RHB Reflex Premium Plus
User Linking Guide with Service Partner

Module	: Corporate Back Office
Reference Guide	: RHB SME e-Solutions
Version	: 2.2

What is SME e-Solutions with Enhanced Reflex?

Customers are now able to integrate their solution providers to RHB Reflex seamlessly. With this enhanced feature in RHB Reflex, customers will now be able to check their account balances, perform transactions, reconcile their accounts through our selected service partners.

SME e-Solutions with Enhanced Reflex eliminates the redundant tasks in running your business operations (i.e. performing accounting book entries, invoice/supplier payments, and even payroll). Customers can now perform their business operations via our service partners without having the need to redundantly replicate their payment details into RHB Reflex banking portal.

Apart from that, in order to ensure the security of our customers transactions, the authorization of transactions from solution providers are still required to review and authorize through RHB Reflex.

Maintaining RHB Reflex Integration with Service Partners

(Please read through the important notes below)

Scenario:

1. NEW user to selected service partners (do not have a business profile/ user ID created with our selected service partners yet) or;
2. EXISTING user to selected service partners (having an existing business profile with our selected service partners)

Scenario 1 – NEW user to selected service partners

- If you are NEW user to our selected service partners, during user linking, RHB Reflex will automate an user registration together along with business profile creation to our selected service partners
- Once this action is completed, customer will receive a "Welcome Email" from our selected service partners together

IMPORTANT NOTE:

- *Upon completion of this action, the linkage between RHB Reflex and the* selected service partners *will be deemed as successful.*

Scenario 2 – EXISTING user to selected service partners

- If you are an existing user to our selected service partners, please ensure that the user profile created in RHB Reflex has the **SAME** E-mail address as the user created in the selected service partner.
- Upon performing user linking via RHB Reflex, kindly ensure that **the E-mail address and the BRN of the user profile** in RHB Reflex is the same as the user details in the selected service partners

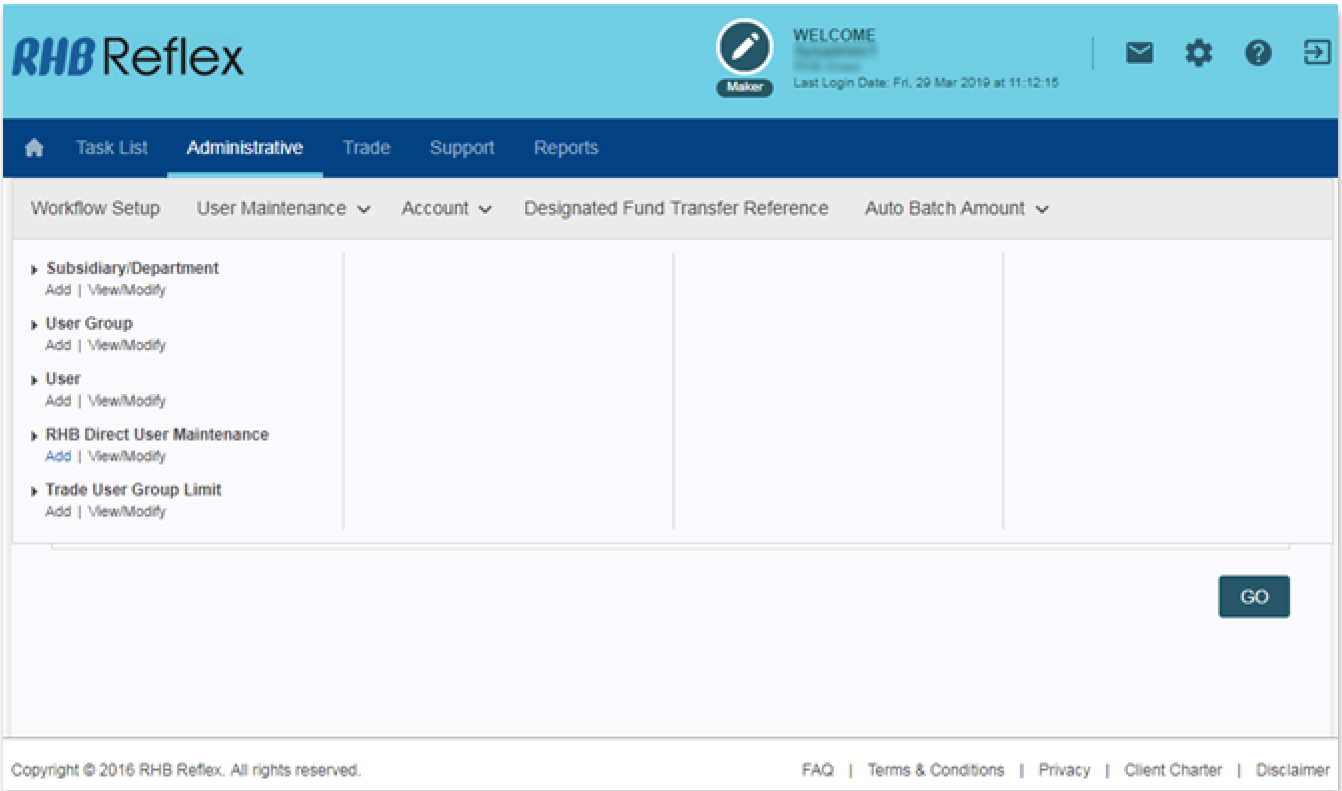
IMPORTANT NOTE:

- *Welcome Email will NOT be sent from our* selected service partners
- Please ensure that the **EMAIL** and the **BUSINESS REGISTRATION NUMBER** registered at our selected service partners are exactly the same as what have been registered in RHB Reflex

Document Contents

Performing User Linking

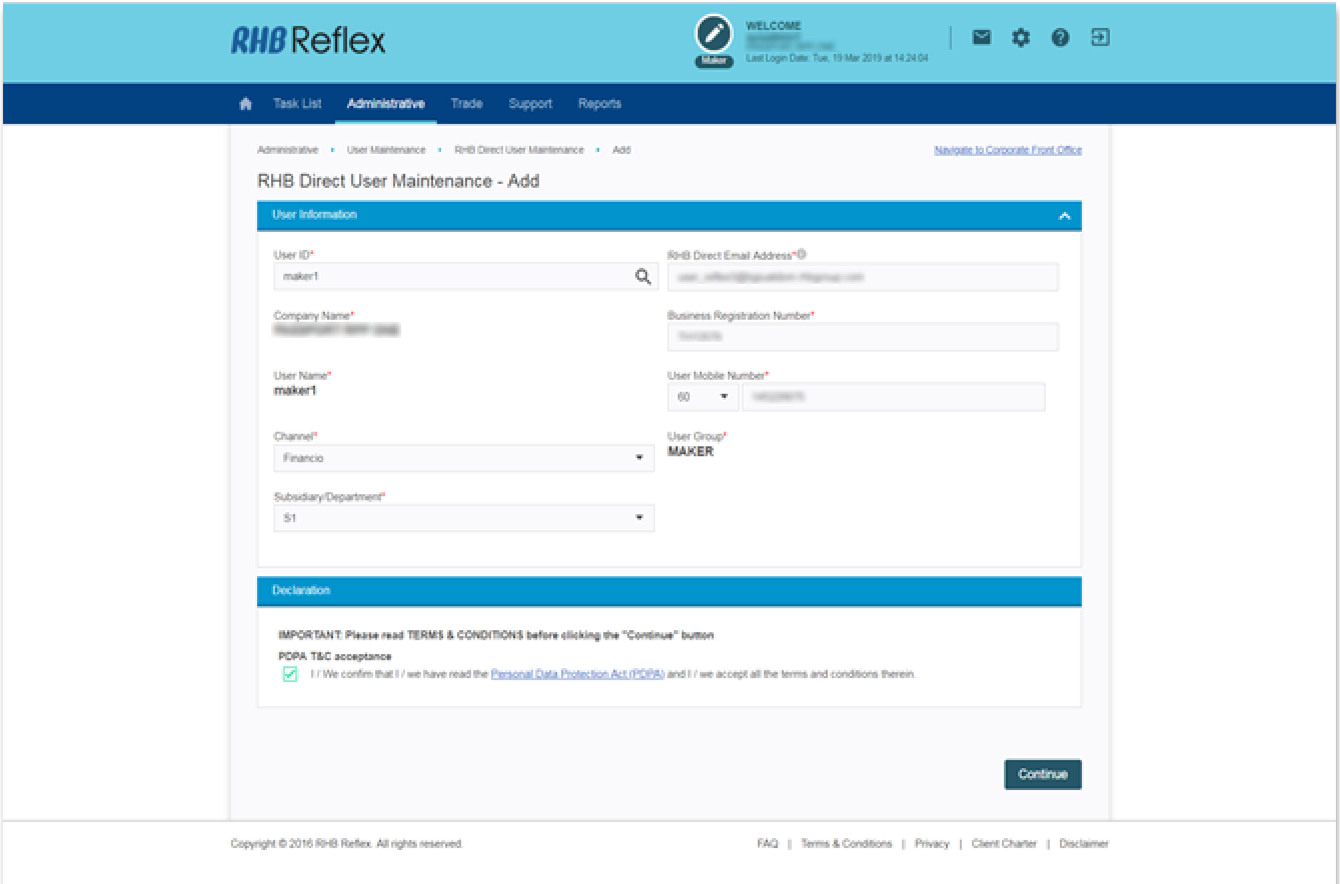
Accessing Corporate Back Office (CBO)



1. Login to RHB Reflex – Corporate Back Office and browse to **Administrative > User Maintenance > RHB Direct User Maintenance**
2. Click "**Add**"

Performing User Linking

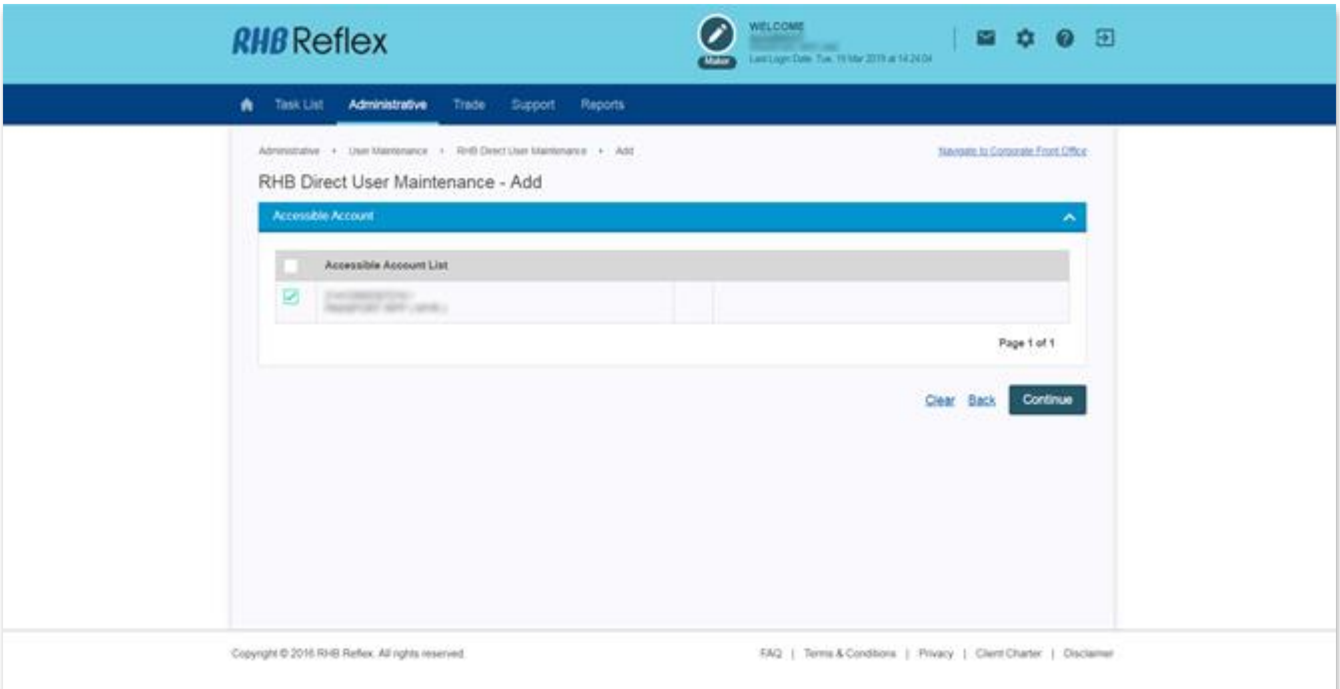
Data Entry – User Details



Field Name	Field Description	Instructions
User ID	RHB Reflex User ID	Click on the magnifying glass and select the user ID to perform user linking
RHB Direct Email Address	RHB Reflex User's E-mail address	Ensure the "RHB Direct Email Address" is the correct and valid email address *(Note: You will receive a "Welcome Email" from the selected service partner through this email address)*
Business Registration Number (BRN)	Corporate's BRN will be the default value	Validate the "Business Registration Number (BRN)". The business profile will be created based on this BRN in the selected service partner
Channel	Third-party integration channels	Select the service partner you would like to perform user linking with
Subsidiary/ Department	Subsidiary/Department of the User	Select one Subsidiary/Department to be linked with the service partner (or select the default "S1")
Continue (Button)	Submit the user linking action	Submit the user linking action for approval
Confirmation Box	A confirmation box will prompt you to ensure the information you entered are correct	Click "OK" to proceed or; Click "Cancel" to go back to the entry page to reconfirm

Performing User Linking

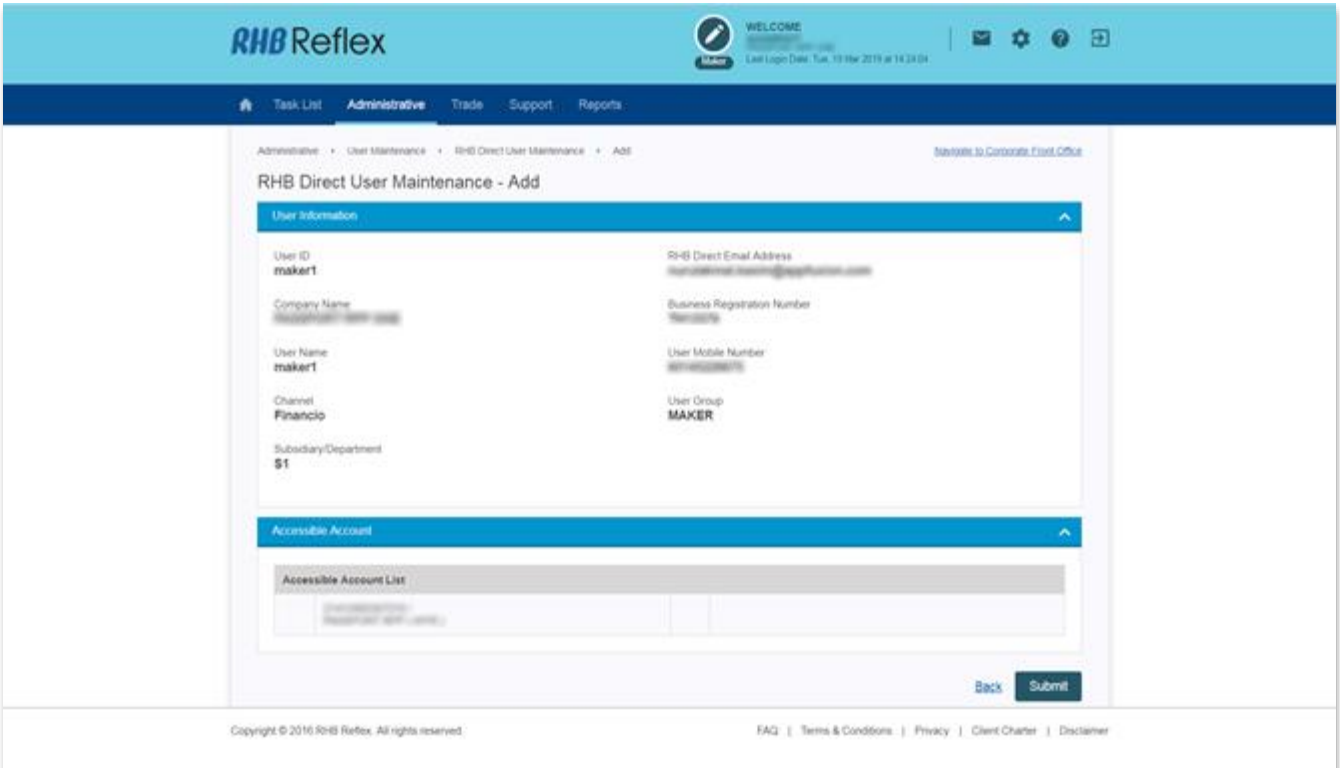
Data Entry – Account Selection



Field Name	Field Description	Instructions
Accessible Account List	Selected account(s) will be linked with the service partner and the details will be sent.	Select which account number which you would like to link with the selected service partner *Note: Account(s) selected will be reflected in the* selected service partner *which enables you to perform transactions and track account(s) activity(s)*
Continue (Button)	Continue to the next page	Click on “Continue” once you have selected the accounts which you would like to link the accounts with the selected service partner

Performing User Linking

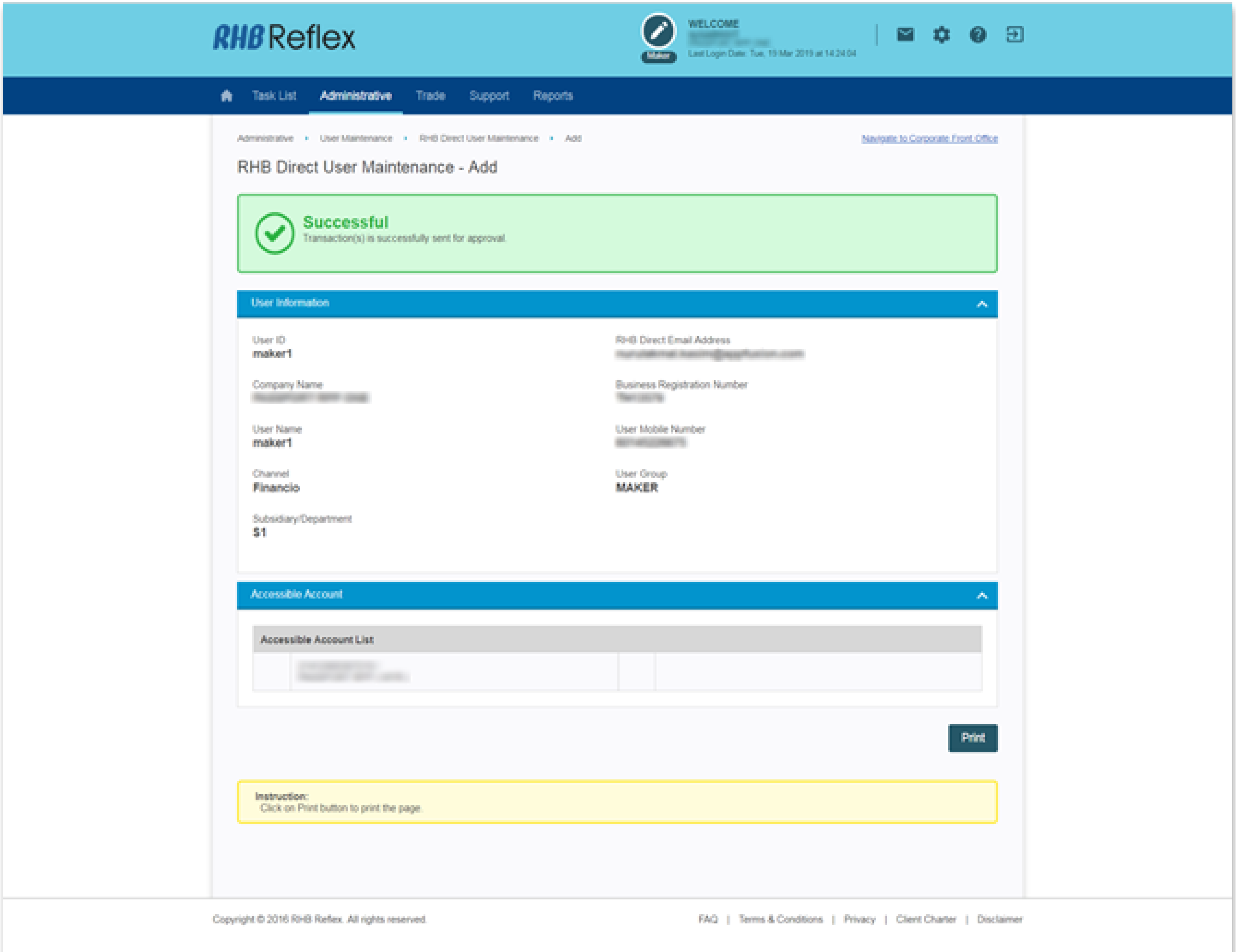
Data Entry – Review



1. Review and confirm all information is provided correctly
2. Once you have confirmed all information are provided correctly, click on “Submit”
3. If there are any changes, click on “Back”

Performing User Linking

Data Entry – Acknowledgement



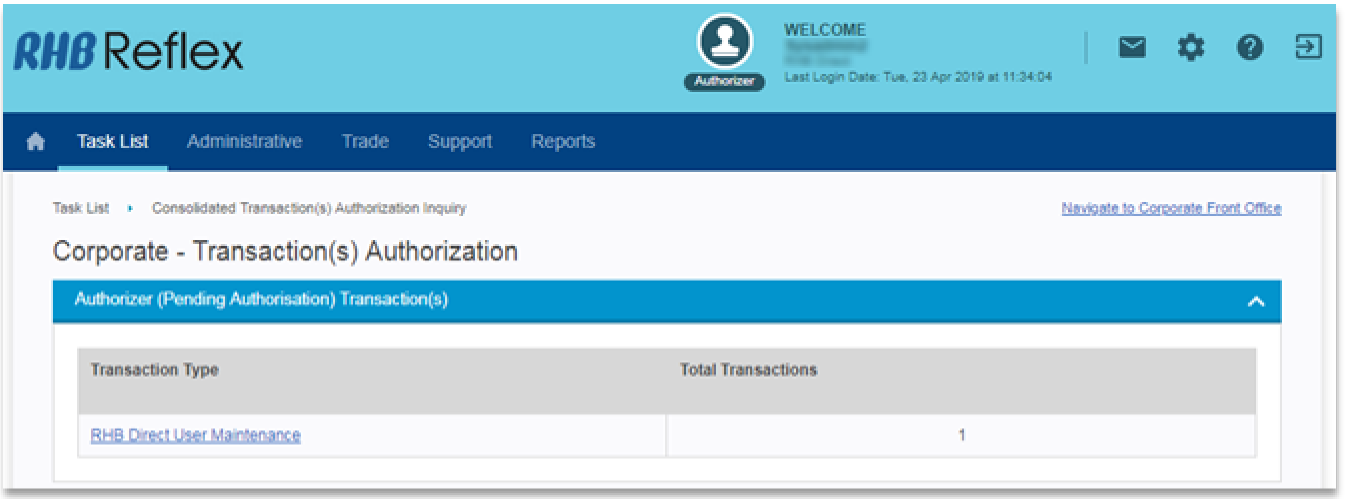
1. You have successfully submitted your user linking
2. Notify authorizer to review and approve your user linking

**Note:

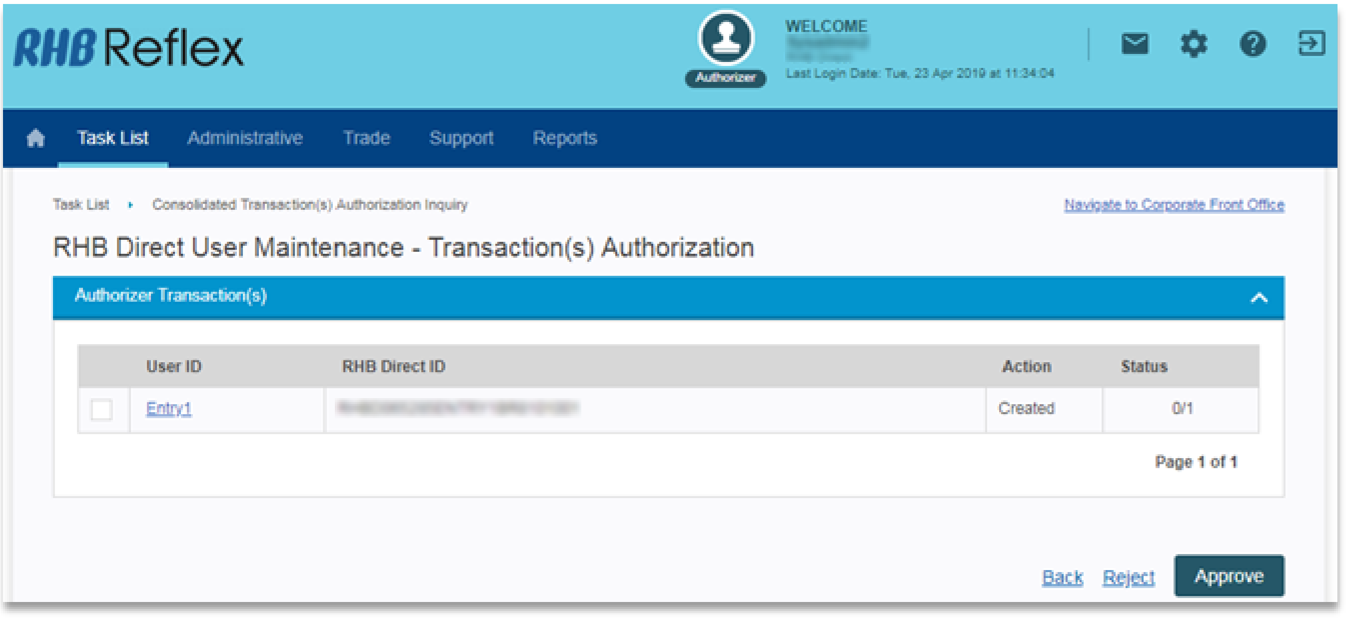
- Repeat steps from page #4 – page #8 if you have multiple users to link
- Only linked users will be able to enjoy the benefits of RHB Direct

Approving User Linking

Authorizer – RHB Direct User Maintenance Authorization List



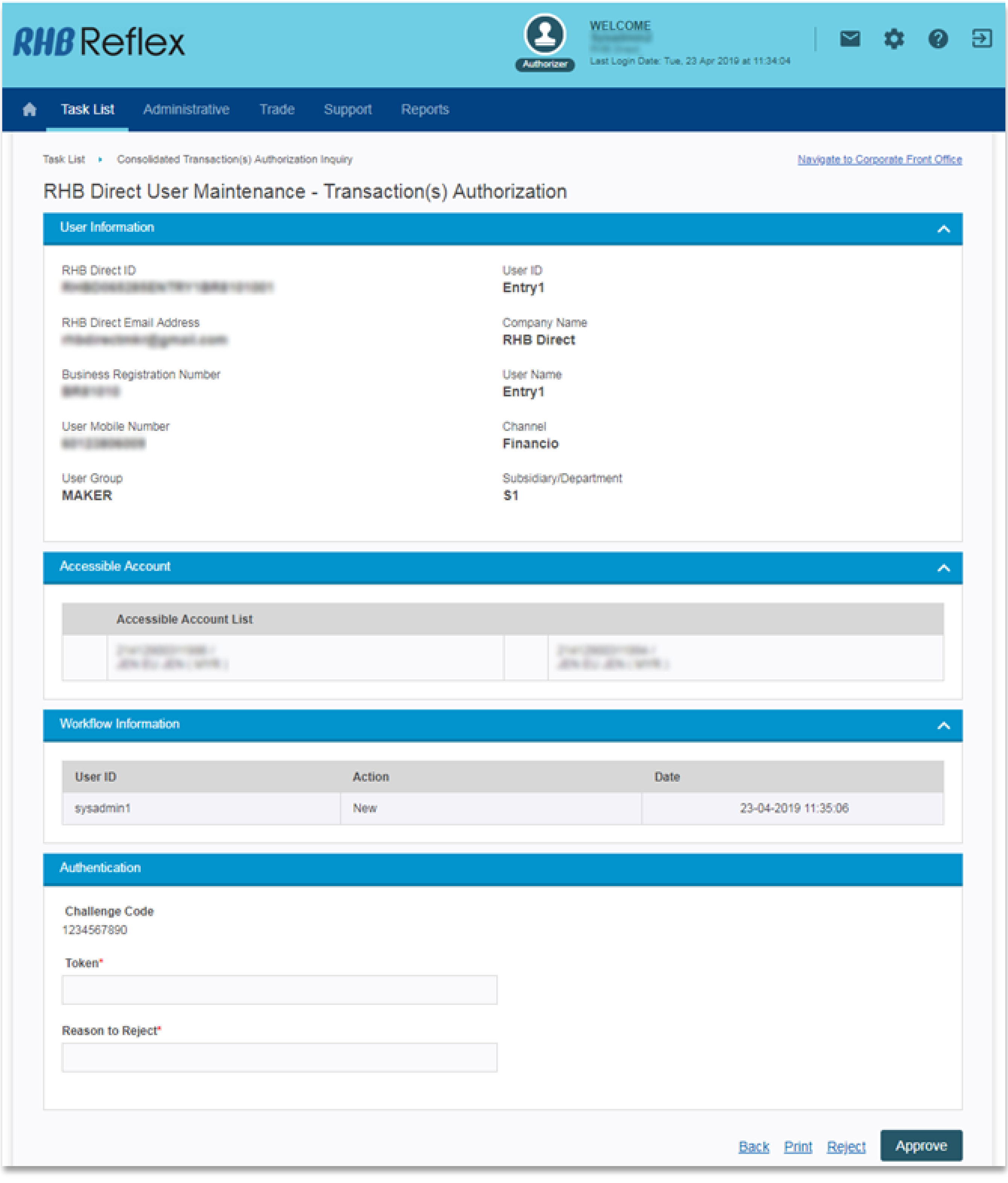
1. Browse to Task List > Consolidated Transaction(s) Authorization Inquiry
2. Click on the hyperlink of “RHB Direct User Maintenance”



1. Click on the “User ID” hyperlink for more details

Approving User Linking

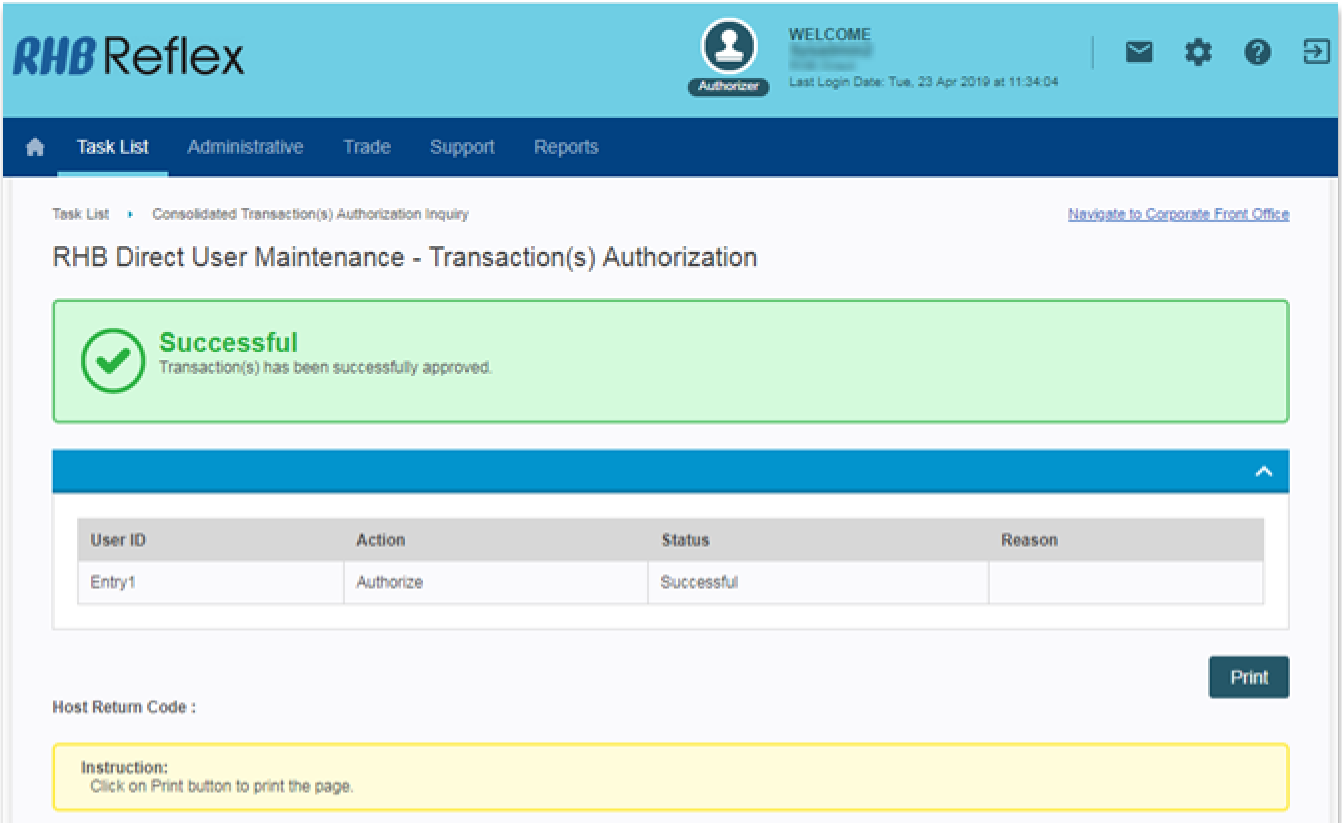
Authorizer – RHB Direct User Maintenance Detail



1. Review the details of the user
2. If all details are in order, click on “Approve”

Approving User Linking

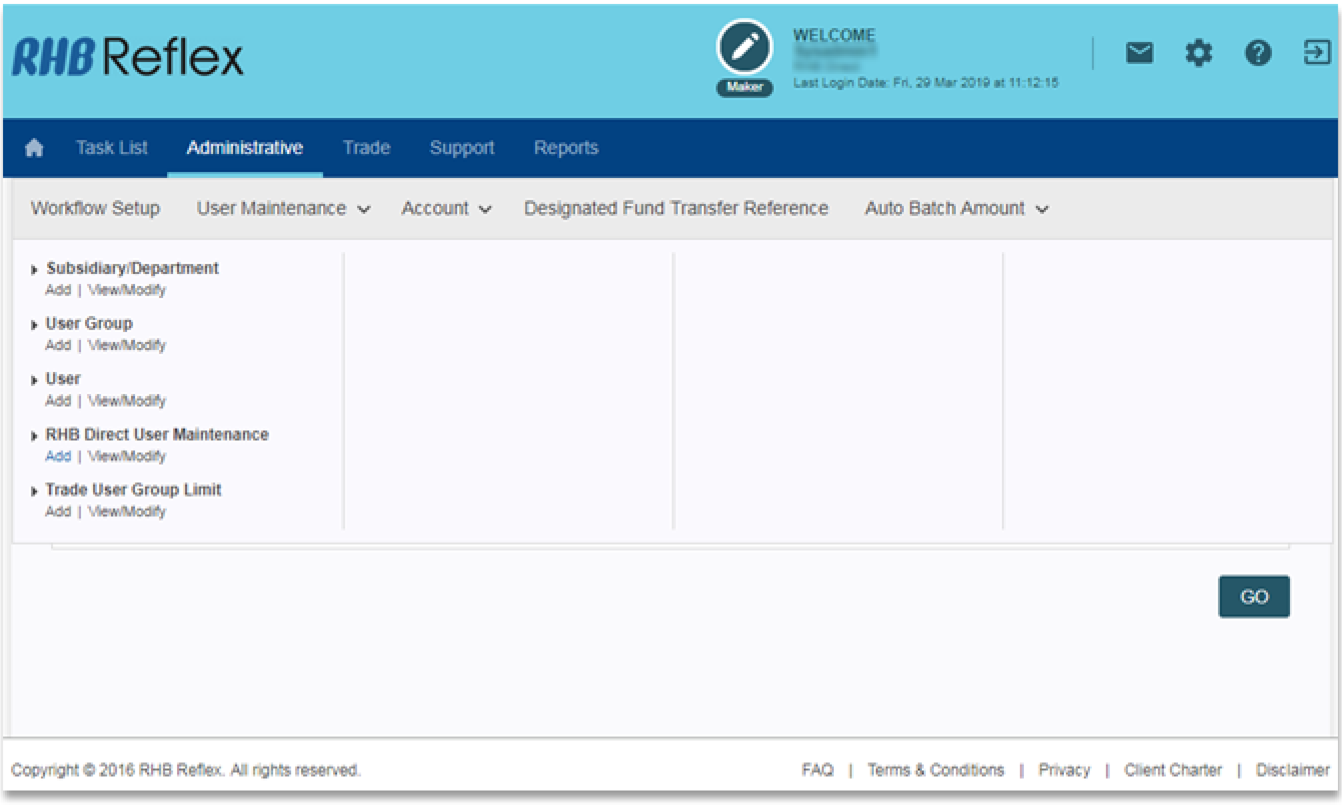
Authorizer – RHB Direct User Maintenance Approved Acknowledgement



1. User have been successfully linked
2. Verify if you have received a welcome email from the selected service partner (the timing of the welcome email may vary by selected service partners)

User Unlinking

Accessing Corporate Back Office (CBO)



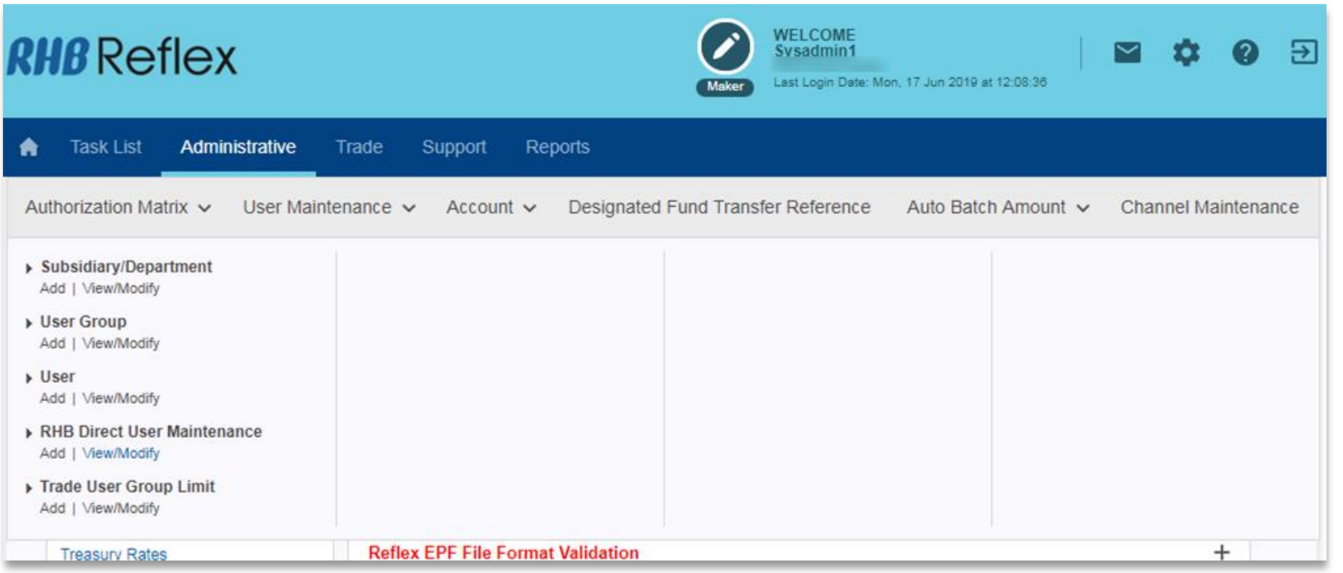
1. Login to RHB Reflex – Corporate Back Office and browse to Administrative > User Maintenance > RHB Direct User Maintenance
2. Click “View/Modify”

**Note:

- Performing user unlinking will delete the linkage between RHB Reflex and the selected service partner
- Deleted linking users will not be able to access any RHB Direct functionalities

User Unlinking

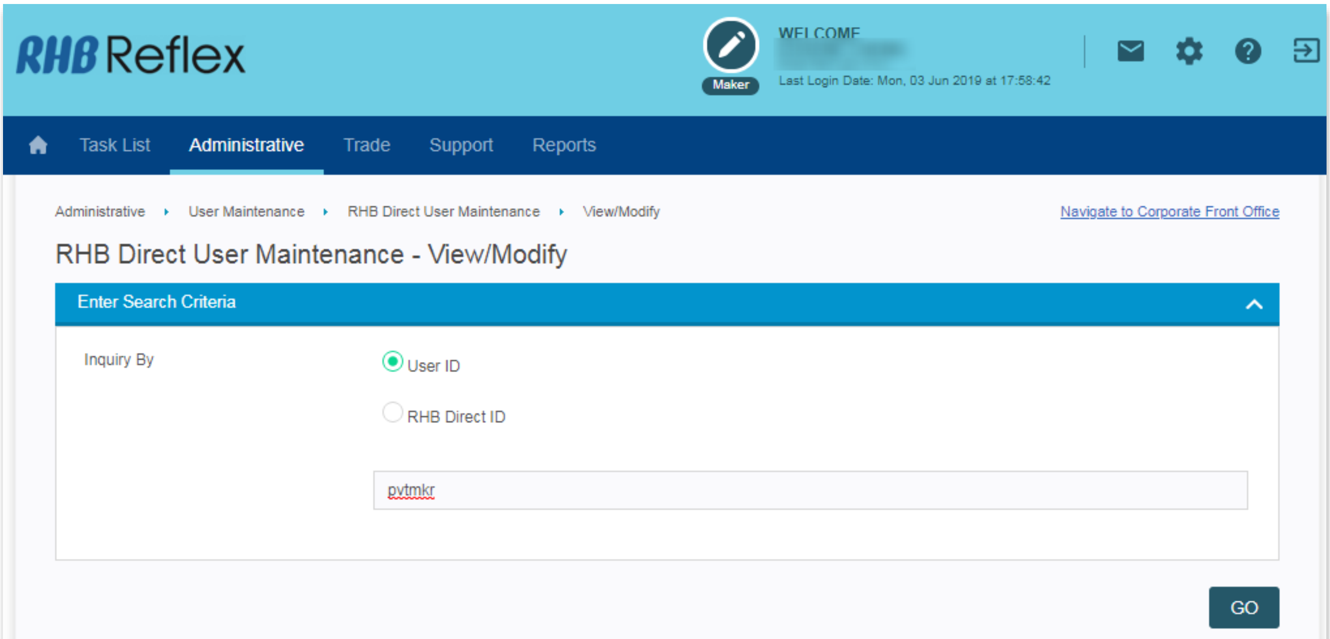
Accessing Corporate Back Office (CBO)



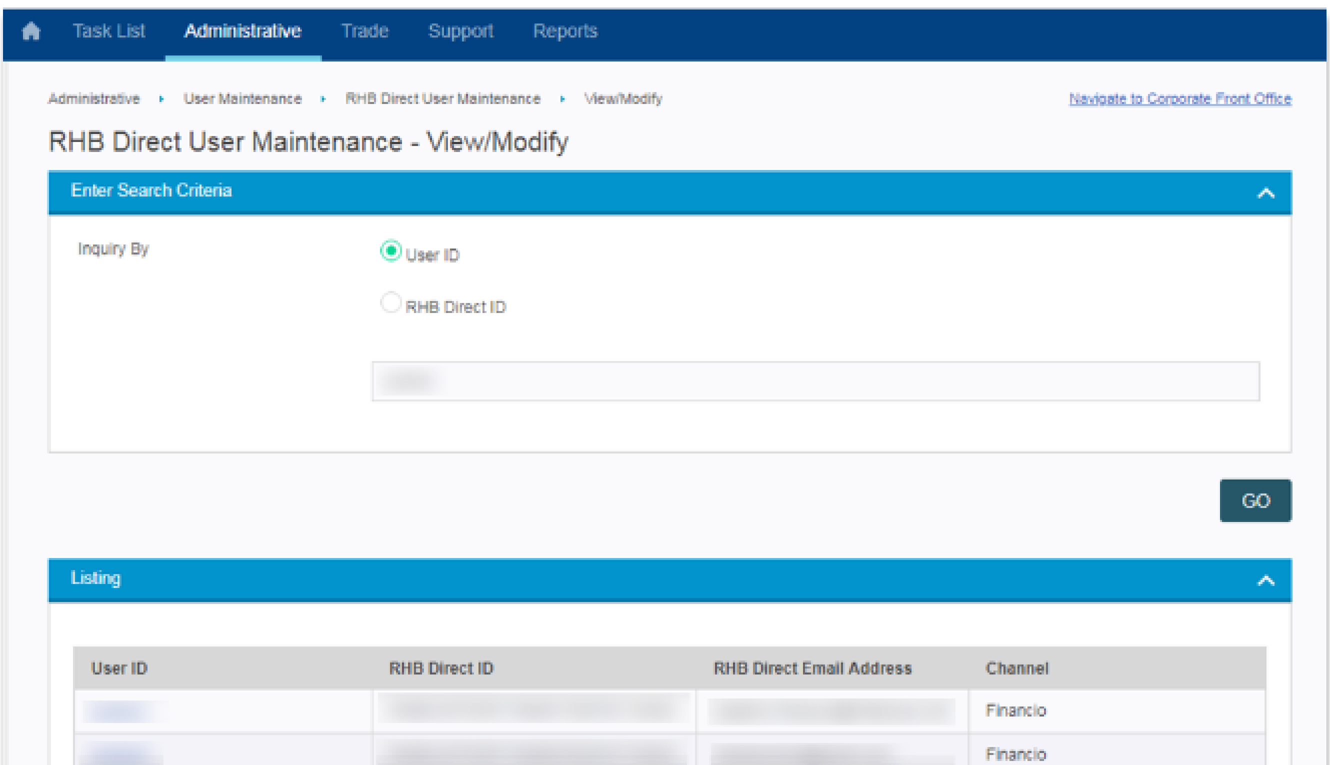
1. Login to RHB Reflex – Corporate Back Office and browse to Administrative > User Maintenance > RHB Direct User Maintenance
2. Click "View/Modify"

User Unlinking

Data Entry – Delete User Linking



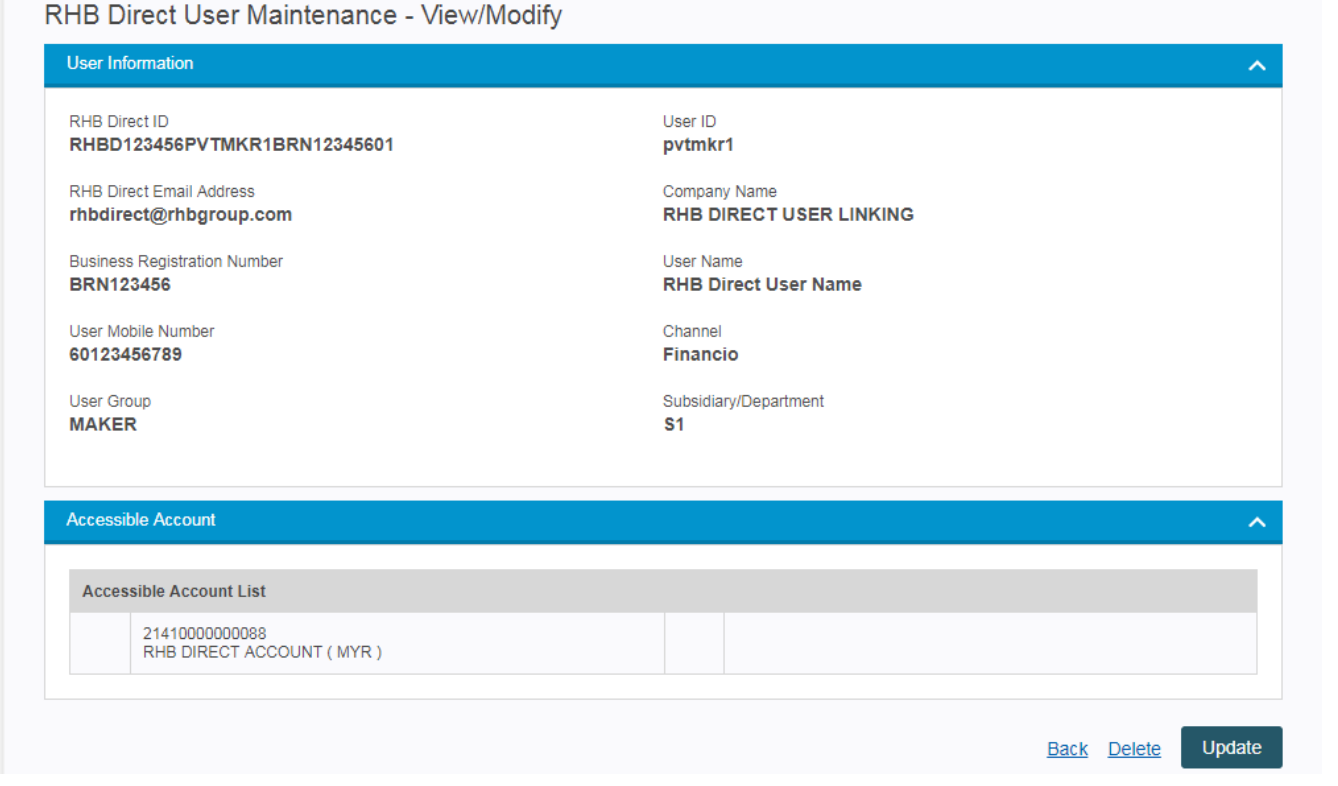
1. Type in the user ID which you would like to unlink from the selected service provider (alternatively you can click "GO" and view all the user ID which have previously performed user linking)
2. Click "GO"



1. Click on the User ID Hyperlink (which you would like to perform unlinking)

User Unlinking

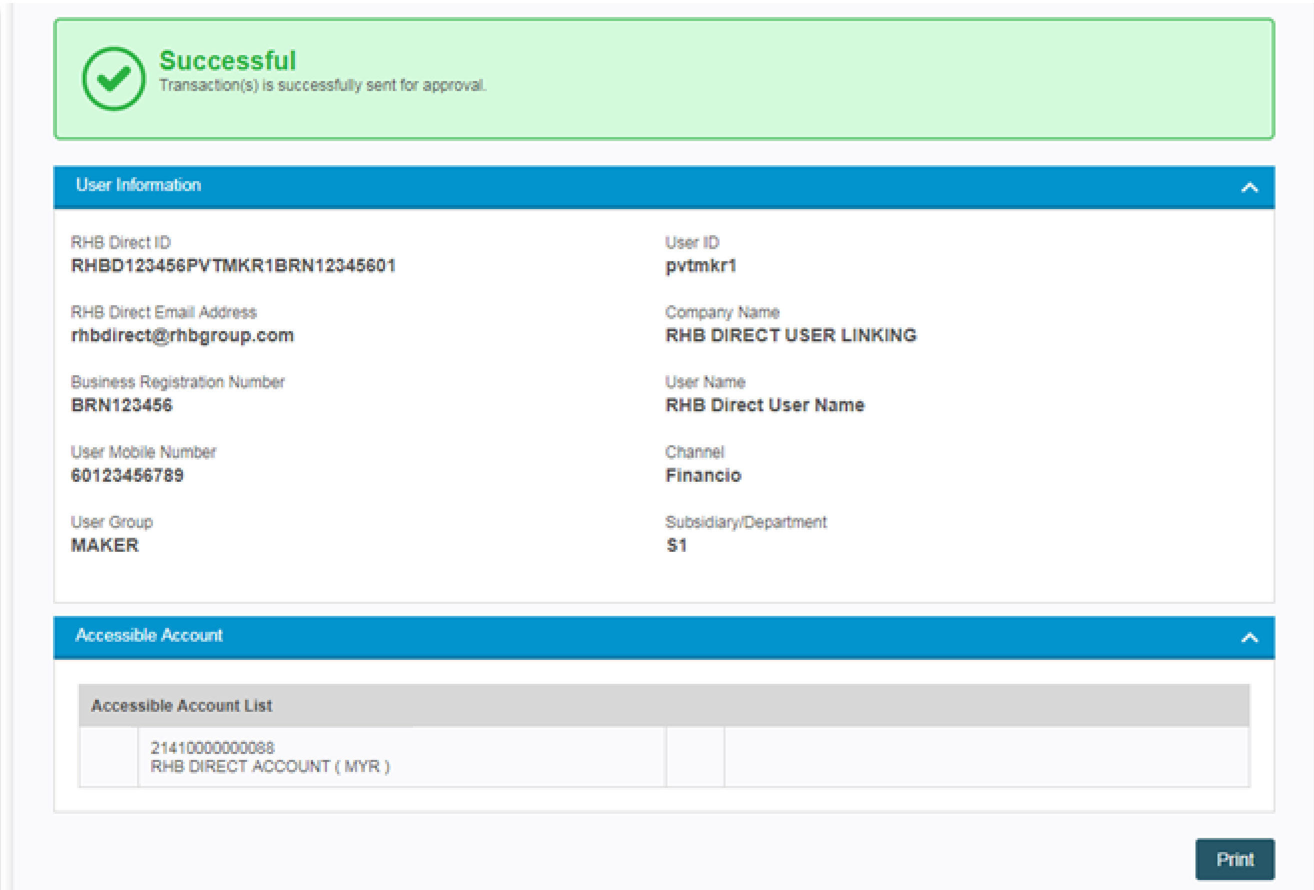
Data Entry – Delete User Linking



1. Verify if this is the correct User ID which you would like to perform unlinking
2. Click on "Delete"

User Unlinking

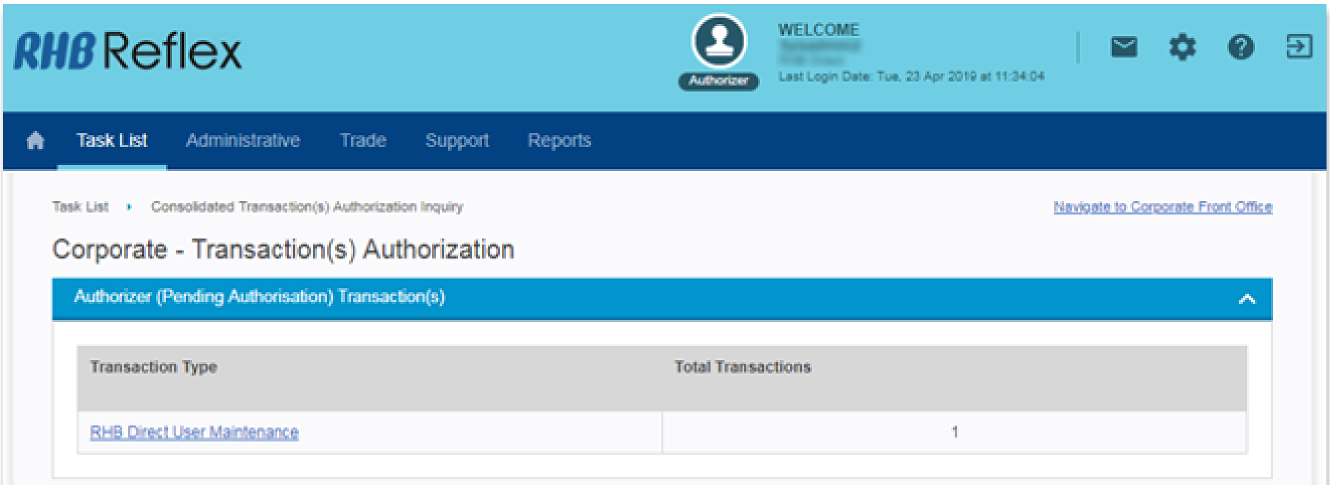
Data Entry – Delete User Linking



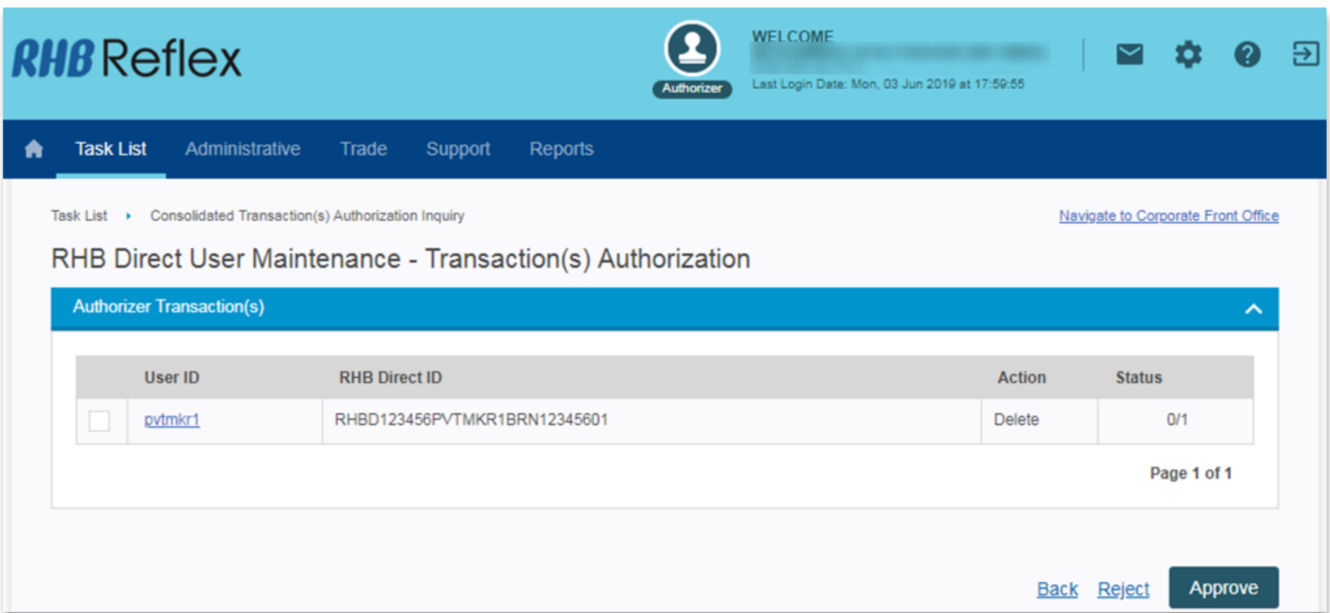
1. You have successfully submitted user unlinking submission
2. Inform your authorizer *sysadmin2" to review and approve the request

Approving User Unlinking

Authorizer – RHB Direct User Maintenance Authorization List



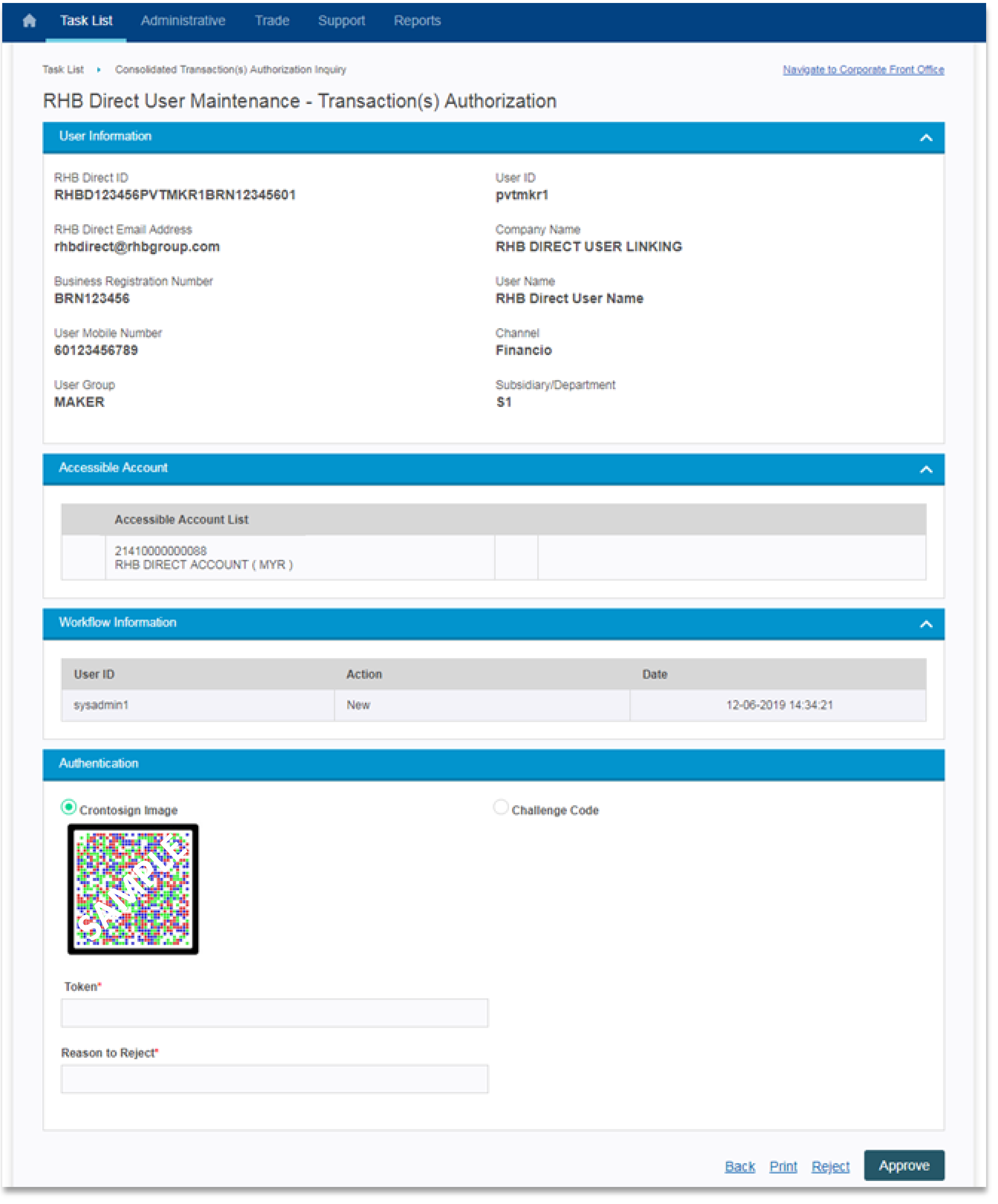
1. Browse to Task List > Consolidated Transaction(s) Authorization Inquiry
2. Click on the hyperlink of "RHB Direct User Maintenance"



1. Click on the "User ID" hyperlink for more details

Approving User Unlinking

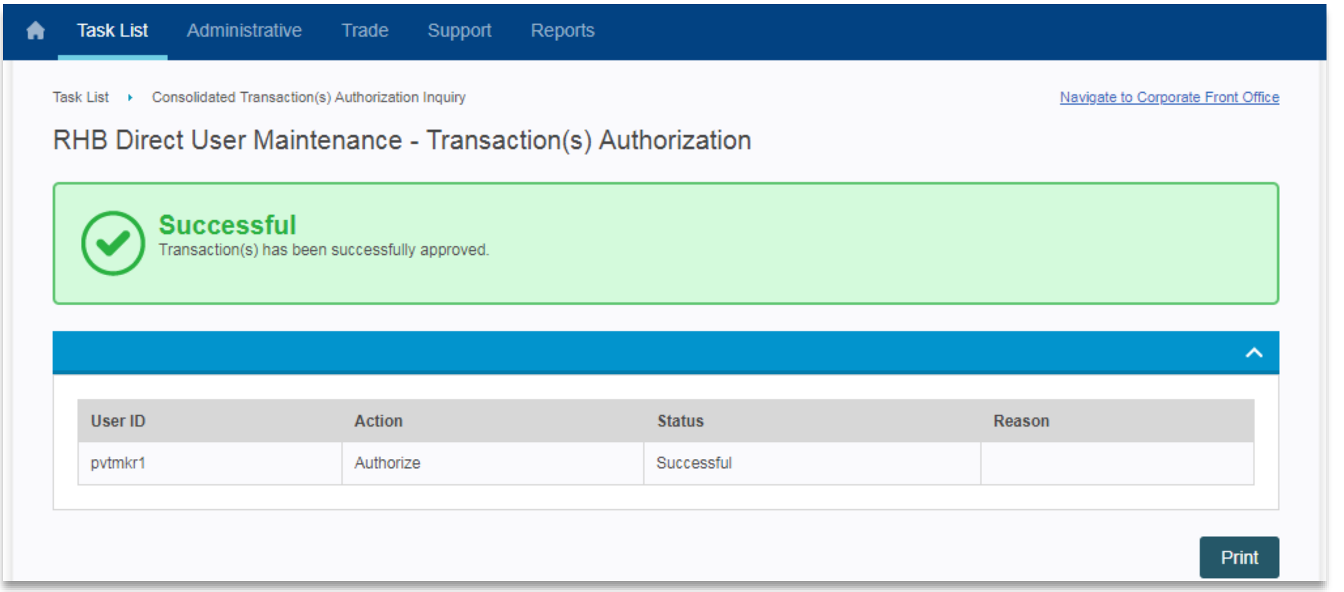
Authorizer – RHB Direct User Maintenance Detail



1. Review the details of the user
2. If all details are in order, click on “Approve”

Approving User Linking

Authorizer – RHB Direct User Maintenance Approved Acknowledgement

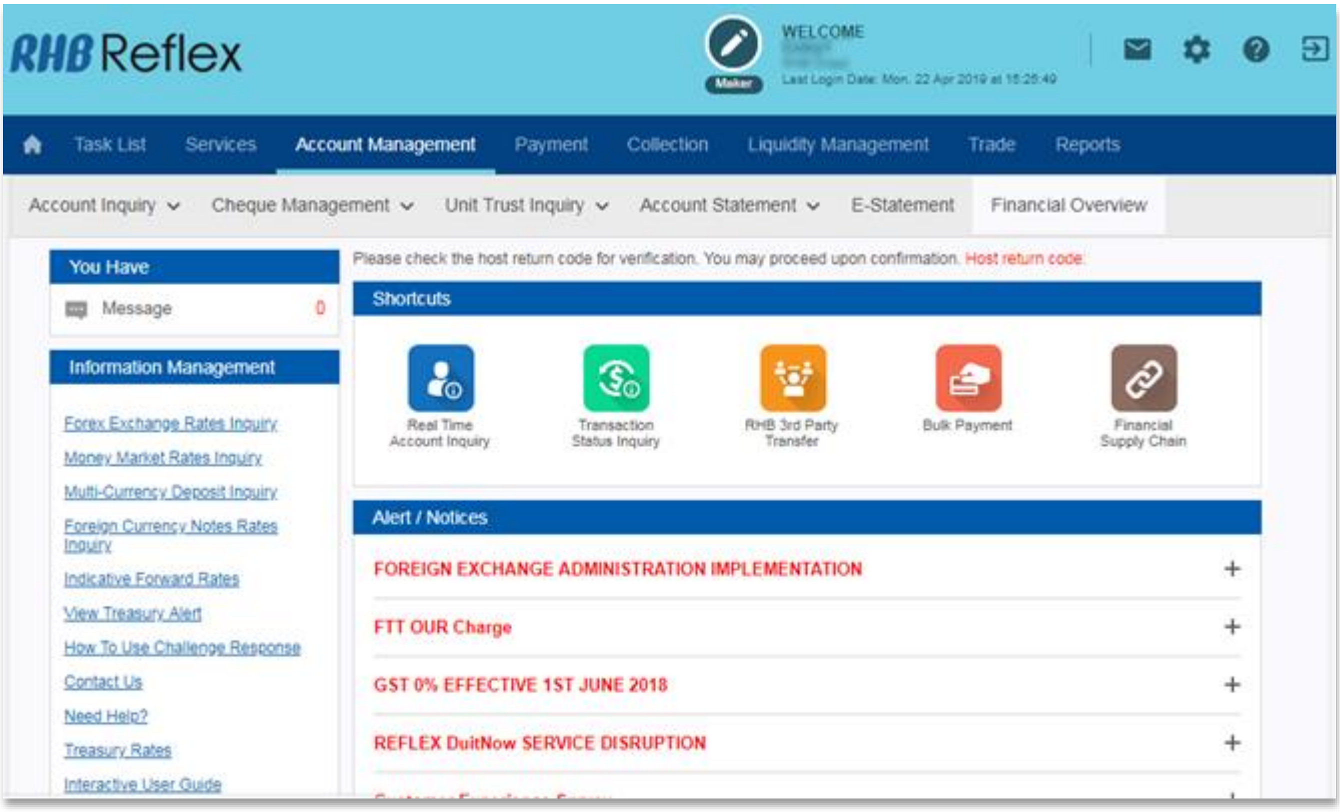


1. User ID have been successfully unlinked

Financial Overview

Accessing Financial Overview Dashboard

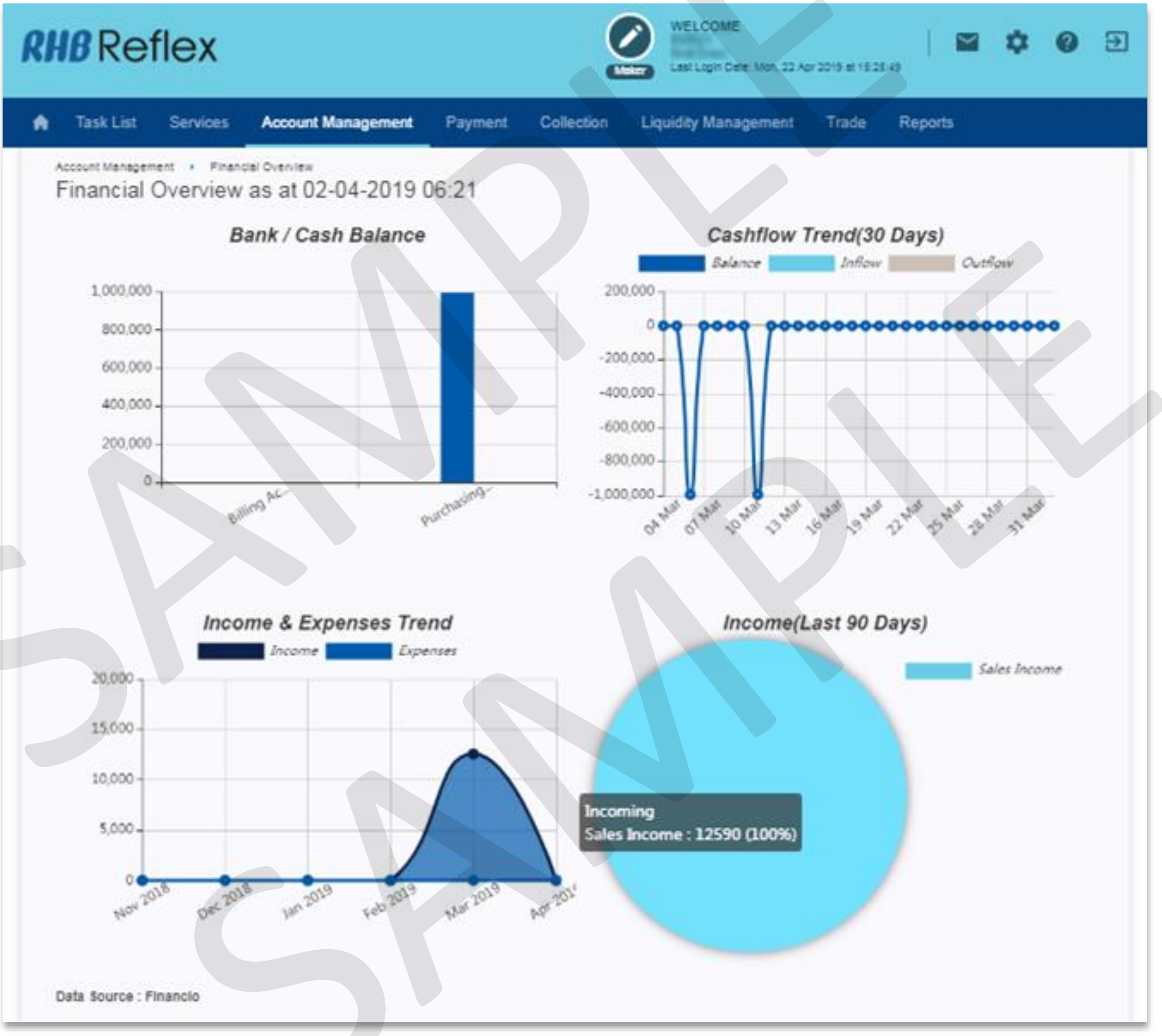
***Currently only Financio has this feature at the time being*



1. Browse to “Account Management > Financial Overview”

Financial Overview

Dashboard



Note:

- *If you have just performed user linking, you will not be able to view the dashboard yet. Check back again tomorrow (T+1 after user linking)*
- *Take note that the dashboard data will only display T-1 data (batch runs midnight)*