USER MANUAL

SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)

MODULE: CONSULTANT MANAGEMENT (FIRST TIME LOGIN) GROUP: CONSULTANT

AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
DOCUMENT DATE	:	24/03/2025
DOCUMENT VERSION	:	1.0

DOCUMENT DESCRIPTION

This document is prepared to explain how to use the FCS system. This user manual explains the functions and step by step how to use the system completely to the users involved.

Document Information	
Project Name	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
Document Name	User Manual
Document Reference No	ZANKO/FIMM/UM/v0.1
Property	Zanko Sdn Bhd
Document Date	24/03/2025

DOCUMENT CONTROL

Version History			
Version No	**Version Date**	**Summary**	**Writer**
0.1	23/03/2025	First draft document	Wan Arissa Insyirah binti Wan Aniff
1.0	24/03/2025	Final Document	Wan Arissa Insyirah binti Wan Aniff

LIST OF TABLES

ACRONYM

ACRONYM	DESCRIPTION
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance

Table 1: Acronym Table

ABBREVIATIONS ROLE

Abbreviation	DESCRIPTION
SYS	SYSTEM
C-CLRK	Consultant Applicant
C-CON	Consultant
C-APP	Consultant Applicant

Table 2: Abbreviation Role Table

CHAPTER 1: INTRODUCTION

The **FCS System User Manual** is designed to provide users with a comprehensive guide to effectively utilizing the **FCS system**. This manual serves as a reference document to help users understand the system's functionalities, features, and processes to ensure smooth operation and efficient task completion.

By following the instructions in this manual, users will be able to navigate the system with ease, perform necessary actions, and troubleshoot common issues. The manual is structured to accommodate both new and existing users, offering clear step-by-step guidance for system access and usage.

Purpose

The purpose of this manual is to equip users with the essential knowledge required to maximize the benefits of the **FCS system**. It provides:

- **A detailed overview of the system's functions and capabilities** to help users understand its key features.

- **Step-by-step instructions** on accessing and operating the system efficiently.
- **Guidelines on alternative modes of operation and contingencies** in case of system issues or errors.

- **Best practices and recommendations** for optimal system use.

This manual ensures that users can confidently navigate the system while maintaining security, accuracy, and efficiency in their tasks.

Contact Information

If users require further assistance or encounter any issues while using the **FCS system**, they can contact the **Federation of Investment Managers Malaysia (FIMM)** for support.

Support Contact Details:

Phone: [Insert Contact Number]
Email: [Insert Support Email]
Website: [Insert FIMM Website]

CHAPTER 2: GENERAL SYSTEM INSTRUCTION

2.1 User Log in

The FCS system application is accessible only to registered users. Each user will be provided with a unique User ID and password to log in securely.

To access the system, users must navigate to the **main login page** ([Insert URL]) and enter their credentials. For first-time users, an initial login setup may be required to activate their accounts.

For security reasons:

- Users should keep their login credentials confidential.

- Passwords should be changed periodically to enhance security.

- In case of forgotten credentials, users can use the **"Forgot Password?"** option to reset their password.

Steps to Open the FCS System Website:

1. **Launch your web browser** (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)
2. **Enter the FCS System URL** in the address bar and press **Enter**.
3. The **login page** will appear, allowing users to enter their credentials.

2.1.1 Log in

Access the Login Page

1. On the homepage, locate the 'Log in' [Log In] button and click it.
2. In the **User ID** field, enter your registered **User ID**.
3. In the **Password** field, enter your **password**.
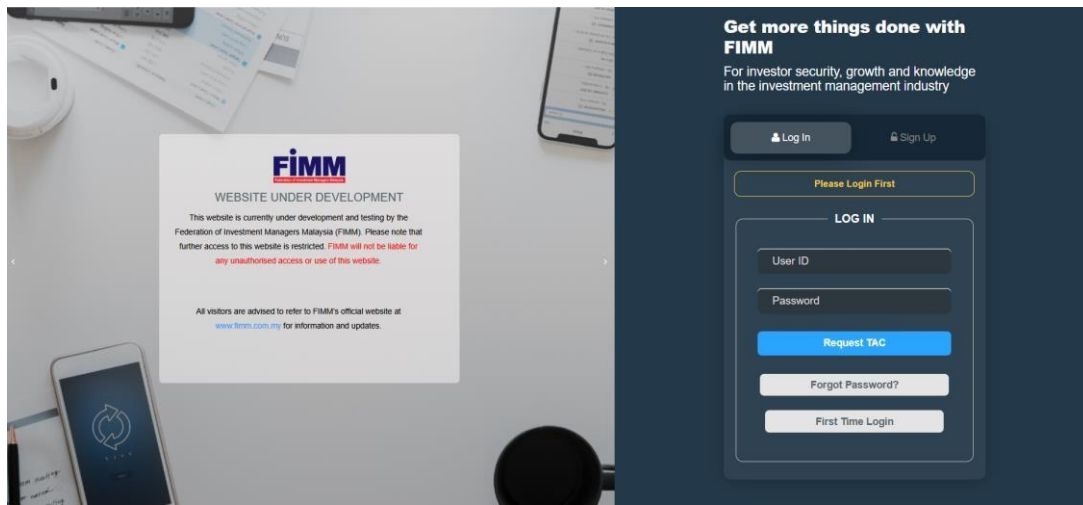
Diagram 1: FCS Homepage

Display **Enter Your Credentials**

4. System will show sign in page, User need to insert this item
    - User ID
    - Password
    - TAC

Diagram 2: Log in Display

Successful Login

5. Click [Login] button and the system will be redirected to the FCS System dashboard.
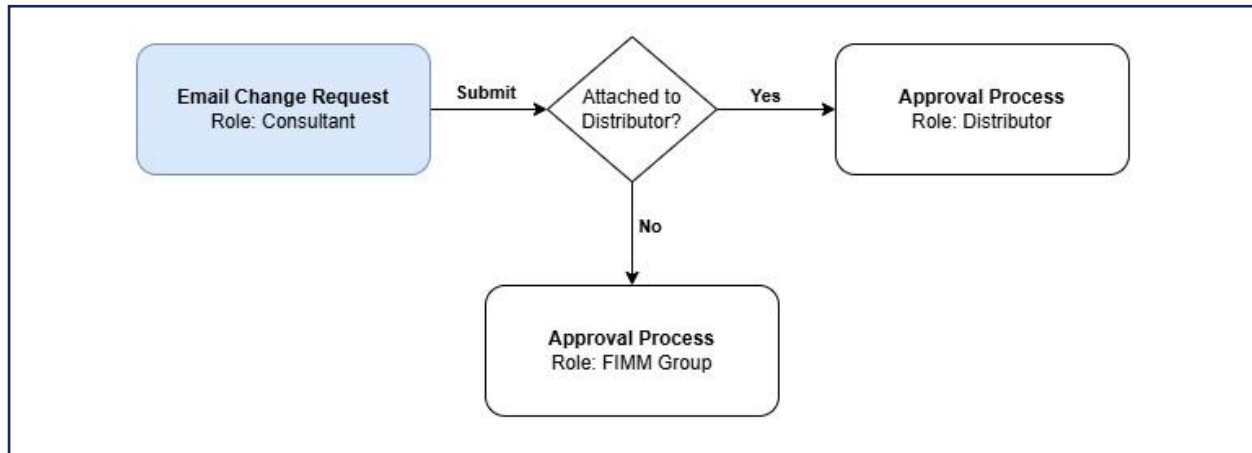
3.9   First Time Login

3.9.1 First Time Login by Consultant

3.9.1.1 Process Flow

3.9.1.2   Manual Steps

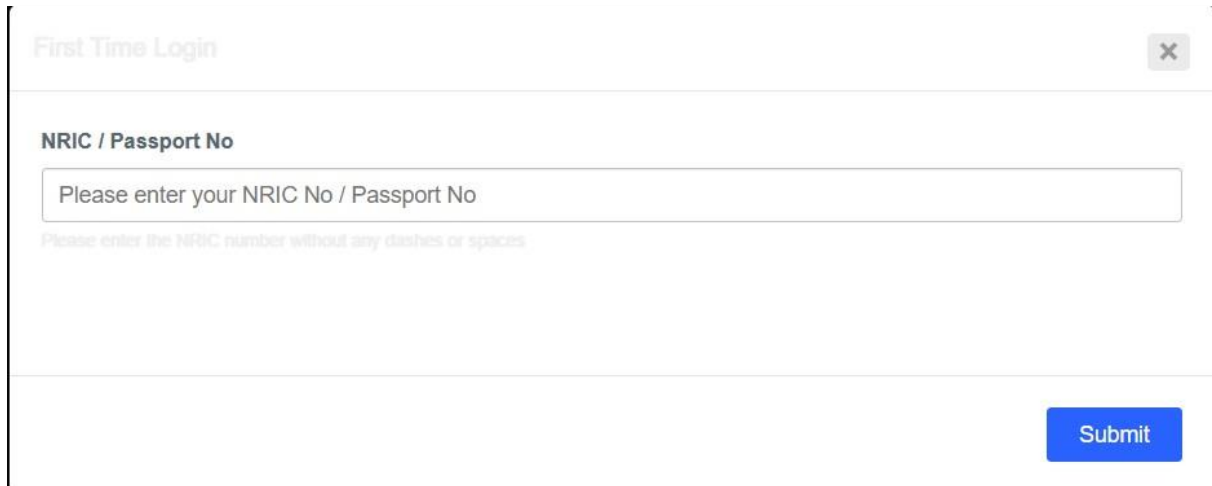1.   On the Log In Page, locate the 'First Time Login' button and click it.
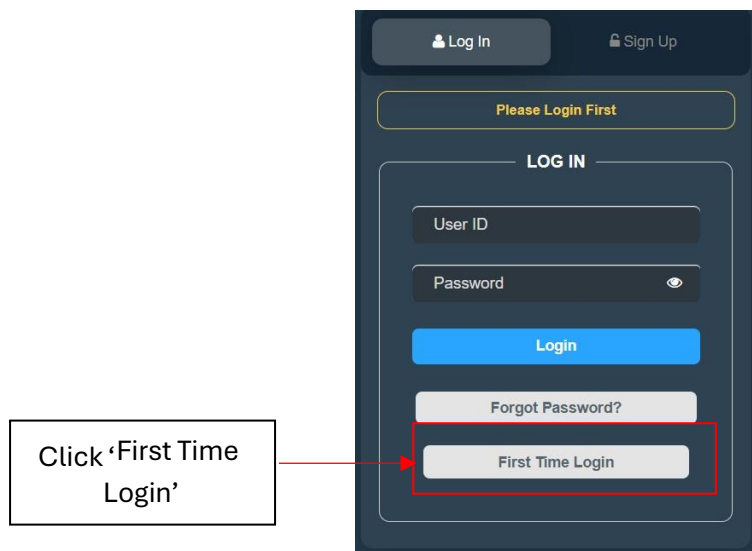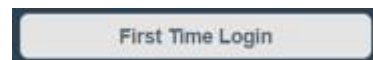
Diagram 260: First Time Log In Button

2. System will display popup box to enter the NRIC / Passport No.

Diagram 261: First Time Log In Pop Up Box

3. User need to fill in detail in required fields:

   • NRIC No (Malaysian)

   • Passport No. (Non-Malaysian)

4. User click [Submit]

   i. If the entered NRIC / Passport No does not exist, system will prompt a message "User does not exist. Please sign up before you attempting to sign
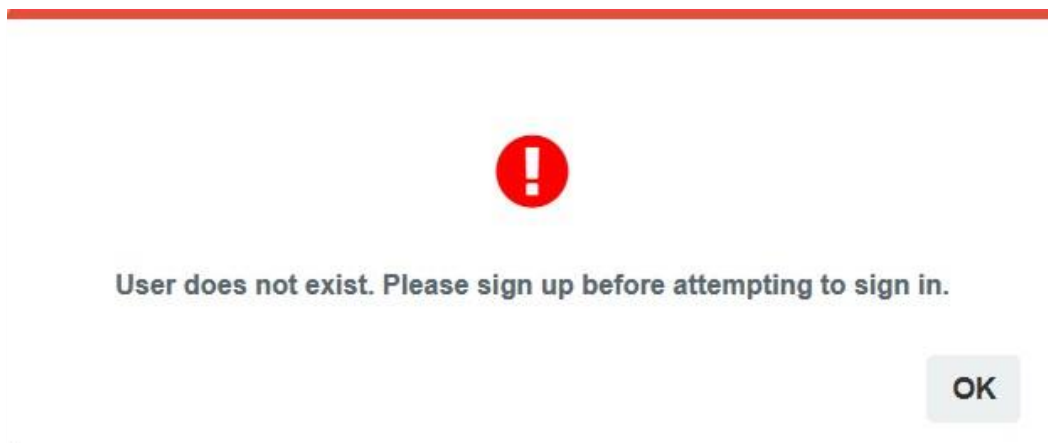
   in."

Diagram 262: Prompt Message For Non Exist User

ii.   If the entered NRIC / Passport No exists, system will display email address field to be filled in.

Diagram 263: Email Address For First Time Login

5.   User fill in the email address and click **Submit** .

   i.   If the entered email address existed in consultant data, system will display a prompt message *"A verification link has been sent to <email address>. Please click the link provided to get started. If the email address is no longer in use, click new email address"* and send a verification link via email.
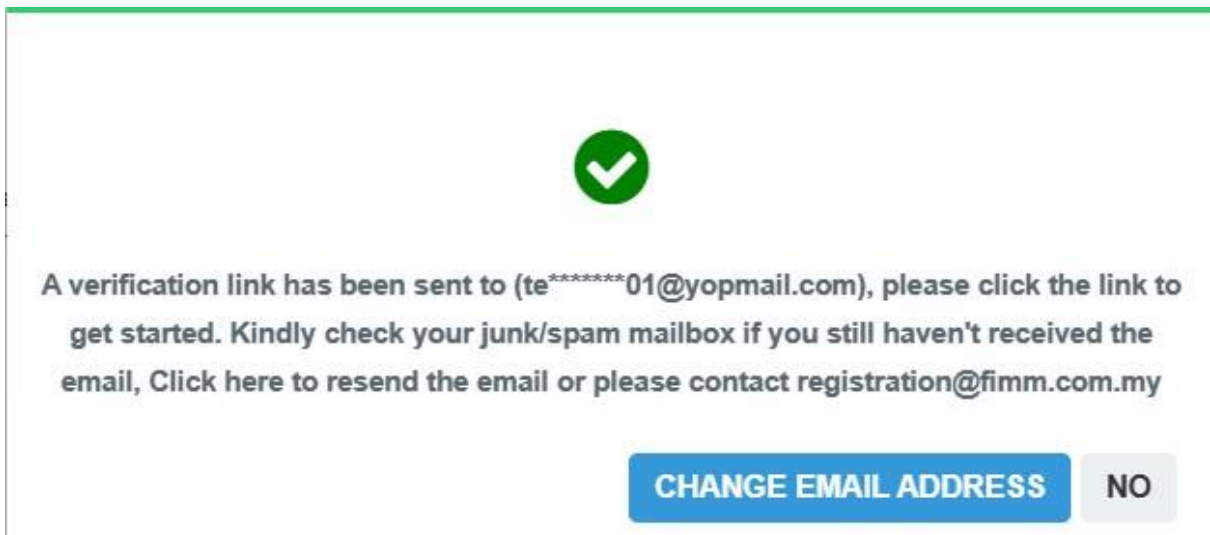

Diagram 264: Link for First Time Login

   a.   User need to check their email.

First Time Login

Hello Amirul Hafiz

Click (Here) to proceed create your password.
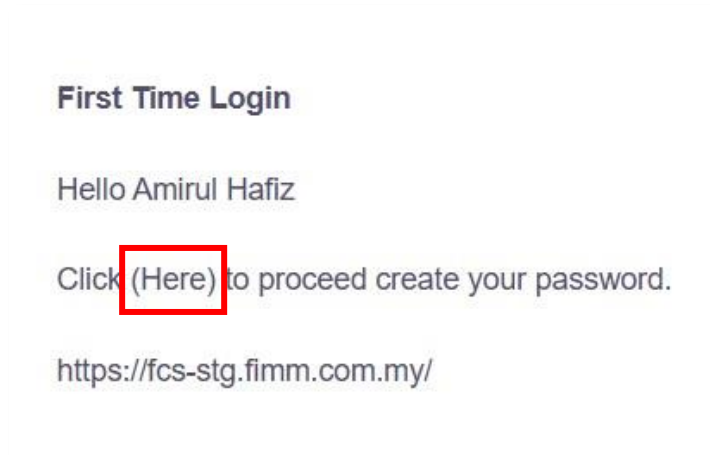
https://fcs-stg.fimm.com.my/

Diagram 265: First Time Log In Email

b.   Click '(Here)'. User will redirect to the reset password page.

c.   User need to fill in details in required fields:

•   Password
•   Confirm Password

Diagram 266: First Time Login Reset Password

d. Click **Submit**

e. User successfully reset the password and able to login.

ii.   If the entered email address does not exist in consultant data, system will prompt a message "We couldn't find a matching email address. Would you like to change your email?"
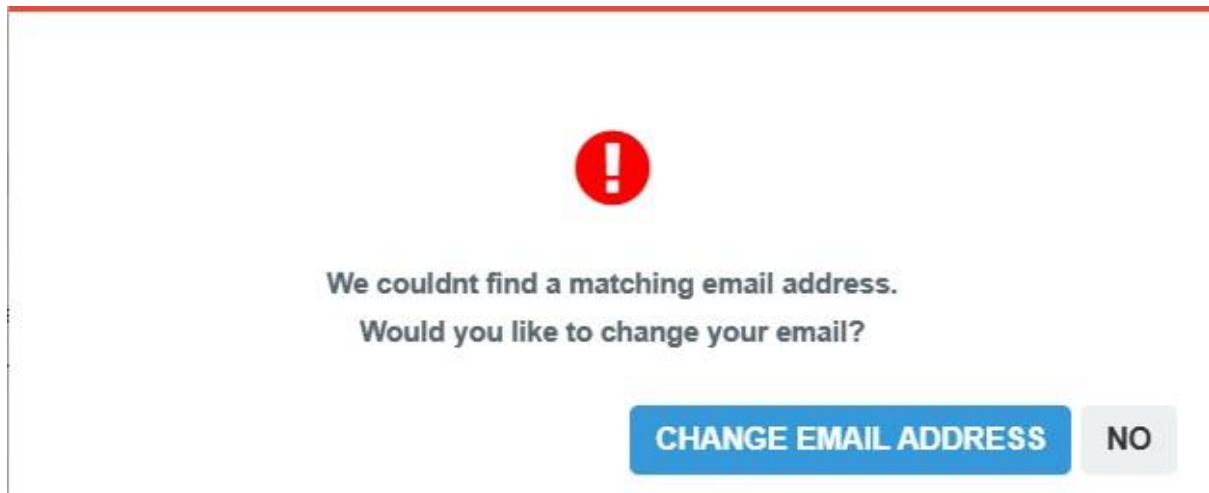

Diagram 267: Prompt Message for Non-Exist Email

iii.   If consultant click **CHANGE EMAIL ADDRESS** button, system will proceed to email change request process.

Email Change Request Process

1.   User click **CHANGE EMAIL ADDRESS**.

2.   System will display email change request form to fill in with details:
a.   NRIC / Passport No (Auto populate based on registered NRIC / Passport No)
b.   New Email Address
c.   Selfie (Note: User need to take a selfie with NRIC / Passport. Please ensure the picture and details are clear.)

Email Change Request   ✕

NRIC / Passport No

860707065678

New Email Address

Please enter your new Email

Selfie *Take a selfie with your NRIC/Passport. Please ensure the picture and details are clear

The screen capture will appear in this box.

📷

Submit

Diagram 268: Email Change Request form

3.   Consultant fills in the detail and click **Submit** button. System will send the application to Distributor or FIMM for approval process.