IDFC RemitFirst
User Guide Document

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1. Scope

RemitFirst is IDFC Bank's cross-border online money transfer offering. RemitFirst, a white label platform of Fable Fintech, is a multi-country, multi-currency, state-of-the-art, AML/KYC compliant, cross-border remittance technology platform that enables banks, exchange houses, digital money transfer companies, telecom companies, and essentially any company in the world that wants to launch its brand of digital remittance services or enhance its current offerings to its customers for sending money from one country to another.

In industry lingo, the platform supports inward remittance services, i.e., receiving money from multiple countries into India.
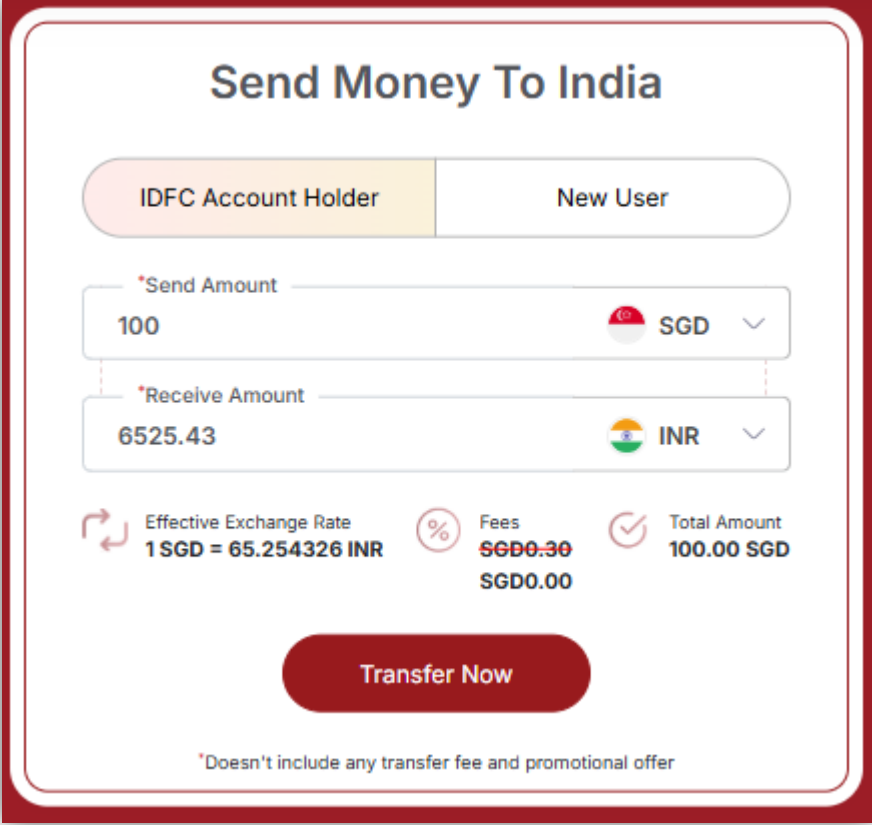
The platform can be used for C2C (Customer to Customer) remittances.

2. Pre-Login

The Pre-Login section offers quick access to key features like Send Money, Help and Support, and Legal information. Users can explore How It Works, Contact Us, give Feedback, set alerts, and use Quick Links for easy navigation— all without logging in.

2.1 Calculator

It shows the amount you send in SGD, the amount your recipient gets in INR, the exchange rate, and any fees (currently waived).

The Pre-Login section offers quick access to key features like Send Money, Help and Support, and Legal information. Users can explore How It Works, Contact Us, give Feedback, set alerts, and use Quick Links for easy navigation— all without logging in.

At the bottom of the website, a set of options is available for exploration. Scroll down to view and explore these options.

Send Money From	Help & Support	Quick Links	Legal
Australia	How it Works	Offers	Cookie Policy
Singapore	Contact us	Open A/C with IDFC Bank	Privacy Policy
Hong Kong	FAQs	Send Money Abroad	Terms & Condition
	Set Rate Alert	Smart Wire Advice	Disclaimer

2.2 Send Money

Choose the country from which you want to send money. Options include Australia, Singapore, and Hong Kong.

2.3 Help And Support

Find answers to your questions, learn how things work, contact customer service or set rate alerts.
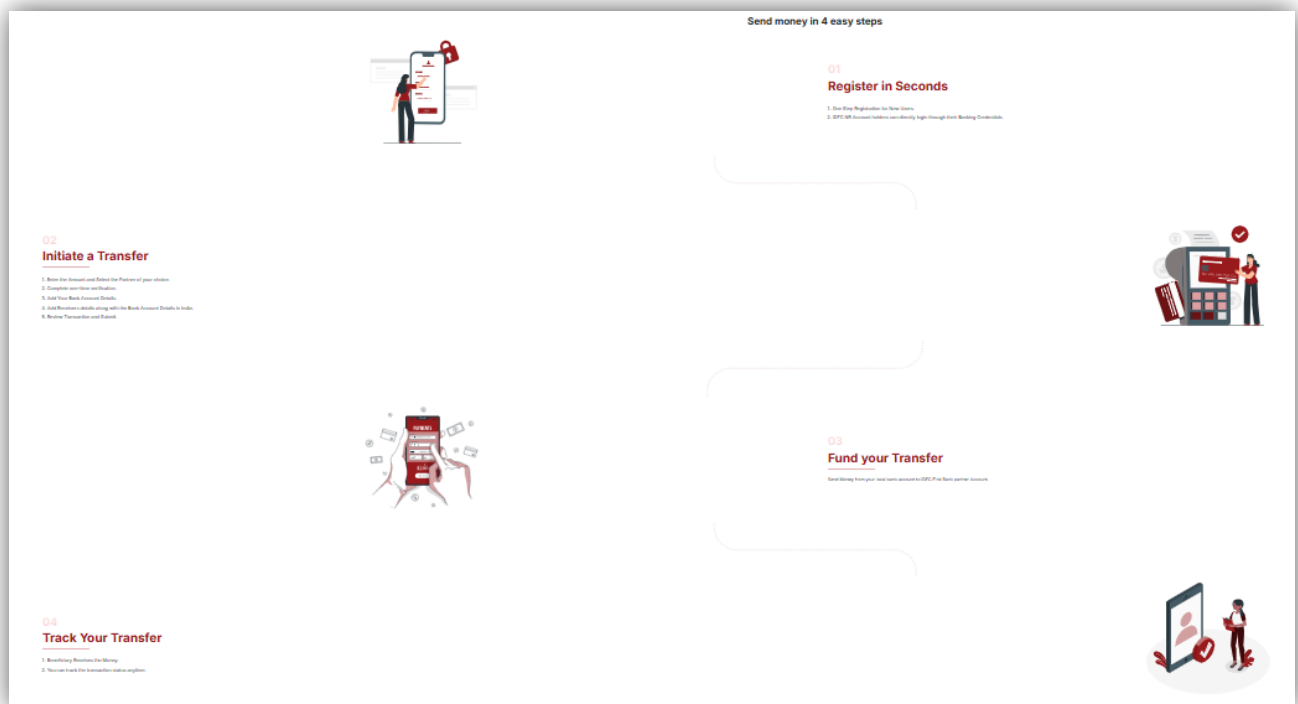
To explore the Help and Support options, follow the steps below:

2.3.1 How It Work

Learn the simple steps to send money, access services, or use the platform effectively with an easy-to-follow guide.

 Step 1   Click the **How it works** option.

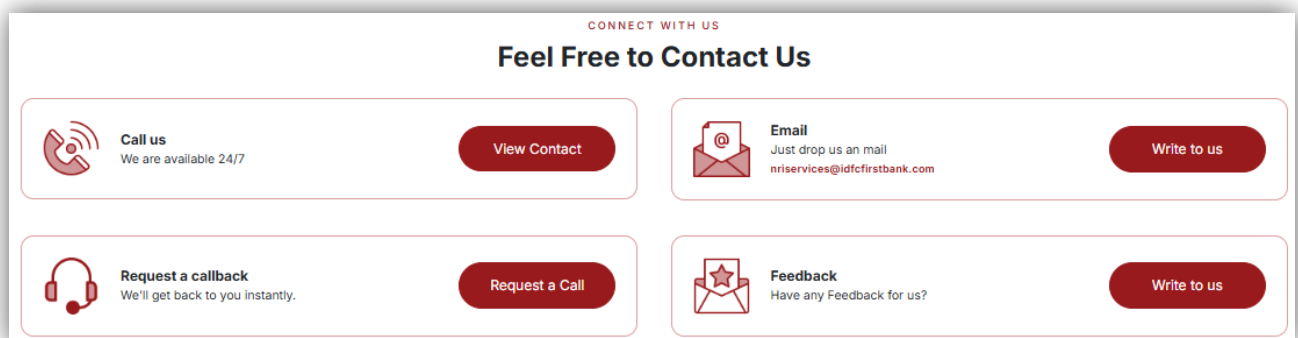**How it works** displays.

2.3.2 Contact Us

Reach out to our support team for assistance, questions, or feedback through the available communication channels.

Step 1 Click the **Contact Us** option to access the page.

Contact Us screen displays.

Call Us:

Available 24/7 for your assistance. Click **View Contact** to see the details.

Email:

Drop us an email at **nriservices@idfcfirstbank.com** for any queries. Click **Write to us to** compose your email.

Request a Callback:

Can't reach us? Request a call, and we'll get back to you instantly.
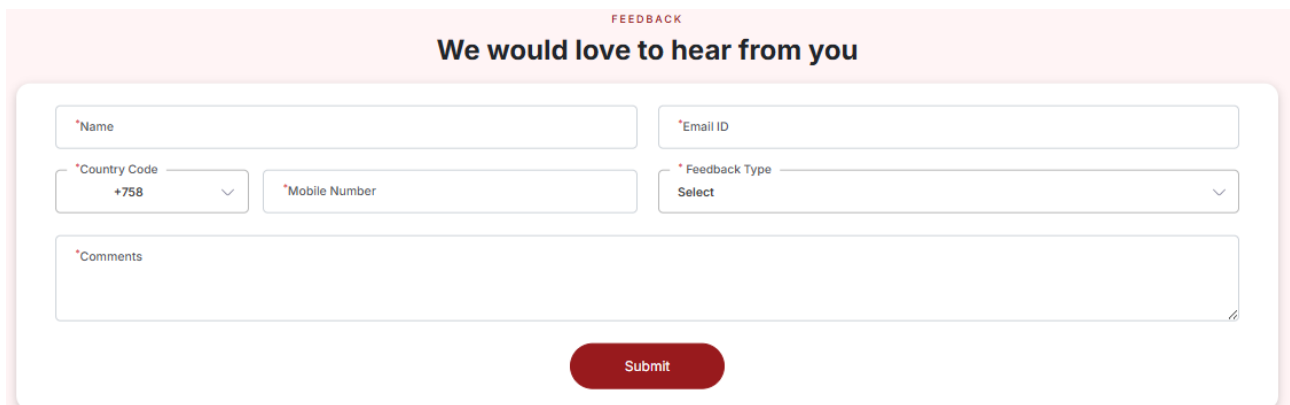
Feedback:

Have suggestions or feedback? Share your thoughts by clicking **Write to us**.

2.3.3 Feedback

Step 1   Click the **Feedback** option to access.

Feedback screen displays

Step 2   ***Name:** Enter the name in the textbox.

Step 3   ***Email ID:** Enter the Email ID in the textbox.

Step 4   ***Country Code:** Select the desired country code from the drop-down.

Step 5   ***Mobile Number:** Enter the mobile number in the textbox.

Step 6   ***Feedback Type:** Select the desired feedback from the drop-down.

Step 7   ***Comment:** Enter the comment in the textbox.
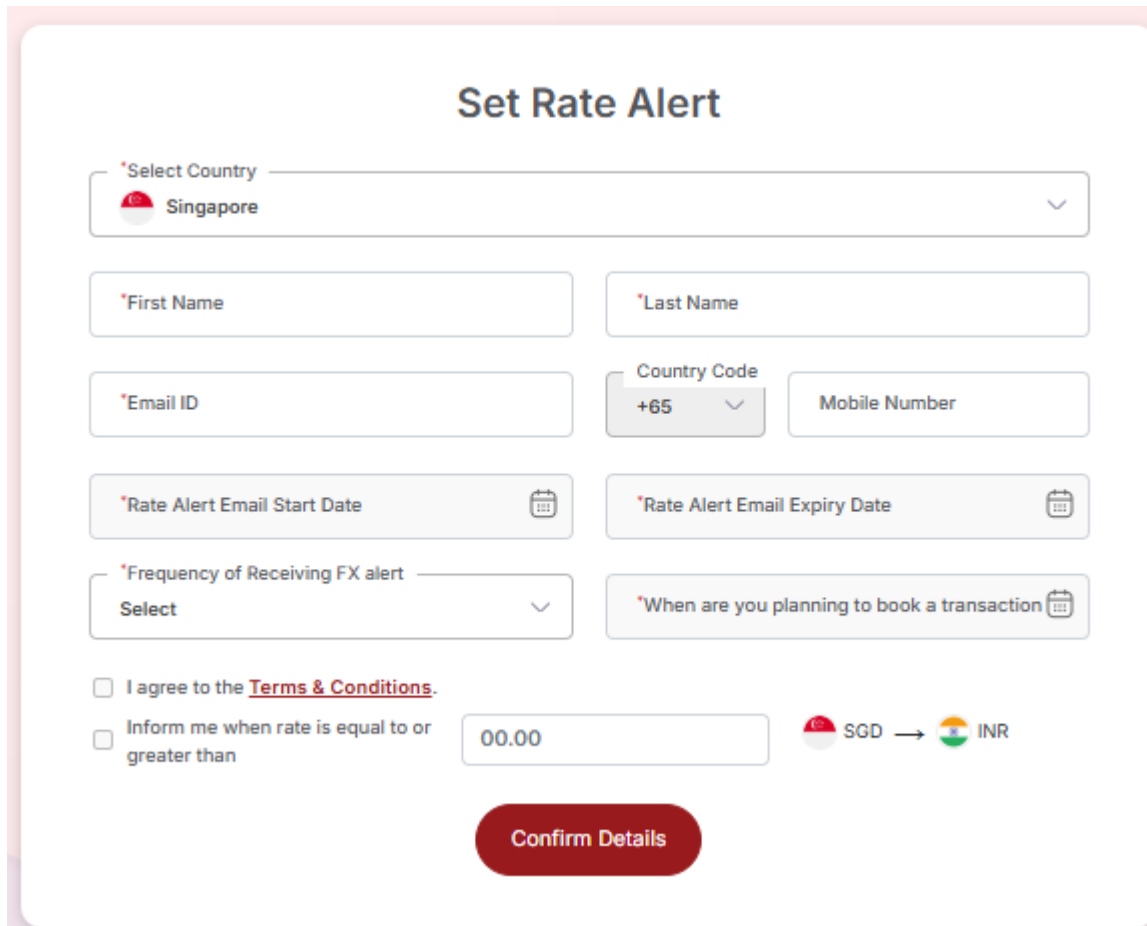
Step 8   Click the **Submit** button to send your feedback.
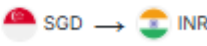
2.3.4 Set rate Alert

To Set an alert follow the steps below.

Step 1   Click on the **Set rate alert** button located in the top-right corner.

Set rate alert screen display.

Step 1   *Select country:** Select the desired country from the drop-down.

Step 2   *First Name:** Enter the first name in the textbox.

Step 3   *Last Name:** Enter the last name in the textbox.

Step 4   *Email ID:** Enter the Email ID in the textbox.

Step 5   *Country Code:** Select the desired country code from the drop-down.

Step 6   *Mobile Number:** Enter the mobile number in the textbox.

Step 7   *Rate Alert Email Start Date**: Click the calendar icon to select the rate alert email start date.

Step 8   *Rate Alert Email Expiry Date**: Click the calendar icon to select the rate alert email expiry date.

Step 9   *Frequency of Receiving FX Alert**: Select the desired frequency of receiving FX alert from the drop-down.

Step 10   *When are you planning to book a transaction:** Click the calendar icon to select the planning to book transaction.

Step 11   Click the **Terms & Conditions** checkbox.

Step 12   Enter the desired rate in the text box

Step 13   Click the **Confirm Details** to add in the record.

2.4 Quick links

Access useful tools and features like offers, opening an account with IDFC Bank, sending money abroad, and getting advice on smart wire transfers.
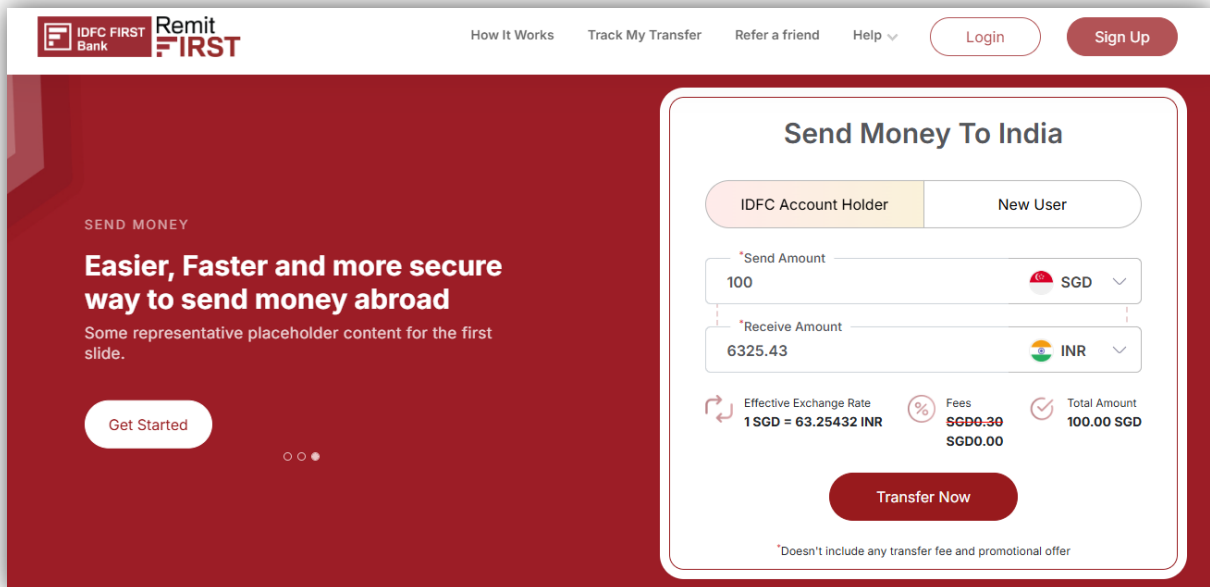
2.5 Legal

Review important policies, including the cookie policy, privacy policy, terms & conditions, and disclaimers.

3. Login

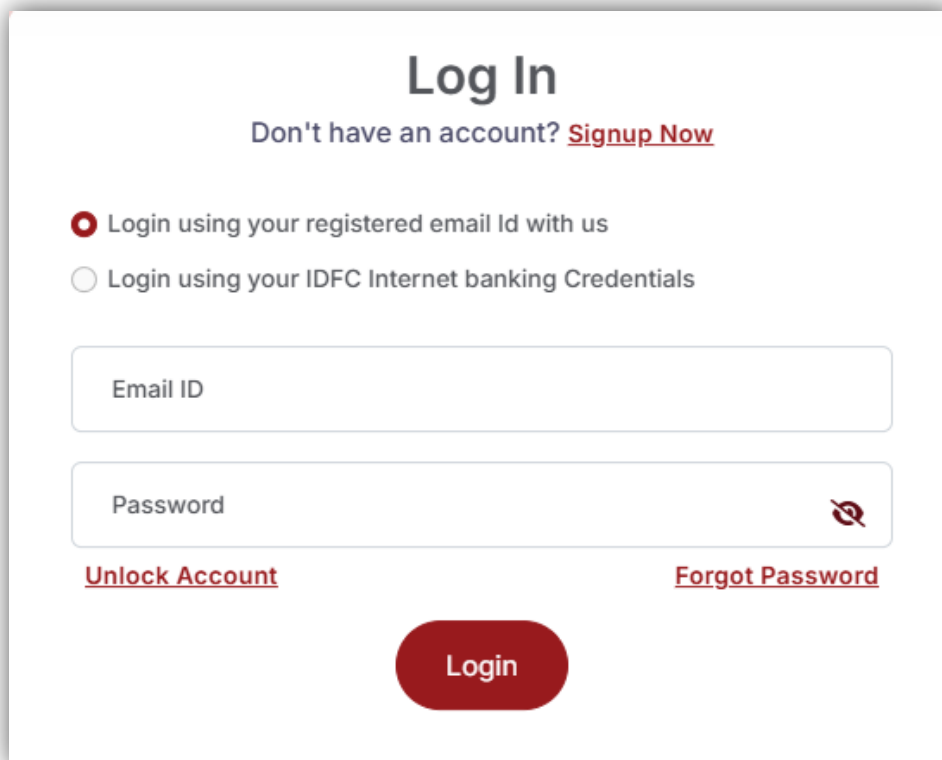A login is a process that allows you to access a website by entering their credentials,

To Login into the IDFC RemitFirst, follow the steps below:

Click on the **login** button

The login option displays.

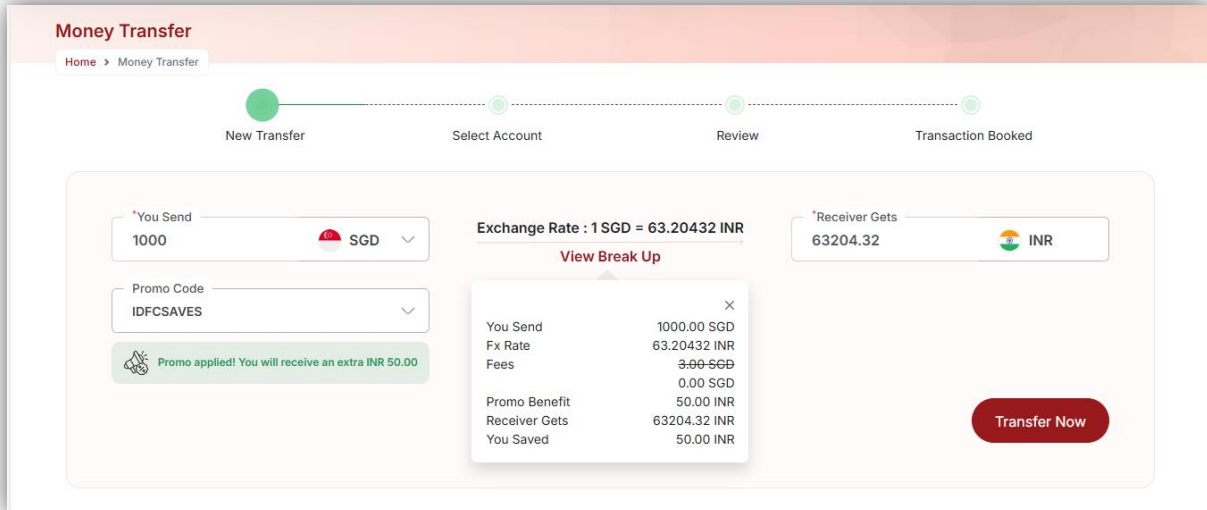If you already have login credentials, follow the steps below to log in.

Step 1 Select Your Login Option

Step 2 **Login using your registered email ID** with us (this is selected by default). *OR*

Login using your IDFC Internet Banking Credentials (click the second option if you want to use these credentials).

Step 3 **Email address:** Enter the email address in the text box.

Step 4 **Password**: Enter the password in the text box.

Step 5 Click the **Login** button to continue.

Now you are login into IDFC RemitFirst site.

4. Money Transfer

Money Transfer refers to the process of electronically moving funds from one person or entity to another.

To money transfer, follow the steps below:

 **Step 1**   Enter the sending amount in the desired currency.

Apply the promo code if you have one to receive additional benefits or savings on the transaction.

The receiving amount is calculated based on the current exchange rate, and the breakup shows detailed charges and benefits.

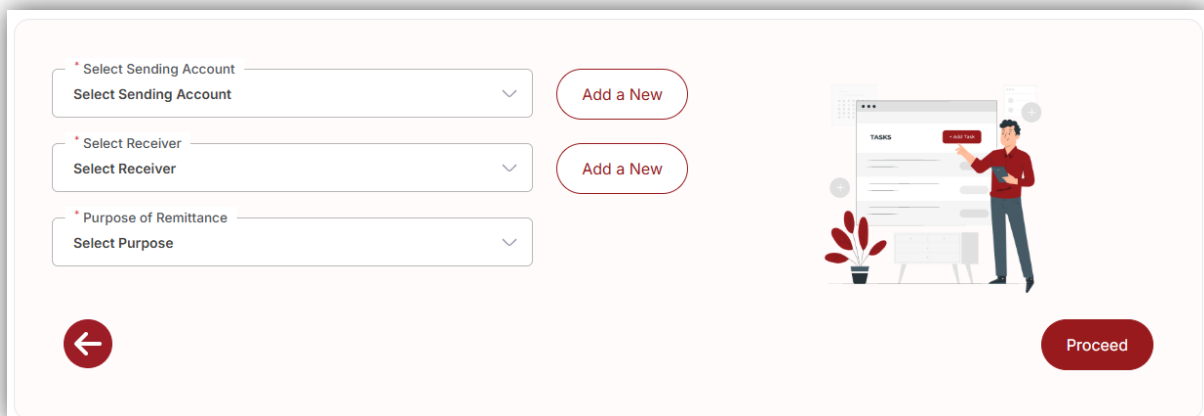**Step 2**   Click on the **Transfer Now** button.

The Screen displays.

The transaction uses RemitFirst as the remittance partner. Review the details carefully.
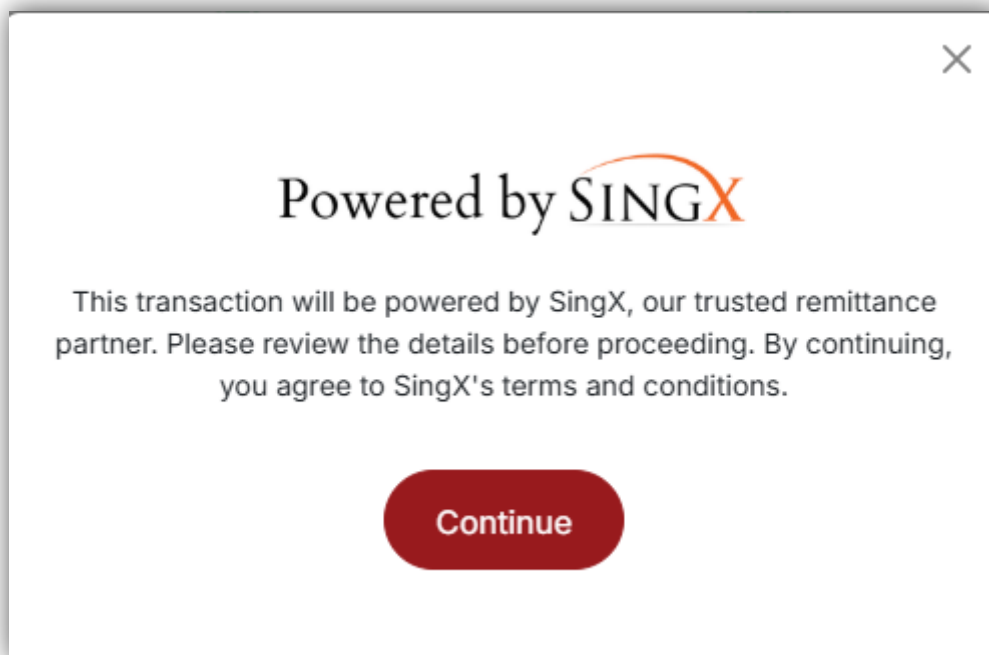
Step 3   Click **Continue** to agree to the terms and proceed.

Select Account screen displays.

Step 4   ***Select Sending Account:** Select the desired sending account from the drop-down.
Step 5   ***Select Receive:** Select the desired receiving account from the drop-down.
Step 6   ***Purpose of Remittance:** Select the desired purpose from the drop-down.
Step 7   Click the **Proceed** to continue.

The **Review** displays.

Review the details and confirm the same.

Step 8   Tick on the **Terms & Conditions.**
Step 9   Click on the **Transfer Now** button.

Transaction booked successfully and displays.

The QR code ensures easy and accurate payment processing.
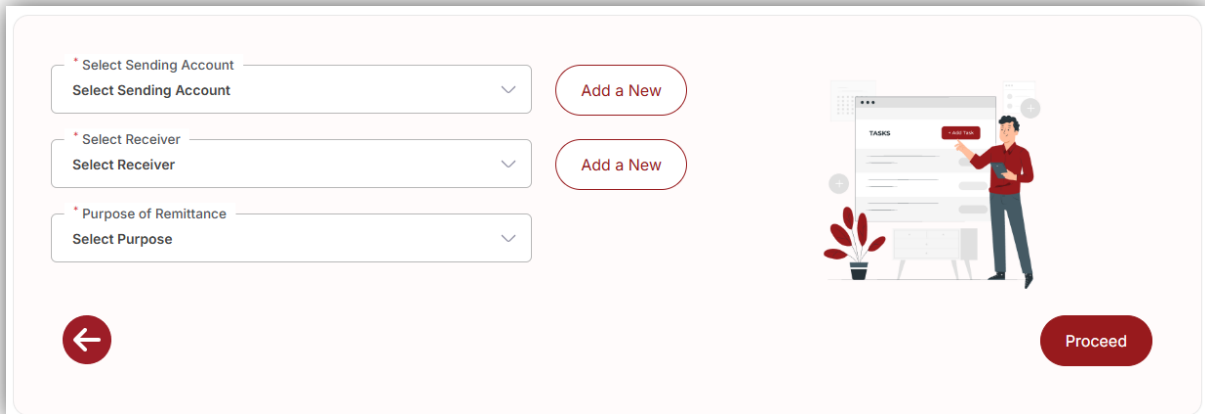
5. Add Sender

Add Sender refers to the process of entering or saving the details of the person or entity who will be sending money in a money transfer system. This step is crucial for ensuring that the transaction is correctly initiated and routed.

To add a sender, follow the steps below.

Step 1 Click the **Add New Sending account** button.

The **Add Sender Account** screen displays.

Step 2   *Account Holder Name:** Enter the account holder's name in the textbox.

Step 3   *Bank Name:** Select the desired bank name from the drop-down.

Step 4   *Bank Sort Code:** Enter the bank sort code in the textbox.

Step 5   *Account Number:** Enter the account number in the textbox.

Step 6   *Confirm Account Number:** Renter the account number in the textbox.

Step 7   Click on the **Confirm** to continue.

The **Sender added** screen displays
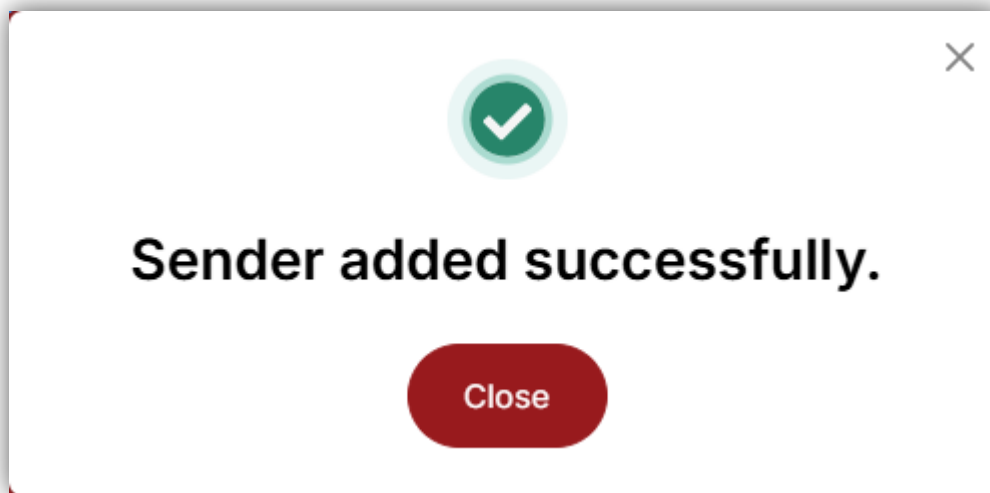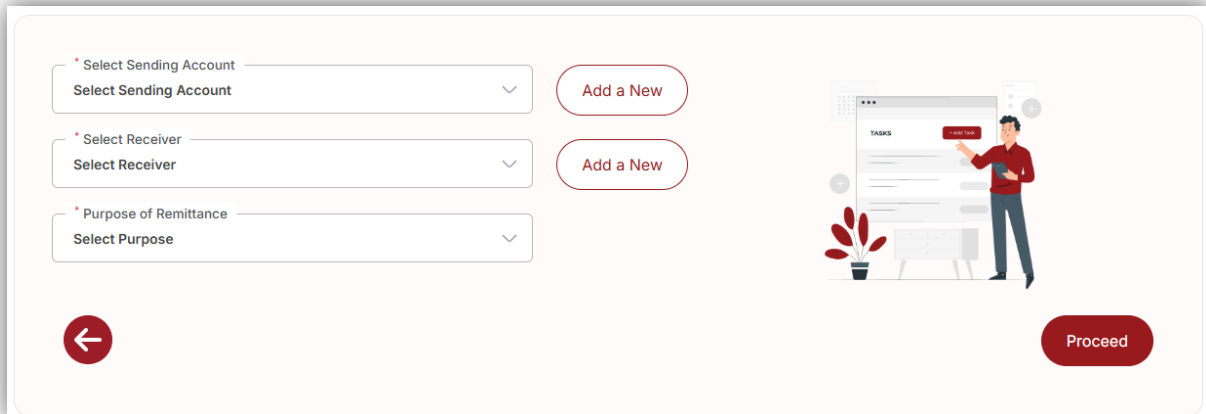
Sender details added successfully.
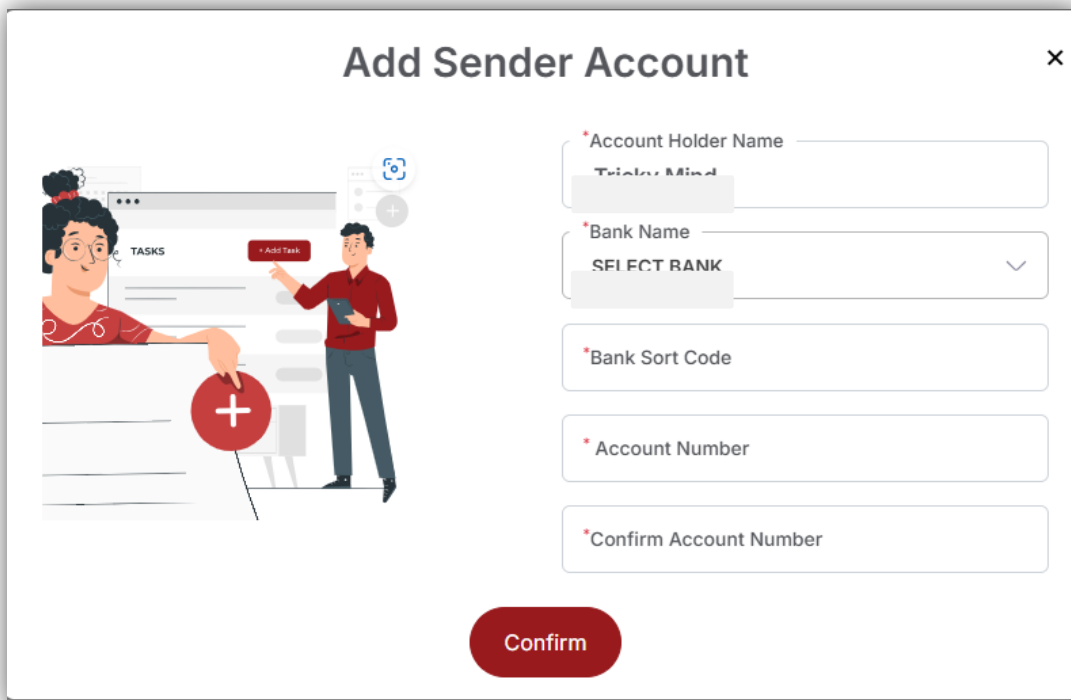
6. Add Receiver

Add Receiver refers to the process of entering or saving the details of the person or entity who will receive money in a money transfer system. This step ensures that funds are sent accurately and securely. You can add a new recipient while sending the money.

To add a new recipient, follow the steps below:

Step 1   Click on the **Add a New** button and select receiver.

The Add Recipient screen displays.

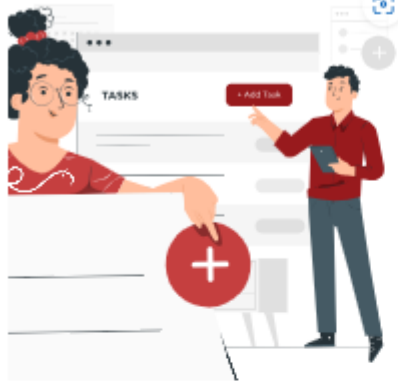|	
Step 2	*__Email__: Enter the email address in the textbox.
Step 3	*__Purpose:__ Select the desired purpose from the drop-down.
Step 4	*__Bank Name:__ Select the desired bank name from the drop-down.
Step 5	*__IFSC code:__ Enter the IFSC code in the textbox.
Step 8	*__Account Number:__ Enter the account number in the textbox.
Step 9	*__Confirm Account Number:__ Renter the account number in the textbox.
Step 6	*__First Name:__ Enter the First name in the textbox.
Step 7	*__Last Name:__ Enter the Last name in the textbox.
Step 8	*__Beneficiary Name:__ Enter the beneficiary's name in the textbox.
Step 9	*__Account Type:__ Select the desired account type from the drop-down.
Step 10	*__Relationship:__ Select the desired relationship from the drop-down.

Step 11   *Receiver Type:** Select the desired receiver type from the drop-down.

Step 12   Click on the **Confirm** to continue.

Receiver data add successfully
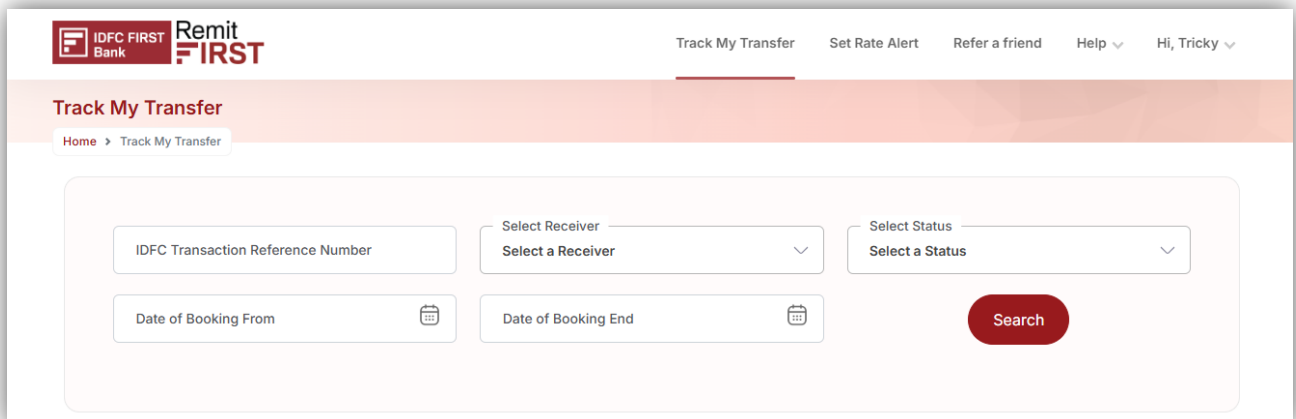
7. Track My Transaction

Track My Transaction allows you to monitor the status of their money transfers in real-time. This feature provides transparency and helps ensure that funds reach the intended recipient securely and on time.

To track transactions, follow the steps below.

     Step 1   Click on the **Track My Transaction** button located in the top-right corner.

Track my transaction screen displays.

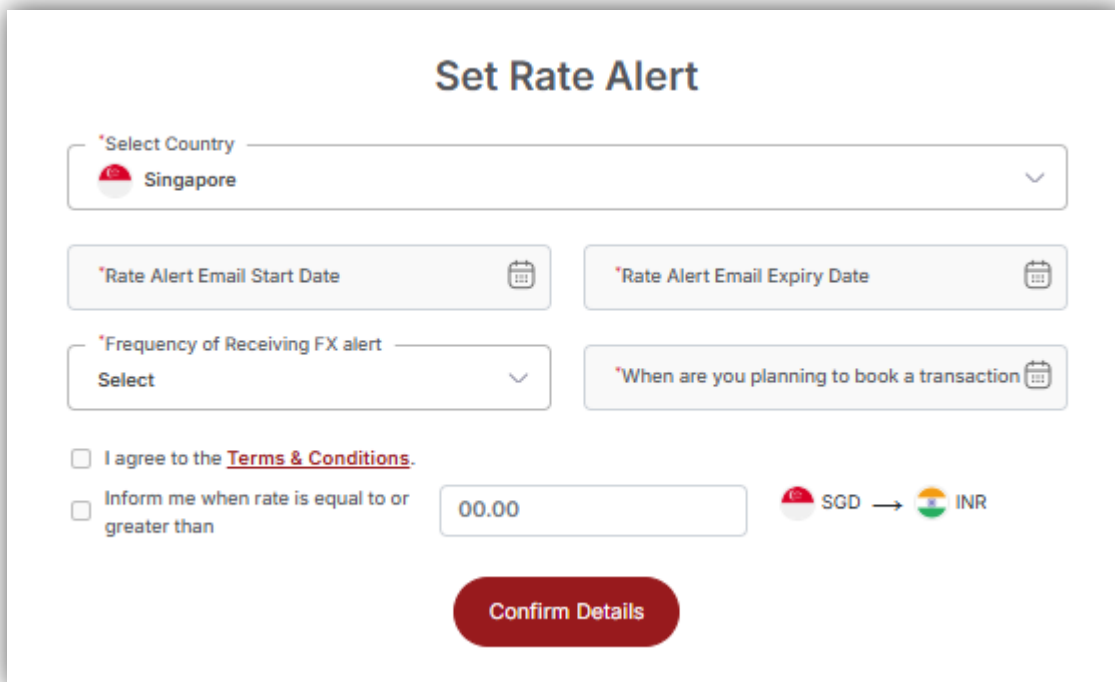|		
Step 2	**IDFC Transaction Reference Number:** Enter the reference number in the textbox.	
Step 3	**Select Receiver:** Select the desired receiver from the drop-down.	
Step 4	**Select Status:** Select the desired status from the drop-down.	
Step 5	**Date of Booking From:** Click the calendar icon to select the booking date.	
Step 6	**Date of Booking End:** Click the calendar icon to select the end booking date.	
Step 7	Click on the **Search** button to continue.	

Transaction Screen displays.

8. Set Rate Alert

The rate, such as currency exchange, and specify the desired range and timeframe. Once configured, you'll receive automatic email notifications whenever the rate meets your criteria within the set period, ensuring you stay updated without constant monitoring.

To Set an alert follow the steps below.

> **Step 14**   Click on the **Set rate alert** button located in the top-right corner.

Set a alert screen display.

> **Step 15**   ***Select country:** Select the desired country from the drop-down.
>
> **Step 16**   ***Rate Alert Email Start Date**: Click the calendar icon to select the rate alert email start date.
>
> **Step 17**   ***Rate Alert Email Expiry Date**: Click the calendar icon to select the rate alert email expiry date.
>
> **Step 18**   ***Frequency of Receiving FX Alert**: Select the desired frequency of receiving FX alert from the drop-down.
>
> **Step 19**   ***When are you planning to book a transaction:** Click the calendar icon to select the planning to book transaction.
>
> **Step 20**   Click the **Terms & Conditions** checkbox.
>
> **Step 21**   Enter the desired rate in the text box
>
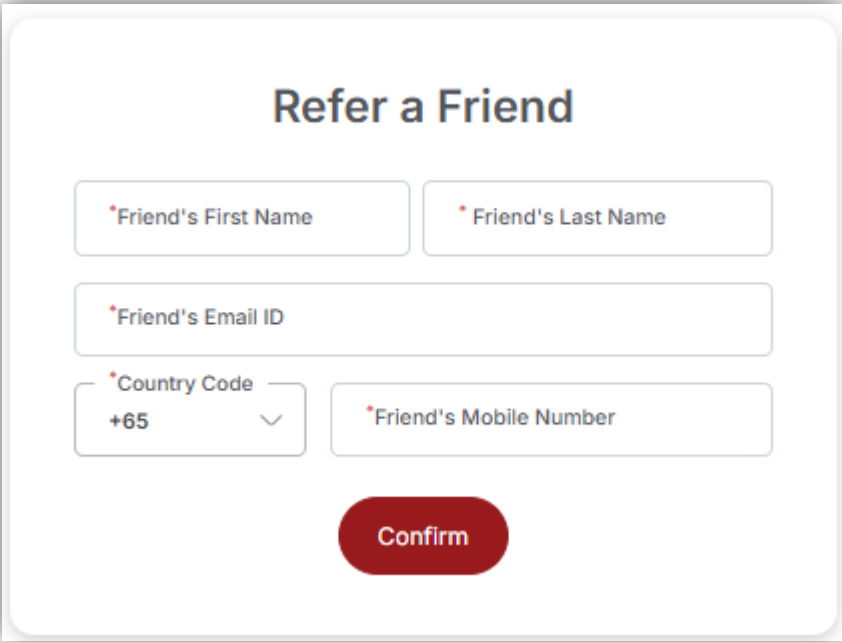> **Step 22**   Click the **Confirm Details** to add in the record.

9. Refer a Friend

Refer a Friend is a feature that allows you to invite others to use a service in exchange for rewards, such as discounts, cashback, or bonus credits.

To Refer a friend, follow the steps below

Step 1   Click on the **Refer a Friend** button located in the top-right corner.

Refer a friend screen display.

Step 2   *__Friend's First Name:__ Enter the friend's First name in the textbox.
Step 3   *__Friend's Last Name:__ Enter the friend's last name in the textbox.
Step 4   *__Friend's Email ID:__ Enter the friend's email ID in the textbox.
Step 5   *__Country Code:__ Select the desired country code from the drop-down.
Step 6   *__Friend Mobile Number:__ Enter the friend's mobile number in the textbox.
**Step 7**   Click on **Confirm** to add details.

10. Help

Help is a support feature that provides you with assistance regarding the service. It includes various resources to answer questions, resolve issues, and guide users through processes.

10.1 FAQ

An FAQ (Frequently Asked Questions) section provides concise answers to common questions users may have about a product, service, or topic. It helps streamline communication by addressing key concerns like setup processes, functionality, troubleshooting, or policies. FAQs are designed to improve user experience by offering quick and accessible solutions without the need for direct support.

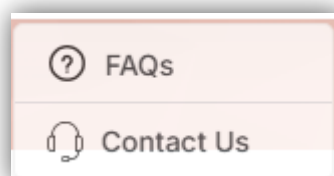**Step 1**   Click on the **Help** menu located in the top-right corner.
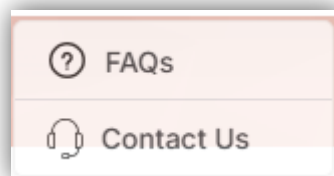
Step 1   Click the **Help** icon with your initials in the upper right corner.

Step 2   Click the **FAQ** option to access.

You can refer to the frequently Ask Question with their answer.

10.2 Contact Us

Step 2   Click on the **Help** menu located in the top bar corner.

Step 1   Click the **Help** icon with your initials in the upper right corner.

Step 2   Click the **Contact Us** option to access.

Contact us screen displays.

CONNECT WITH US
Feel Free to Contact Us

Call us
We are available 24/7

[View Contact]

Email
Just drop us an mail
nriservices@idfcfirstbank.com

[Write to us]

Request a callback
We'll get back to you instantly.

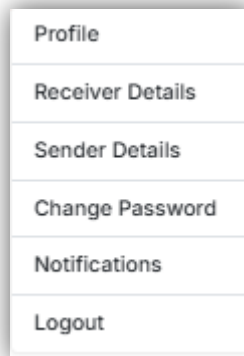[Request a Call]

Feedback
Have any Feedback for us?

[Write to us]

11.   Hi User

Several hi User options are available to access your profile easily, receiver details, sender details password change, notification, and more.

To explore the User options, follow the steps below:

Profile

Receiver Details

Sender Details

Change Password

Notifications

Logout

Step 1   Click on the **Hi User** icon with your initials in the upper right corner.

Step 2   Click on the profile option to access.

11.1   Profile

To access the Profile option, follow the steps below:

Profile

Receiver Details

Sender Details

Change Password

Notifications

Logout
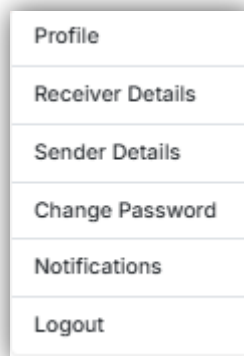
Step 2   Click the **Hi User (You will see your name in place of User)** icon with your initials in the upper right corner. For Ex: Hi Tricky
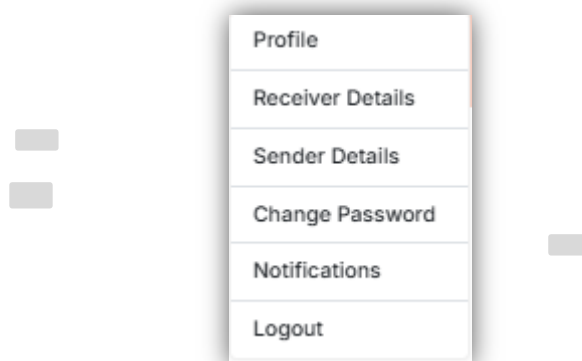
Step 3   Click the **Profile** option.

The profile screen displays.

Profile details cannot be modified as they are predefined.

11.2   Receiver Details

To access the receiver details, follow the steps below:

Step 1   Click the **Hi User** icon with your initials in the upper right corner.
Step 2   Click the **receiver Details** option.

My receiver screen displays.

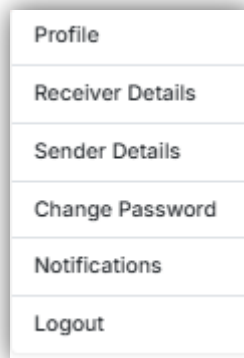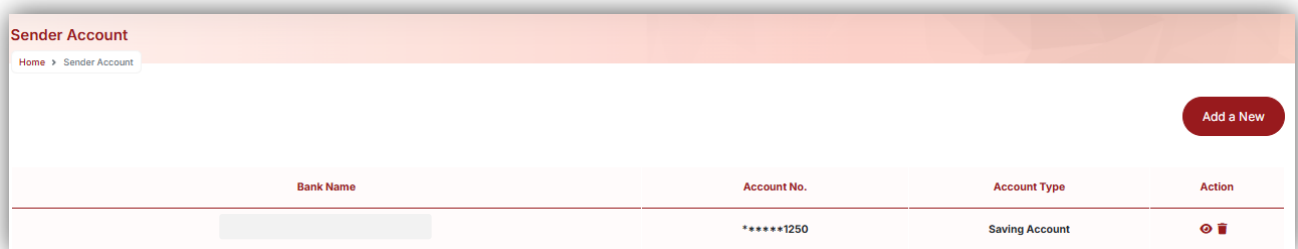You can add new recipients by clicking the **Add New** button.

11.3 Sender Details

To access the Sender details, follow the steps below:

Profile	
Receiver Details	
Sender Details	
Change Password	
Notifications	
Logout	

Step 1   Click the **Hi User** icon with your initials in the upper right corner.

Step 2   Click the **sender Details** option.

My sender screen displays.

Sender Account

Home › Sender Account

Add a New

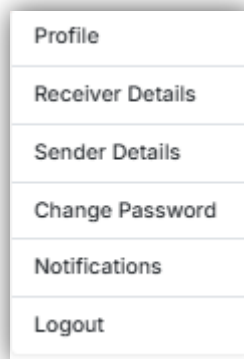| Bank Name	Account No.	Account Type	Action
	*****1250	Saving Account	👁 🗑

You can add new Sender by clicking the **Add New** button.

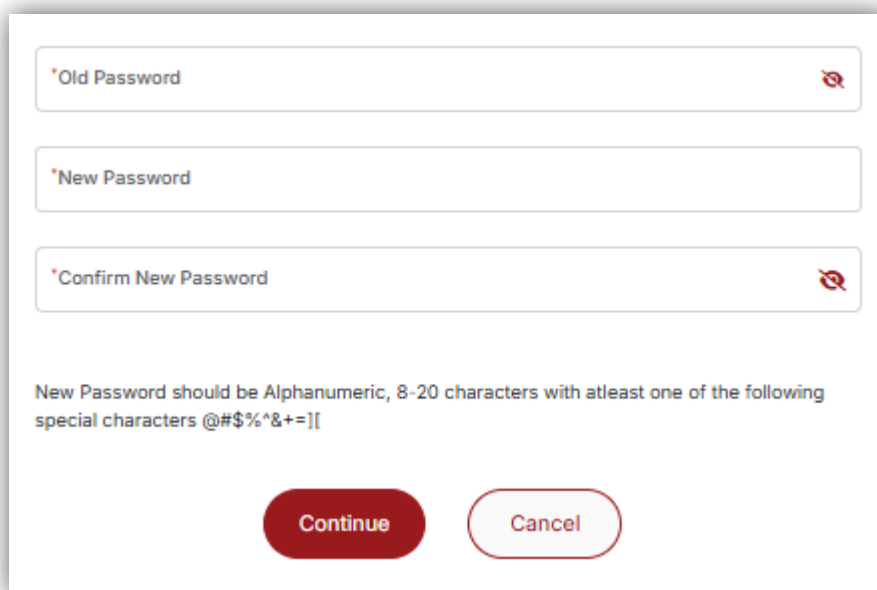## 11.4 Change Password

To change the password, follow the steps below:

Step 1   Click the **Profile** icon in the upper right corner.

Step 2   Click the **Change Password** option to access.

The Change Password screen displays.

Step 3   **Current Password:** Enter the current password in the textbox.

Step 4   **Choose a New Password**: Enter the new password in the textbox.

Step 5   **Confirm New Password**: Confirm the new password.

Step 6   Click the **Continue** button

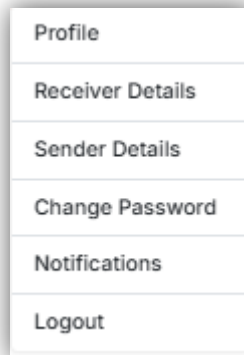You receive an OTP on your email address.

Step 7   Enter the OTP in the textbox.

Step 8   Click the **Change Password** button.
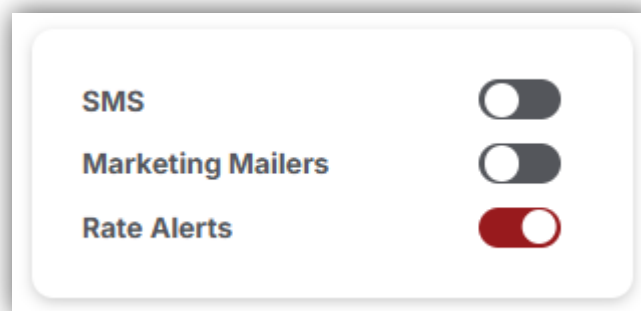
The Password is now modified.

11.5   Notification

To change the Notification, follow the steps below:

Profile
Receiver Details
Sender Details
Change Password
Notifications
Logout

Step 1	Click the **Hi, User** icon in the upper right corner.
Step 2	Click the **Notification** option to access.

The Notification screen displays.

SMS	
Marketing Mailers	
Rate Alerts	

Click the desired toggle switch to turn on notifications.

11.6   Logout

To log out, click the Logout button.

Profile
Receiver Details
Sender Details
Change Password
Notifications
Logout
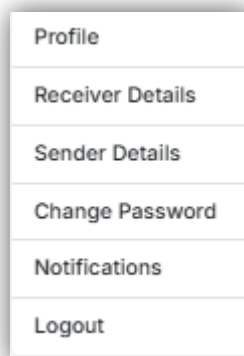
You are now logged out of the system.