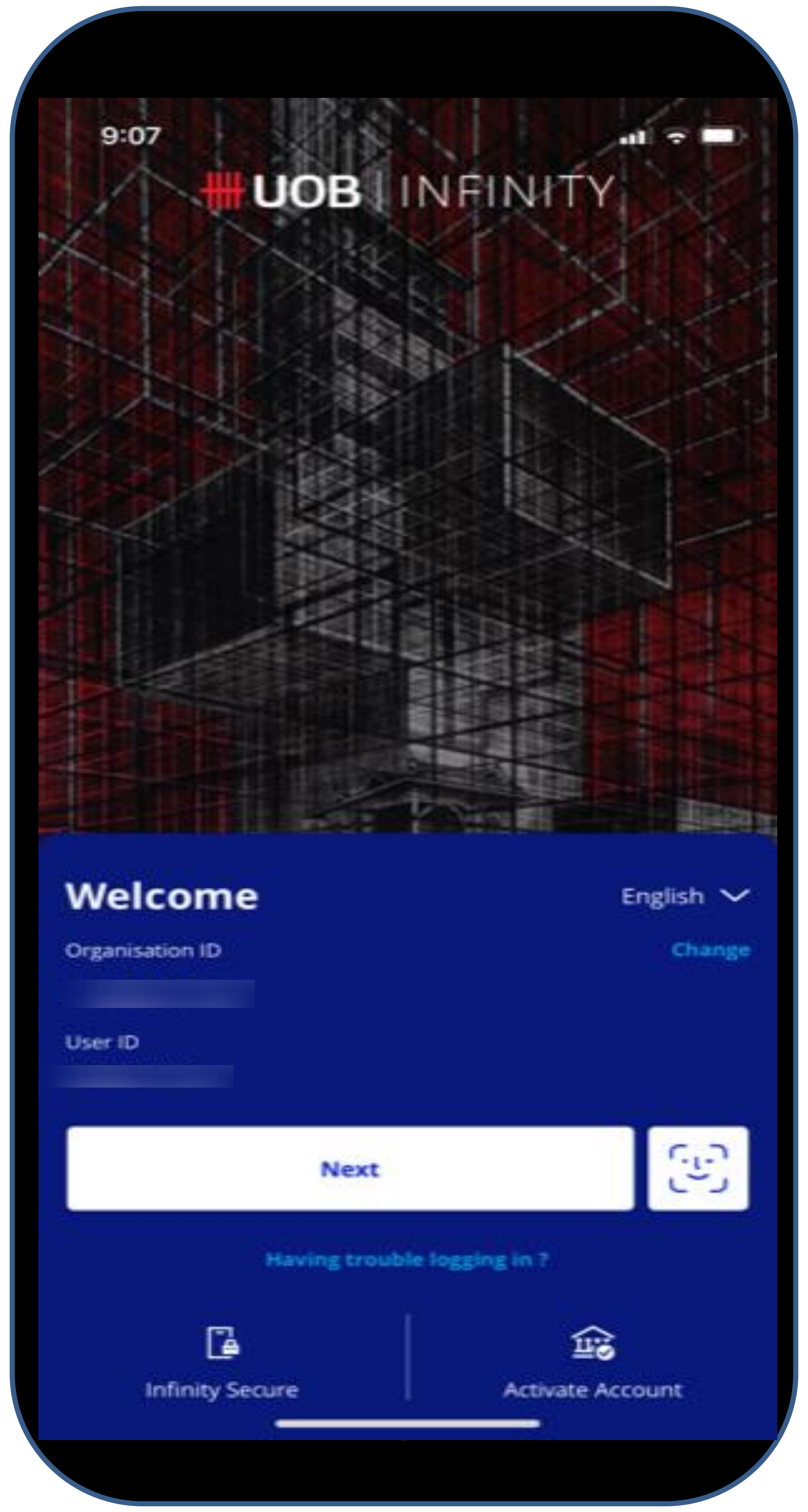
Getting Started

UOB INFINITY – A new digital banking experience for business



Infinity Desktop features a User Interface designed to improve efficiency

- Track Telegraphic Transfers End-to-End with Swift GPI.
- Send alerts to authorisers for transactions pending approval
- Generate PDF reports for Bulk Payments with 1 click.



Download on the App Store
GET IT ON Google play

Infinity Mobile App features Digital Tokens & Biometrics login

- Authorise Single and Bulk payments using Digital Tokens (Infinity Secure).
- Faster login with Biometrics.
- Activate new user account on the mobile app.
- Perform payment types e.g. DuitNow, JomPAY, IBG.

Getting Started

Topics covered

1. Navigating in UOB Infinity
2. How to Access Global View
3. How to Access Trade Services
4. Introducing Infinity Secure (Digital Token)
5. What Do You Need to Login
6. Quick Guide to Login Page
7. How to Activate Your User ID/Recover Your Password
8. How to Update Your Contact Details, Notification Setup and Security Phrase
9. How to Enable Biometric Login
10. Quick Guide to Dashboard
11. How to Customise Your Dashboard
12. How to View Your Account Balances
13. How to View Your Account Activities
14. How to View Inward Remittance and Download Advices
15. How to Upload Bulk Payment Files
16. How to Authorise Transaction via My Tasks
17. How to Download Reports
18. How to Use Your Favourite Account Lists
19. How to Use the Filters

1. Navigating in UOB Infinity

Navigating in UOB Infinity

Overview

After logging into Infinity, you will see the "Dashboard" page. If there is an announcement, you will see that through the "Announcement Message" bar on the top. Navigation in Infinity is done through the main menu.

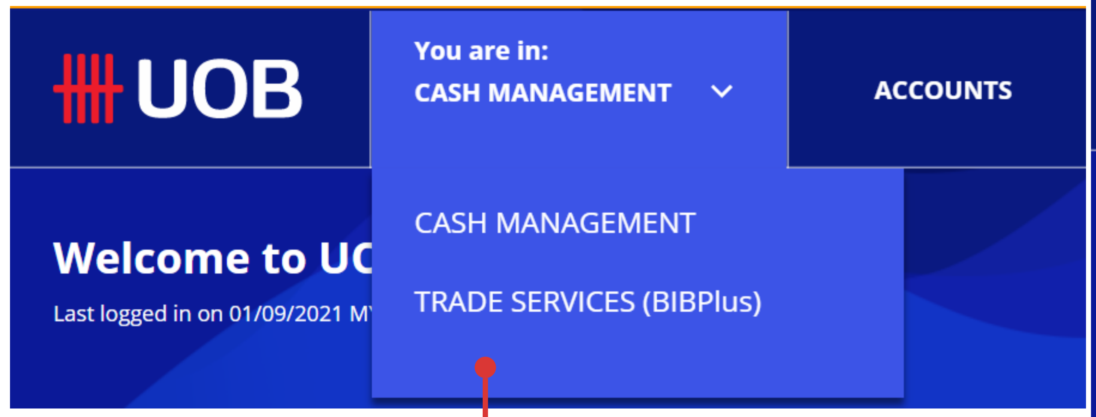
1. Announcement messages related to functionalities of Infinity are posted on the "Announcement Message" bar. You may see up to 3 announcement messages. You may close these messages by selecting "X".

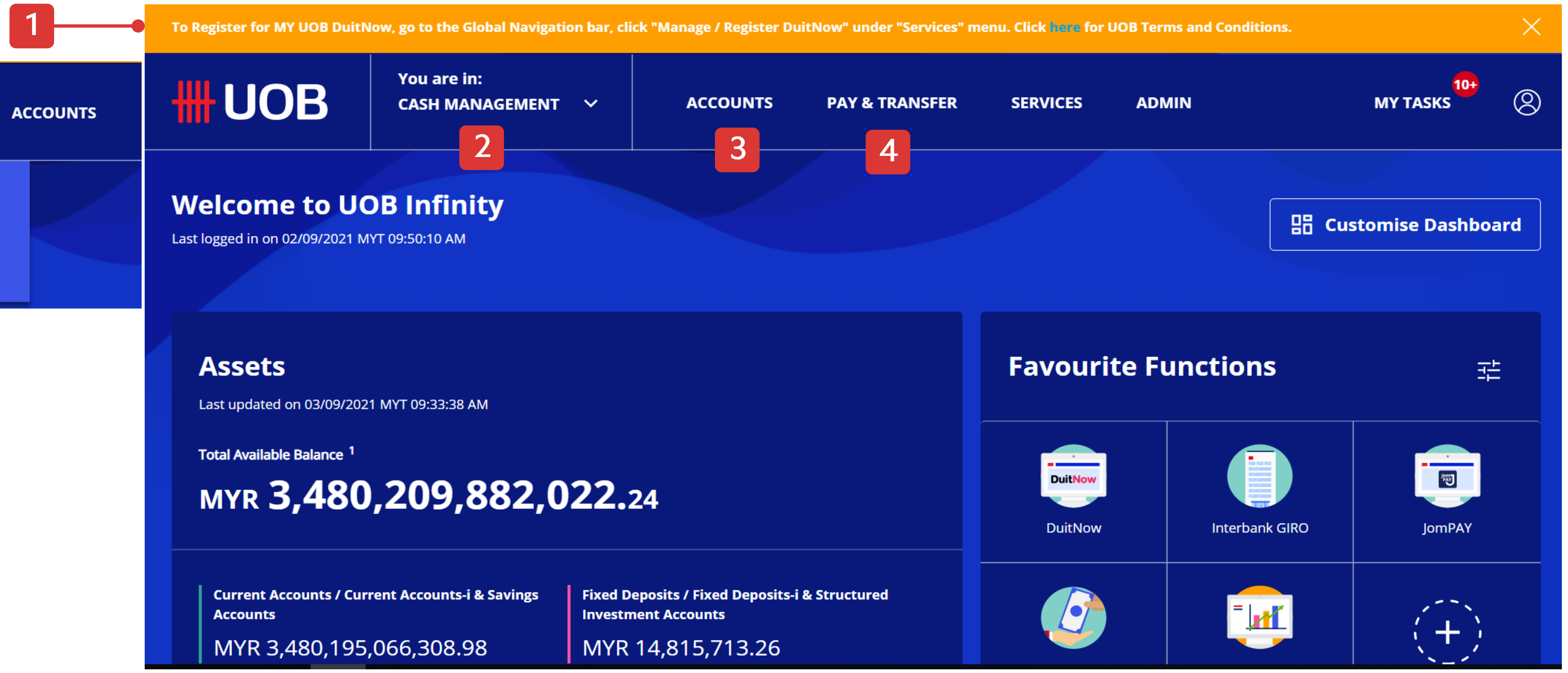
2. You may navigate to other functions using "You are in" function. In this case, you may navigate to Trade Services functions by selecting "TRADE SERVICES (BIBPlus)".

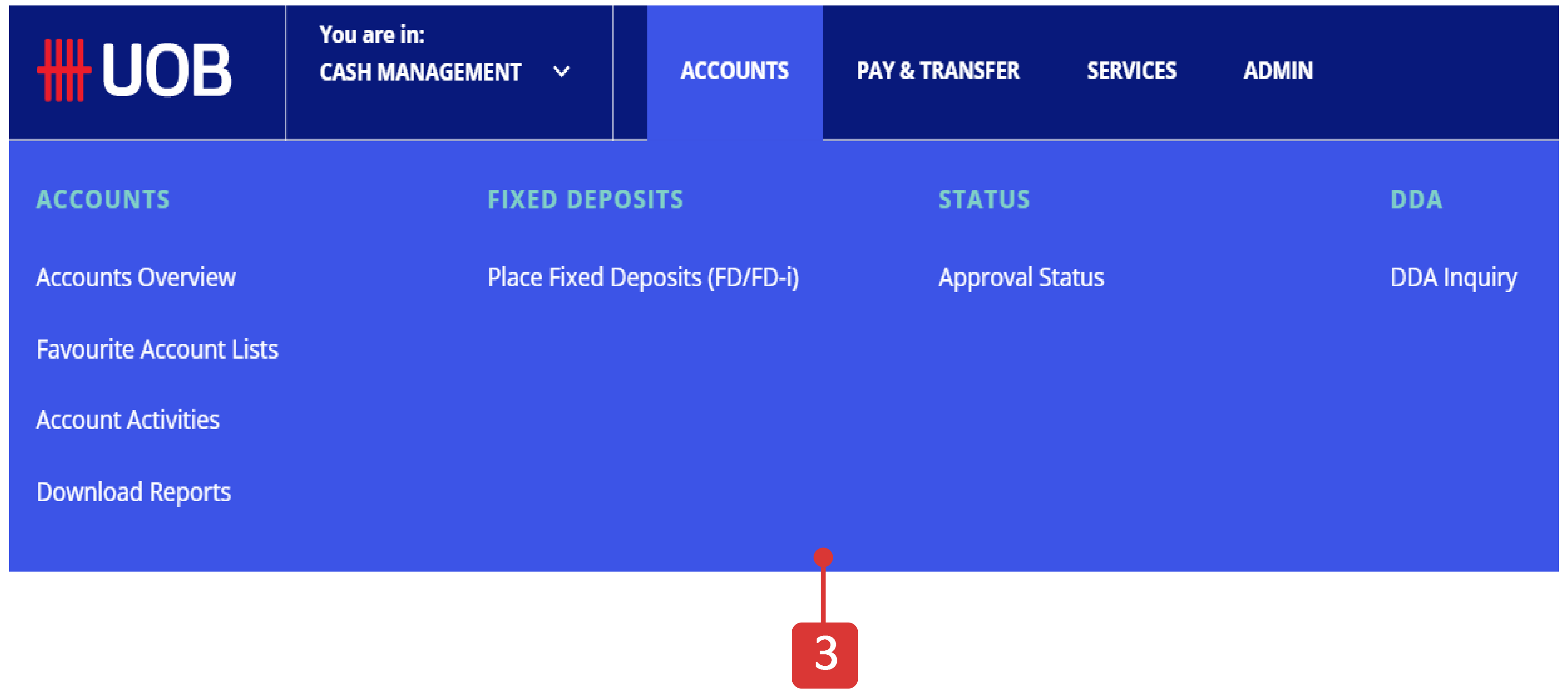
3. Functions in Infinity are grouped by characteristics of user personas collected from our customers.

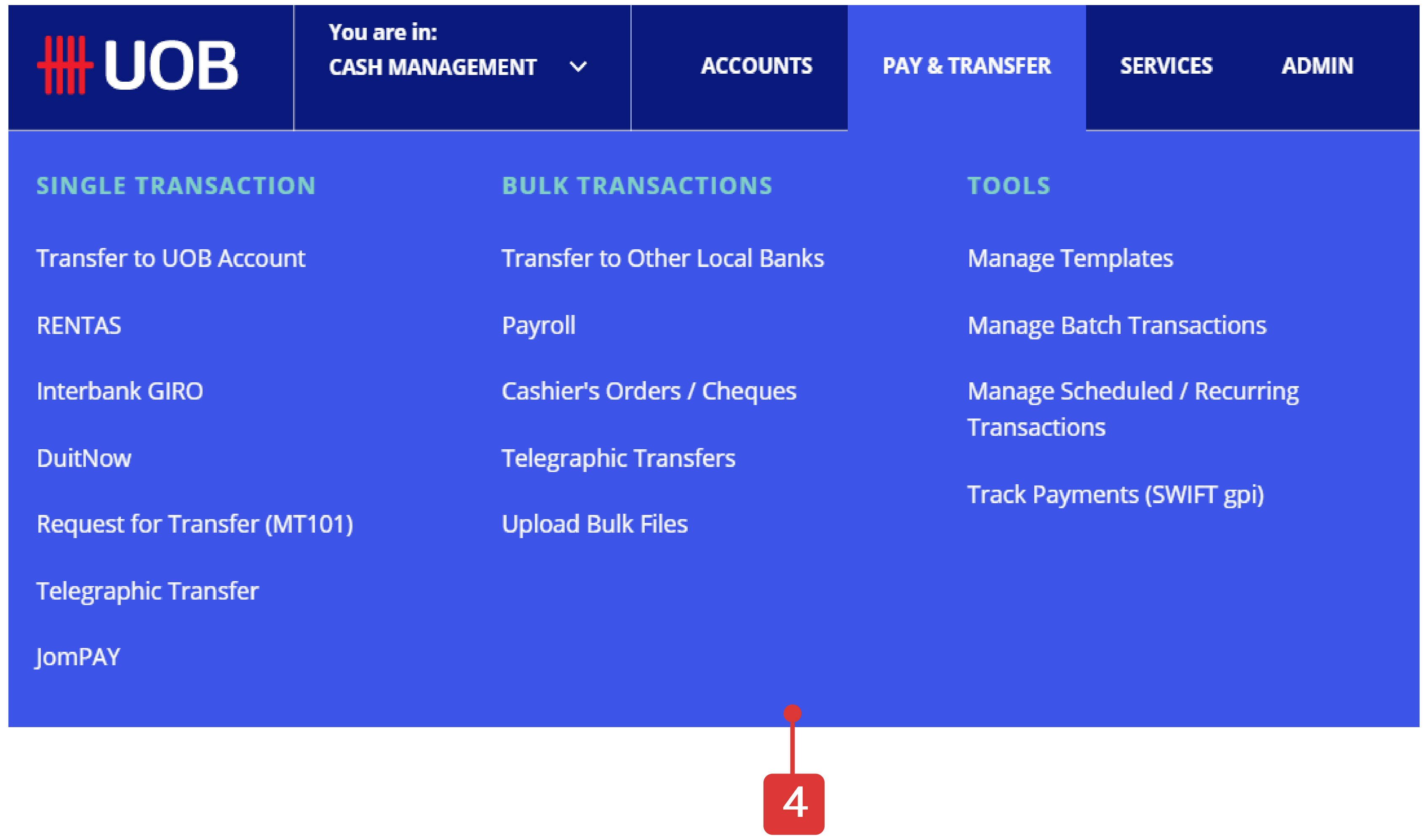
Enquiry users can access Accounts statements, Reports and Transaction enquiry related functions under "Accounts" tab. Notable functions include:
- Account Activities for downloading Bank Statements and Advices.
- Download Reports for downloading system and user-generated reports.
- Approval Status for listing of transactions grouped by their status.

4. Payment Preparers can use the functions under "PAY & TRANSFER" to create payments, manage templates or track cross-border payments.









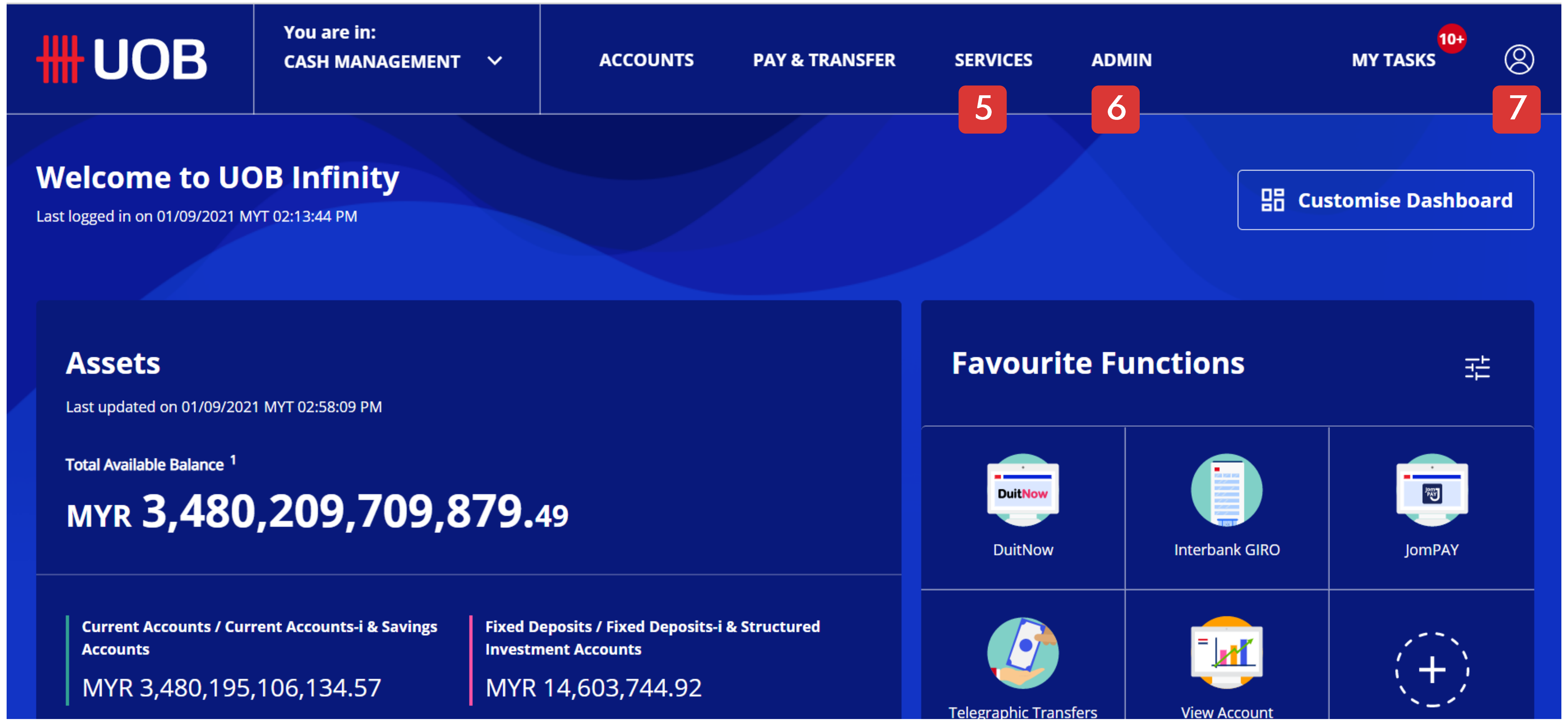
Navigating in UOB Infinity

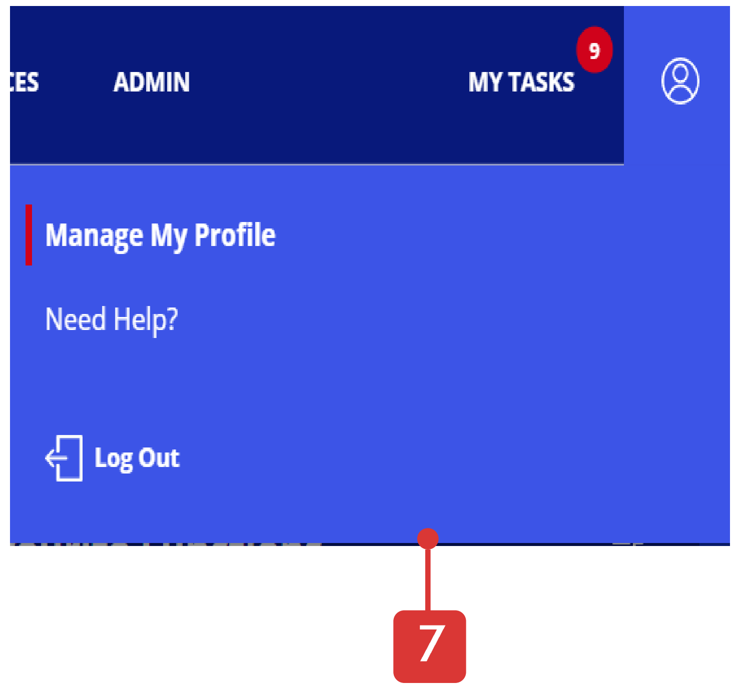
Overview

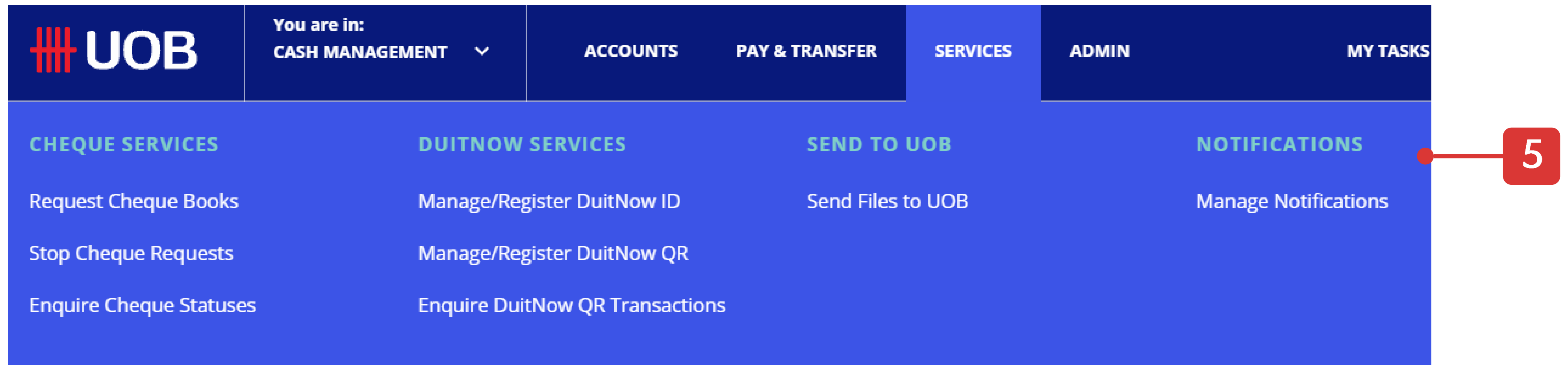
5. Other payment services such as Cheques or Notifications are grouped under Services.

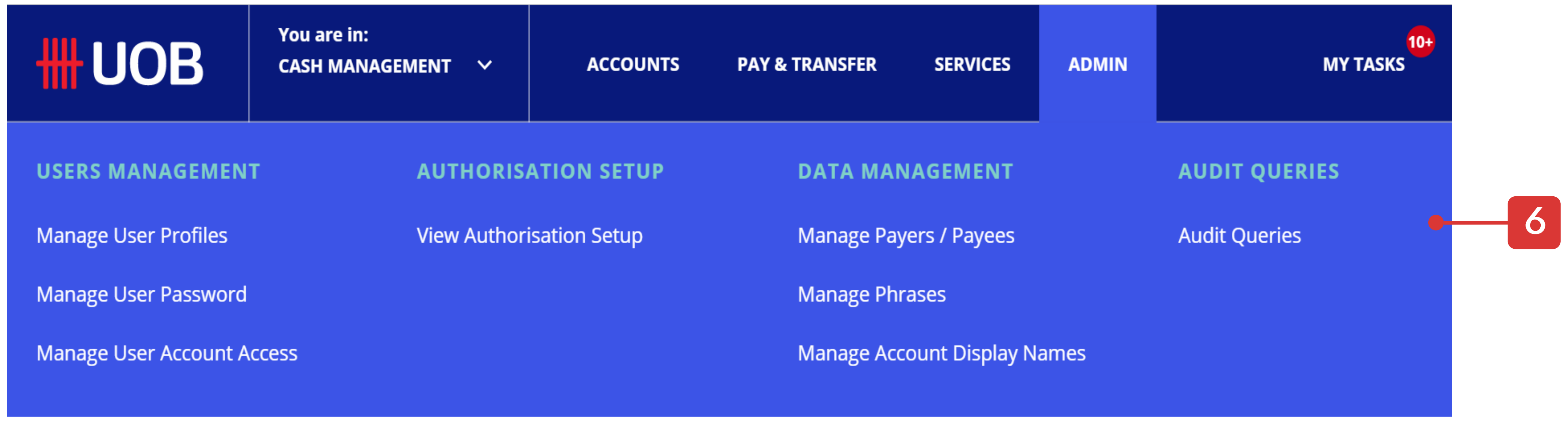
6. Company Admins can access User Management, Data Management and Audit Query functions under the "ADMIN" Tab.

7. To update your personal particulars in Infinity, select the user icon at the right corner of the top menu bar and click "Manage My Profile".







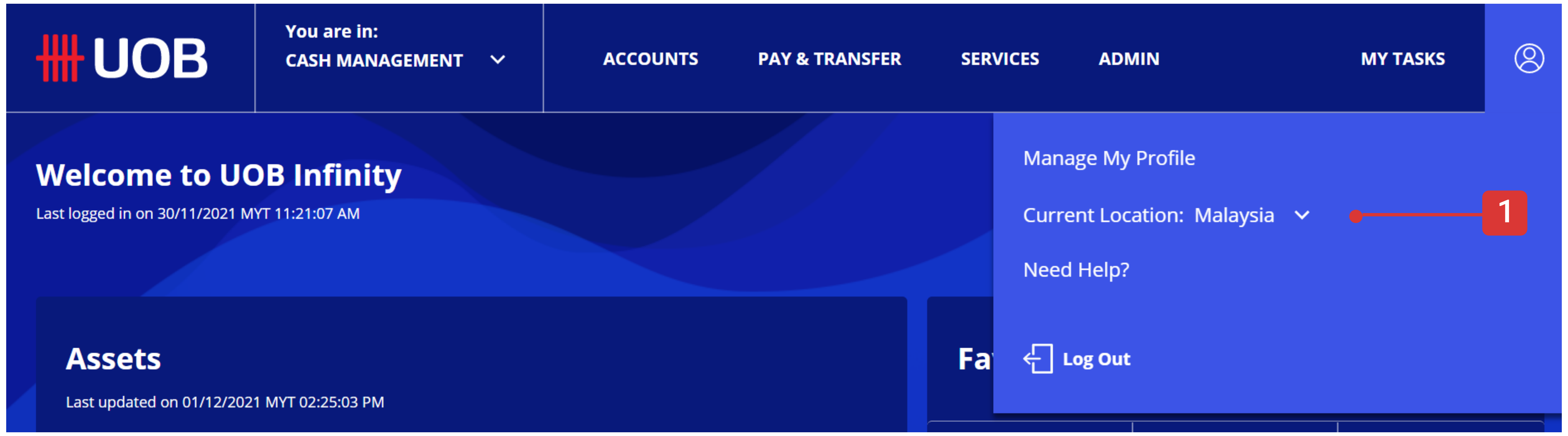


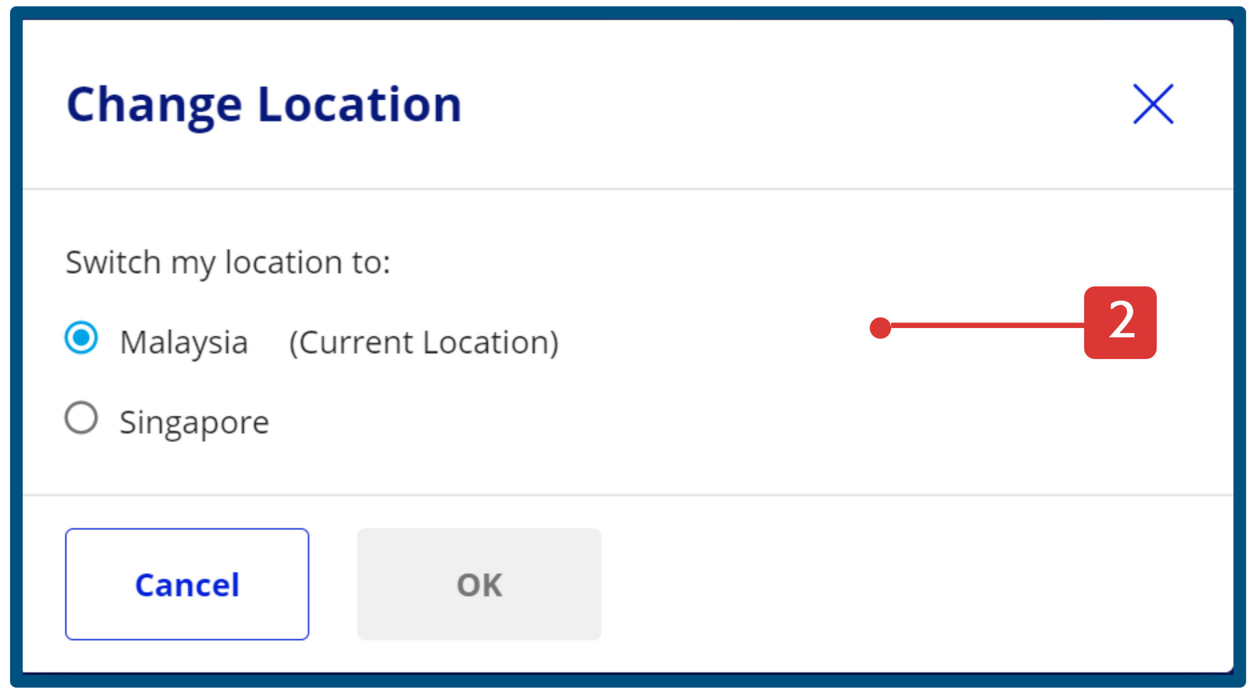
2. How to Access Global View

How to Access Global View

Global View

1. If your Global View access has been setup, you can access your account in other countries by clicking the user icon at the right corner of the top menu bar and click "Malaysia" to open the country selection.
2. Click the country/region name and click "OK" to confirm.





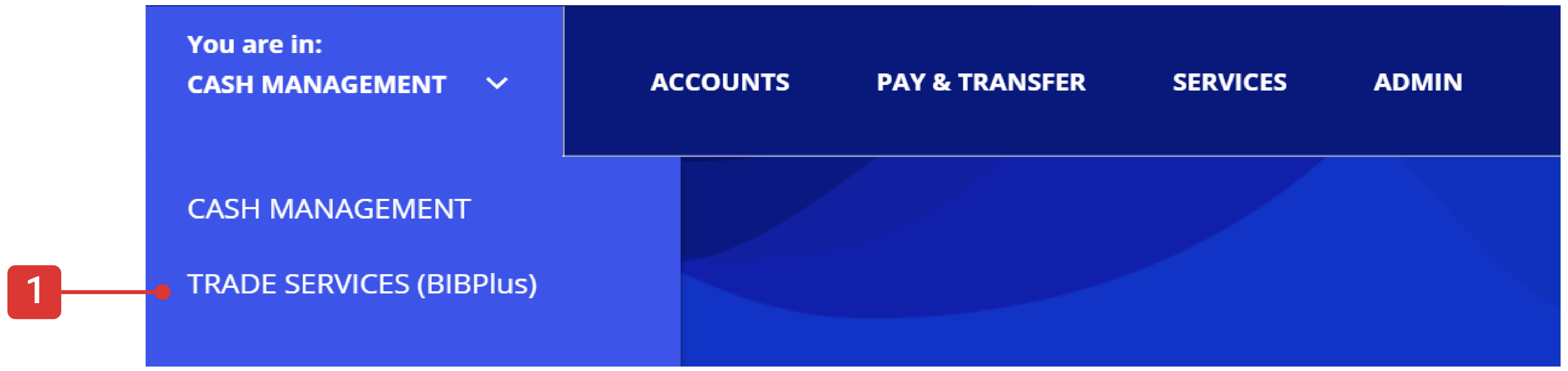
3. How to Access Trade Services

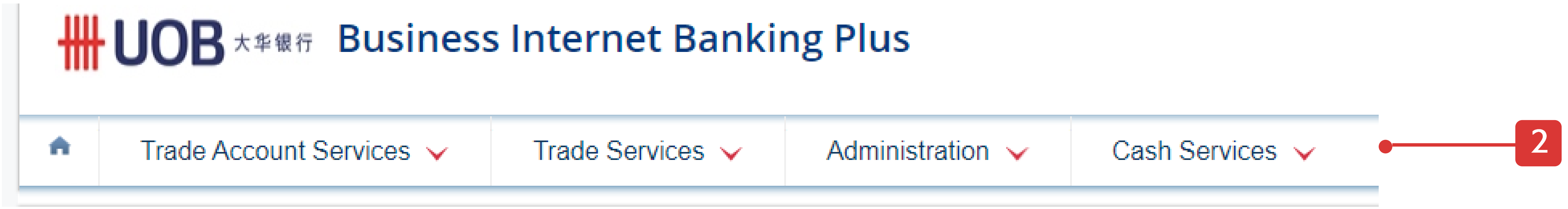
How to Access Trade Services

Trade Services

1. To access Trade Services, go to the top menu bar, hover over the “You are in: CASH MANAGEMENT” and click “TRADE SERVICES (BIBPlus)”.
   You will then be directed to BIBPlus screens to perform trade functions.

2. To go back to “CASH MANAGEMENT”, go to the top menu bar, click “Cash Services”.





4. Introducing Infinity Secure (Digital Token)

Introducing Infinity Secure (Digital Token)

UOB

Commonly Asked Questions

1. Infinity Secure is a digital security token that allows you to login to UOB Infinity and approve cash transactions in UOB Infinity.
2. To start using Infinity Secure:
   - Ensure you have a valid mobile number AND email address in your user profile in UOB Infinity.
   - Download UOB Infinity mobile app from Apple App Store or Google Play Store.
   - Register for Infinity Secure (After you log into UOB Infinity mobile app, using your normal login details).
   - Activate Infinity Secure (After you log into UOB Infinity mobile app, using your normal login details).
3. To reset Password:
   - If you are a user who is not an Authoriser, you may look for your Company Administrator to reset your password
   - For Authoriser or Company Administrator, you may reset your password by contacting UOB at **603-2638 6560.**

5. You are encouraged to sign up for Infinity Secure so that you do not have to worry about your physical token running out of battery or getting lost anymore. Please note that Infinity Secure does not support Trade, Huawei device, Mobile Device Operating System (OS) lower than minimum requirement, Global View functions, User based in China or Direct Debit.

6. For more information about Infinity Secure, please refer to the UOB Infinity Secure Guide.

5. What Do You Need to Login

What Do You Need to Login

UOB Infinity Login

Before you login to UOB Infinity for the first time, please ensure that you have received the two items listed below:

1) User ID

2) Digital OR Physical Token*
(required for login to UOB Infinity and to approve transactions)

Please call UOB at 603-2638 6560 for assistance before activating your user account access.

Login Page (Default View)

*The physical token will only be issued to users with Trade subscription, Huawei mobile device, Mobile Device Operating System (OS) lower than minimum requirement, Global View functions, User based in China or Direct Debit.

For other users, you will be able to use our digital token called Infinity Secure. Steps to register and activate Infinity Secure can be found in the “Infinity Secure User Guide”.

6. Quick Guide to Login Page

Quick Guide to Login Page

Features

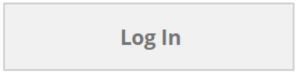
Note: If you are logging in to UOB Infinity for the first time, you need to activate your user ID. **Please call UOB at 603-2638 6560 for assistance before activating your user account access.**

Upon successful verification of user account access:

1. Enter Organisation ID and User ID (you will receive a letter to inform you about your user credentials).

2. Input valid password. The “eye” icon enables you to see the password that you enter.

3. Tick the “Remember Me” checkbox to save Organisation ID and User ID so that, in your subsequent login, you only need to key in your password.

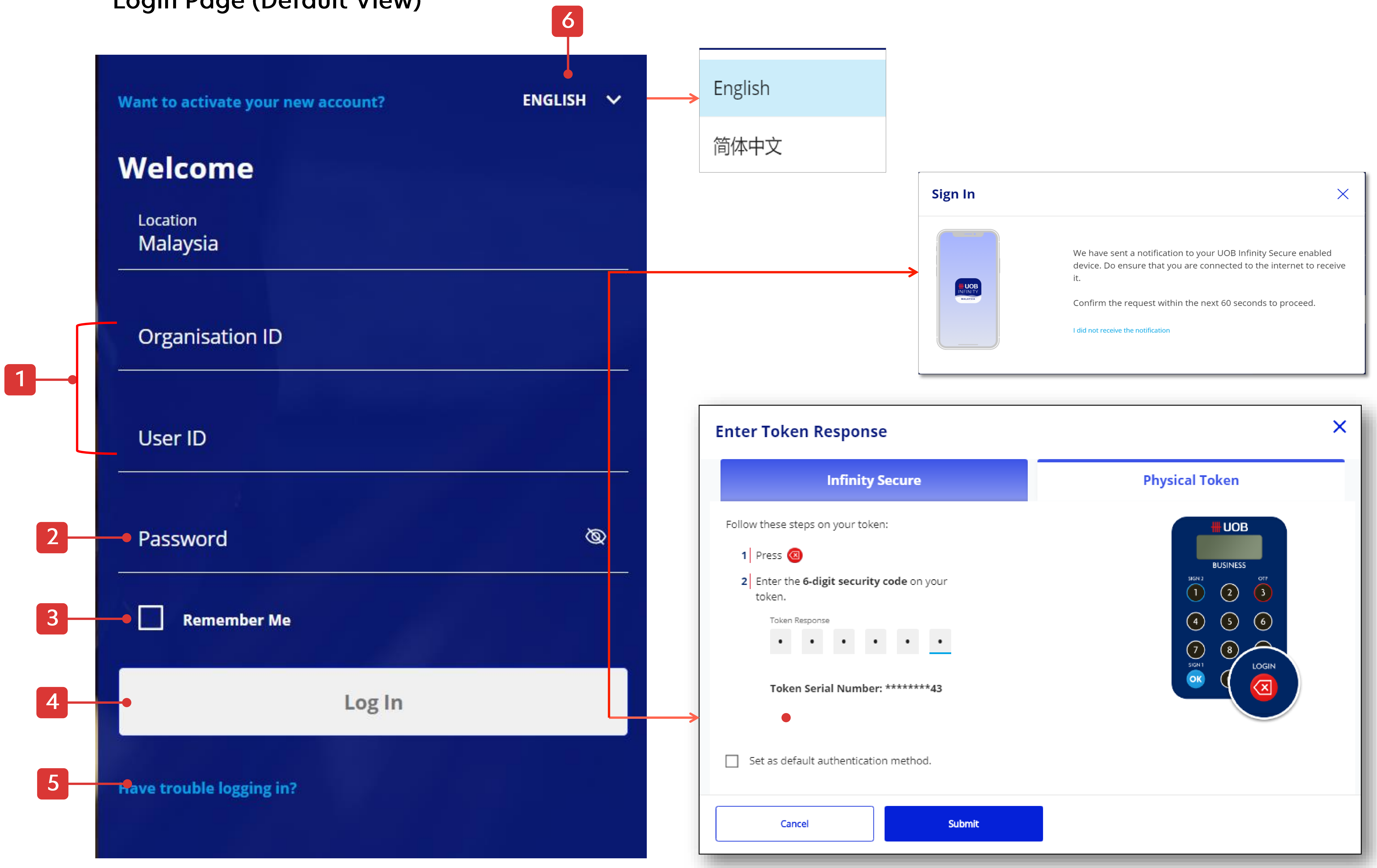
4. Upon clicking the 

button:
   a) If you are logging in for the first time without physical or digital token, you will be prompted by a message to setup a digital token.
   b) If you are logging in using Infinity Secure (digital token), you will see a notice that a push notification is sent to your mobile phone.
   c) If you are logging in using a physical token, you will see an on-screen instructions to generate the token response.

5. This option will help you to recover your password if you have forgotten it.

6. Languages available are English and Simplified Chinese.

Login Page (Default View)



7. How to Activate Your User ID/Recover Your Password

UOB

How to Activate Your User ID/Recover Your Password

Self Service Functions

You can perform the following functions via the UOB Infinity login page (applies to both browser/desktop and mobile app):

A. Activate your new user ID. **Please call UOB at 603-2638 6560 for assistance before activating your user account access.**

B. Recover your password (for Authoriser or Company Administrator who are holding a physical security token). For user who are not an Authoriser, you may request your Company Administrator to reset your password.

A. Activate your new User ID

1. You may activate using Infinity mobile app (tap on "Activate Account" icon at the bottom right corner of the login screen) or using desktop browser (click on "Want to activate your new account?"). **Please call UOB at 603-2638 6560 for assistance before activating your user account access.**

   If you do not have a physical token, you may activate using Infinity mobile app by registering Infinity Secure (digital token) via Infinity mobile app after the activation is completed.

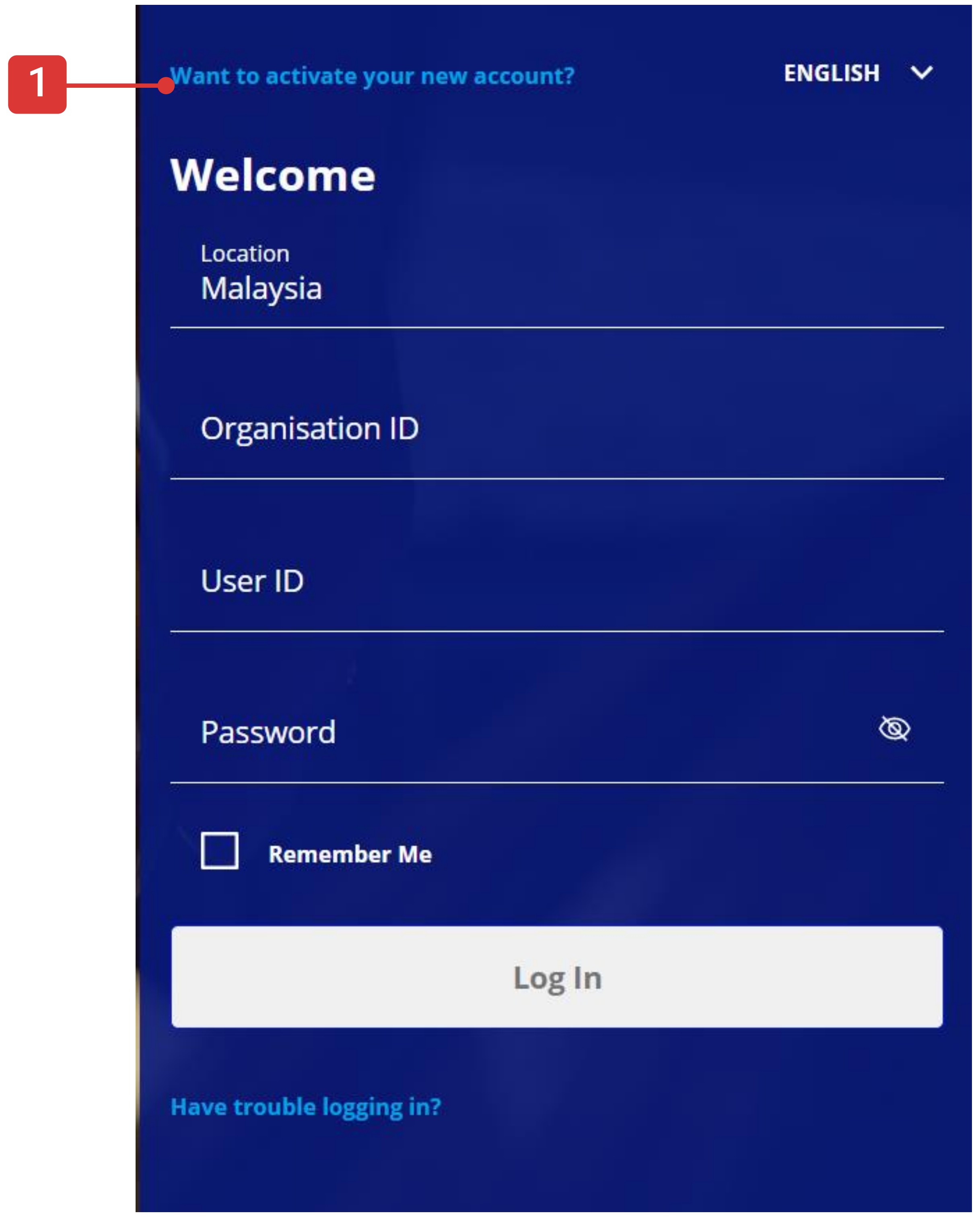
2. Input your Organisation ID and User ID.

3. Tick the checkbox to accept Terms and conditions for your user ID activation.

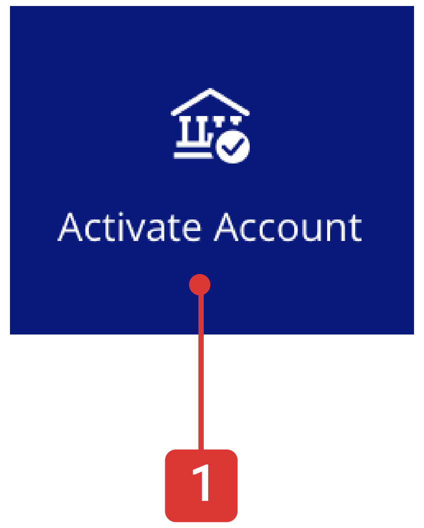
4. Click on the Next button.

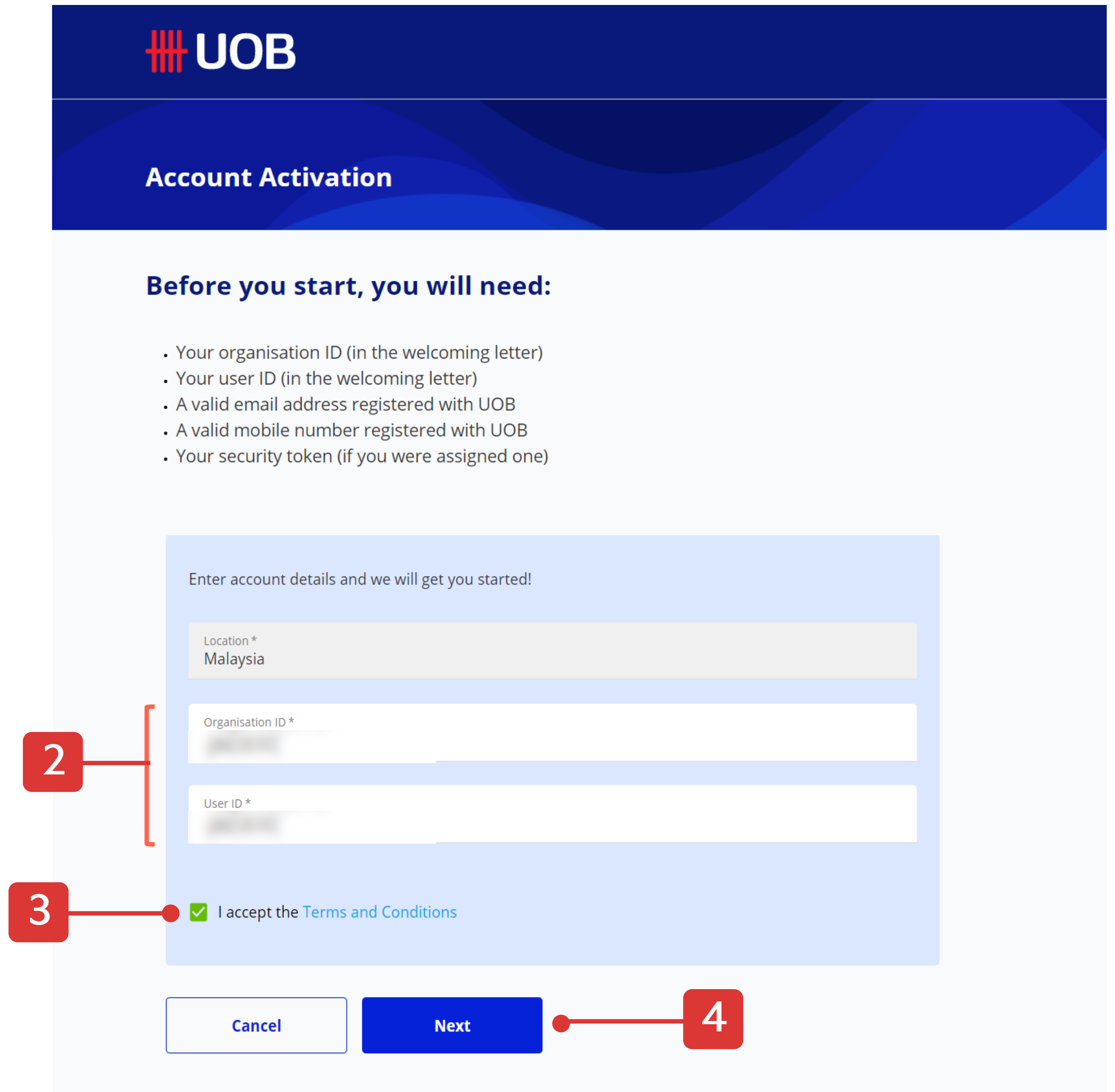
* Required if you are logging in to UOB Infinity for the first time.

via Web Browser



via Mobile App





How to Activate Your User ID/ Recover Your Password

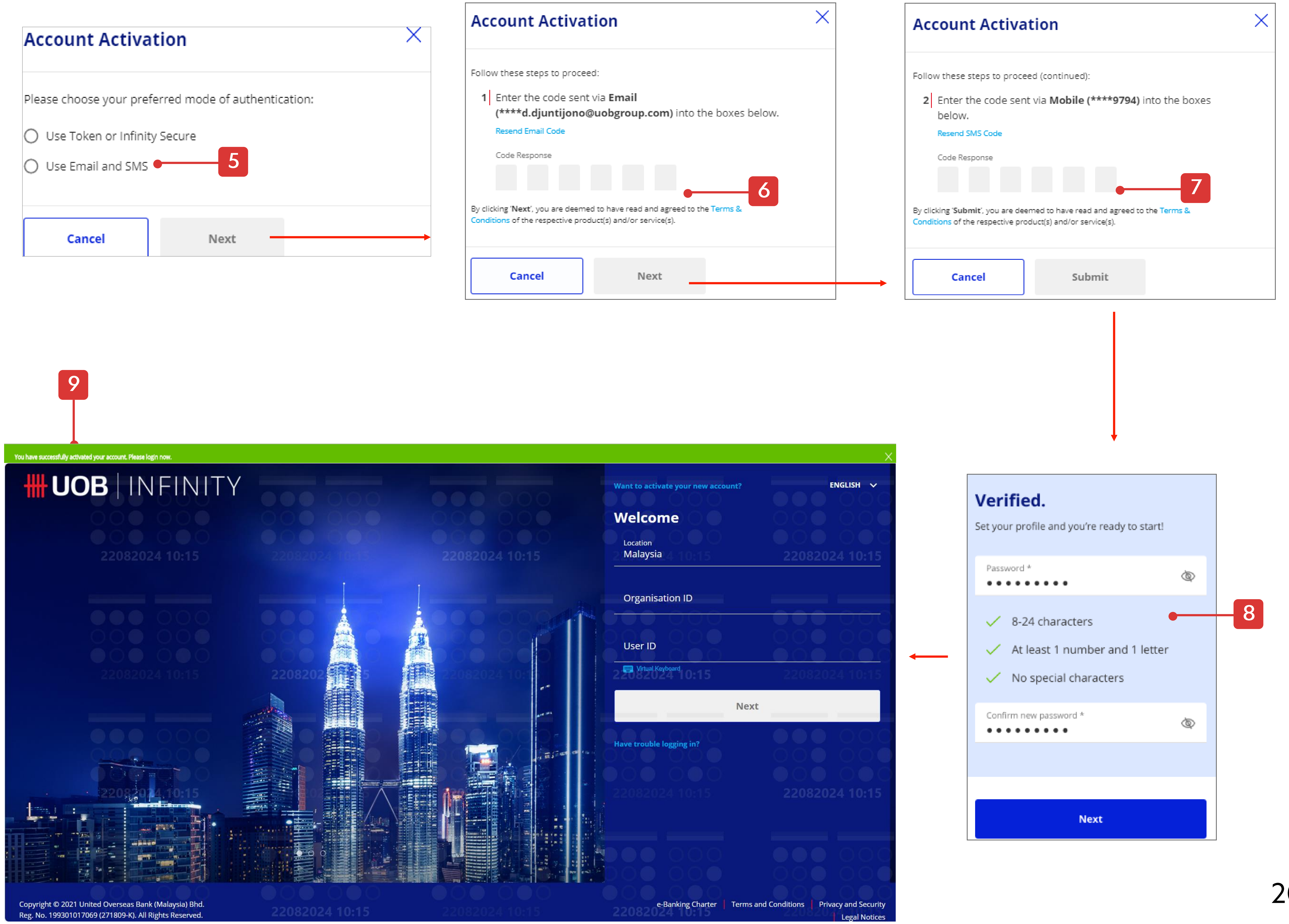
Activate using Email and SMS

5. Choose "Use Email and SMS". Click Next .
6. Enter the 6-digit code sent to the email address registered in your Infinity user profile. Click Next .
7. Enter the 6-digit code sent to the mobile number registered in your Infinity user profile. Click Submit .
8. Set your new passwords and click Next to complete the setup.
9. Confirmation message will be displayed on the screen.

Upon completion of the user activation, if you do not have a physical/digital token, you may log in onto UOB Infinity mobile app using your Organisation ID, User ID and the newly created password.

Upon tapping on the Log In button, you will be prompted by a message to setup a digital token.

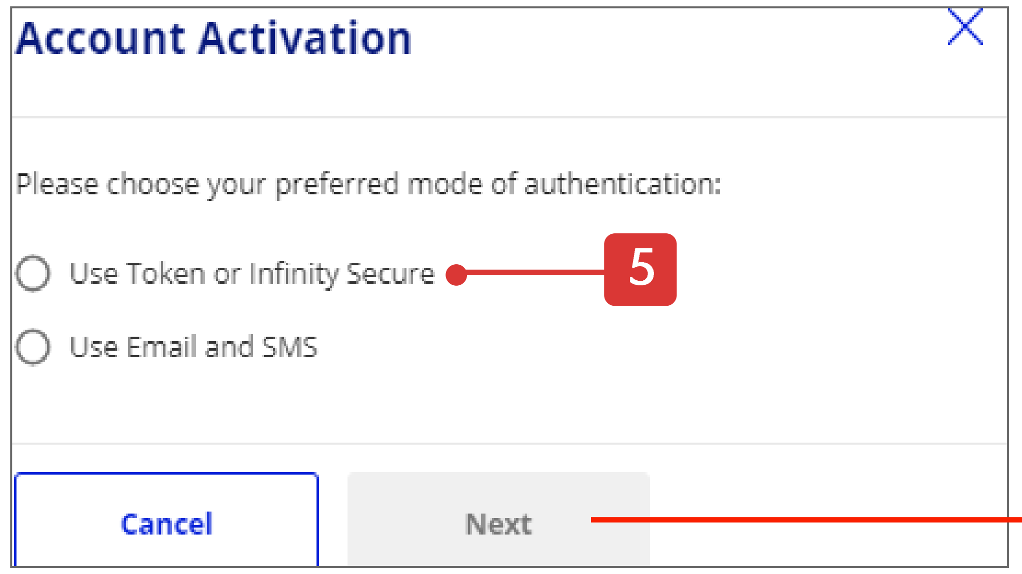
Please refer to the user guide to setup your digital token from UOB MY Infinity website UOB.my/Infinity-Guides

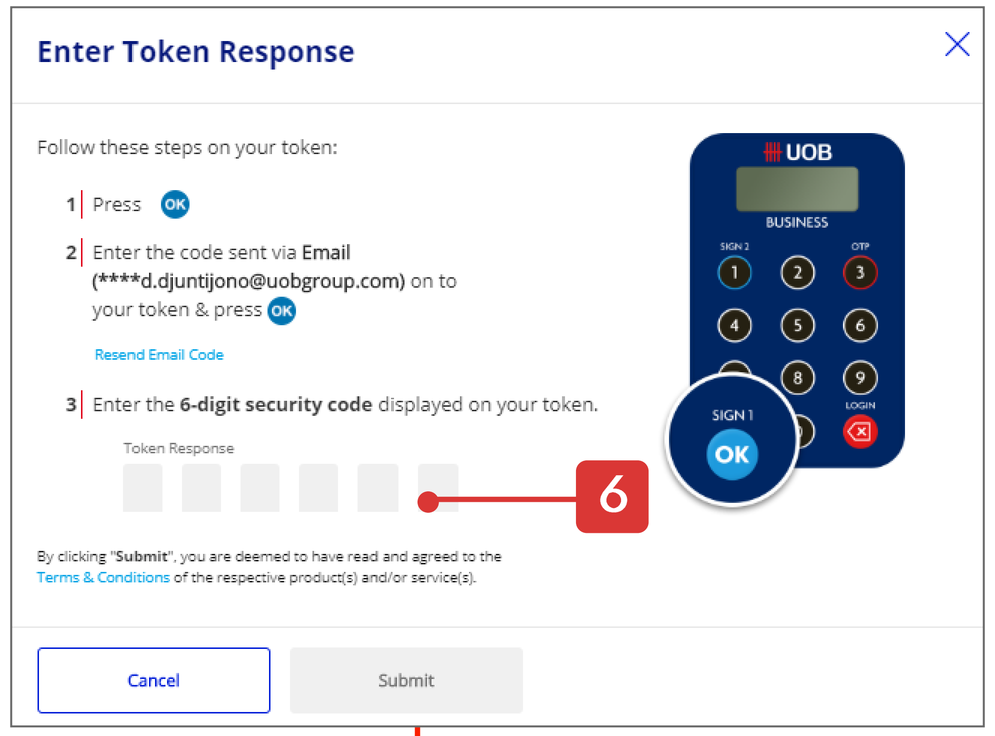


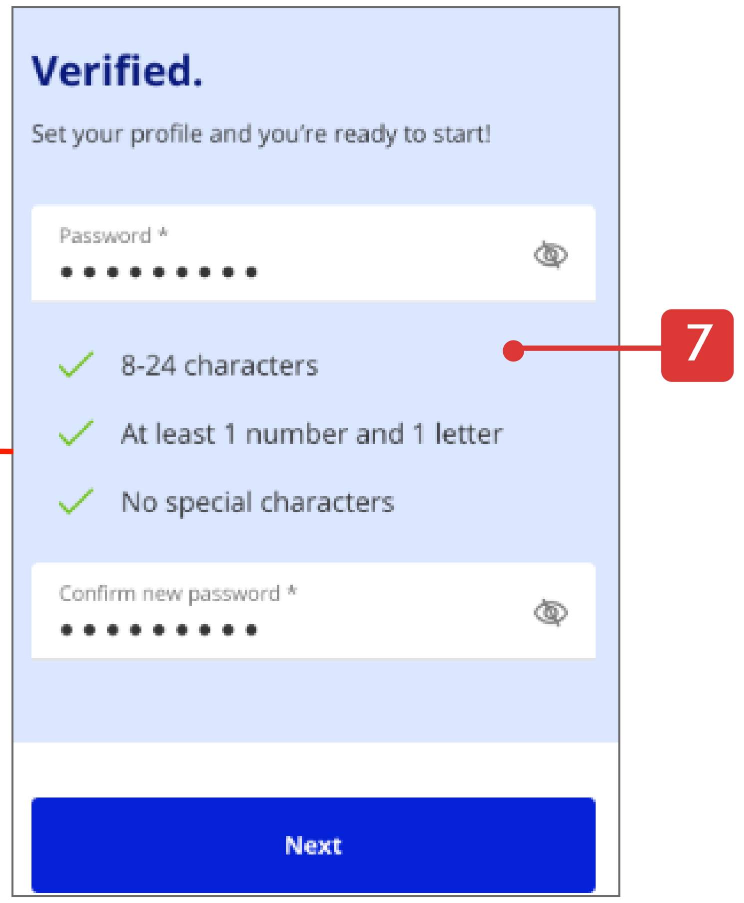
How to Activate Your User ID/ Recover Your Password

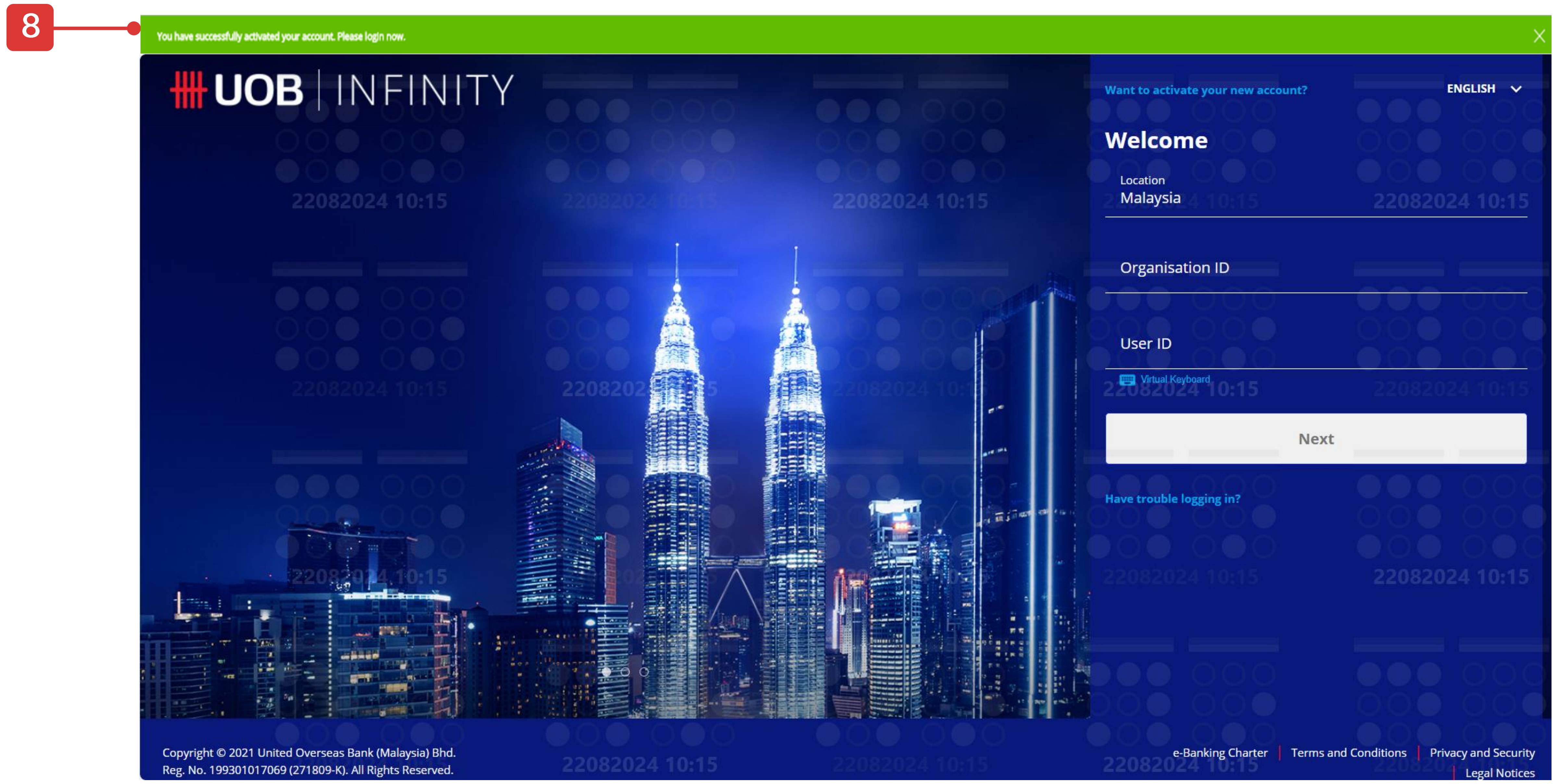
Activate using Token or Infinity Secure

5. Choose "Use Token or Infinity Secure". Click Next .
6. Follow the on-screen instructions to generate token response and input the response to the screen. Click Submit .
7. Set your new passwords and click Next .
8. Confirmation message will be displayed on the top banner and you can login into UOB Infinity.









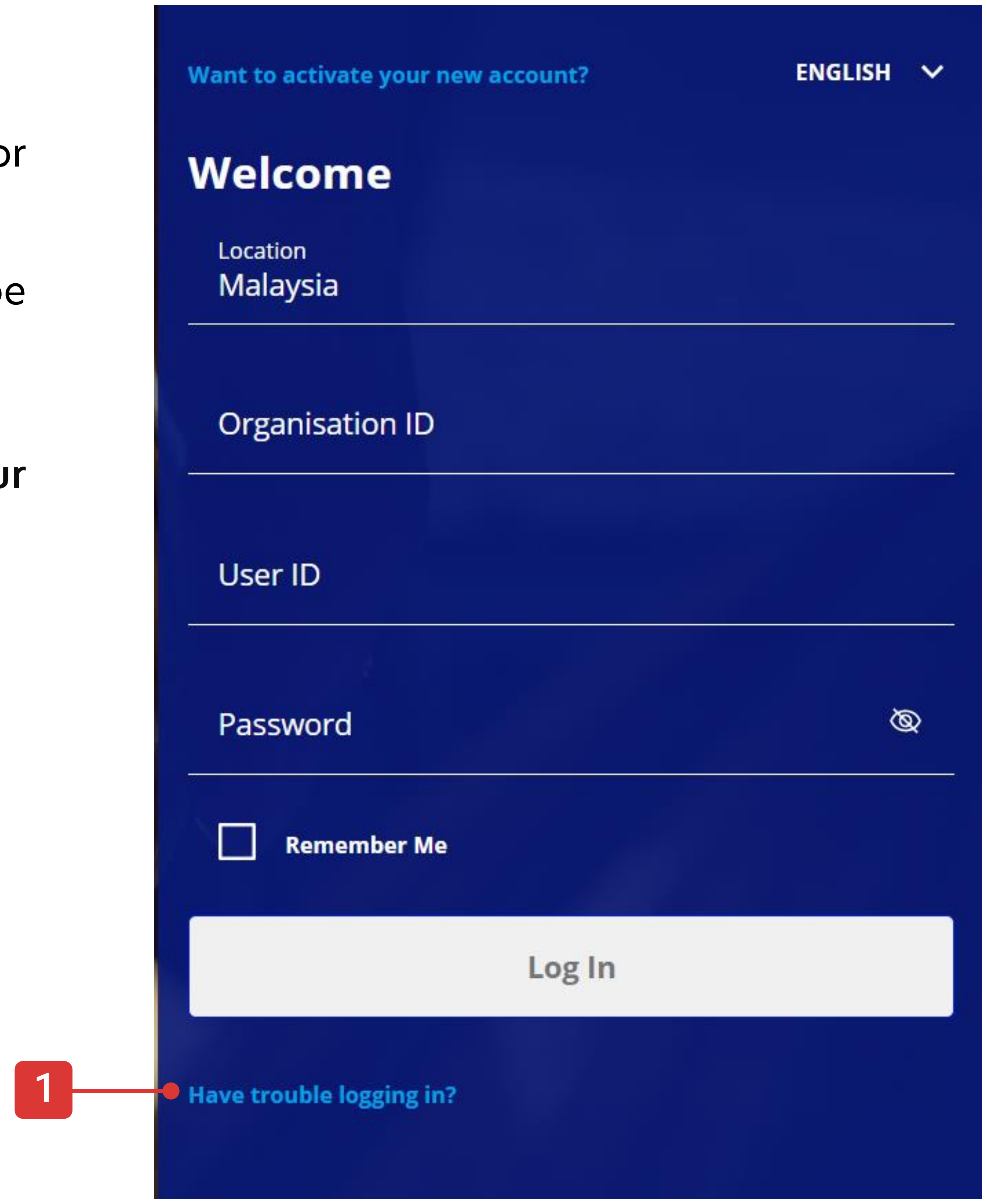
How to Activate Your User ID/ Recover Your Password

B. Recover your password (Applicable to Company Administrator and Authoriser only)

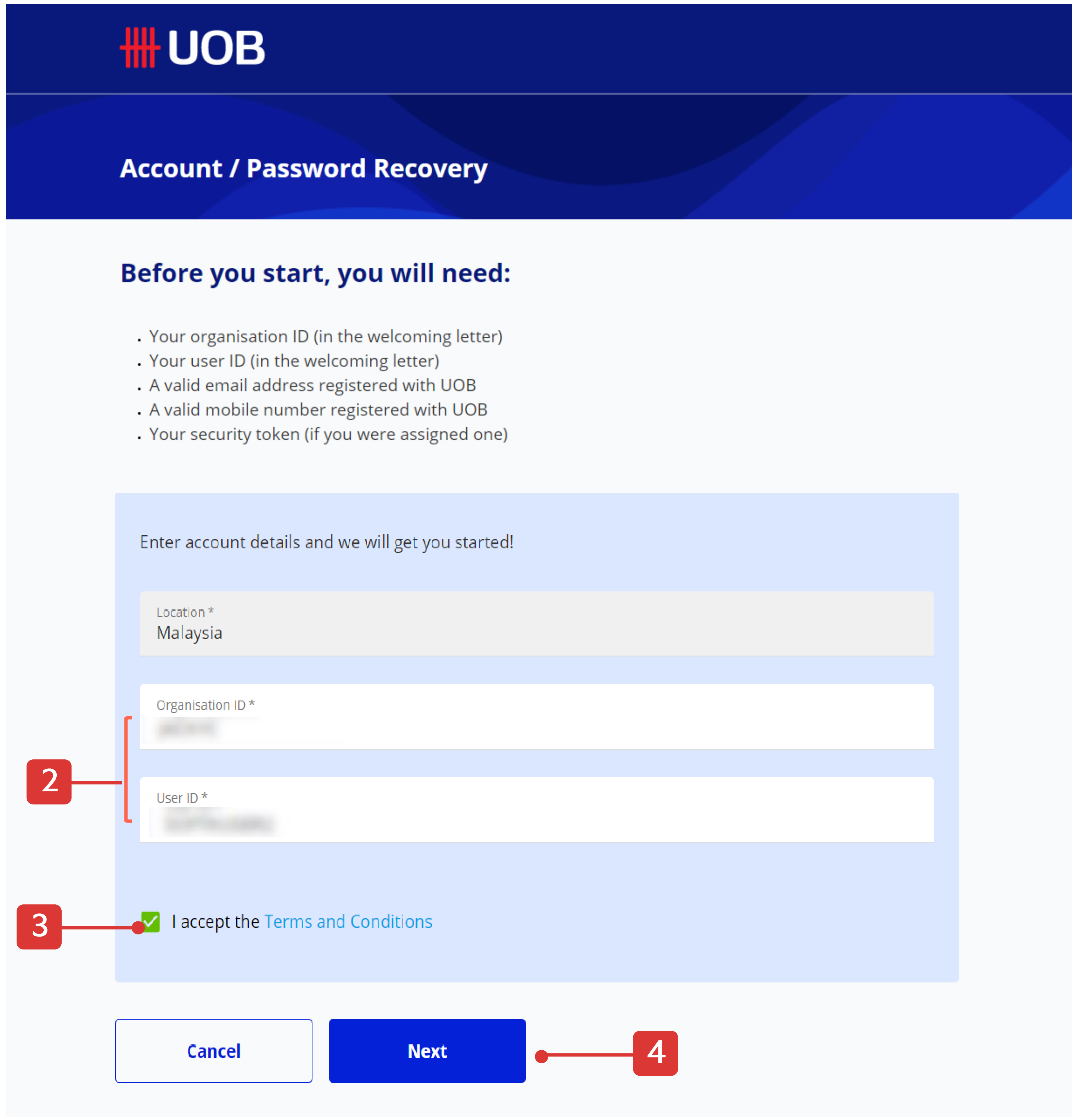
1. Please click on “**Have trouble logging in?**”
2. Input your Organisation ID and user ID.
3. Tick the checkbox to accept terms and conditions for your user ID activation.
4. Click on Next button. The subsequent steps will be similar to the user activation step (refer to page 13).

For user who are not an Authoriser, you may request your Company Administrator to reset your password.

Login Page (Default View)



Account Activation screen (Default View)



8. How to Update Your Contact Details, Notification Setup and Security Phrase

How to Manage My Profile

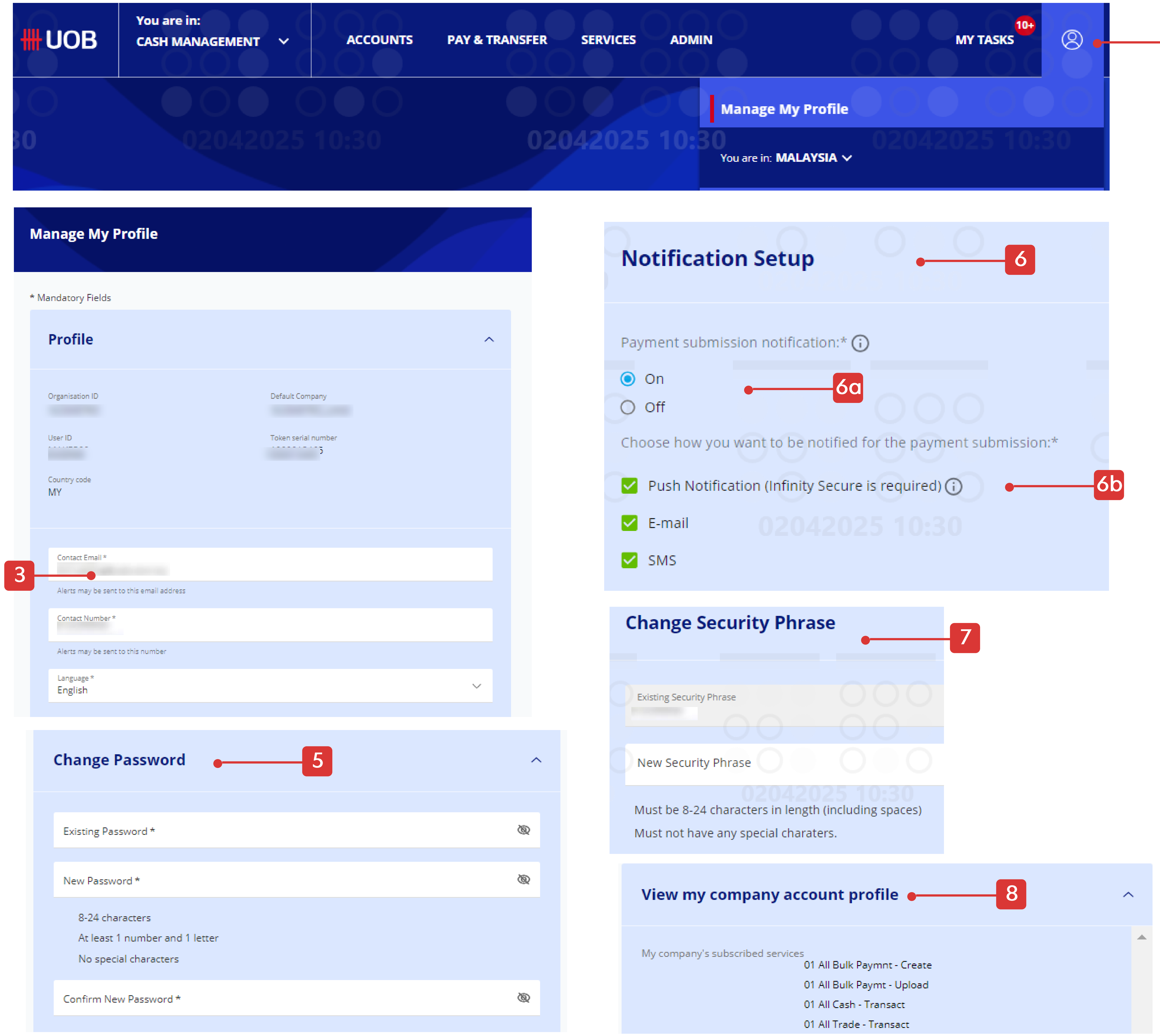
Manage My Profile

1. Select the user icon at the right corner of the top menu bar and click “Manage My Profile”. System launches the “Manage My Profile” page.
2. There are 5 sections in this page, which can be edited and saved independently.
3. Profile details. There are 3 editable fields:
   - Contact Email, Contact Number and Language.
   - To update contact details, please change “Contact Email” and “Contact Number” and click “Save”.
4. For Malaysia contact numbers, you do not need to provide country code. Otherwise, please include the country codes – e.g. +65xxxx.
5. Change Password – user may change own password.
6. Notification Setup **(Only applicable to Authoriser)**

   a) Authoriser may edit Notification Setup by turning On/ Off the setting.

   b) Authoriser may choose the notification method: Push Notification, E-mail, SMS.

   Please note turning off the Notification or updating the notification method will take 12 hours for the setting to be effective. We recommend for Authoriser to always turn on notification to be alerted on account activities.
7. Change Security Phrase – user may change security phrase
8. View company account profile (Non-editable) – user may view the assigned user roles.



9. How to Enable Biometric Login

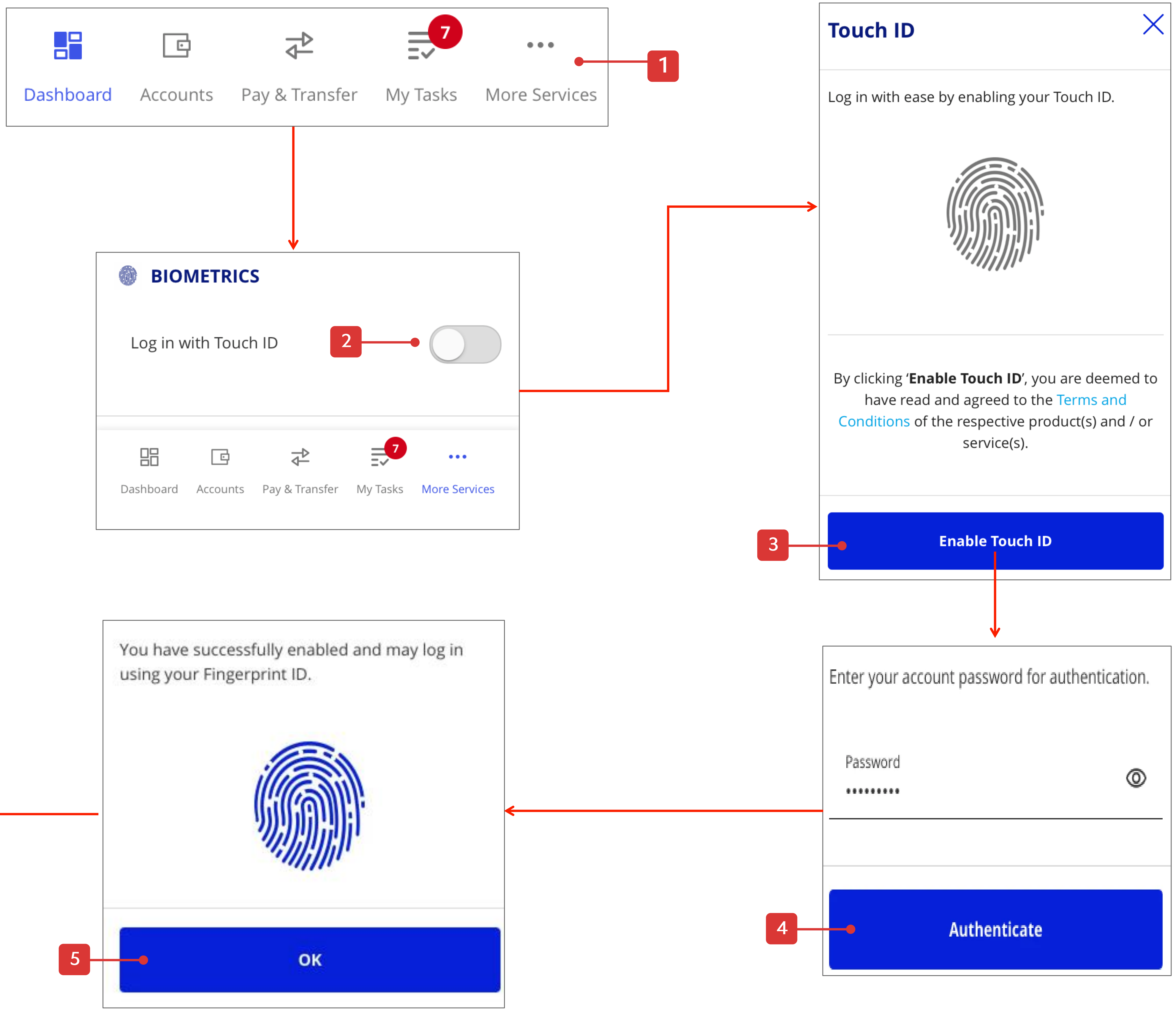
How to Enable Biometric Login

UOB

Enable Biometric Login

1. Login to UOB Infinity mobile app. Tap on “More Services” at the bottom menu bar.
2. Scroll down to the “Biometrics” section and tap on the toggle to enable the feature.
3. Tap on “Enable Touch ID” (you will see “Face ID” if your phone supports facial recognition authentication).
4. Enter your login password. Tap on “Authenticate”.
5. A confirmation message will be displayed once the setup is completed. Tap on “OK”. On your subsequent login, there will be a fingerprint/facial recognition icon located at the right side of the “Log in” button.

Note: To disable this feature, repeat step 1-2 and follow the onscreen instructions accordingly.



10. Quick Guide to Dashboard

Quick Guide to Dashboard

Overview of Dashboard

1. **UOB Logo** – Click on the logo to return to the dashboard from any page in UOB Infinity.

2. **Customise Dashboard** – Allows you to add, remove or switch the position of the widgets that matter to you. The widgets include "Assets", "Loans", "Favourite Functions", "My Tasks", "Approval Statuses" and "FX Rates".

3. **Assets** – Allows you to view the total assets and shows the available account balances of your company such as Current Accounts, Fixed Deposits & Structured Investments which you are entitled to view. Click on the account balances to find out the balances of each of your accounts.
   - The "12M" indicator refers to the past 12 months account data displayed in the graph.
   - The time frame displayed in the graph does not represent the Fixed Deposit tenure.

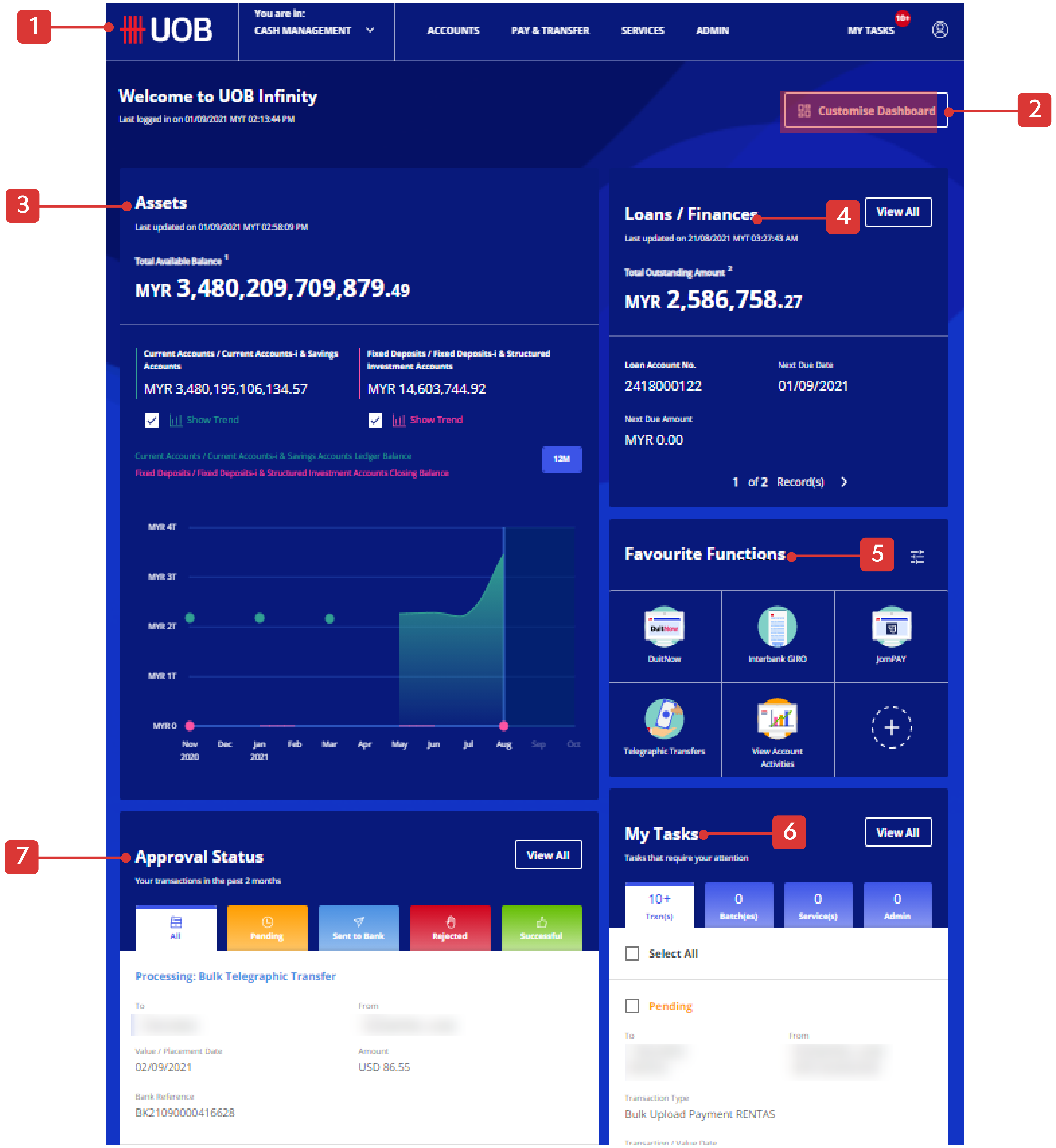
4. **Loans** - Allows you to view the total outstanding loans. Click on the loans outstanding amount to find out the details of each loan account.

5. **Favorite Functions** – Allows you to go to the frequently visited screens instantly. To add a favourite function, click on the filter icon or the "+" icon and then you can select the function(s) you wish to add or remove, and then click "Submit".

6. **My Tasks** – Allows you to take action on the pending transactions/tasks which require your attention.

7. **Approval Statuses** – Allows you to view all your transactions. Please refer to the Approval Statuses User Guides for the detailed explanation of each tab.

Dashboard



11. How to Customise Your Dashboard

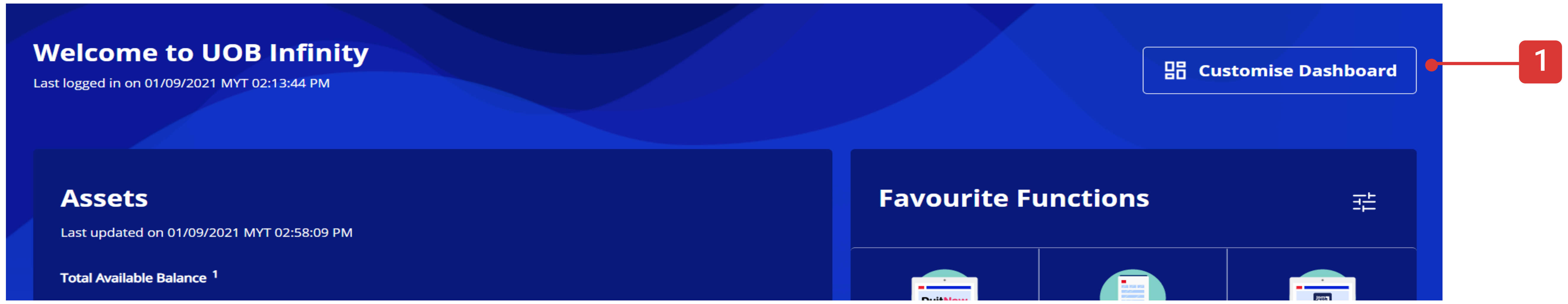
How to Customise Your Dashboard

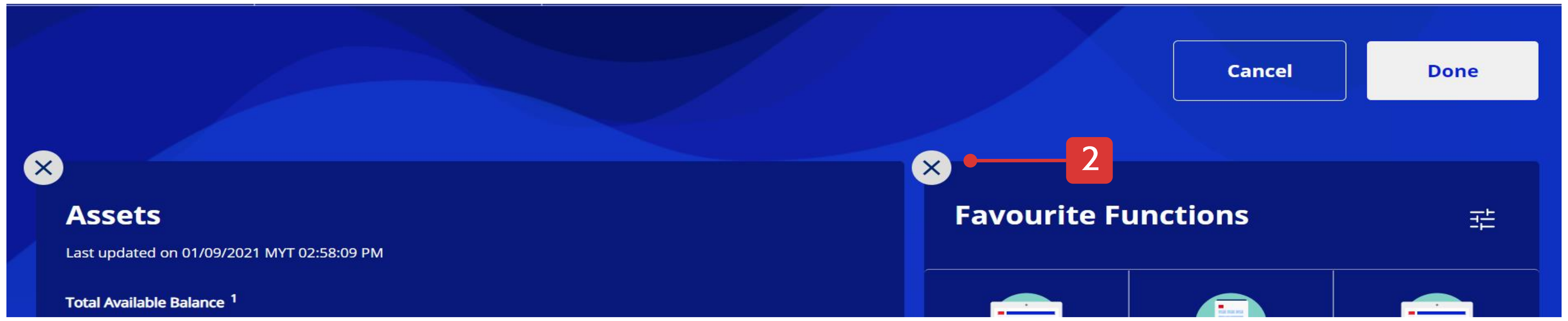
Hide / Move Widget

1. After clicking “Customise Dashboard”, there will be a “Cancel” and “Done” button.

2. To hide a widget, user can click the “X” icon at the top left corner of the widget and click “Done” button.

3. To move the position of the widget, user can do mouse over within the widget area and the mouse cursor will change into a cross-arrow cursor (+).
   User can drag the widget up/down (because widget can only be moved within the same column).

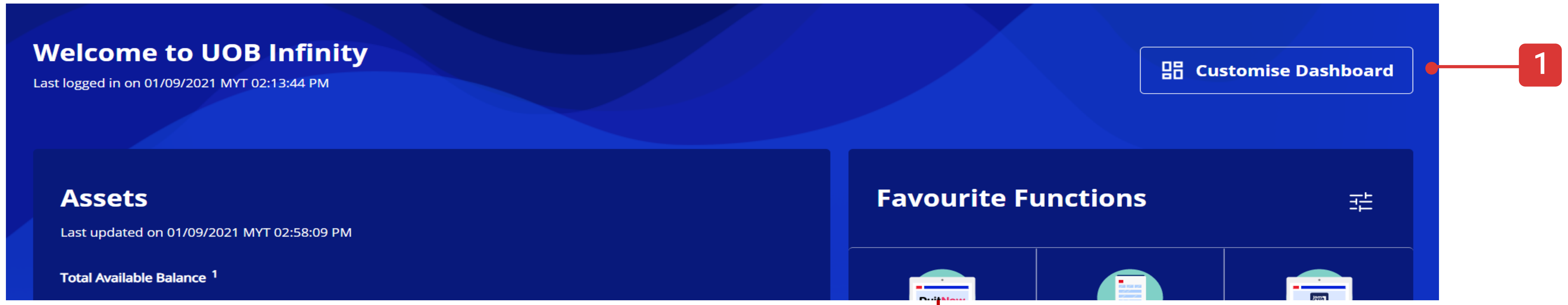


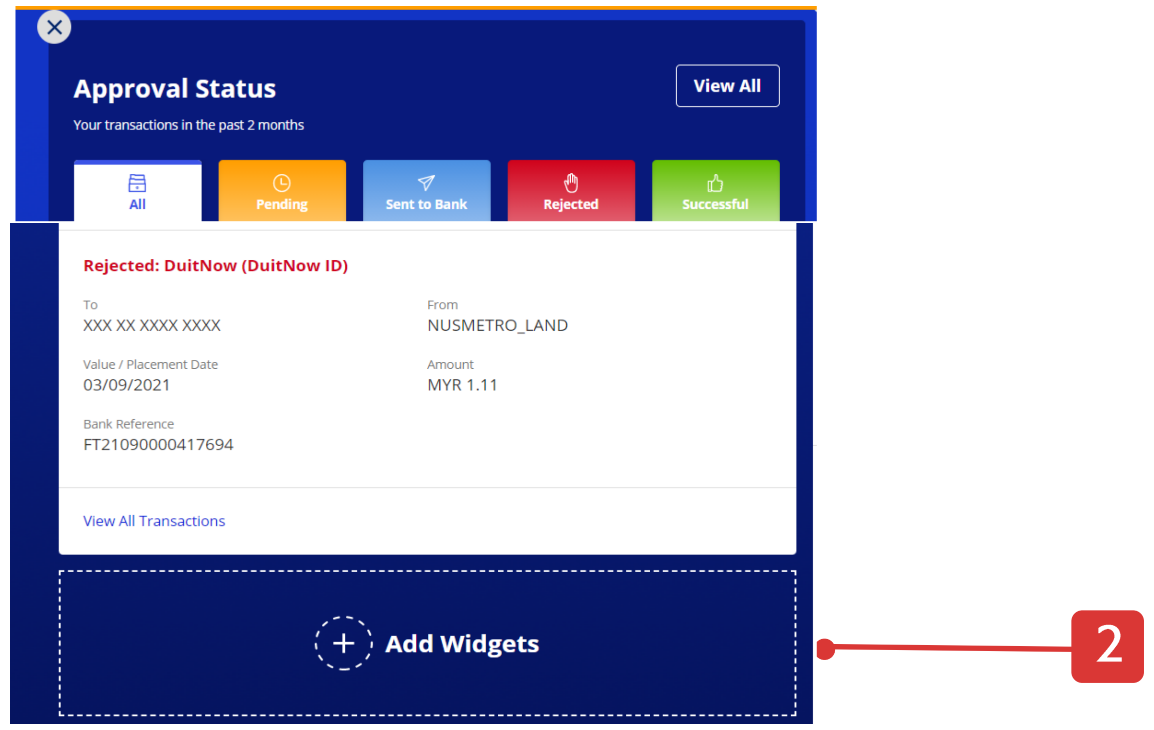


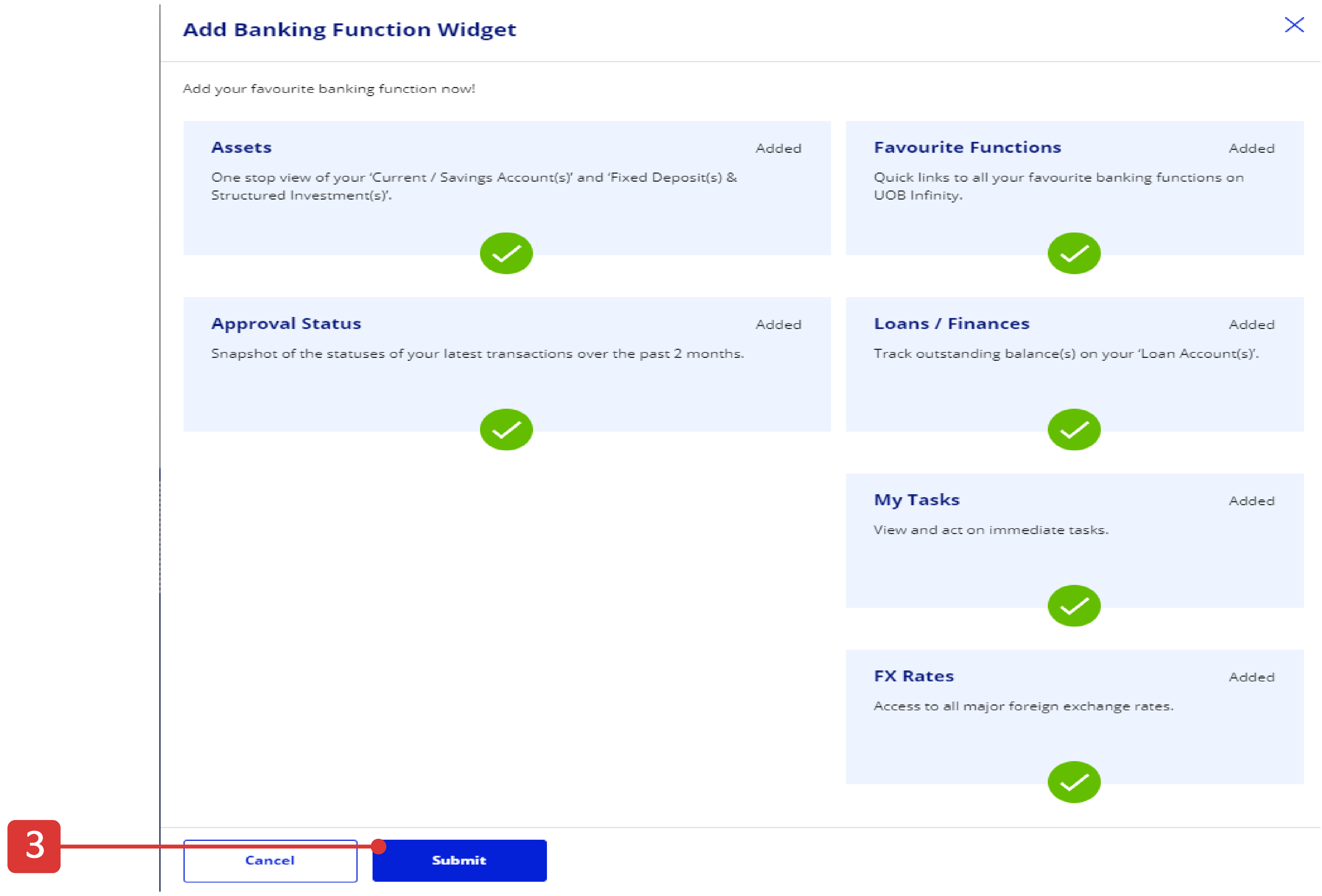
How to Customise Your Dashboard

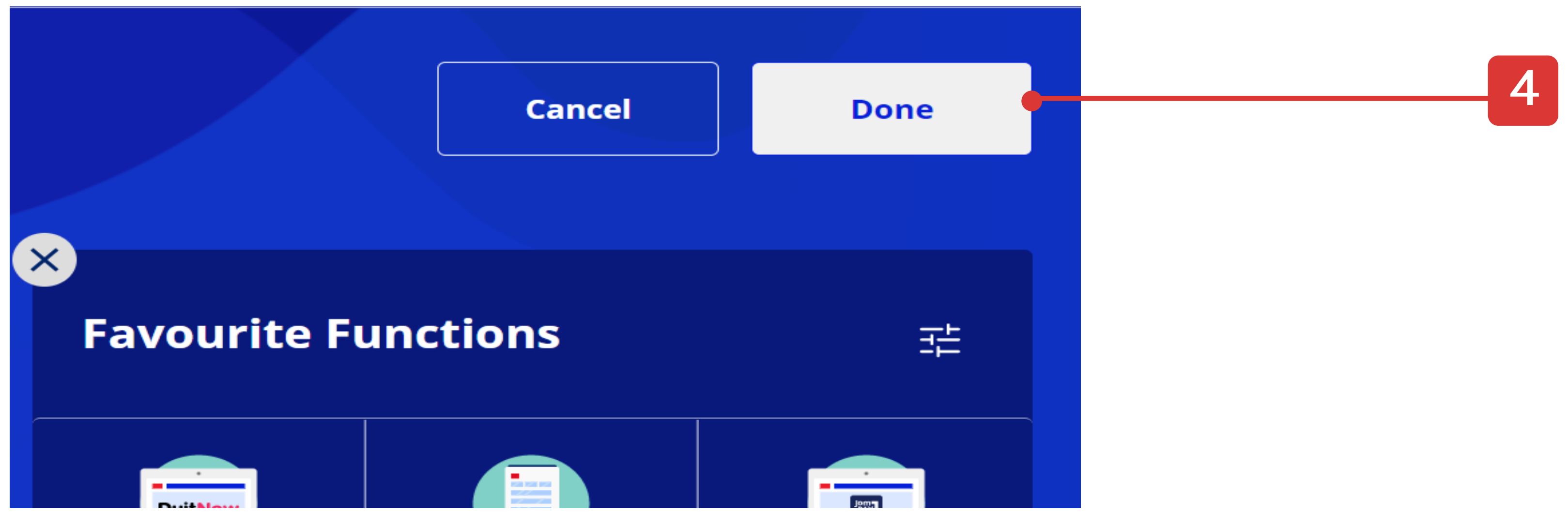
Add Widget

1. Click “Customise Dashboard”.
2. There will be an “Add Widget” button at the bottom of the widget column.
3. Click “Submit” button to confirm adding the widget.
4. Click “Done” button to confirm customising the widget.









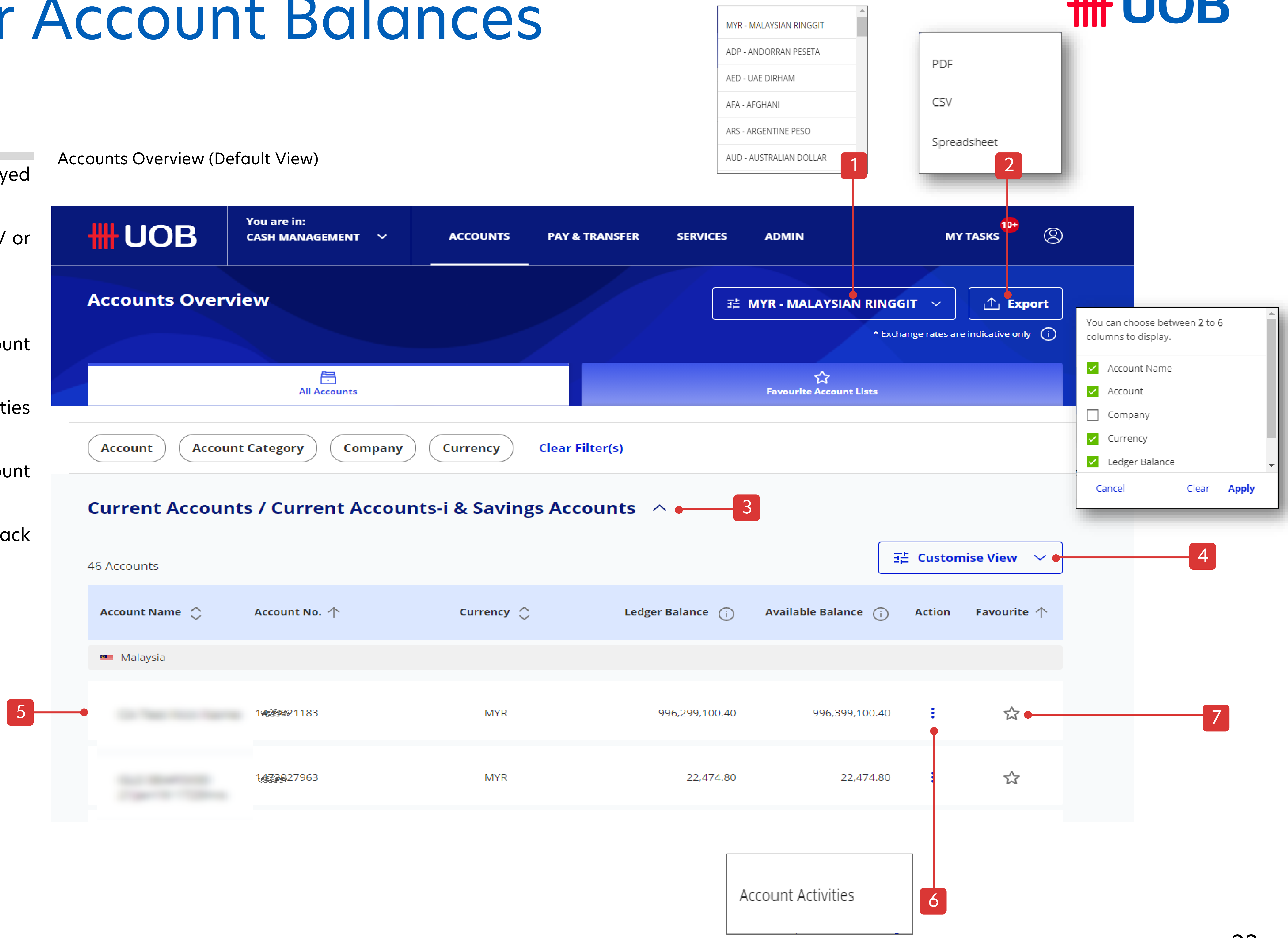
12. How to View Your Account Balances

How to View Your Account Balances

Features

1. This is to select the equivalent currency to be displayed as the total account balances.
2. You can download the account summary as PDF, CSV or Excel spreadsheet.
3. Click to expand / collapse the section.
4. You can select the columns to be viewed on the "Account Overview" screen.
5. Click on the account name to view the account activities (you will be redirected to "Account Activities" page).
6. Action button shortcut allows you to access the "Account Activities" page or to initiate payment.
7. You can create your favourite account list and track accounts in your preferred view.

Accounts Overview (Default View)



13. How to View Your Account Activities

How to View Account Activities

Features

Go to Accounts at top menu then Account Activities

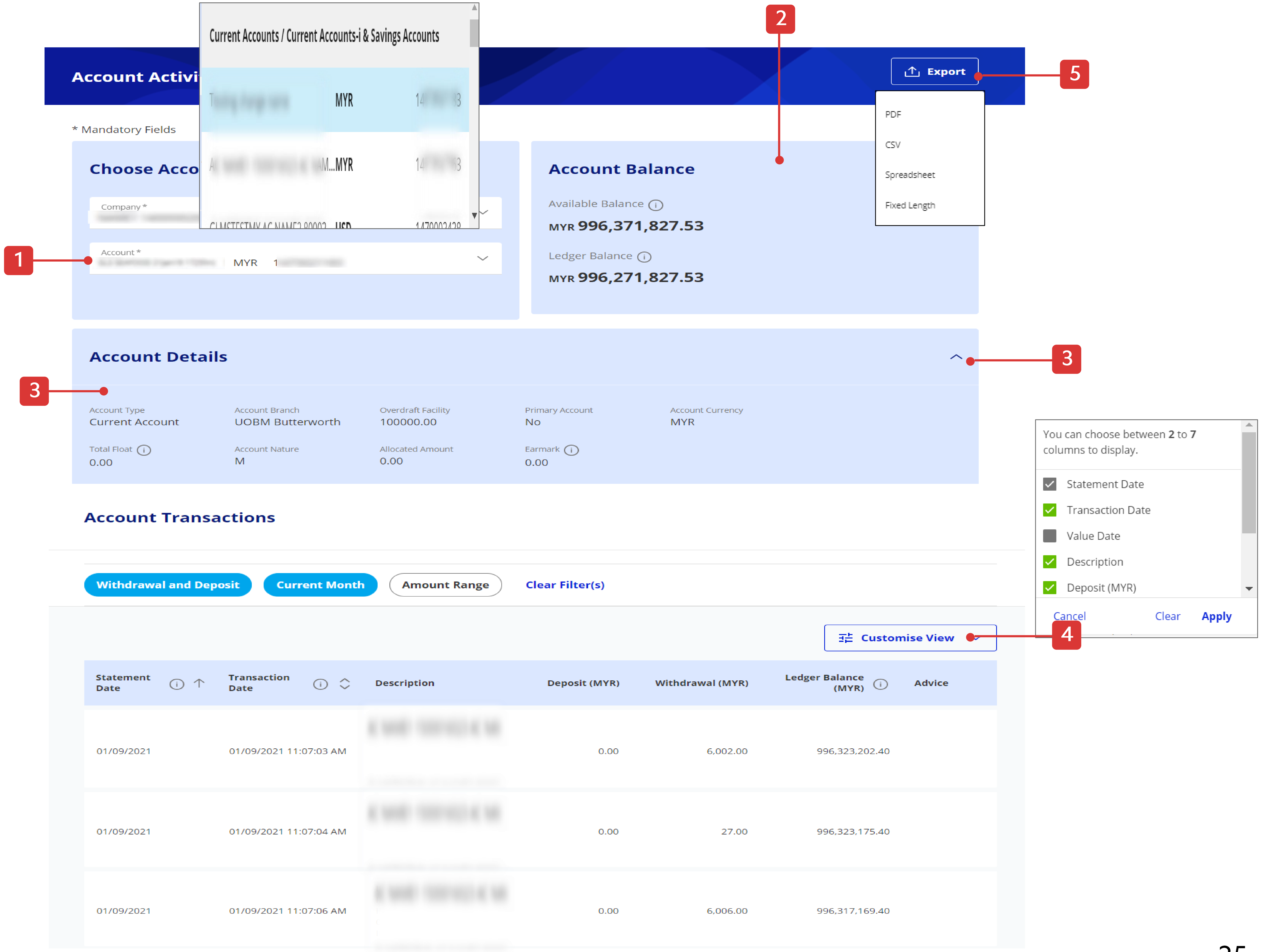
1. Click on the magnifying glass icon to select your company name and account number. For single entity, your company name will be pre-filled by default.

2. The balance of the selected account will be displayed in this section.

3. The account details of the selected account will be shown and this section can be collapsed and expanded by using down arrow button.

4. You can view up to 7 columns in one table. If you want to add/remove columns, please click the “Customise View” button.

5. To export/download the statement, press “Export” button at the top right corner of account activities screen and select the preference format from the dropdown list to export/download.



14. How to View Inward Remittance and Download Advices

How to View Inward Remittance and Download Advices

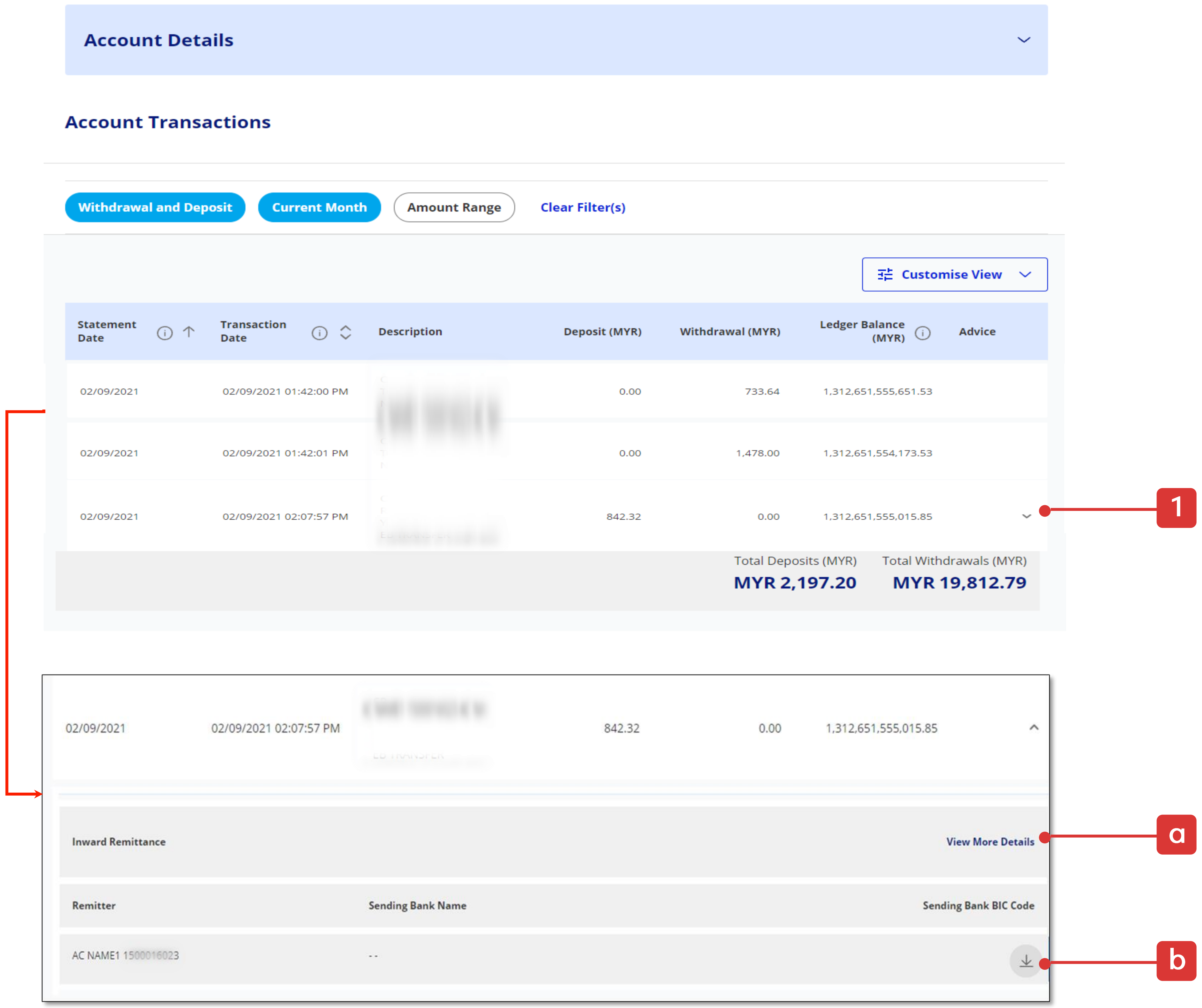
Features

Similar steps as View Account Activities, go to Accounts at top menu then Account Activities. After the account transaction details of the selected account will be shown below.

1. For Inward Remittance transaction, user can expand to view more information.

   a. To view detailed Inward Remittance transaction, click on "View More Details" link.

   b. To download advices, click on download icon.



15. How to Upload Bulk Payment Files

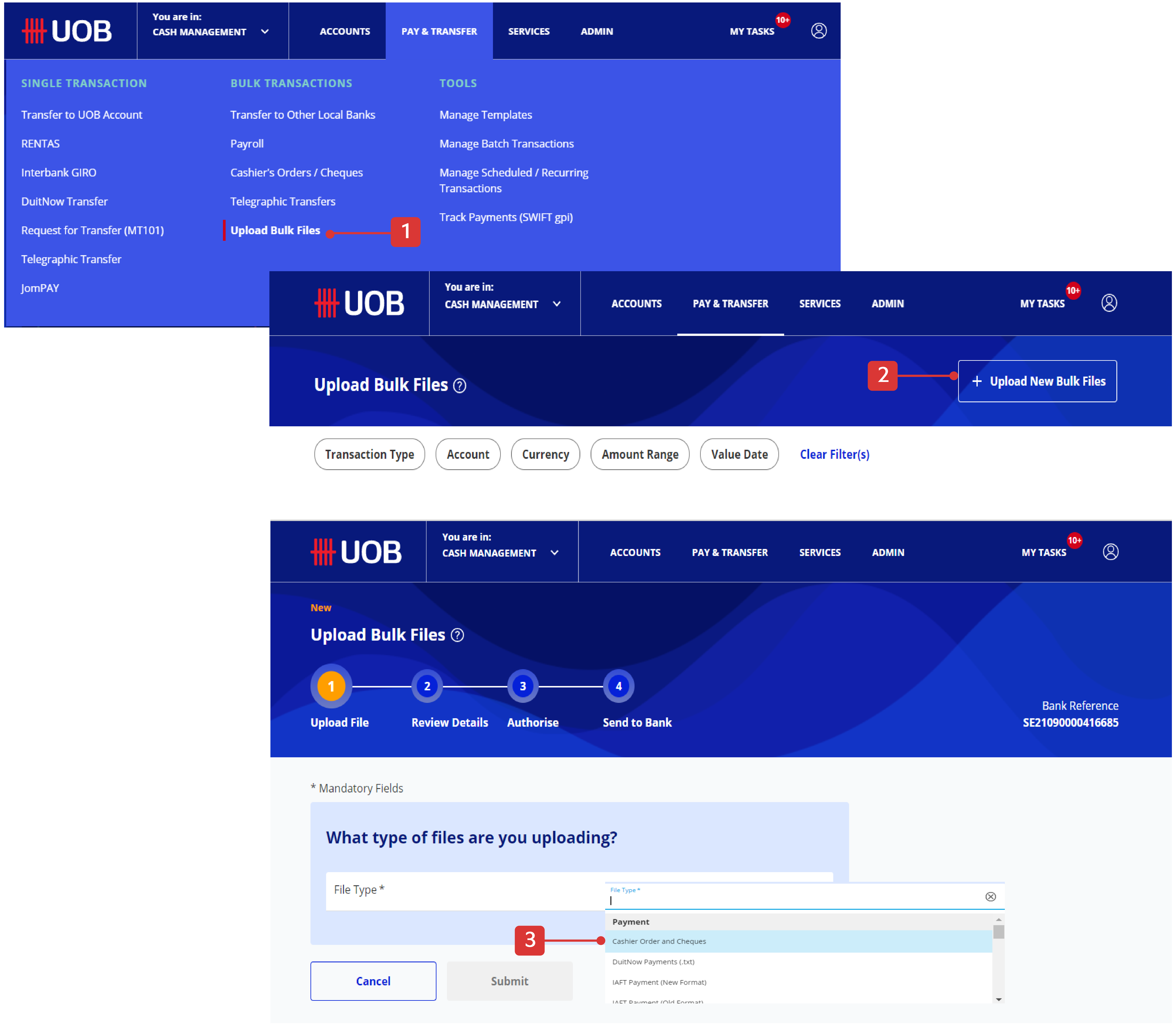
How to Upload a Bulk Payment Files

Overview

1. Select “Upload Bulk Files” under “Pay & Transfer” menu.
2. Click “Upload new bulk files”, the following next page will be displayed.
3. Select the file type.
4. Select Account Name and Account Number
   - This is applicable for IBG Payments files only.
   - The account number selected will not replace the debit account specified in the Bulk Payment file. Batches – all the sets of multiple transactions that are grouped into batches.
   - System does not validate the debit account number specified in the payment file against the debit account number selected on the screen.
5. Select the bulk file to be uploaded. You may drag & drop up to 5 files.
6. After uploading the file, select the file to be submitted. Files that are not selected will not be submitted and will be automatically removed from the system.
7. Files which have passed system’s validation will be presented in a “Pending” status. The bulk will be available for Authoriser’s action in “Approval Status” or “My Tasks”
   - If the bulk file upload failed, the original bulk file may be downloaded from this function for verification.

For more details, refer to “UOB Infinity User Guide (Bulk Payments).

Important Note:
- Users with access to “Upload Bulk Files” function can download failed bulk files submitted by other users.



16. How to Authorise Transaction via My Tasks

How to Authorise Transactions via My Tasks

My Tasks

1. Select "My Tasks" from the top menu bar.

2. Under My Tasks, the tasks pending your action are categorized into 4 tabs:

- Transactions - all the transactions involving funds transfers.

- Batches - all the sets of multiple transactions that are grouped into batches.

- Services - all the service-related requests, including "Cheque Book Request", DuitNow setup, and "Stop Cashier's Order/Cheque Request" will be displayed.

- Admin - all the administration-related requests, including "User Profile" setup, "User Account Access" setup and "User Authentication" setup will be displayed.

3. You can locate a specific transaction using the filer criteria.

4. After you select transactions, you can view the selected transactions by clicking this button.

5. You can either tick the checkbox on the transactions records and click the "Submit" button or you can click the icon under the menu to approve:

- Approve - to approve the transaction.

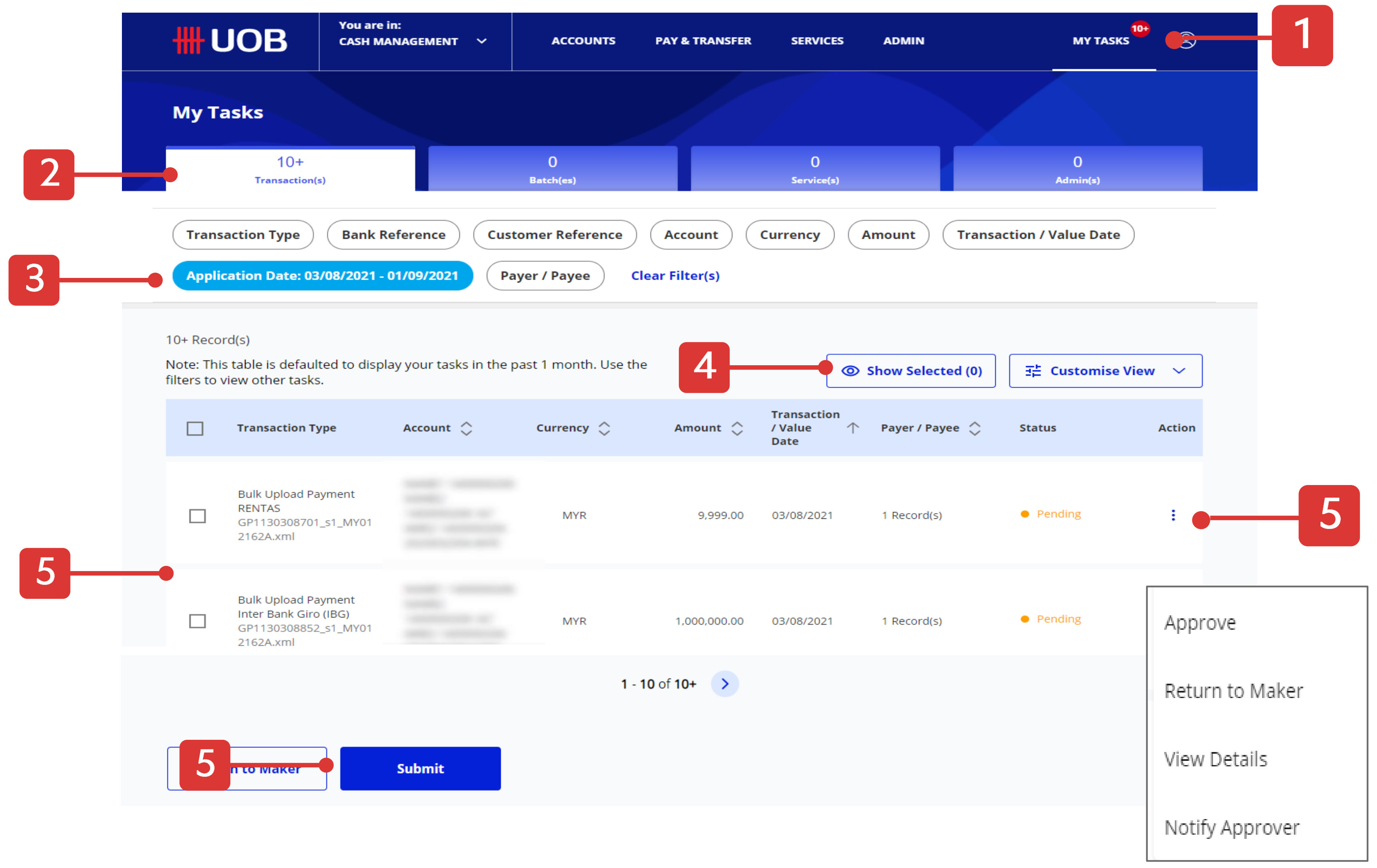
- Return - to return the transaction back to the maker. Status will be "Pending Rework".

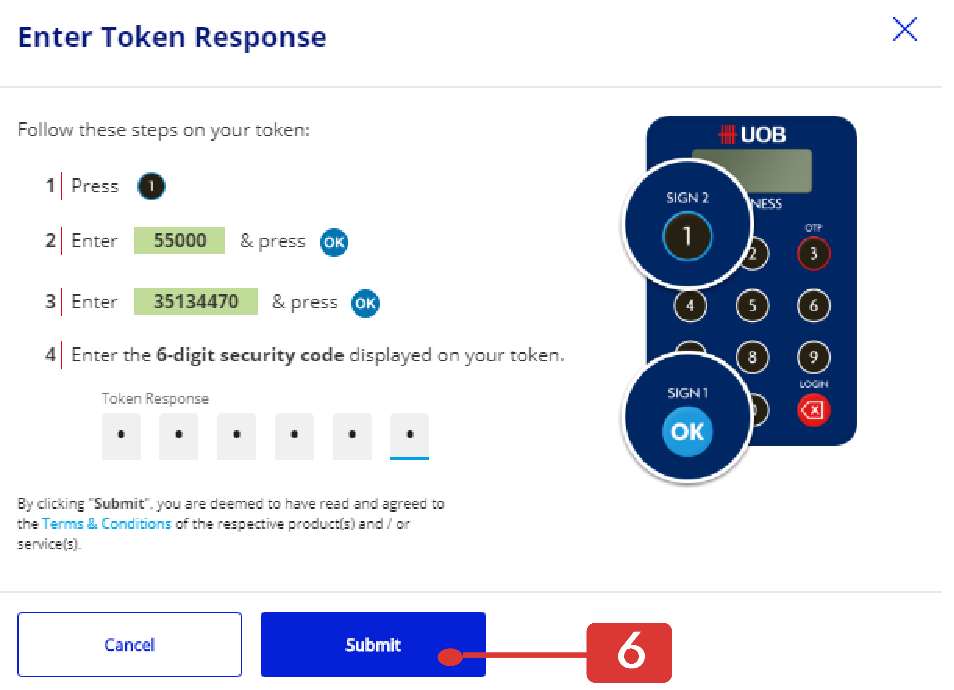
- View Details - to view the transaction details. There are options to "Approve" or "Return" inside the transaction details as well.

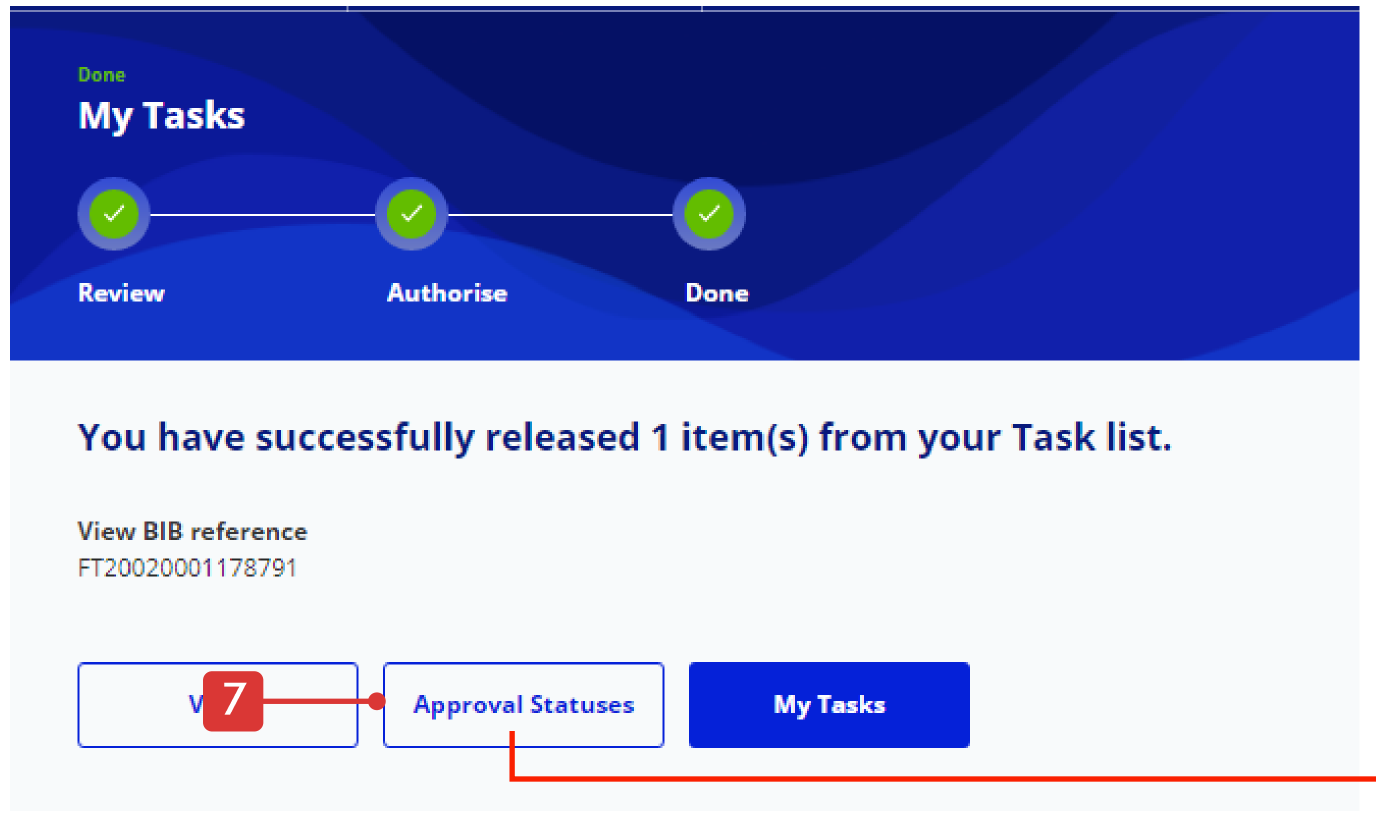
- Notify Approver - to notify the approver to approve the transaction.

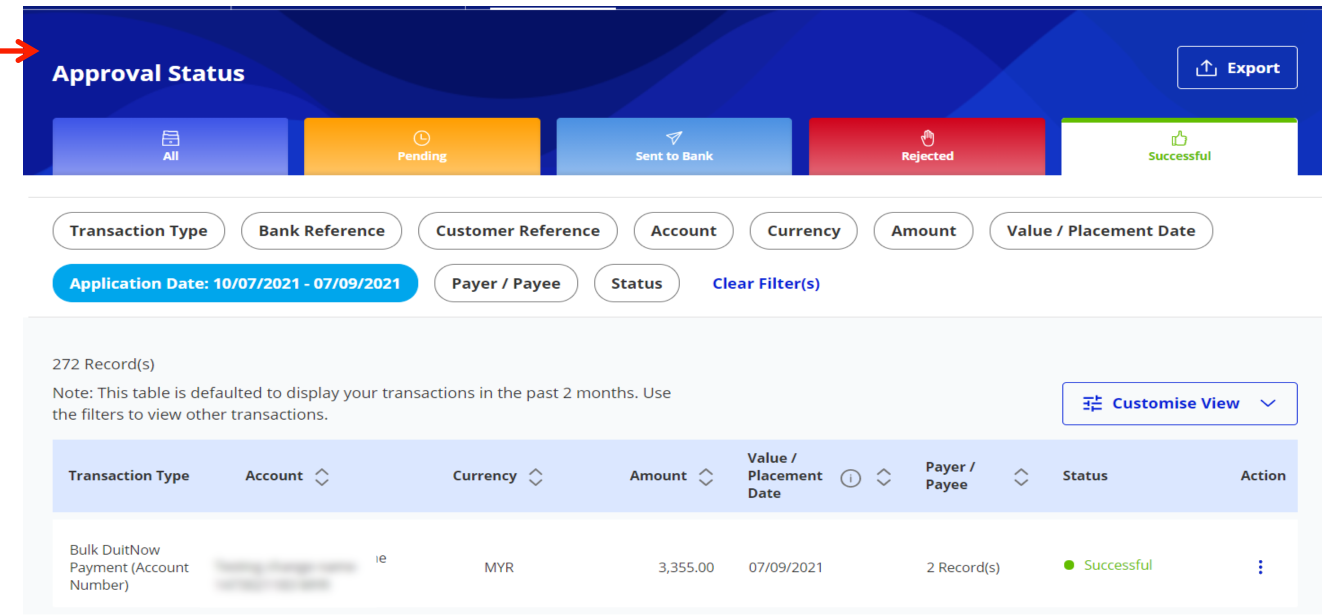
6. If you select "Approve", you will see the OTP authentication screen and enter the OTP response and click "Submit" button.

7. You can view the status in the "Approval Statuses" screen.









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17. How to Download Reports

How to Download Reports

Features

There are 2 types of reports available, "System Generated" and "User Generated".

"System Generated" reports refer to the list of reports which will be automatically made available for download without any action required from user (e.g. MT940 report).

"User Generated" reports refer to the list of exported transaction details file which will only be made available for download upon user request.

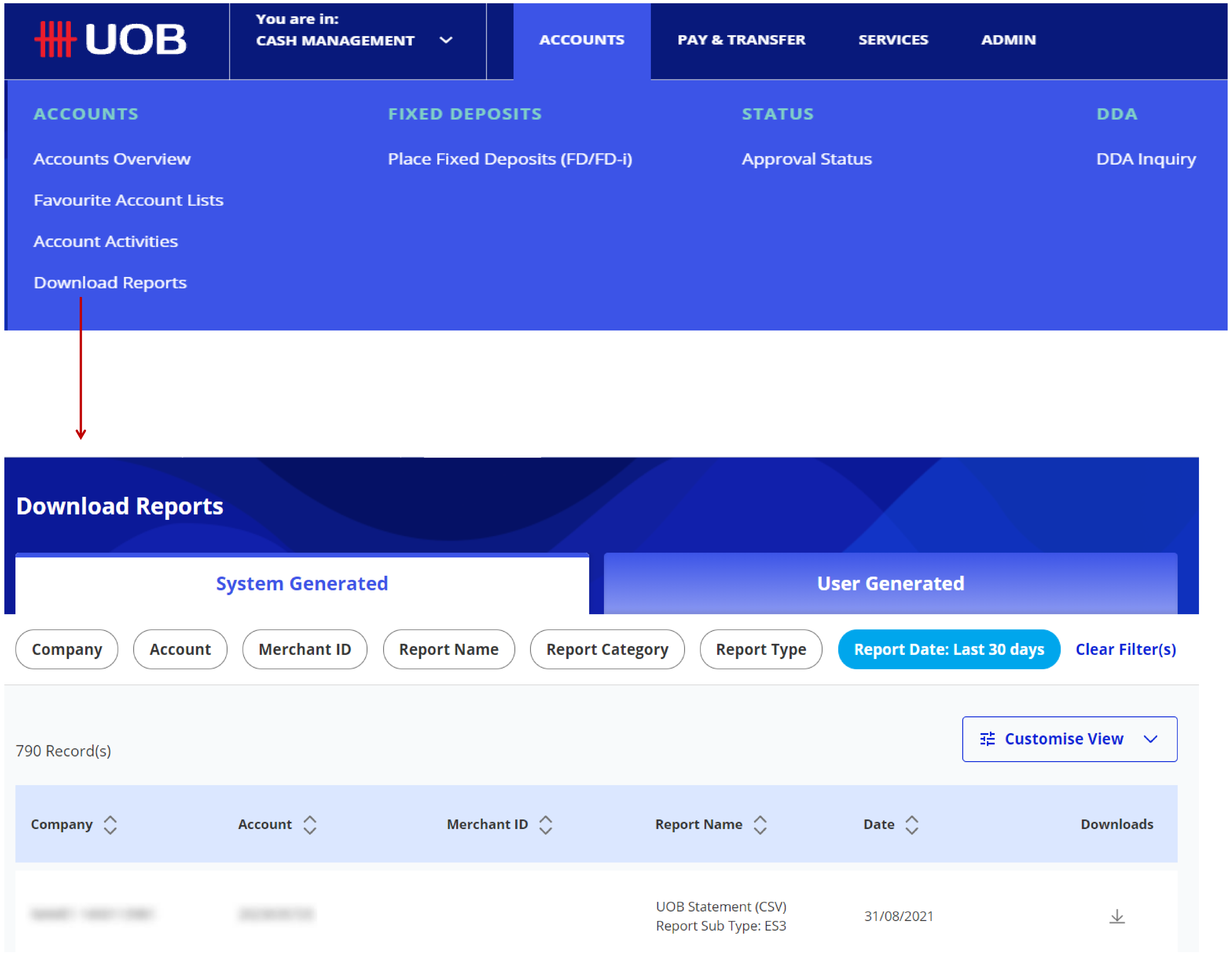
To request for exported transaction details file:
1. Go to "Accounts" at the top menu bar, select "Approval Status".

2. Search the transaction that you want to download. Click the action menu and select "View Details".

3. In the transaction details screen, click the "Export" function at the top right side of the screen.

Important Note:
- Users with access to "Download Reports" function will have access to all reports the company has subscribed to.

- If you require specific access control for some reports, please contact UOB for a discussion.



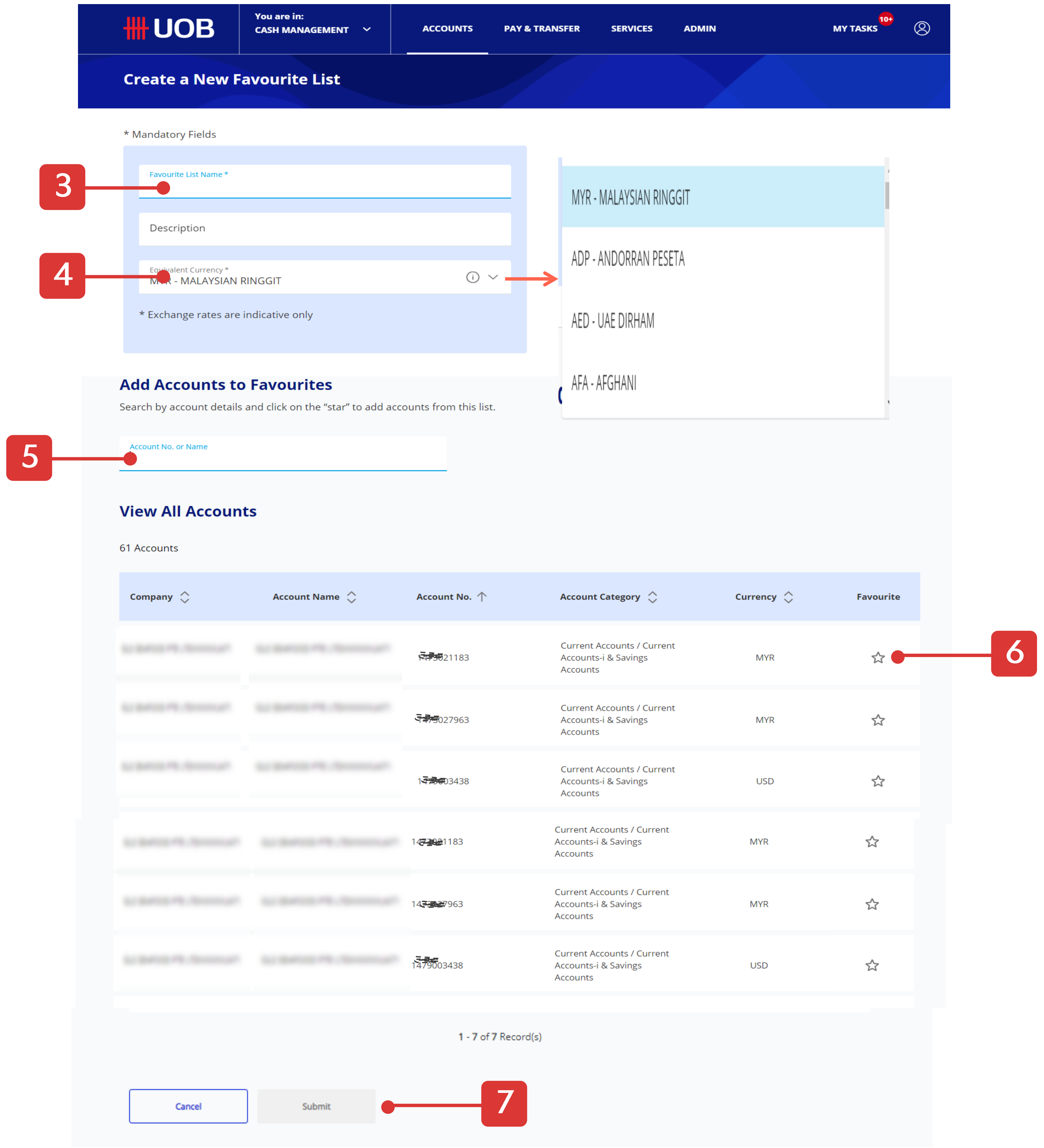
18. How to Use Your Favourite Account Lists

How to Use Your Favourite Account Lists

All Options

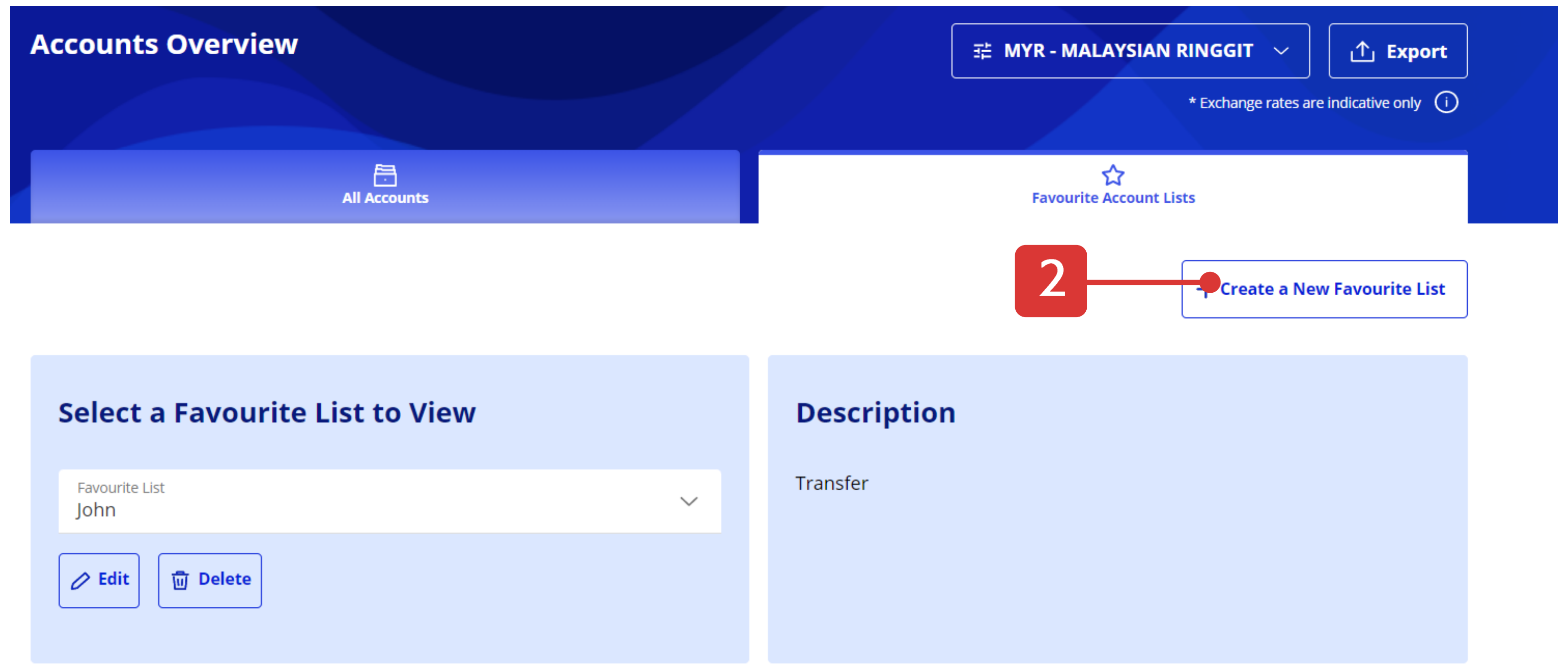
There are three main functions of the Favourite Account Lists:

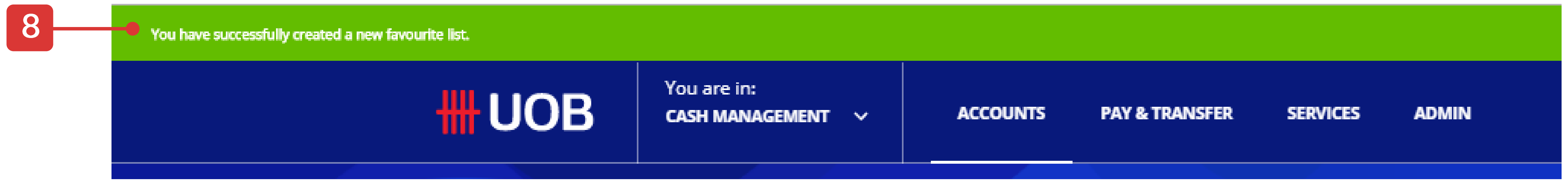
A. Create a new Favourite Account List
B. Edit a Favourite Account List
C. Delete a Favourite Account List



A. Create a new Favourite Account List

1. From the top menu bar, hover over "Accounts" and select "Favourite Account Lists" under "Accounts" column.
2. Select if you want to create a new favourite List.
3. Please key in your preferred "Favourite List Name" and "Description".
4. Click arrow and select the equivalent currency to display.
5. Key in "Account Number or Account Name" to add accounts to the favourites account list.
6. Or click the "Star" icon to add an account into your favourite account list.
7. Click "Submit" button once you have selected your accounts.
8. If your favourite account list is saved successfully, Confirmation message will be displayed at the top of the screen.





How to Use Your Favourite Account Lists

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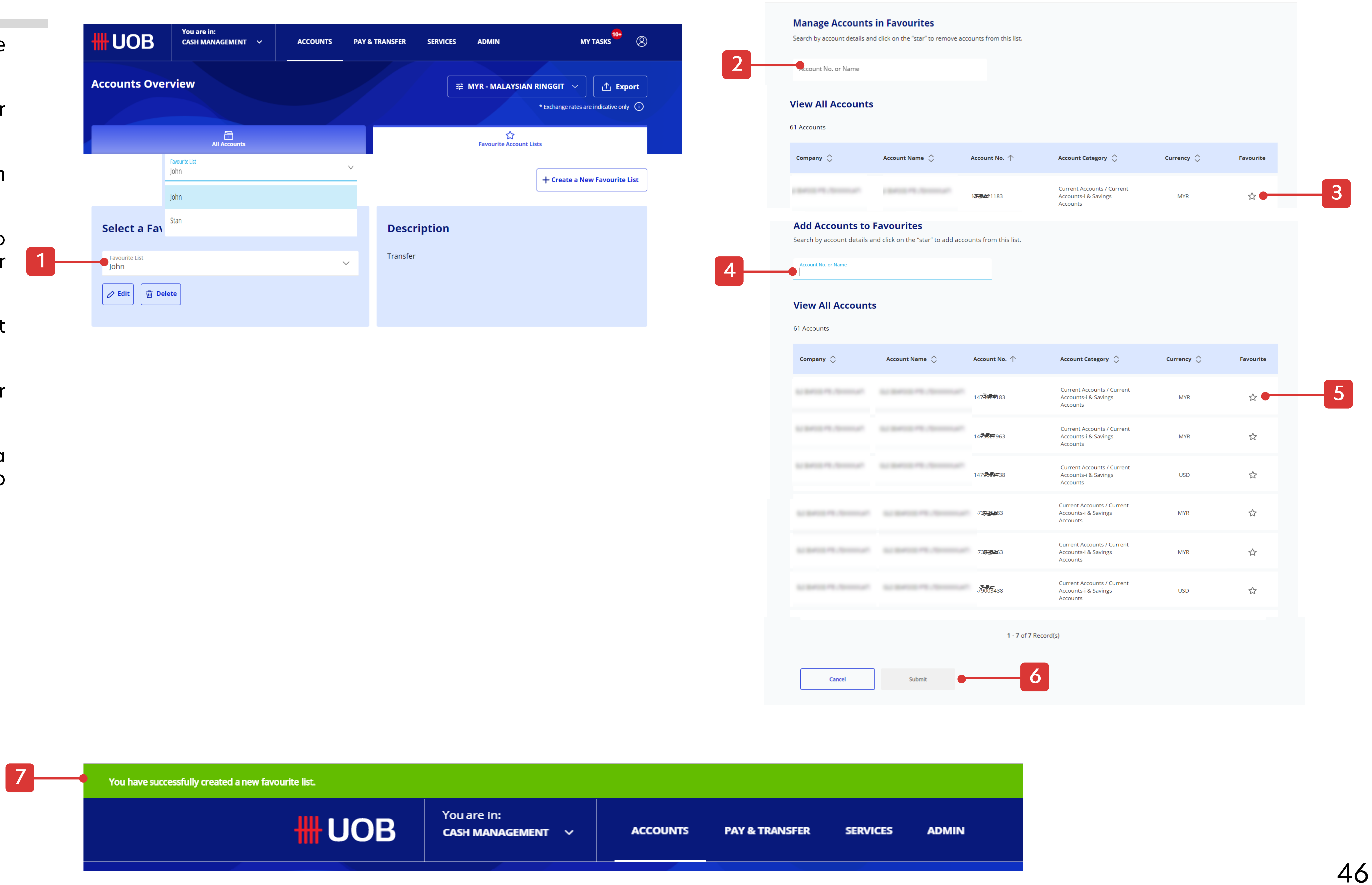
B. Edit a Favourite Account List

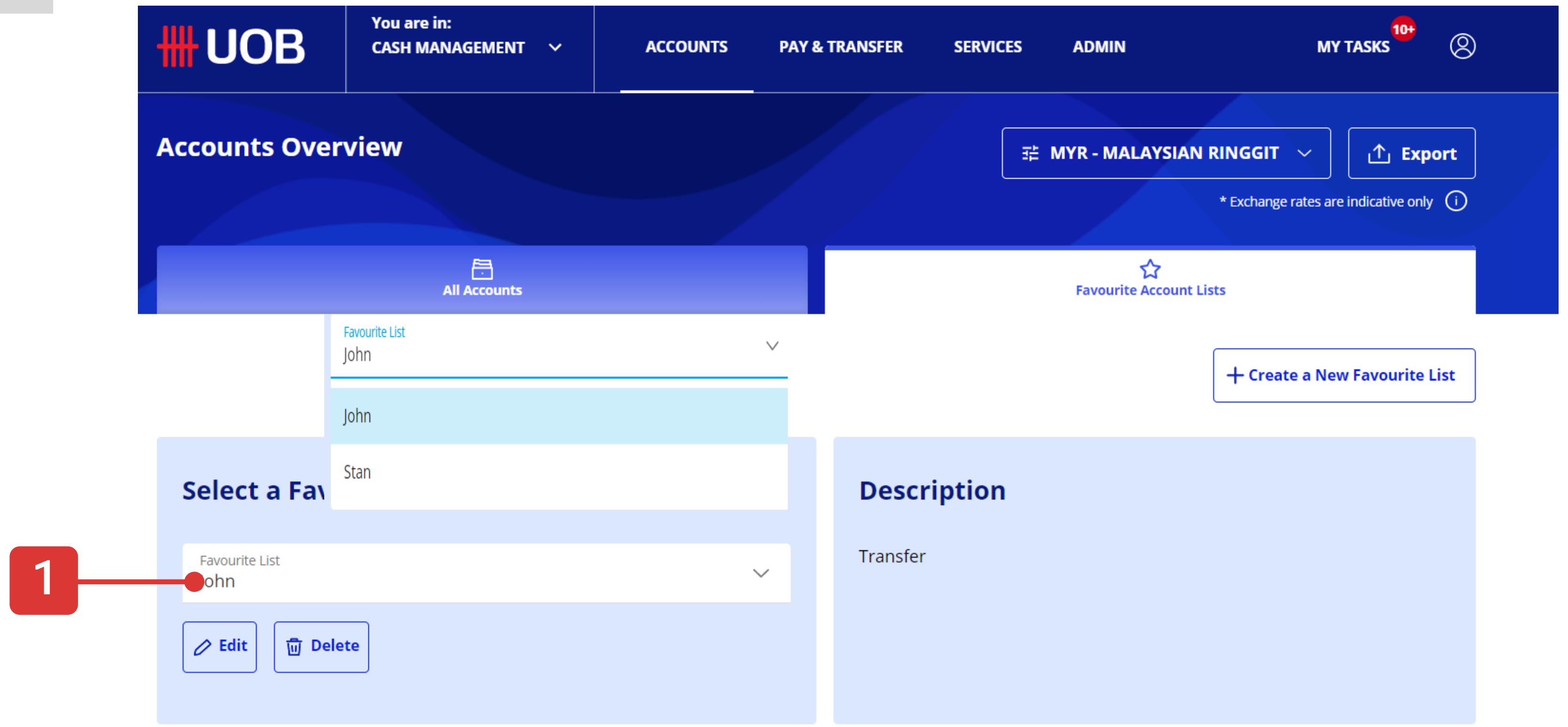
1. First, select the list which you wish to add or remove an account from, and then click “Edit” button.
2. Key in “Account Number” or “Account Name” to filter the account to remove.
3. Or, click the star (*) icon to remove account from your favourite account list.
4. Key in the “Account Number” or “Account Name” to search the desired account to be added into your favourite account list.
5. Or click the “Star” icon to add the desired account into your favourite account list.
6. Click “Submit” button once you have selected your accounts.
7. If your favourite account list is saved successfully, a confirmation message will be displayed at the top banner.

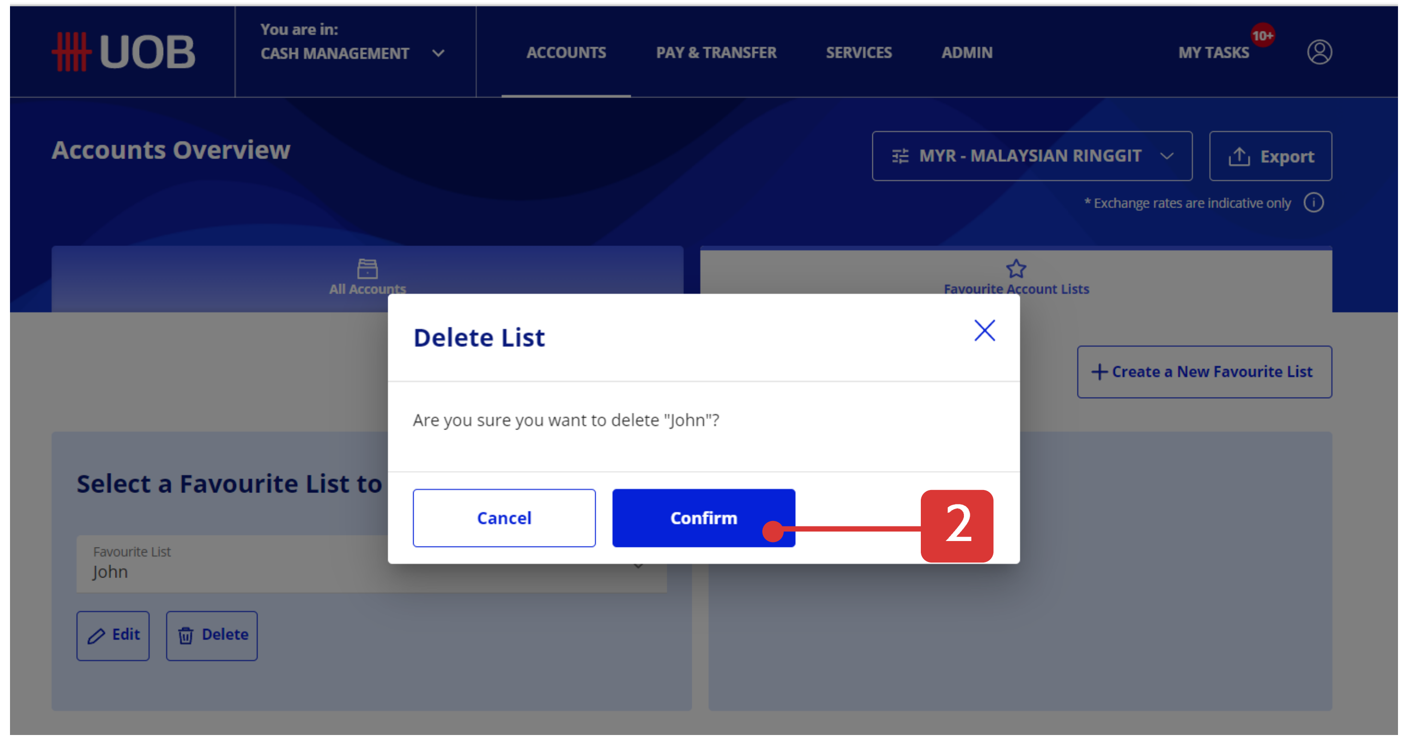


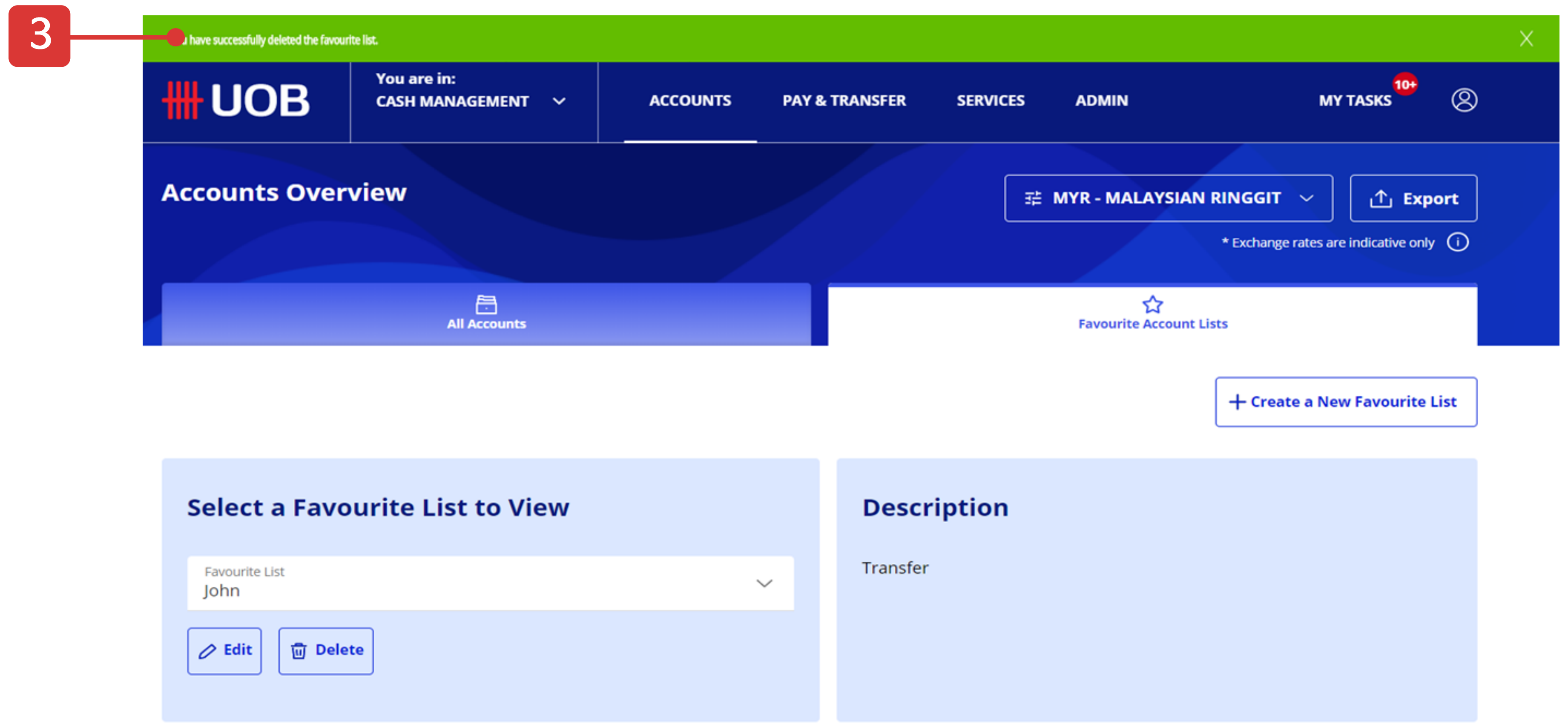
How to Use Your Favourite Account Lists

C. Delete a Favourite Account List

1. First, select the list that you wish to delete and then click “Delete” button.
2. Please click “Confirm” button once a confirmation pop up message displayed.
3. If your favourite account list deleted successfully, a confirmation message will be displayed at the top of the screen.







19. How to Use the Filters

How to Use the Filters

Example of Filter Options

1. Transaction / Deposit Type
This pill allows you to choose the desired transaction type for viewing.

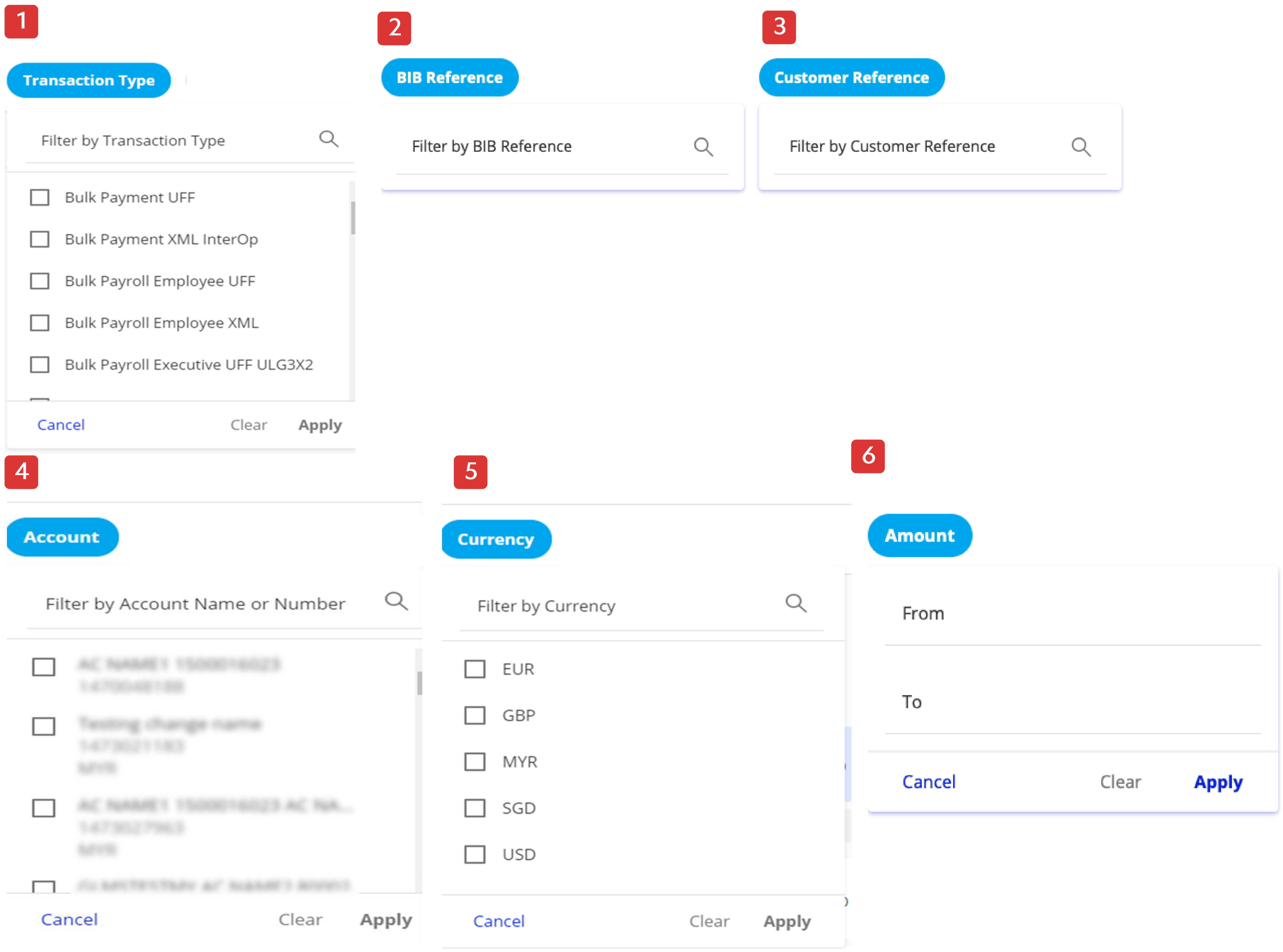
2. BIB Reference
Entering a BIB reference number allows you to locate the exact transaction for viewing.

3. Customer Reference
Entering a customer's reference allows you to filter the transactions to those which are related to the reference that you keyed in.

4. Account
Selection of account allows you to view transactions tagged to the selected account.

5. Currency
Selection of currency allows you to view transactions related to the selected currencies.

6. Amount
Entering a range of transaction amount allows you to filter the list of transactions that are applicable.



Right By You