



# **USER MANUAL**

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

**MODULE: CONSULTANT MANAGEMENT  
(COMPLIANCE TAGGING)  
GROUP: FIMM**

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## 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.

<b>Document Information</b>	
<b>Project Name</b>	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
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## DOCUMENT CONTROL

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## ACRONYM

ACRONYM	DESCRIPTION
AAR	Alternate Authorized Representative
AMLCFT	Anti-Money Laundering/Combating the Financing of Terrorism
AMSF	Annual Membership Subscription Fee
AR	Authorized Representative
AUM	Asset Under Management
BOD	Board of Directors
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance
CEO	Chief Executive Officer
CFP	Certified Financial Planner
ChFC	Chartered Financial Consultant
CMSRL	Capital Market Services Representative License
CPD	Continuing Professional Development
CPRA	Corporate Private Retirement Scheme Adviser
CPRE	Computerized Private Retirement Scheme Examination
CSD	Corporate Services Division
CUTA	Corporate UTS Adviser
CUTE	Computerized Unit Trust Examination
DMS	Document Management Storage
FIMM	Federation of Investment Managers Malaysia
FMS	Funds Malaysia System
GM	General Manager

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ACRONYM	DESCRIPTION
HOD	Head of Department
ID	Industry Development
IFP	Islamic Financial Planner
IPRA	Institutional Private Retirement Scheme Adviser
ISD	Industry Services Division
IUTA	Institutional Unit Trust Scheme Adviser
KYC	Know Your Customer
LRA	Legal and Regulatory Affairs
MOF	Ministry of Finance
NAV	Net Asset Value
NRIC	National Registration Identity Card
OTP	One Time Password
PDS	Professional Development and Services
PRC	Private Retirement Scheme Consultant
PRP	Private Retirement Scheme Provider
PRS	Private Retirement Scheme
R&A	Research and Analytics
RD	Registration Department
RFP	Registered Financial Planner
RSD	Regulatory Services Division
SC	Security Commission Malaysia
SRFP	Shariah Registered Financial Planner

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<b>ACRONYM</b>	<b>DESCRIPTION</b>
SRS	System Requirement Specification
SD	Supervision Department
UML	Unified Modelling Language
UTC	Unit Trust Consultant
UTMC	Unit Trust Management Company
UTS	Unit Trust Scheme
OR	Official Receipt
CN	Credit Note
IDD	Integration Design Document

*Table 1: Acronym Table*

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## ABBREVIATIONS ROLE

<b>Abbreviation</b>	<b>DESCRIPTION</b>
F-RD	FIMM RD
F-HRD	RD Approver
F-GRSD	FIMM GM RSD
F-RDR	FIMM RD Reviewer

*Table 2: Abbreviation Role Table*

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## 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:

 **Email:** [itsupport@fimm.com.my](mailto:itsupport@fimm.com.my)

 **Website:** [www.fimm.com.my](http://www.fimm.com.my)

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## CHAPTER 2: GENERAL SYSTEM INSTRUCTION

### 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** (<https://fcs.fimm.com.my>) 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.

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## Log in

### Access the Login Page

1. On the homepage, locate the ‘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**.

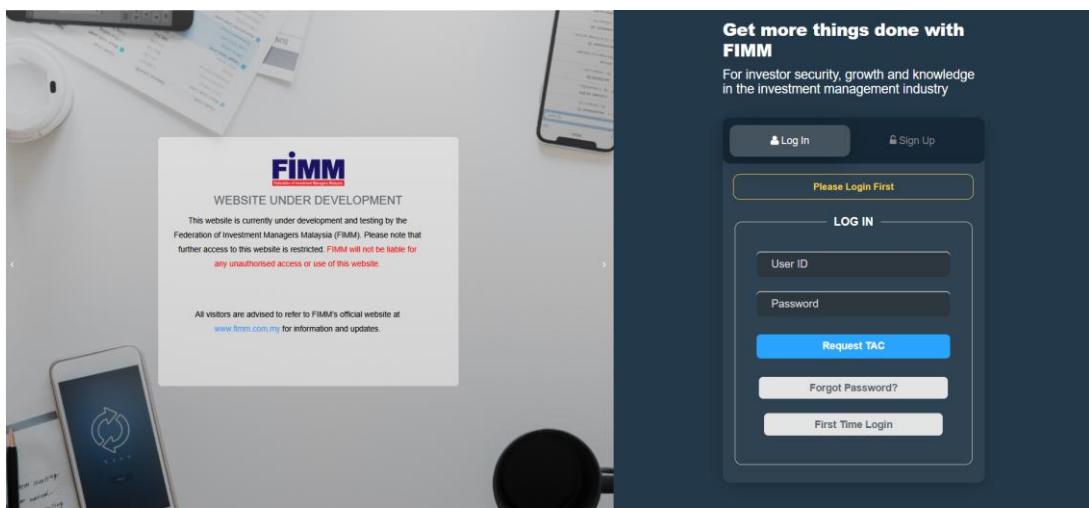


Diagram 1: FCS Homepage Display

### Enter Your Credentials

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

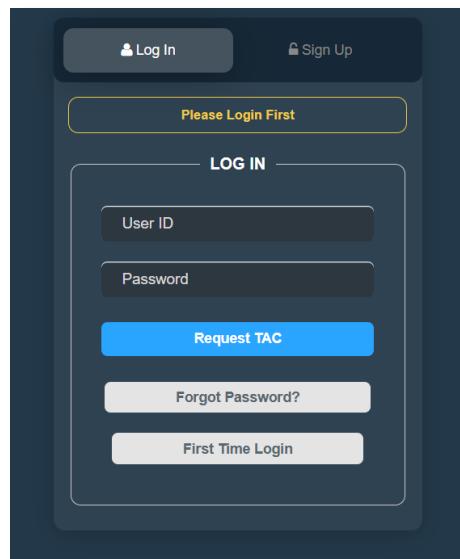


Diagram 2: Log in Display

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## Successful Login

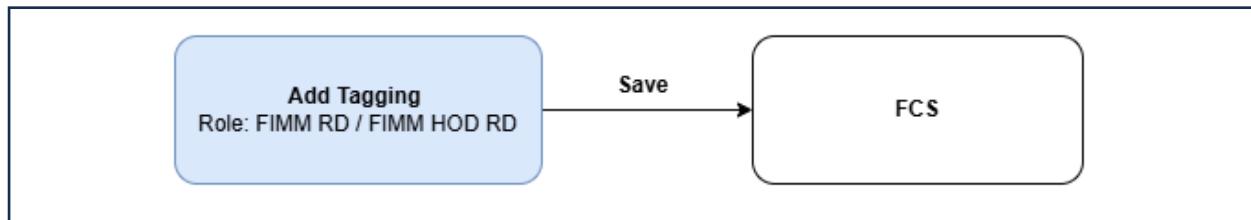
5. Click  button and the system will be redirected to the FCS System dashboard.

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### 3.1 Compliance Tagging

#### 3.1.1 Add Tagging to Consultants by FIMM RD / FIMM HOD RD

##### 3.1.1.1 Process Flow



##### 3.1.1.2 Manual Steps

Click menu 'Consultant'. System will display list of submenu for Consultant.

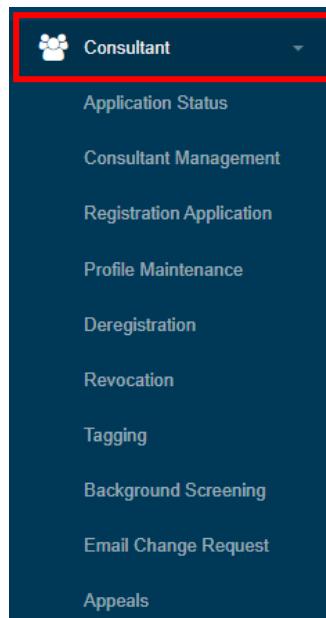


Diagram 3: Consultant Submenu for FIMM RD

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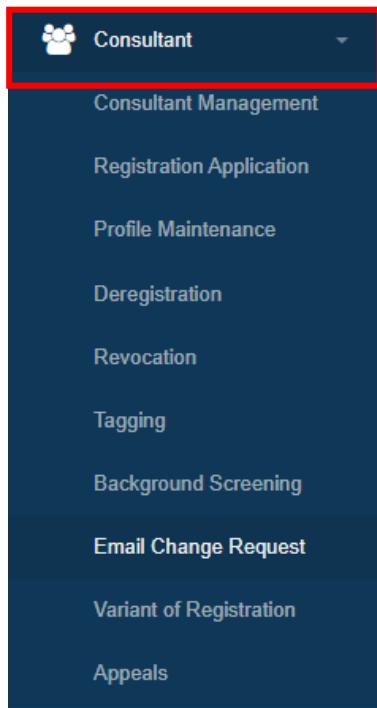


Diagram 4: Consultant Submenu for FIMM HOD RD

Click submenu 'Consultant Management'.

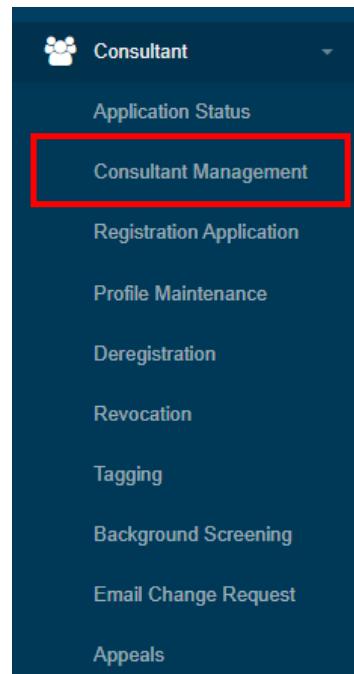


Diagram 5: Submenu 'Consultant Management' for FIMM RD

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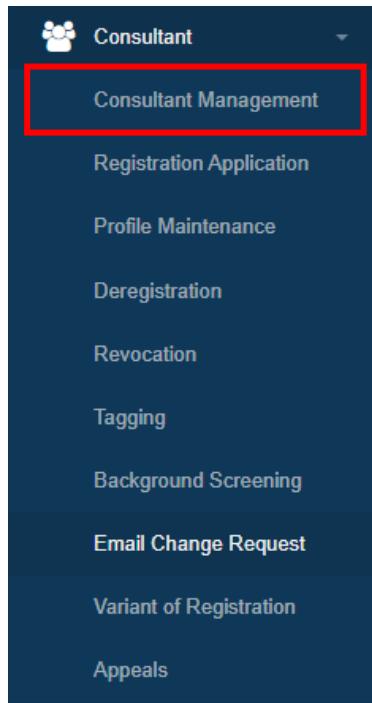


Diagram 6: Submenu 'Consultant Management' for FIMM HOD RD

System will display List of Consultant which contain these columns:

- i. No
- ii. Distributor Name
- iii. Consultant Name
- iv. NRIC/Passport No
- v. FIMM No
- vi. Scheme
- vii. Email
- viii. Phone No
- ix. Registration Status
- X. Action

NO	DISTRIBUTOR NAME	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	EMAIL	PHONE NO	REGISTRATION STATUS	ACTION
1	MENTARI BERHAD	Dania binti Rashid	960615015432	F02002010	PRS	daniaum@yopmail.com	+60142656821	Active	
2	MENTARI BERHAD	Hani Danial (W)	B22446689	F02002009	UTS	hanium@yopmail.com	+60142656821	Suspended	
3	HERITAGE WEALTH DISTRIBUTORS	Nandini Krishnan	850517055678	F02001998	PRS	nandinifat@yopmail.com	+60142656821	Active	

Diagram 7: List of Consultant

FIMM RD / FIMM HOD RD can filter the list by either one or more of:

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- i. Distributor Name
- ii. NRIC/Passport No
- iii. Consultant Name
- iv. FIMM No
- v. Phone No
- vi. Email
- vii. Scheme
- viii. Registration Status

The screenshot shows a web-based form titled "Consultant Management". It contains several input fields and dropdown menus. At the bottom right are two buttons: "Reset" and "Find".

Distributor Name	NRIC / Passport No
<input type="text"/>	<input type="text"/>
Consultant Name	FIMM No
<input type="text"/>	<input type="text"/>
Phone No	Email
<input type="text"/>	<input type="text"/>
Scheme	Registration Status
-- Choose --	-- Choose --
<input type="button" value="Reset"/> <input type="button" value="Find"/>	

Diagram 8: Filter

System will display List of Consultant based on the filtering.

FIMM RD / FIMM HOD RD can choose total records to display per page from dropdown.

System will display the list based on total records choose.

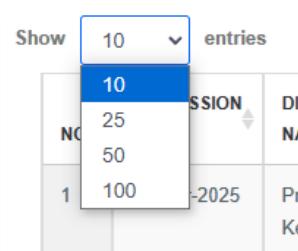


Diagram 9: Entries

FIMM RD / FIMM HOD RD can click button 'Previous' or 'Next' to navigate to next listing

page.



Diagram 10: Pagination

FIMM RD / FIMM HOD RD can filter the list by keyword by inputting the keyword in search box. System will display record which contain the keyword.

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Show 10 entries

NO	DISTRIBUTOR NAME	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	EMAIL	PHONE NO	REGISTRATION STATUS	ACTION
1	MENTARI BERHAD	Dania binti Rashid	960615015432	F02002010	PRS	daniaum@yopmail.com	+60142656821	Active	
2	MENTARI BERHAD	Hani Danial (W)	B22446689	F02002009	UTS	hanium@yopmail.com	+60142656821	Suspended	

Diagram 11: Keyword Search

In List of Consultant under column Action, FIMM RD / FIMM HOD RD click button on desired Consultant.

NO	DISTRIBUTOR NAME	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	EMAIL	PHONE NO	REGISTRATION STATUS	ACTION
1	MENTARI BERHAD	Dania binti Rashid	960615015432	F02002010	PRS	daniaum@yopmail.com	+60142656821	Active	
2	MENTARI BERHAD	Hani Danial (W)	B22446689	F02002009	UTS	hanium@yopmail.com	+60142656821	Suspended	

Diagram 12: List of Consultant

10. System will show the Consultant's profile, organized with following tabs:

- i. Registration Info
- ii. Profile
- iii. CPD
- iv. Tagging
- v. History

**FIMM** > Consultant > Consultant Management

**Registration Info**

**1. Profile**

Name	DANIA BINTI RASHID	FIMM Virtual Card
NRIC / Passport No	960615015432	FIMM No
FIMM Joined Date	09-MAR-2025	

Diagram 13: Consultant's Profile

11. FIMM RD / FIMM HOD RD click 'Tagging' tab.



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The screenshot shows the 'Tagging' tab interface. At the top, there are tabs: Registration Info, Profile, CPD, Tagging (which is selected), and History. Below the tabs, there is a section titled 'List of Tagging' with a 'Tagging Date' filter. The 'From' field is set to 'DD----YYYY' and the 'Until' field is also set to 'DD----YYYY'. There are buttons for 'Reset', 'Find', and '+ Add Tagging'. Below the filter, there is a table header with columns: NO, TAGGING DATE, TAGGED BY, ROLE, TAG, and ACTION. The table body is empty and displays the message 'No data available in table'. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.

Diagram 14: 'Tagging' tab

12. System will display List of Tagging which contain these columns:

- i. No
- ii. Tagging Date
- iii. Tagged by
- iv. Role
- v. Tag
- vi. Action

List of Tagging					
NO	TAGGING DATE	TAGGED BY	ROLE	TAG	ACTION
1	10-Mar-2025	Danial Tester Staging	RD	Pending Review Consultant's attached documents	
2	10-Mar-2025	Danial Tester Staging	RD	Consultant Pending Supporting Documents	

Diagram 15: List of Tagging

13. FIMM RD / FIMM HOD RD can filter the list by date range (from date and to date). System will display List of Tagging based on the filtering.

The screenshot shows the 'Tagging' tab interface with a 'Tagging Date' filter. The 'From' field is set to 'DD----YYYY' and the 'Until' field is also set to 'DD----YYYY'. There are buttons for 'Reset', 'Find', and '+ Add Tagging'. Below the filter, there is a table header with columns: NO, TAGGING DATE, TAGGED BY, ROLE, TAG, and ACTION. The table body contains two rows of data, identical to those in Diagram 15. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.

Diagram 16: Filter

FIMM RD / FIMM HOD RD can choose total records to display per page from dropdown.

System will display the list based on total records choose.

<b>FIMM</b> Federation of Investment Managers Malaysia	<b>Project</b>	<b>Reference</b>	<b>File</b>	<b>Version</b>	<b>Date</b>	<b>Page</b>
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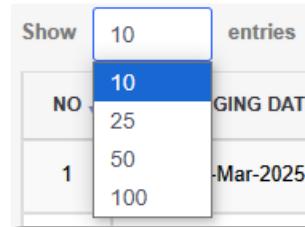


Diagram 17: Entries

FIMM RD / FIMM HOD RD can click button ‘Previous’ or ‘Next’ to navigate to next listing page.

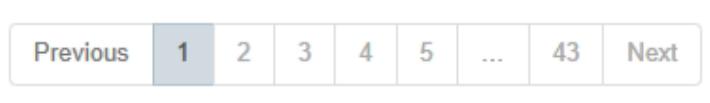


Diagram 18: Pagination

FIMM RD / FIMM HOD RD can filter the list by keyword by inputting the keyword in search box. System will display record which contain the keyword.

Search: <input type="text"/>					
NO	TAGGING DATE	TAGGED BY	ROLE	TAG	ACTION
1	10-Mar-2025	Danial Tester Staging	RD Approver	Pending CAS issues	
2	10-Mar-2025	Danial Tester Staging	RD	Pending Review Consultant's attached documents	
3	10-Mar-2025	Danial Tester Staging	RD	Consultant Pending Supporting Documents	

Diagram 19: Keyword Search

+ Add Tagging

To add new tag, FIMM RD / FIMM HOD RD click

- i. System will popup the Add Tag box for user to enter the tagging details.

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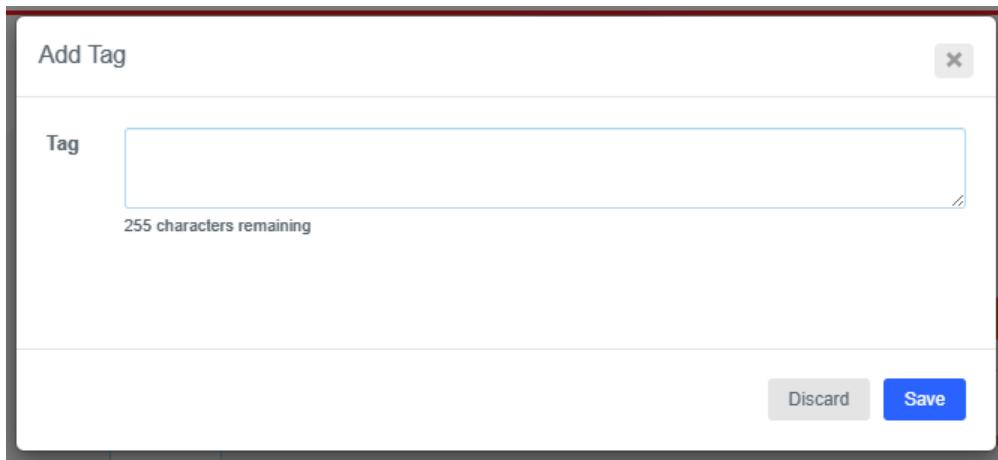


Diagram 20: Add Tag box

- ii. User click **Save**. System will show confirmation messages, “Confirm to proceed?”.

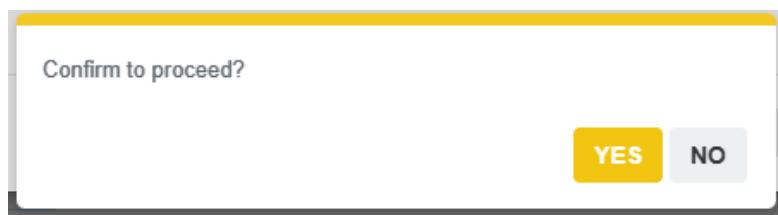


Diagram 21: Confirmation Message

- a. If user click **NO**, FIMM RD / FIMM HOD RD will continue to edit / update the tagging details.
- b. If user click **YES**, the tag will be added to the tagging list.
- c. System will prompt error message if user does not fill in the tagging details.

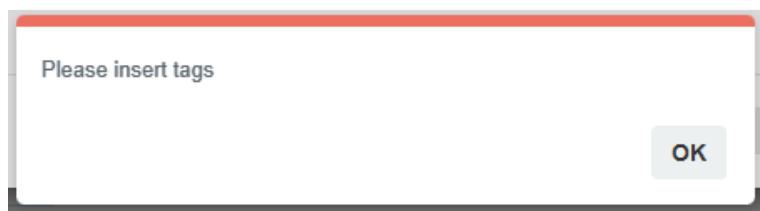


Diagram 22: Error Message

- iii. If user click **Discard**, return to tagging summary.

FIMM RD / FIMM HOD RD navigates to menu Consultant, submenu Tagging.

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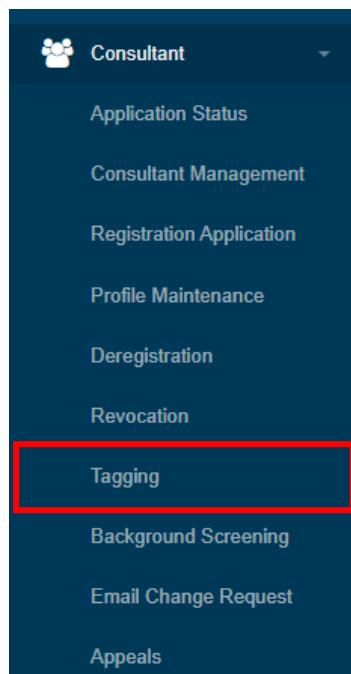


Diagram 23: Submenu ‘Tagging’ for FIMM RD

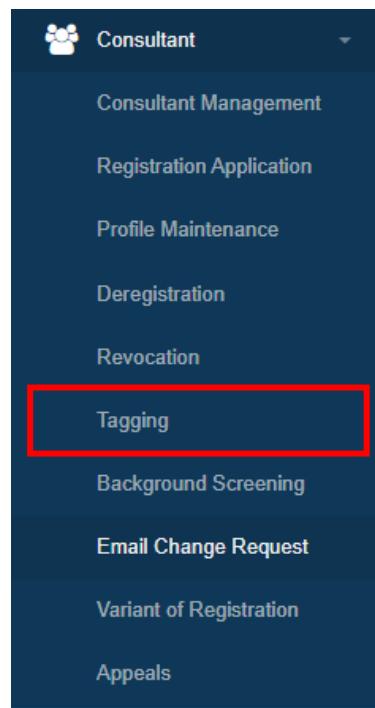


Diagram 24: Submenu ‘Tagging’ for FIMM HOD RD

System will display List of tagged Consultants which contain these columns (only the tagged Consultants will be shown in the listing table):

- i. No
- ii. Submission Date

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- iii. Distributor Name
- iv. Consultant Name
- v. NRIC/Passport No
- vi. FIMM No
- vii. Scheme
- viii. Registration Status
- ix. Action

NO	SUBMISSION DATE	DISTRIBUTOR NAME	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	ACTION
1	10-Mar-2025	MENTARI BERHAD	Dania binti Rashid	960615015432	F02002010	PRS	Active	
2	28-Nov-2024	TEST PAYMENT DISTRIBUTOR 5	TEST PAYMENT CONS 39	991020010039	F01001676	UTS	Terminated - Non Renewal	

Diagram 25: List of Tagged Consultants

FIMM RD / FIMM HOD RD click button on desired Consultant.

- i. System will show the Consultant's profile, organized with following tabs:

  - a. Registration Info
  - b. Profile
  - c. CPD
  - d. Tagging
  - e. History

Registration Info

**1. Profile**

Name	DANIA BINTI RASHID	FIMM Virtual Card	
NRIC / Passport No	960615015432	FIMM No	F02002010
FIMM Joined Date	09-MAR-2025		

Diagram 26: Consultant's Profile

FIMM RD / FIMM HOD RD clicks the 'Tagging' tab and proceed with add tag process.

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The screenshot shows the 'Tagging' tab interface. At the top, there are five tabs: 'Registration Info', 'Profile', 'CPD', 'Tagging' (which is highlighted in blue), and 'History'. Below the tabs, a section titled 'List of Tagging' contains a 'Tagging Date' filter with 'From' and 'Until' date pickers. To the right of the filters are three buttons: 'Reset' (orange), 'Find' (dark blue), and 'Add Tagging' (blue). Below the filters, there is a search bar labeled 'Search:' and a dropdown menu showing 'Show 10 entries'. The main area features a table with the following columns: NO, TAGGING DATE, TAGGED BY, ROLE, TAG, and ACTION. Two rows of data are listed:

NO	TAGGING DATE	TAGGED BY	ROLE	TAG	ACTION
1	10-Mar-2025	Danial Tester Staging	RD Approver	Pending CAS Issues	
2	10-Mar-2025	Danial Tester Staging	RD	Pending Review Consultant's attached documents	

Diagram 27: Tagging tab

The tags will be added to the listing table after the tag addition process is completed.