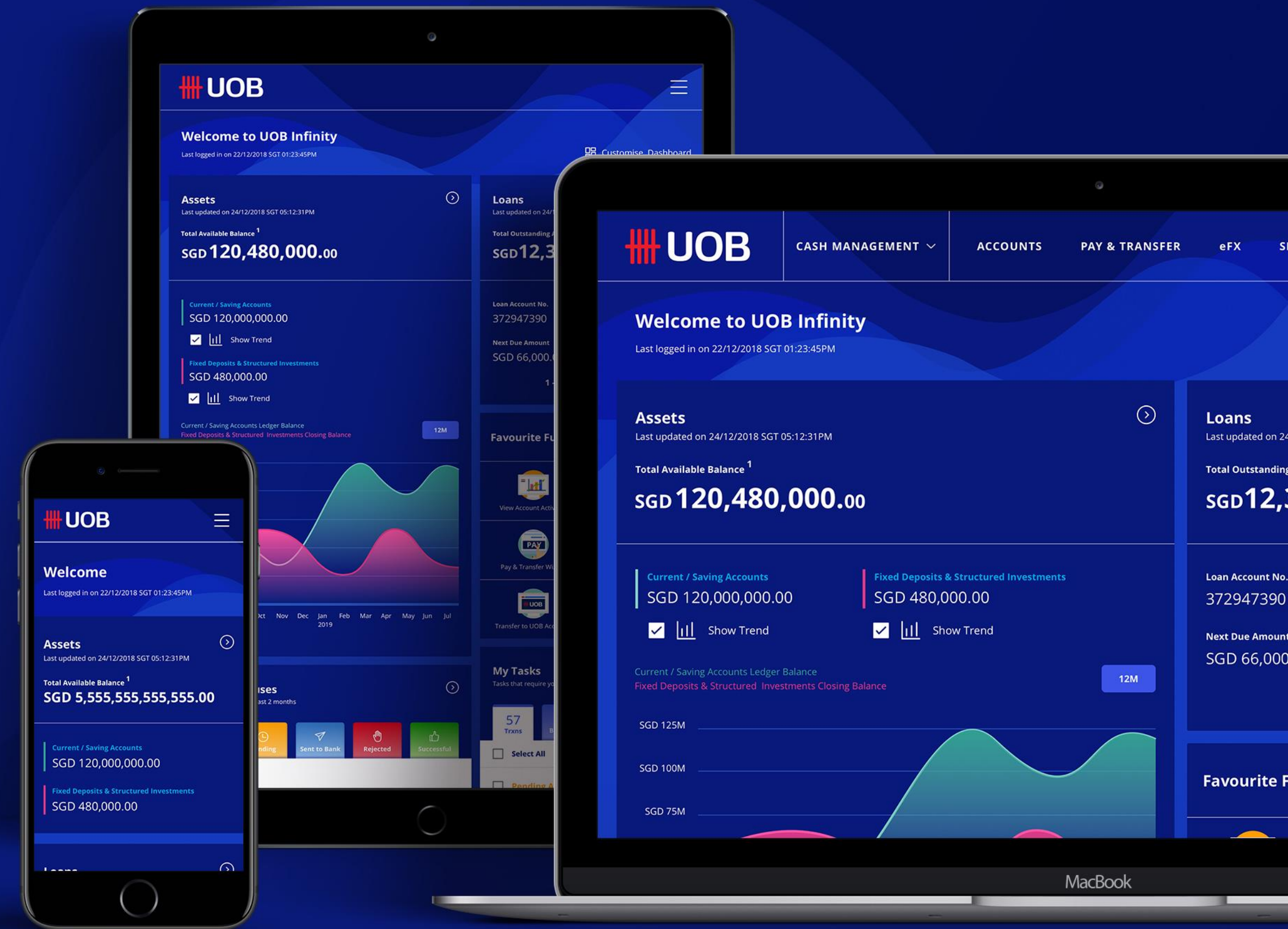# INFINITY
User Guide

Single Payments

UOB

Single Payments

Overview

1   **How to Create New Single Transaction**

     1.1. Transfer to UOB Accounts. **Please refer to your countries for details**

     1.2. Telegraphic Transfer

2   **How to Create a Transaction from Drafts, Templates and Past Payments**

3   **How to Save Transaction**

4   **How to Submit Transaction as a Maker**

5   **How to Approve Transaction**

6   **How to Terminate Recurring Transactions**

7   **How to Approve Multiple Transactions by Batch**

How to Create New Single Transaction

Transfer to UOB Accounts

You can transfer funds from your account to another UOB account in the following currencies:
- **Same currency e.g. SGD to SGD**
- **Different currencies e.g. SGD to USD**
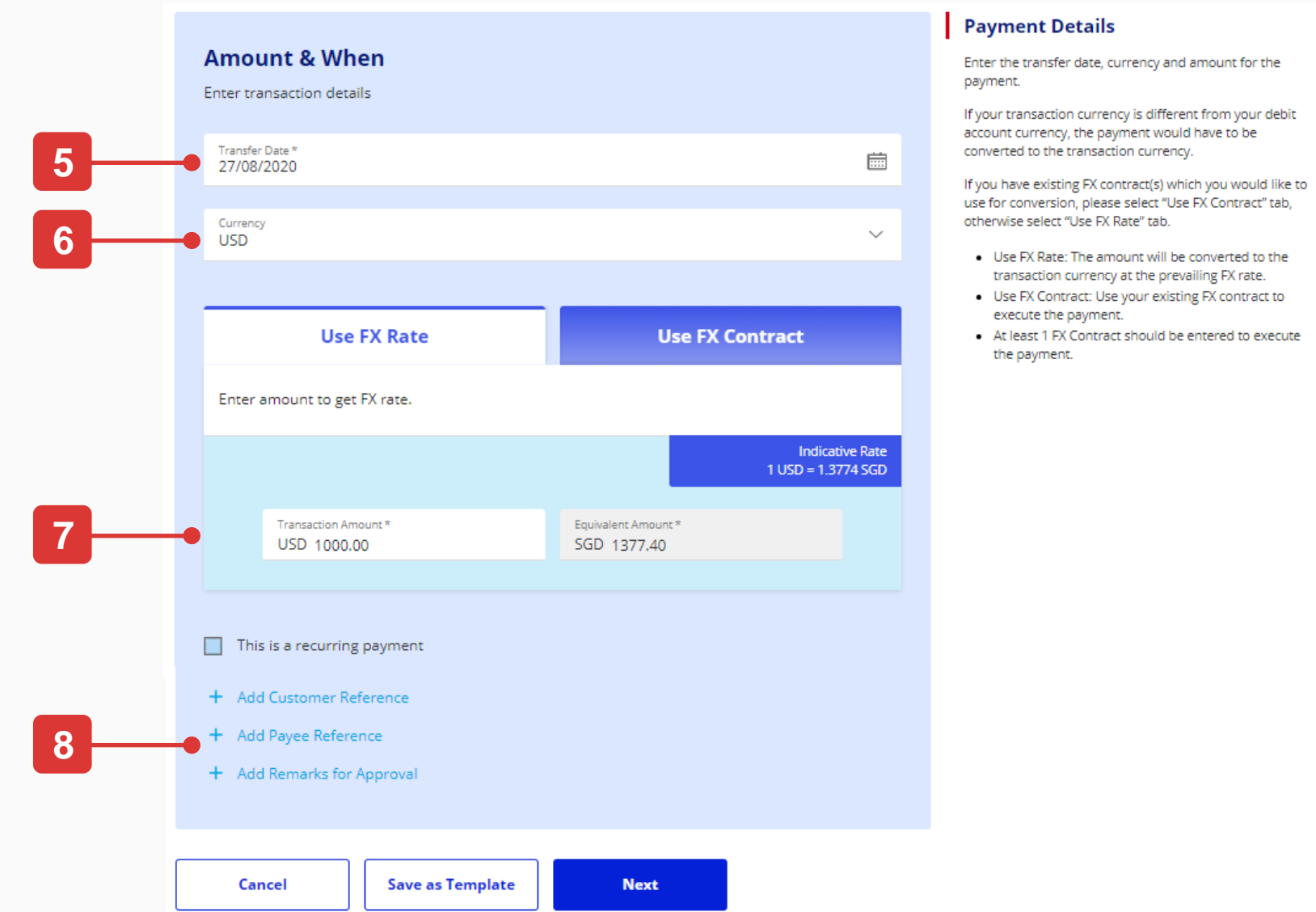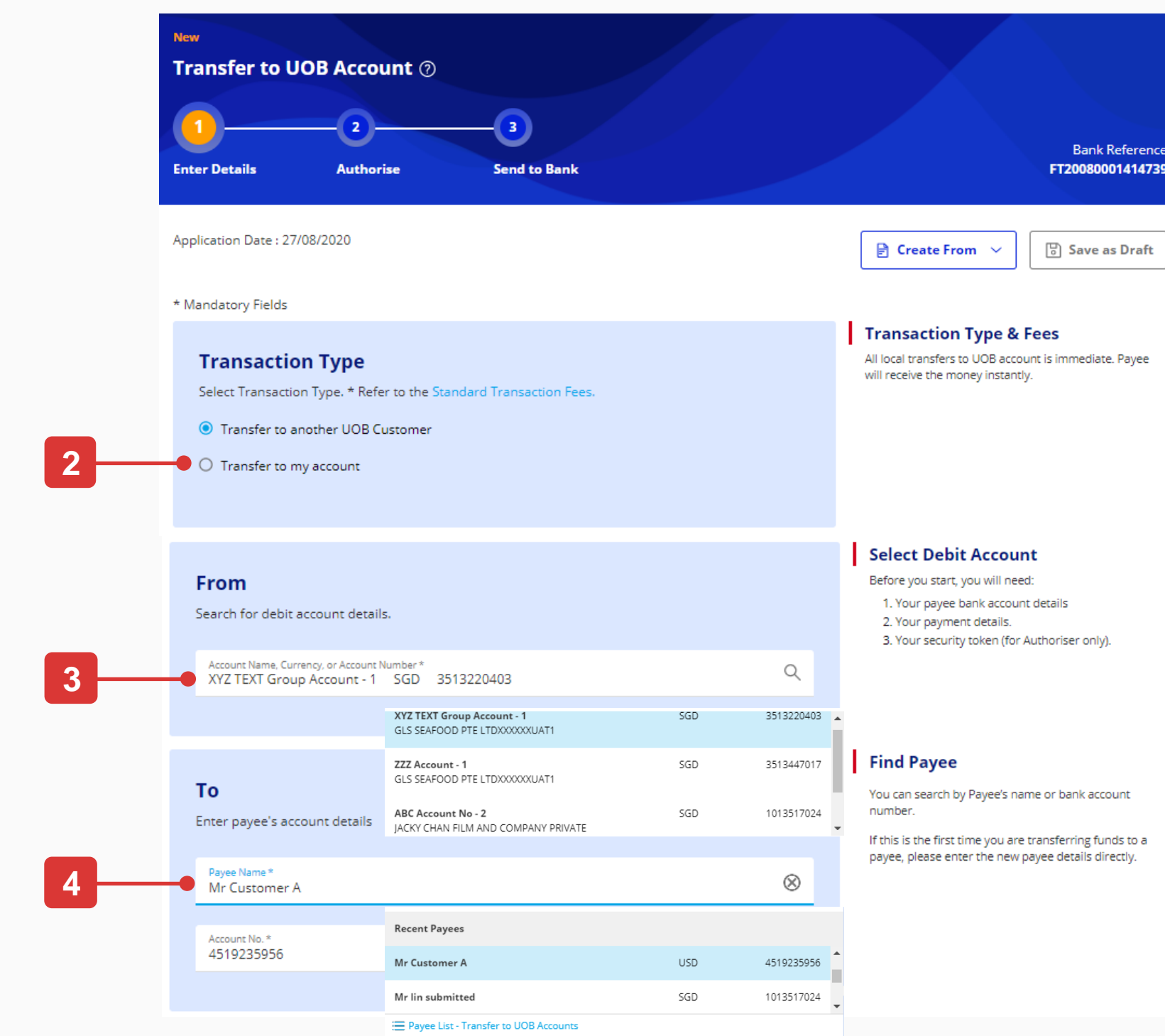
Note: The example is in Singapore.

Create new single transaction

1. **From the top Menu bar, hover over "Pay & Transfer" and click select "Transfer to UOB Account" under "Single Transactions" column.**

2. **Select "Transaction Type" which you want transfer to.**

3. **In the "From" section, select which of your account to be used as a debiting account for this transaction.**

4. **In the "To" section, you can provide your payee details either by selecting a payee from the dropdown search list or by entering all the details manually.**

5. **Select the transfer date of your transaction.**

6. **Select the transaction currency (This option is available if payee's account currency is different from your debit account currency).**

7. **Enter the transaction amount.**

8. **All the optional fields are not shown as a textbox and it will only be available for data input upon clicking the label.**

Top Mega Menu (Default View)

Transfer to UOB Account (Default View)

Cancel transaction without saving

Save transaction as a template for future use. You will need to input a Template Name.

Click "Next" to proceed with transaction details.

4

How to Create New Single Transaction

Telegraphic Transfer

You may transfer funds to an overseas account via telegraphic transfer (TT).
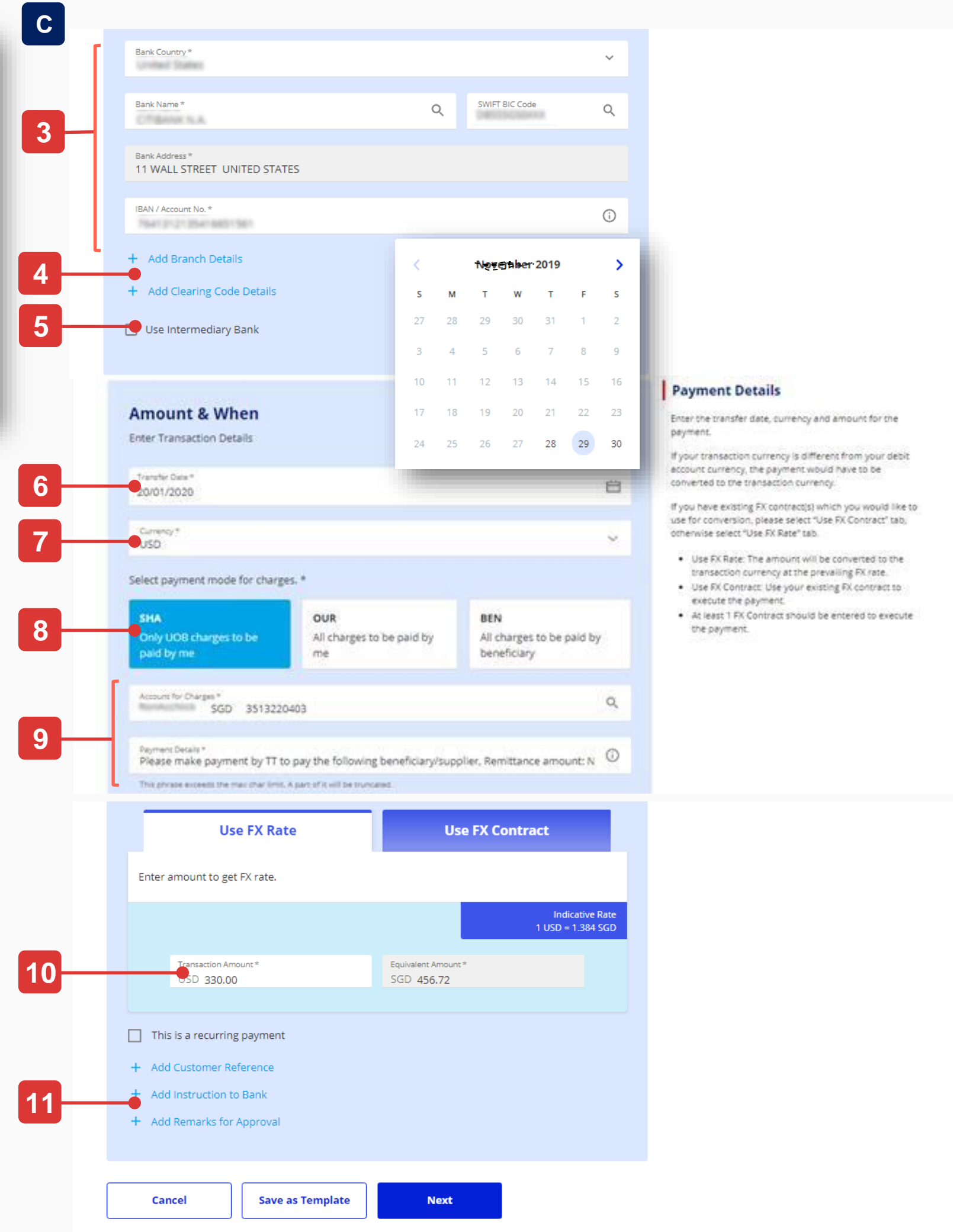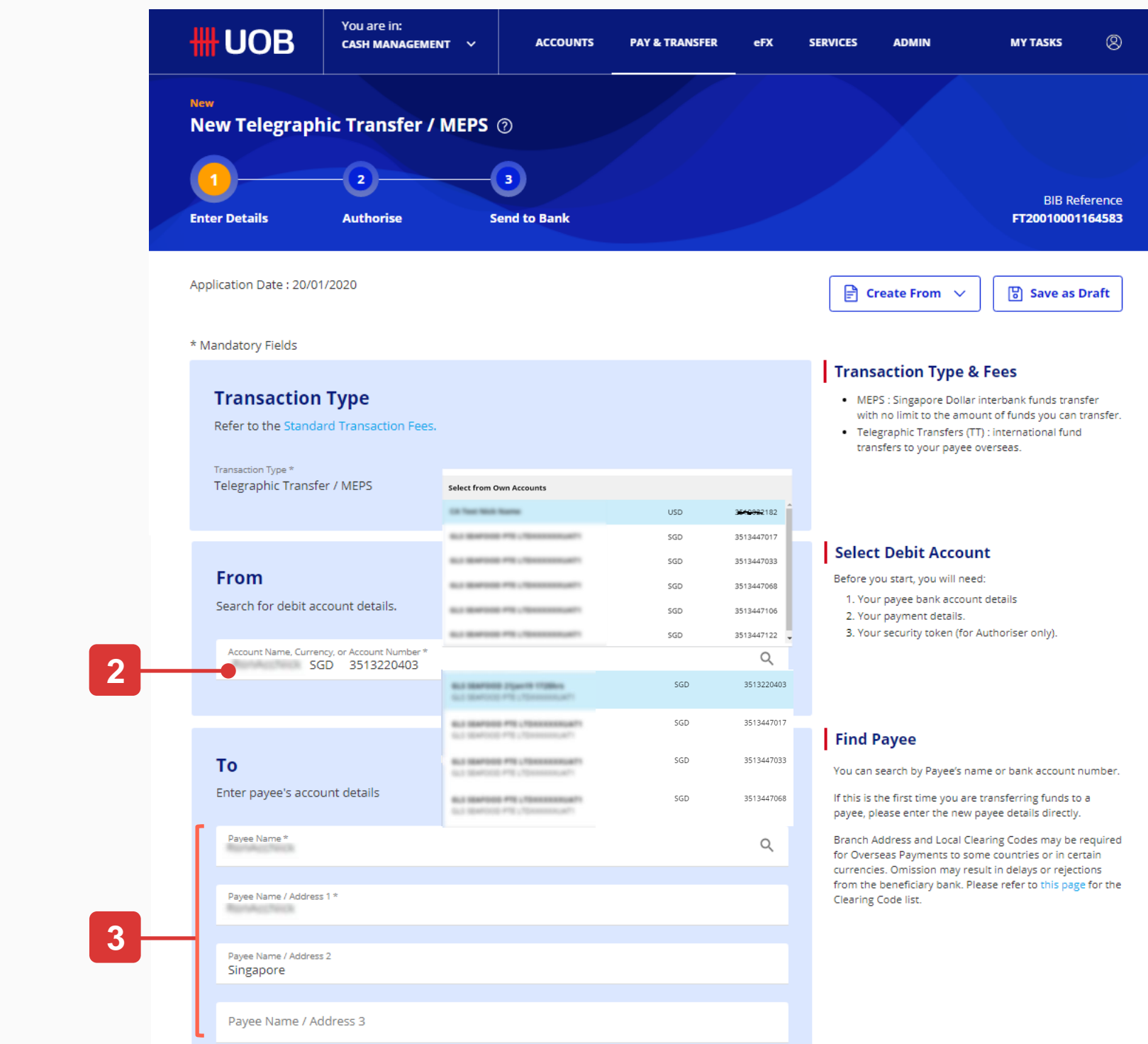
Create new single transaction

1. **From the top menu bar, hover over "Pay & Transfer" and click select "Telegraphic Transfer" under "Single Transactions" column.**

2. **In the "From" section, select which of your account to be used as a debiting account for this transaction.**

3. **In the "To" section, you can provide your payee details either by selecting a payee from the dropdown search list or by entering all the details manually.**

4. **The optional fields are not shown as a textbox and it will only be available for data input upon clicking the label.**

5. **Tick the checkbox if you want to use intermediary Bank for your payment.**

6. **Select the transfer date of your transaction.**

7. **Select the transaction currency.**

8. **Select one of the three payment mode for charges: SHA, OUR or BEN.**

9. **If you select "SHA" or "OUR" as the mode, you must select the debited account for charges and input the payment details.**

10. **Input the transaction amount.**

11. **All the optional fields are not shown as a textbox and it will only be available for data input upon clicking the label.**

A **Top Mega Menu (Default View)**

B **New Transfer to Other Local Bank (Default View)**

C

5

How to Create a Transaction from Drafts, Templates and Past Payments

Create from Draft, Template, or Past Payments

1. From the top Menu bar, hover over "Pay & Transfer" and click select a payment type under "Single Payments" column. "Telegraphic Transfers" is used as an example for this user guide.

2. Click "Create From" and click "Draft", "Templates", or "Past Payments". "Draft" is used as an example for this user guide. The same flow is applied to create transaction from "Templates" and "Past Payments"

3. Use the filter options to view the saved (draft) transactions to be listed.

4. Select the desired saved (draft) transaction you wish to use and all the draft details will be displayed onto the payment screen.

Create From "Drafts"

Select transaction from the pop up screen from draft

Selected transaction will be displayed in the following screen

How to Save a Transaction

All Options

If you wish to save the transaction details and would like to use it again in future, you can save the details as:

A. Drafts
If you save a transaction as Draft, you will be able to locate this draft under "Approval Statuses" screen. Once you submit the transaction, you will not be able to locate the draft anymore.

B. Templates
If you save a transaction as Template, you will be able to keep using the detail of the transaction as a template when you are initiating new transactions.

Save as Draft

1. Click "Save as Draft" button located at the top right corner of the payment screen.

2. A confirmation message will appear at the top of your screen after a transaction is successfully saved as a draft.

Saved as Draft (Default View)

Saved as draft successfully.

How to Save a Transaction

Save as Template

1. **Save transaction as a template for future use. You will need to input template name and template description.**

2. **Click "Submit" button, once you fill in the "Template Name" and the "Template Description".**

3. **A confirmation message will appear at the top of your screen after a transaction is successfully saved as template.**

Saved as draft successfully.
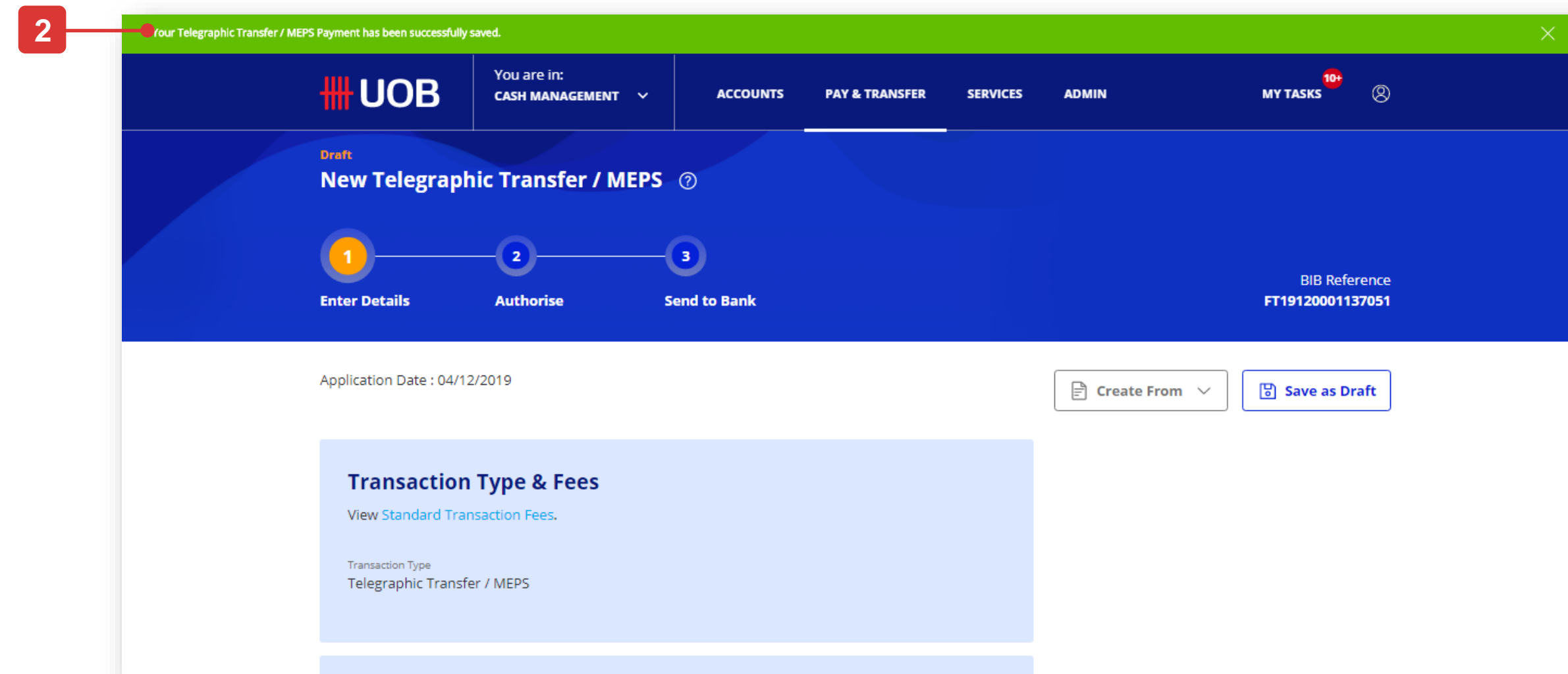
How to Submit a Transaction as a Maker

Upon clicking "Next" button under transaction creation screen

You will be allowed to check your transaction details once again before proceeding to submit the transaction.

In the review page, you will see four buttons located at the bottom of the page, namely:

1. "Cancel": If you proceed with this, the transaction will be cancelled and will not be saved as draft.

2. "Edit": If you proceed with this, you will be directed back to the previous transaction creation page.

3. "Add to My Task": This button will only appear if, based on your authorisation mandate, you are allowed to authorise your own transaction. Transaction will be added to "My Tasks" and you can approve it later.

4. "Submit": submit transaction for approval.

How to Submit a Transaction as a Maker

Submit for approval and Notify Approver

Based on company's authorisation mandate, if you are not allowed to approve the transaction, the following confirmation screen will be shown and the transaction status will be displayed as "Pending Authorise" at the top heading.

In this page, there are three buttons located at the bottom of the page, namely;

1. **"View": It allows user to view the submitted transaction detail.**

2. **"Notify Approver": A dialog box will appear showing a list of approvers who are eligible to approve the transaction.**

   a. **User can select up to 5 approvers.**
   b. **Click "Notify"**

   If the approver has setup the digital token (Infinity Secure), a push notification will be shown on the approver's mobile device screen otherwise an email will be sent to the selected approver(s).

   "Notify Approver" can be retriggering for transactions, which are still under pending for authoriser to approve, via Approval Status (i and ii)

3. **"Another Payment": It allows user to create another transaction, therefore user will be directed back to transaction input screen.**

How to Approve Transactions

Method #1 – Self Push Notification

This method will only work if you have registered and activated Infinity Secure and you must complete all the steps within 60 seconds.

1. **Go to "My Task", tick the transaction that you want to approve and click "Submit" button.**

2. **Upon seeing the "Authorise Transaction" popup at your browser, you will receive a push notification on your mobile phone from "UOB Infinity Singapore". Tap on the push notification.**

3. **The Infinity app will be automatically opened and you will see an authorisation popup with options to "Approve" or "Cancel" the transaction. Tap on "Approve".**

4. **Provide the Infinity Secure PIN and tap on "Submit". A successful message will be displayed on your phone and on your browser.**

My Tasks

| 8 Transaction(s) | 4 Batch(es) | 2 Service(s) | 0 Admin(s) |

Transaction / Deposit Type   BIB Reference   Customer Reference   Account   Currency   Amount   Value / Placement Date

Application Date: 23/01/2020 - 21/02/2020   Payer / Payee   Clear Filter(s)

8 Record(s)
Note: This table is defaulted to display your tasks in the past 1 month. Use the filters to view other tasks.

Show Selected (0)   Customise View

	Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Application Date	Status	Action
☐	GIRO	35132 :Nick 3513220403 SGD	SGD	2.00	10/02/2020	10/02/2020	Pending Authorise	⋮

1

Return   Submit

Authorise Transaction **2**

We have sent a notification to your UOB Infinity Secure enabled device. Do ensure that you are connected to the internet to receive it.

Confirm the request within the next 60 seconds to proceed.

I did not receive the notification

UOB Infinity Singapore ✕

You are approving a Single Transaction of SGD5,000.00. BIB Ref: FT123345646.

For full transaction details you may proceed to UOB Infinity via your web browser.

3 Approve

Cancel

UOB Infinity Singapore ✕

Enter your Infinity Secure PIN to authorise the administrative task(s).

Secure PIN
[•][•][•][•][•][•]

Forgot Secure PIN?

4 Next

Cancel

UOB Infinity Singapore ✕

🔒

Authorisation Complete

New Transfer To UOB Account

BIB Reference FT16050000364472

✓ Enter Details   ✓ Authorise   ✓ Send to Bank

Your Transfer to UOB Payment has been successfully released to the bank.

BIB Reference: FT16050000364472

**Successful Message on Browser**

How to Approve Transactions

Method #2 – Push Notification Sent by Maker

This method will only work if you have activated the digital token (Infinity Secure) and have enabled the push notification function on your mobile device.

1. **Once the maker sends a push notification to you (as the approver) via "Notify Approver" function, you will receive a push notification on your device (Infinity Secure). Tap on the push notification.**

2. **The UOB Infinity app will be launched and you will see the UOB Infinity login screen. Kindly proceed to login.**

3. **After a successful login authentication, you will see the details of the transaction submitted by the maker. Click "Submit".**

4. **Provide your Infinity Secure PIN.**

5. **Click the "Next" button to complete transaction approval.**
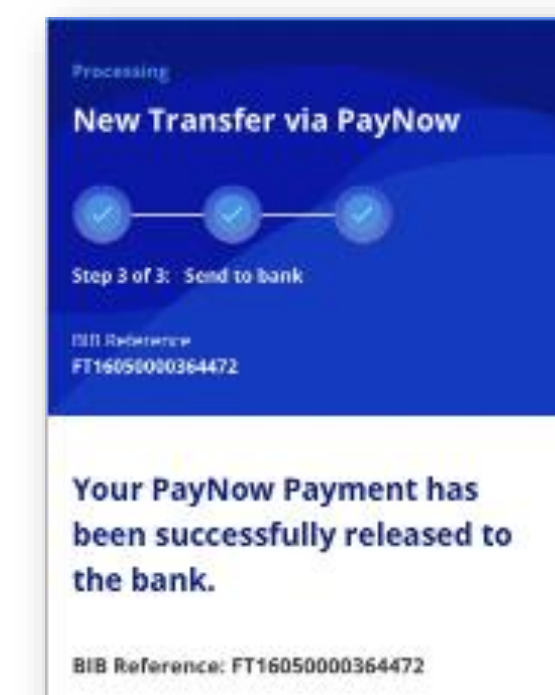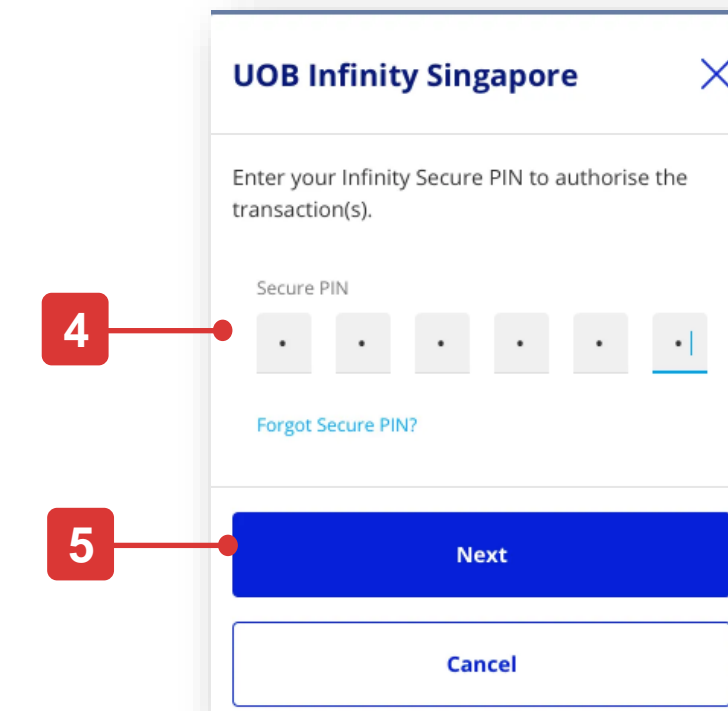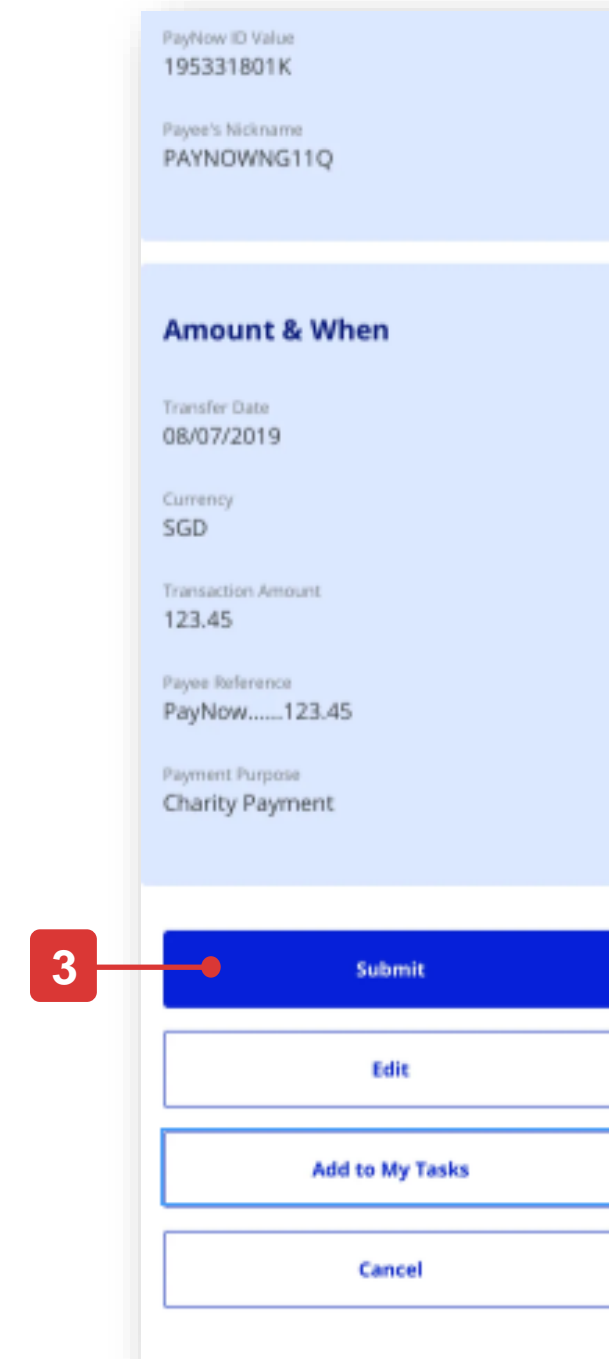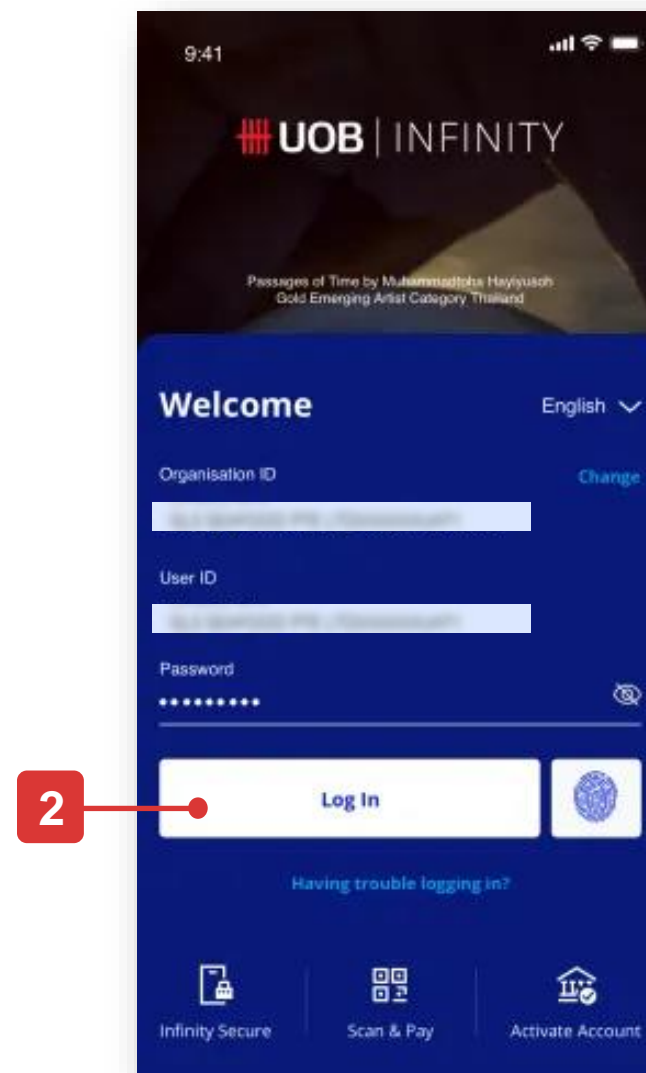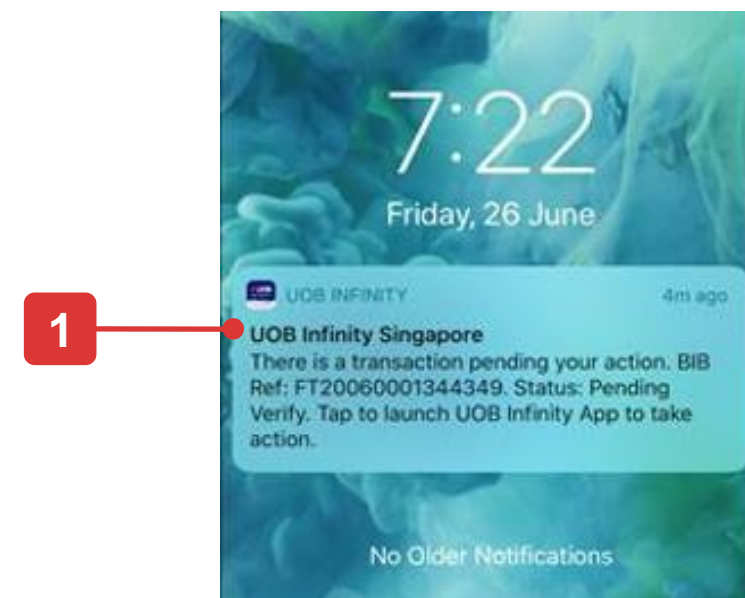
How to Approve Transactions

Method #3 – Generate Token Response using Infinity Secure

This method will only work if you have registered and activated Infinity Secure.

1. Go to "My Task", tick the transaction that you want to approve and click "Submit" button.

2. Upon seeing the "Authorise Transaction" popup at your browser, click on "I did not receive the notification". Please remove/dismiss the "UOB Infinity Singapore" app push notification on your mobile.

3. You will see 2 tabs. If you are not on the "Infinity Secure" tab, click on the "Infinity Secure" tab.

4. Open the Infinity mobile app and tap on "Infinity Secure" on the login page. Select "Transaction Key II", enter the 6-digit Infinity Secure PIN and tap on "Next" button.

5. Enter the code displayed on your browser's Step 3 into your phone, tap on "Next". Enter the code displayed on your browser's Step 4 into your phone, tap on "Generate Key". Input the generated numbers into your browser and click "Submit".

My Task

My Tasks

8 Transaction(s) | 4 Batch(es) | 2 Service(s) | 0 Admin(s)

Transaction / Deposit Type | BIB Reference | Customer Reference | Account | Currency | Amount | Value / Placement Date

Application Date: 23/01/2020 - 21/02/2020 | Payer / Payee | Clear Filter(s)

8 Record(s)
Note: This table is defaulted to display your tasks in the past 1 month. Use the filters to view other tasks.

Show Selected (0)   Customise View

	Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Application Date	Status	Action
☐	GIRO	351322040 ... 3513220403 SGD	SGD	2.00	10/02/2020	10/02/2020	● Pending Authorise	⋮

1

Return   Submit

Authorise Transaction

We have sent a notification to your UOB Infinity Secure enabled device. Do ensure that you are connected to the internet to receive it.

Confirm the request within the next 60 seconds to proceed.

I did not receive the notification   **2**

Enter Token Response

We were unable to receive your confirmation. To proceed with your authorisation, follow the steps below.

Infinity Secure   Physical Token

3

Infinity Secure   **4** →   Transaction Key II

Enter the code displayed in step **3** on your browser.

Key Response
1 0 1 0
0

5

Next

Enter the code displayed in step **4** on your browser.

Key Response
1 2 3 4
5 6 7 8

Generate Key

Enter the following Login Code on your browser

Code Response
5 2 7 7 1 5

Refreshes in
00:09

5 Enter the **6-digit transaction key** generated

Key Response
[ ] [ ] [ ] [ ] [ ] [ ]

By clicking '**Submit**', you are deemed to have read and agreed to the Terms & Conditions of the respective product(s) and / or service(s).

☐ Set as default authentication method.

Cancel   Submit

13

How to Approve Transactions

Method #4 – Generate Token Response using Physical Token

This method will only work if you have registered and activated Infinity Secure.

1. Go to "My Task", tick the transaction that you want to approve and click "Submit" button.

2. Upon seeing the "Authorise Transaction" popup at your browser, click on "I did not receive the notification". Please remove/dismiss the "UOB Infinity Singapore" app push notification on your mobile.

3. You will see 2 tabs. If you are not on the "Physical Token" tab, click on the "Physical Token" tab.

4. Follow the on-screen instruction to generate the token response using your physical token and input the generated numbers into your browser and click "Submit".

My Task

How to Terminate Post-Dated / Recurring Transactions

Retrieve Recurring Transaction Details

To terminate a post-dated / recurring instruction:

1. From Top Menu bar, hover over "Pay & Transfer" and click select "Manage Scheduled / Recurring Transactions" under "Tools" column.

2. Use the filer criteria to find a specific transaction to terminate.

3. Click the action menu:

• View details: Review the recurring transaction details to be terminated. Please refer to the next page for the detailed explanation.

• Terminate Payment: Transaction can be terminated directly from preview screen.

4. Similar to approving transactions, there are 3 methods of authorising the termination request. Enter the generated token response and click "Submit" button.

5. Confirmation message will display as transaction is terminated successfully.

6. Click "View" button to view details of the terminated recurring transaction.
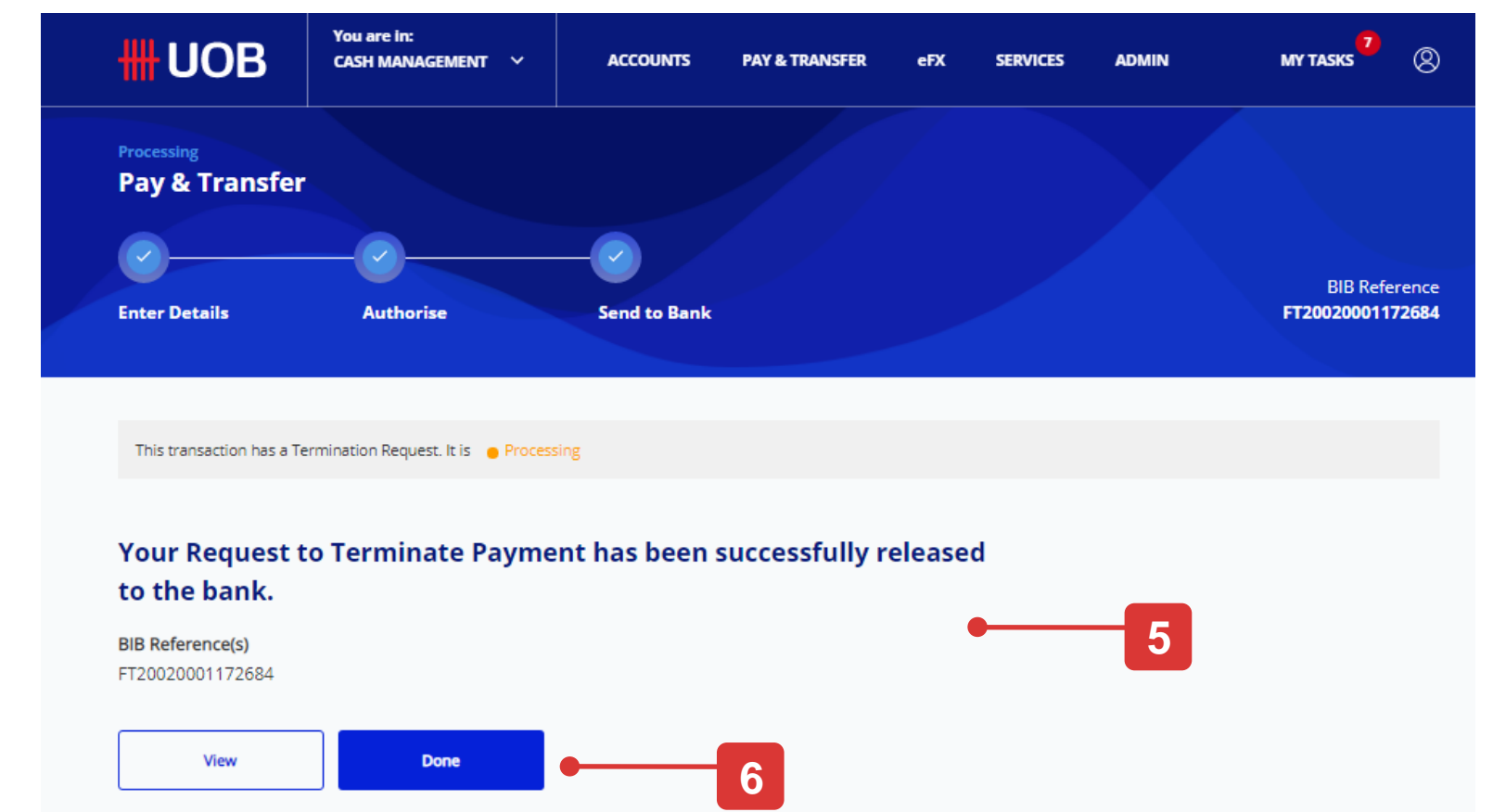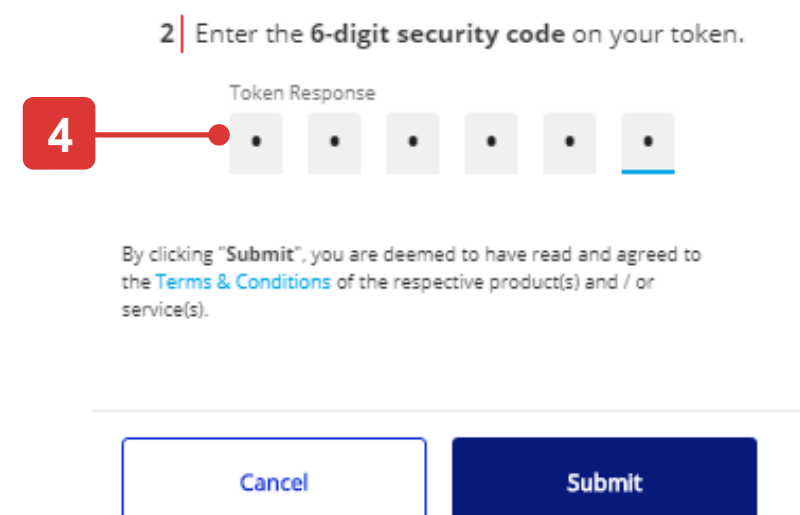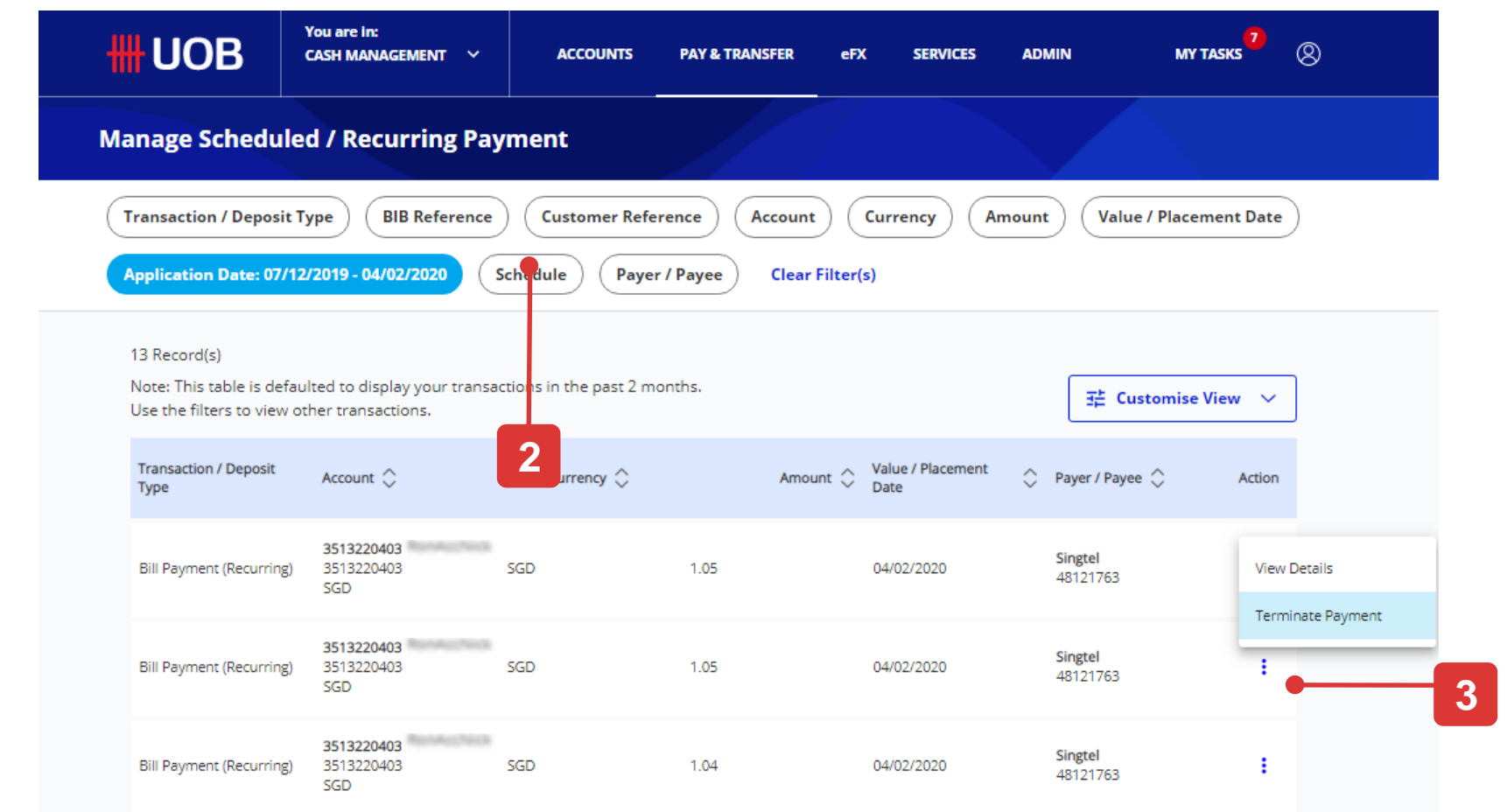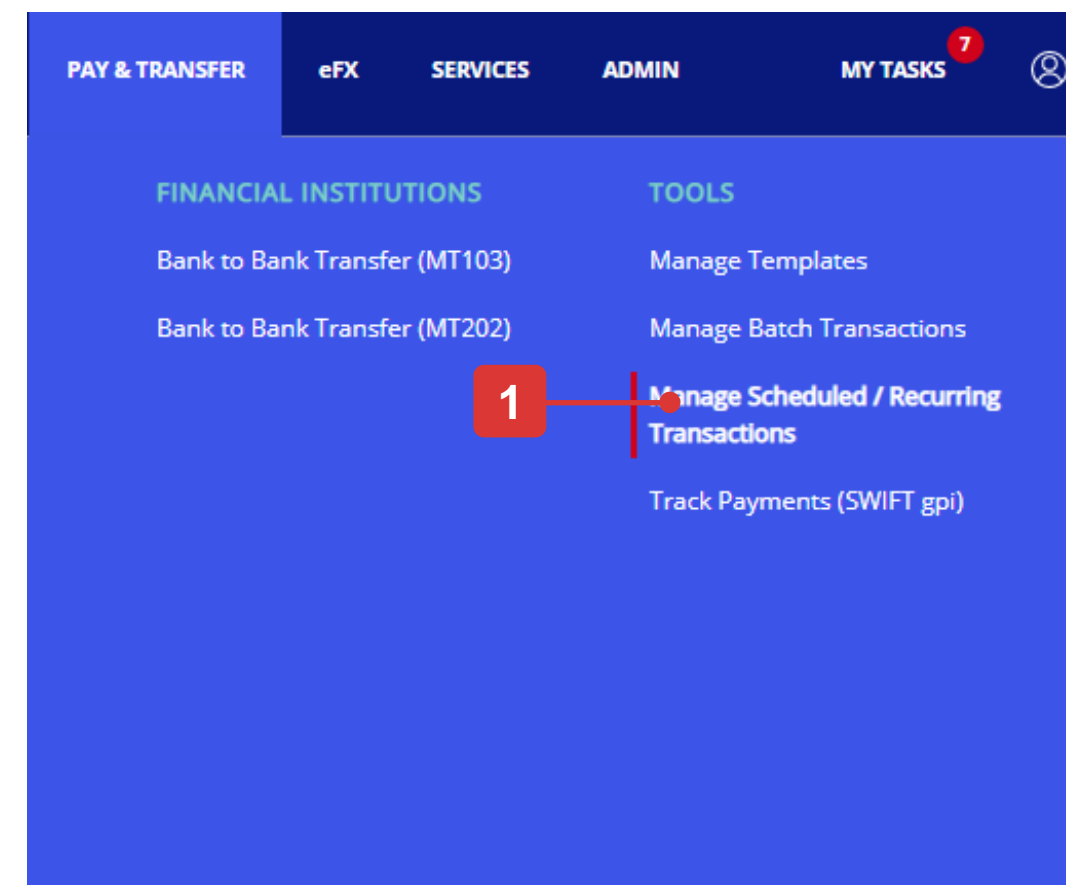
How to Terminate Post-Dated / Recurring Transactions

View Recurring Transaction Details

1. You can view the number of transactions which have been successfully processed and how many transactions left to process.

2. Options available:

- "Cancel": If you proceed with this, the transaction will be cancelled and will not be saved as draft.

- "Add to My Task": This button will only appear if, based on your authorisation mandate, you are allowed to authorise your own transaction. Transaction will be added to "My Tasks" and you can approve it later.

- "Terminate Payment": Please refer to the next page for the detailed explanation.

To

Payee's account details

Payee Name
GLS SEAFOOD PTE LTDXXXXXXUAT1

Account No.   Currency
3513447017   SGD

Amount & When

Transfer Date
31/01/2020

Transaction Currency   Transaction Amount
SGD   1.31

☑ This is a recurring payment

Frequency of Payment   **1**   Number of Times
Daily   30

Customer Reference
UOB-Rec

Payee Reference
UOB-Rec

Additional Information

View Recurring Transaction Details.

No of Processed Transactions   Successful Transactions
5   4

Rejected Transactions
1

2 — Cancel   Add to My Tasks   **Terminate Payment**

How to Terminate Post-Dated / Recurring Transactions

Submit the Termination Request

1. Follow the on-screen instructions to authorise the request.

2. Confirmation message will display as transaction is terminated successfully.

3. You can view the transaction status under "Approval status". Status will display as "Successful Terminate".

4. To check the audit trail of the termination request, click the action menu, then click the "Termination Status" tab.

Approval Statuses

How to Approve Multiple Transactions by Batch

All options

You can group multiple (single and bulk) transactions from the same entity, with same currency and status into one batch for approval purpose.

You can either:

A. **Create a Batch for Approval, or,**

B. **Approve Batched Transactions.**

Accessing "Manage Batch Transactions"

1. **From Top Menu bar, hover over "Pay & Transfer" and click select "Manage Batch Transactions" under "Tools" column.**

2. **Select batched transactions via using filer criteria to fined a specific batch transaction.**

3. **You can select the columns to be viewed on the batch overview screen.**

4. **Click the icon under the Action:**

- **View batch details: Review the batch transaction details.**

- **Delete: Batch Transactions can be deleted directly from the overview screen.**
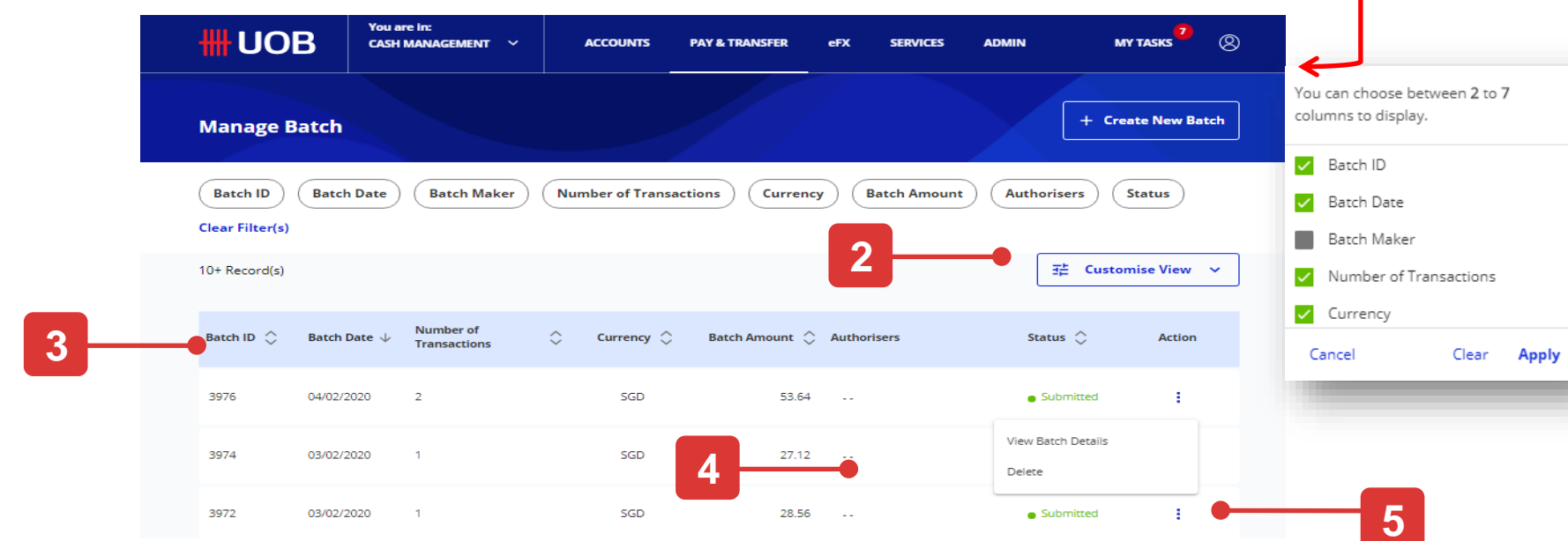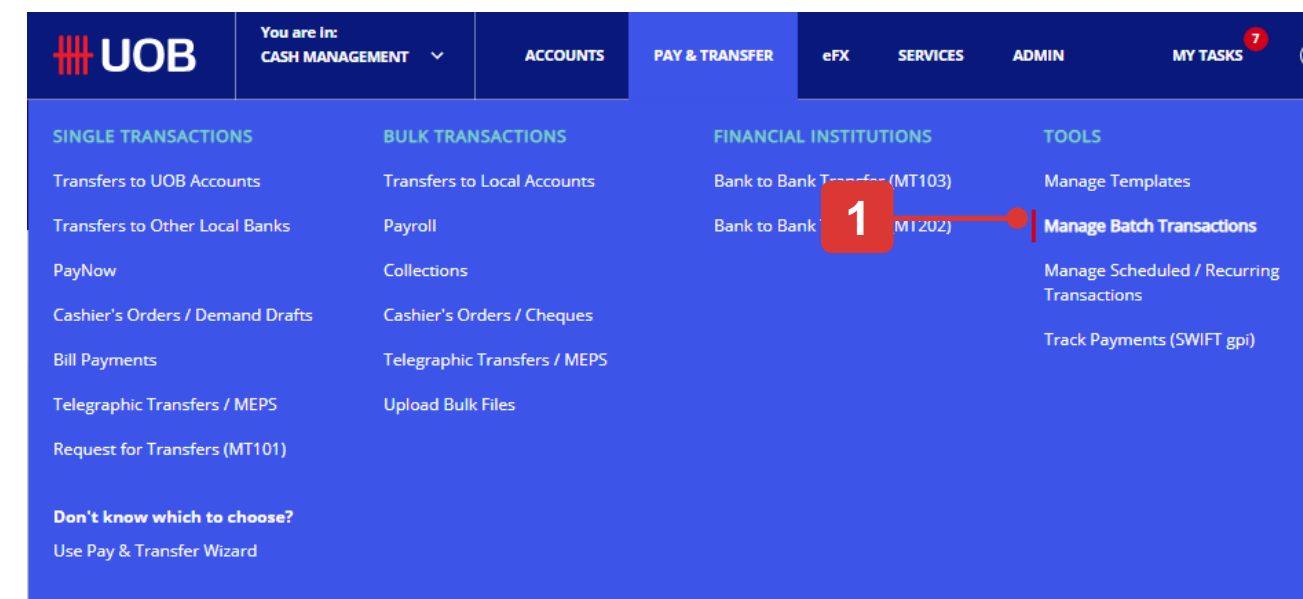
How to Approve Multiple Transactions by Batch

Create a Batch for Approval

1. To create a batch, please click "Create New Batch" button from the top side of "Manage Batch" default view.

2. Select the transactions to be batched via using filer criteria to fined a specific transaction.

3. You can select the columns to be viewed on the batch overview screen.

4. Check ✓ the transactions to be batched together and click "Create Batch".

How to Approve Multiple Transactions by Batch

Approve Batch Transactions

1. **View the transactions details to be batched and click 'Submit' button.**

2. **Enter token response and click "Submit" button.**

3. **A batch ID will be generated for each successful batching.**

4. **Once batch transactions is submitted to the bank successfully, the status will display as "Successful".**

Right By You