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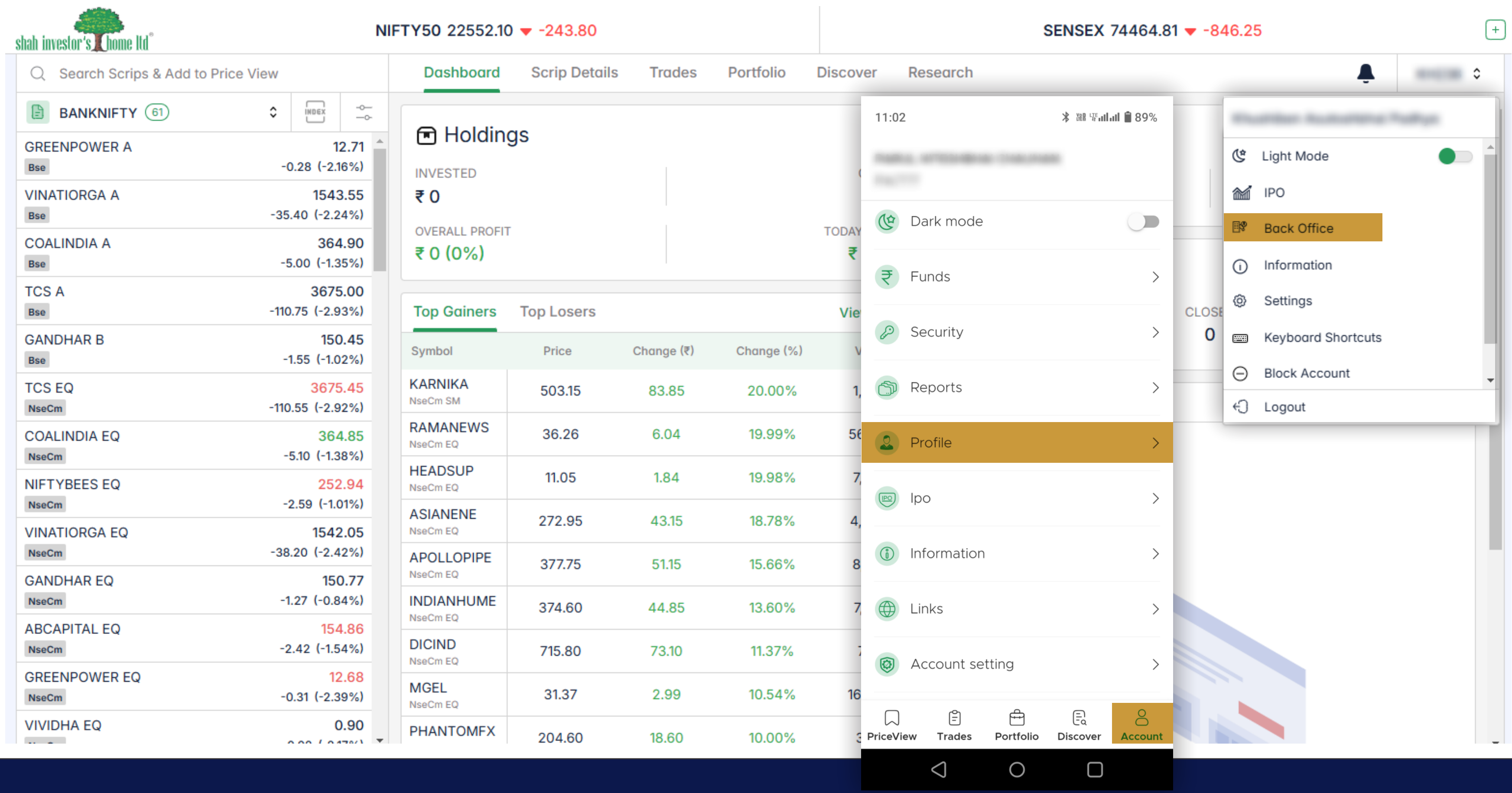
Bank Change Process

From The Application And Web Portal
PPT Guide

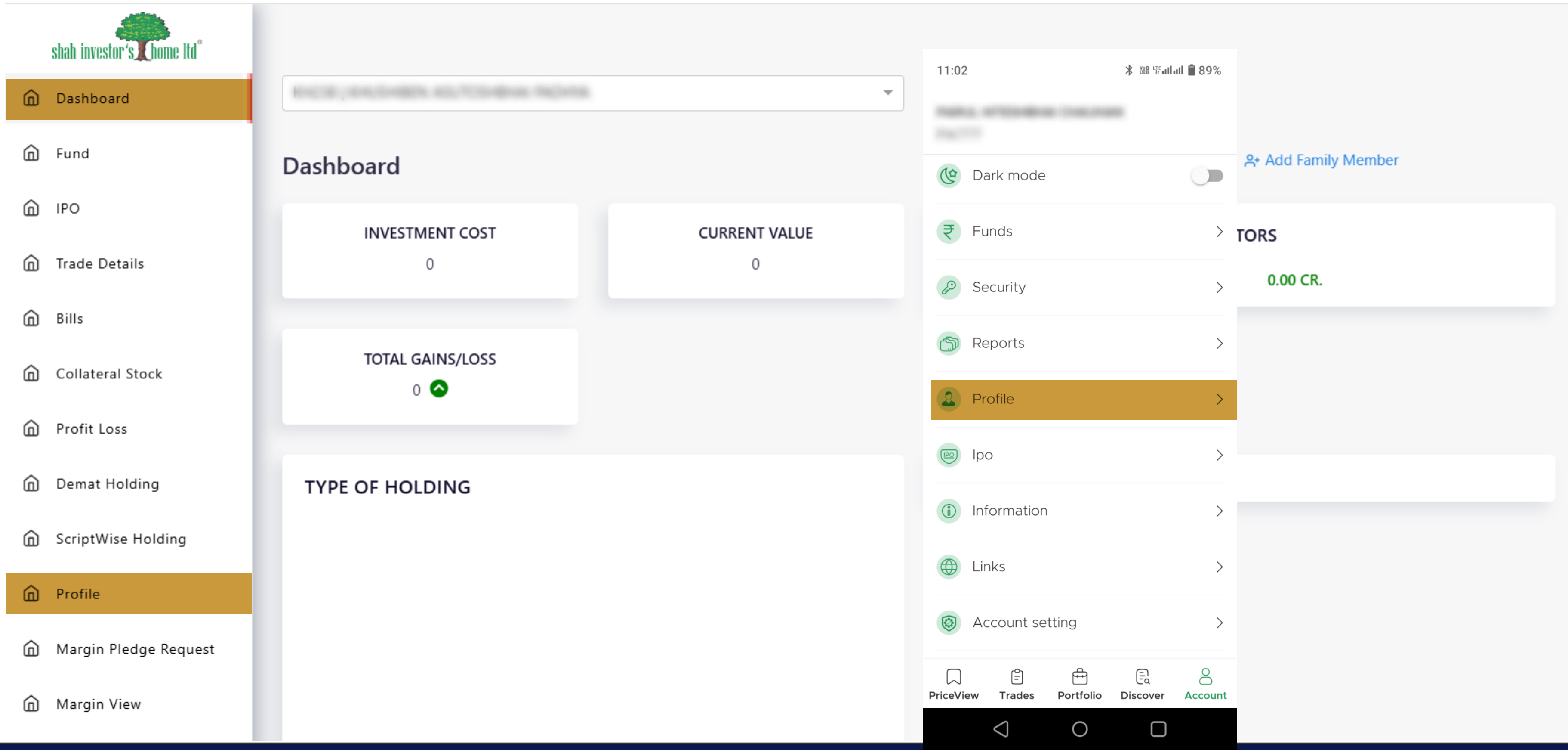
Slide 1:
Login to the Application or Web Portal



Mobile Application: Navigate to the "Accounts" section and tap on "PROFILE". The dashboard will appear.

Web Portal: Click on your trading code at the top-right corner. A dropdown menu will appear—select "Back Office".

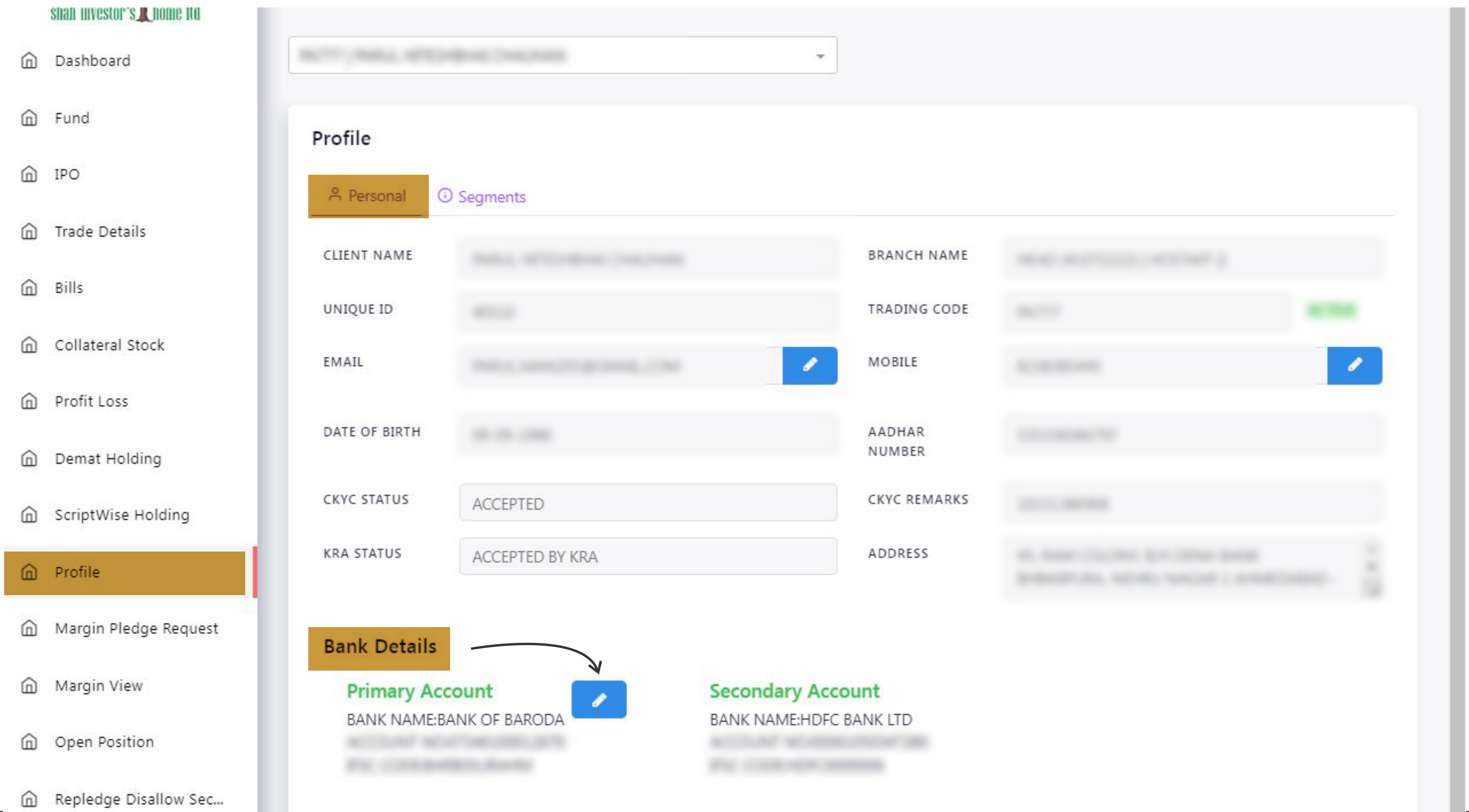
Slide 2:
Back Office Dashboard



After selecting "Back Office", the dashboard will open.

The process for Bank details change is the same for both mobile and web login.

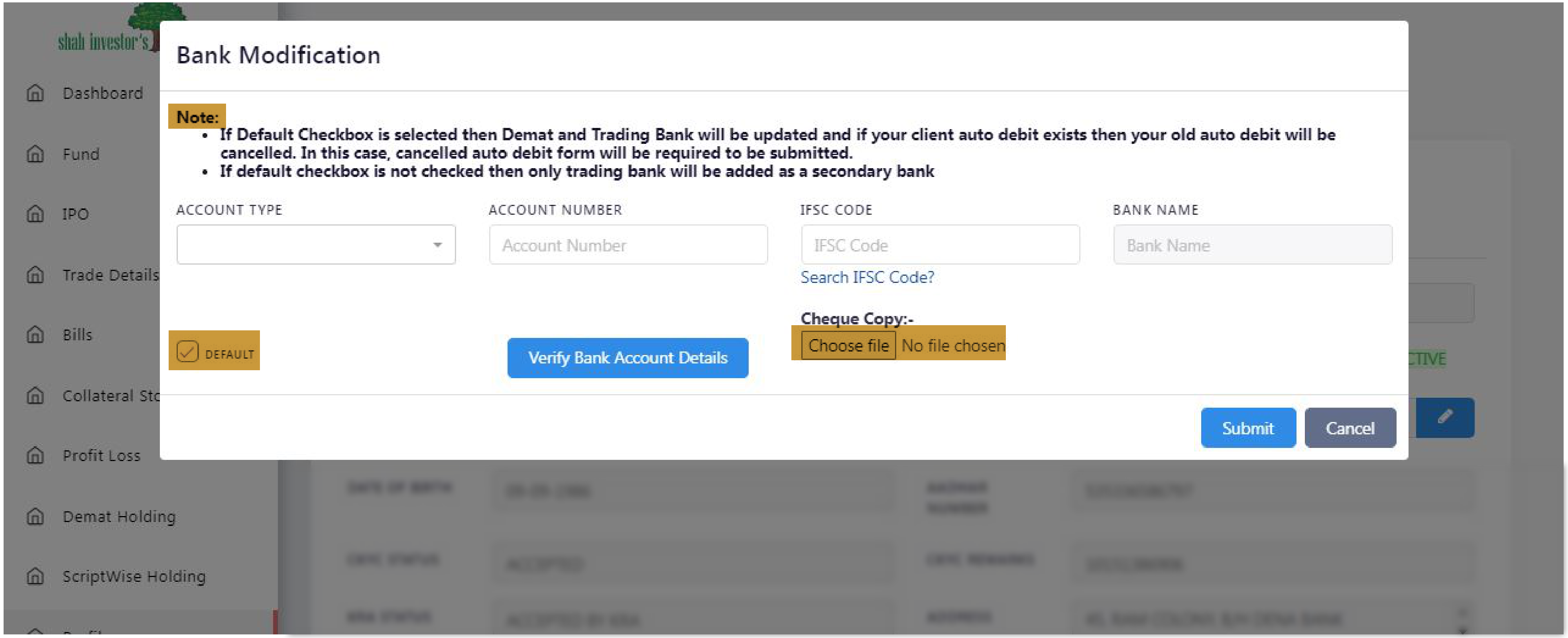
Slide 3:
Access Profile



Click on "Profile" on the left side of the screen.

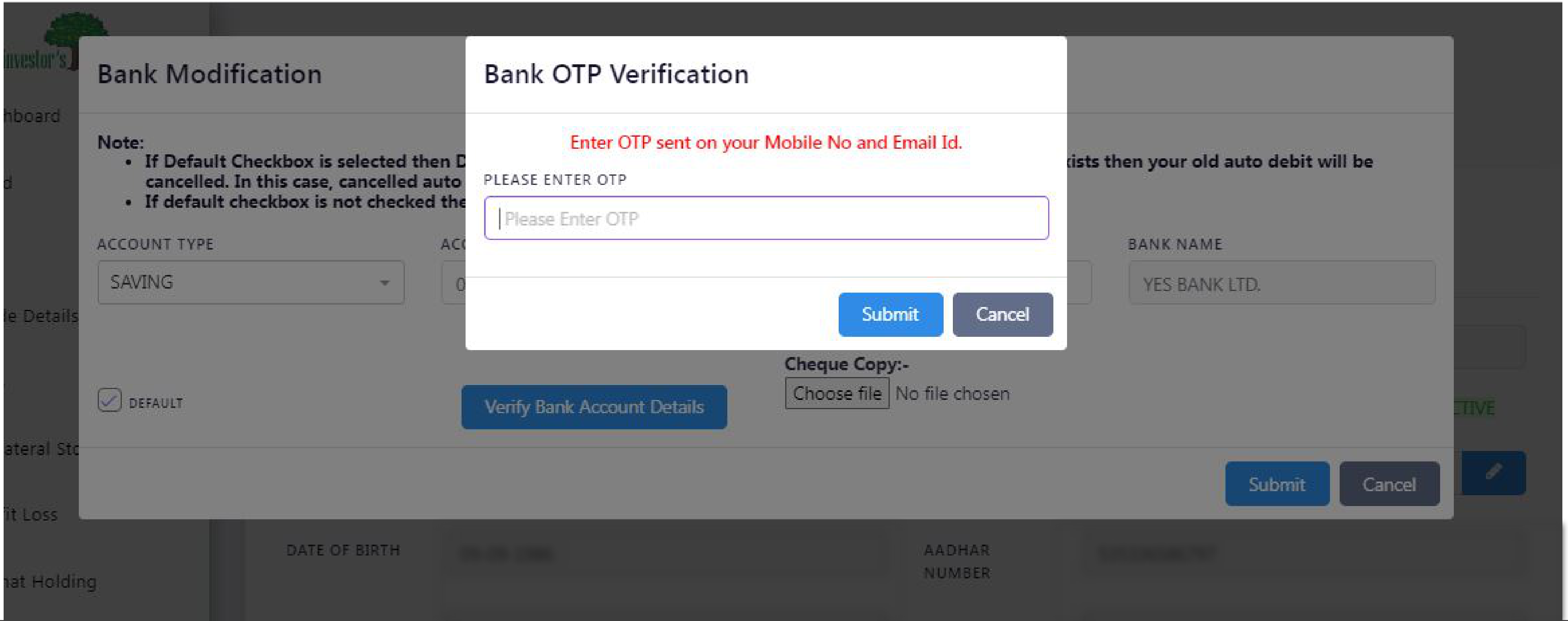
The Personal Details page will open.

Slide 4:
Modify Bank Details



-After tapping the pen icon, the Bank Modification screen will open.
-Fill in the required details and tap "Choose File" to upload a copy of your bank cheque.
-Tick the "Default" checkbox if required.
-Read the important note at the top of the screen.

Slide 5:
Mobile Verification



-Click "Verify Bank Account"—an OTP will be sent to your registered mobile number & email.
-Enter the OTP and tap "Submit".

Slide 6:
Bank Verification Confirmation

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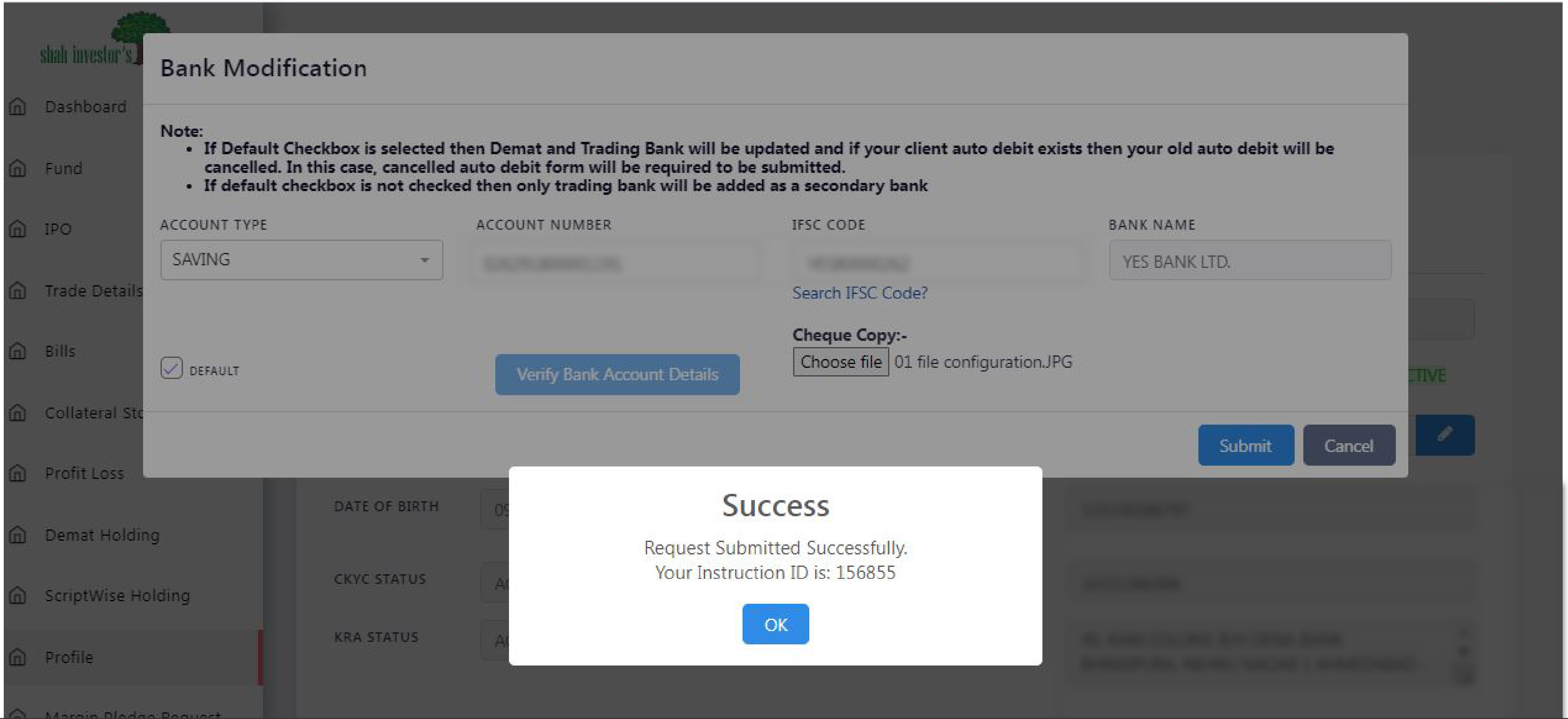
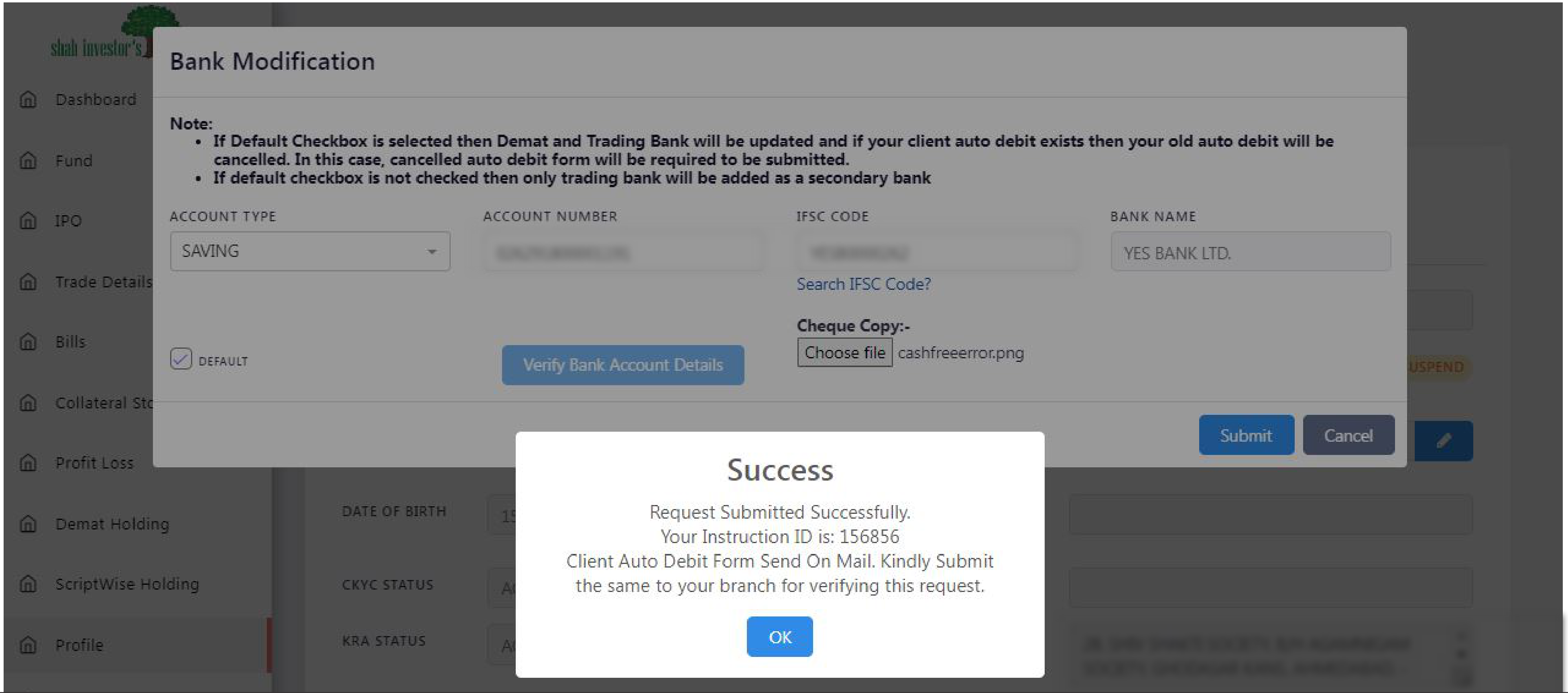


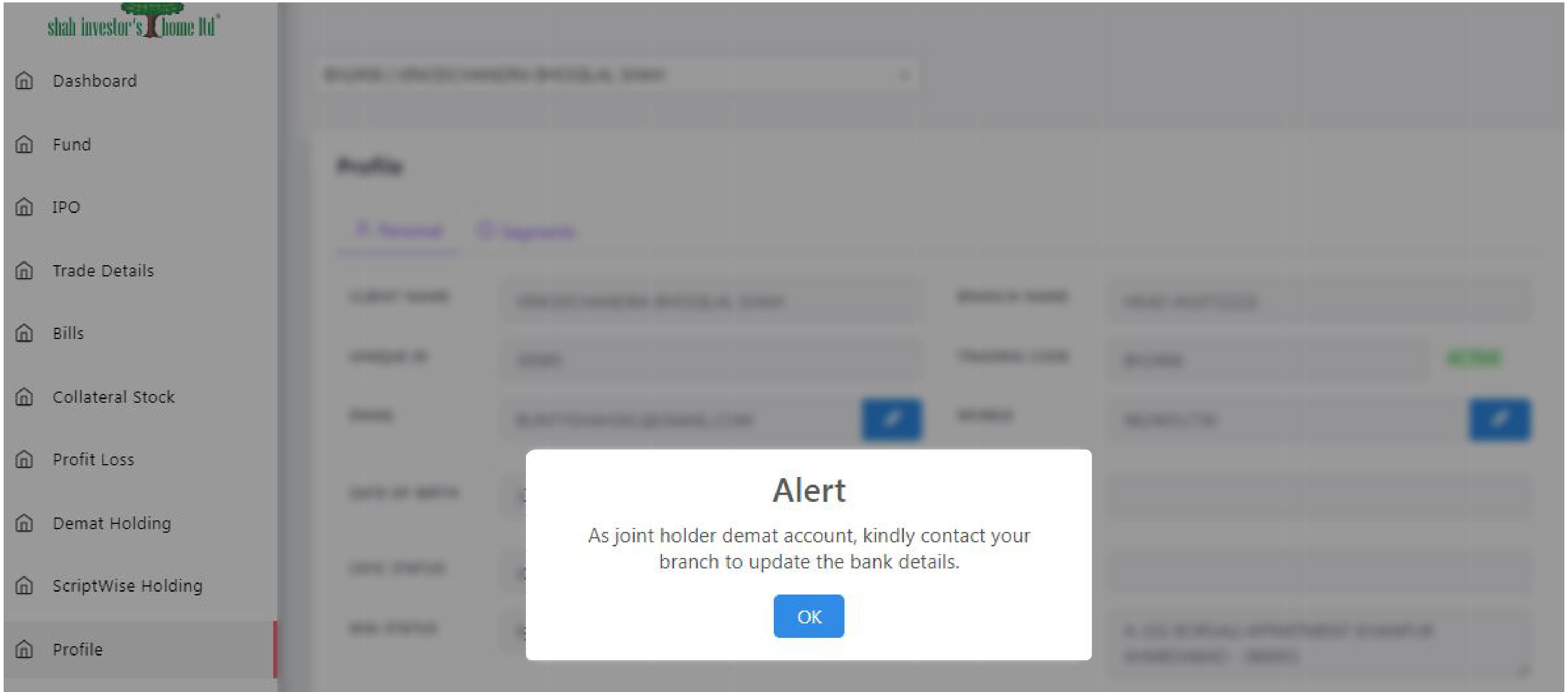
-You will get the message successfully verified
-A screen with the Instruction ID will appear.
-Tap "OK" to complete the process.

Slide 7:
Auto Debit Cancellation (If Applicable)



If Auto Debit is active on your current bank account, a message will appear stating: "You will receive the auto debit cancellation form on your registered email. Submit the form to your branch. Once submitted, the auto debit will be canceled, and your request will be verified.”

Slide 8:
Important Note



-Bank details can only be changed via the web portal and mobile application for individual single-holder accounts.
-For joint-holder accounts, please visit your branch for assistance.

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Contact 079 6822 6822

Thank You