




USER MANUAL

MODULE: CONSULTANT MANAGEMENT (FORGET PASSWORD) GROUP: CONSULTANT


AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (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.

Document Information	
Project Name	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
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance


Table 1: Acronym Table

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ABBREVIATIONS ROLE

Abbreviation	Role	Descriptions
SYS	SYSTEM	System generated transactions
C-CLRK	Consultant Applicant	Consultant applicant during first account creation
C-CON	Consultant	Consultant role after becoming a consultant either active or in-active
C-APP	Consultant Applicant	Consultant applicant once submitted the application to distributor

Table 2: Abbreviation Role Table

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CHAPTER I: 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 troubleshooting 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

 **Website:** <https://www.fimm.com.my>

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CHAPTER II: GENERAL INSTRUCTION TO USE THIS MANUAL

Reminder: Please read this section for a better understanding of the user manual.

There are **three different categories** in the Consultant Module:


No	Type of consultant	Steps	Required Documents
1	Never registered with FIMM or inactive before April 2022 ¹ (Group A)	Registration	
		<div><div><div>1. Liaise with your preferred distributor before registering in the FCS.</div><div>2. Register as a New Consultant by following Chapter III, Section F in this document.</div><div>3. Once you submitted your application, your preferred distributor will do their review and approval process. Any inquiry please liaise with them.</div><div>4. Once approved, you will receive confirmation email for Examination date as stated in Chapter III, Section F, Item 38 – Examination.</div><div>5. Should you fail your exam and you have a valid proof/ reason, you may choose to Appeal your exam result as stated in Chapter III, Section O – Appeal Exam Result²</div><div>6. Should you unable to sit for your exam and you have a valid proof/ reason, you may choose to Appeal your exam fee waiver as stated in Chapter III, Section P – Appeal Exam Fee Waiver³</div><div>7. Once you have become FIMM Active consultant and intend to vary your license, please follow Chapter III, Section U – Variation of Registration</div></div></div>	<div><div>1. Coloured passport photo (follow the Registration Manual's resolution guidelines).</div><div>2. Coloured NRIC / Active Passport (front & back).</div><div>3. Relevant supporting documents, e.g., SPM, Diploma, etc.</div></div>
		Section for Group A:	
2	Inactive consultants (from April 2022 onwards) ⁴ (Group B)	1. Account Activation	
		<div><div><div>1. Liaise with your preferred distributor before registering in the FCS.</div><div>2. Activate your account by following Chapter III, Section A.</div><div>3. If you need to change your registered email, follow Chapter III, Section B.</div></div></div>	<div><div>1. Coloured passport photo (follow the Registration Manual's resolution guidelines).</div></div>
		2. Registration	

¹ All inactive consultants before April-2022 are considered as new applicant.

² Subject to distributor and FIMM approval. Additional costs may apply.

³ Subject to distributor and FIMM approval. Additional costs may apply.

⁴ All inactive consultants before April-2022 are considered as new applicant.


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		<ol style="list-style-type: none">1. Liaise with your preferred distributor before registering in the FCS.2. Register as a New Consultant by following Chapter III, Section F in this document.3. Once you submitted your application, your preferred distributor will do their review and approval process. Any inquiry please liaise with them.4. Once you have become FIMM Active consultant and intend to vary your license, please follow Chapter III, Section U – Variation of Registration <p>Section for Group B:</p> <table><tr><th>Chapter</th><th>Section</th><th>Item</th></tr><tr><td>III</td><td>A</td><td>Account Activation</td></tr><tr><td>III</td><td>F</td><td>Registration</td></tr><tr><td>III</td><td>U</td><td>Variation of Registration</td></tr><tr><td>III</td><td>V</td><td>CPD submission</td></tr></table>	Chapter	Section	Item	III	A	Account Activation	III	F	Registration	III	U	Variation of Registration	III	V	CPD submission	<ol style="list-style-type: none">1. Coloured passport photo (follow the resolution guidelines provided).2. Coloured NRIC / Active Passport (front & back).3. Relevant supporting documents, e.g., SPM, Diploma, etc.
Chapter	Section	Item																
III	A	Account Activation																
III	F	Registration																
III	U	Variation of Registration																
III	V	CPD submission																
3	Active consultants (Group C)	<ol style="list-style-type: none">1. Account Activation<ol style="list-style-type: none">1. Activate your account by following Chapter III, Section A.2. If you need to change your registered email, follow Chapter III, Section B.3. Once logged in, update your profile details as per Chapter III, Section D.4. If intend to vary your license, please follow Chapter III, Section U – Variation of Registration5. For CPD submission follow Chapter III, Section V – CPD Submission6. For Renewal declaration follow Chapter III, Section W – Renewal <p>Section for Group C:</p> <table><tr><th>Chapter</th><th>Section</th><th>Item</th></tr><tr><td>III</td><td>A</td><td>Account Activation</td></tr><tr><td>III</td><td>R</td><td>Profile Maintenance</td></tr><tr><td>III</td><td>U</td><td>Variation of Registration</td></tr><tr><td>III</td><td>V</td><td>CPD submission</td></tr></table>	Chapter	Section	Item	III	A	Account Activation	III	R	Profile Maintenance	III	U	Variation of Registration	III	V	CPD submission	<ol style="list-style-type: none">1. Coloured passport photo (follow the resolution guidelines provided).2. Colour NRIC/ Active Passport (front & back)3. Relevant supporting documents.
Chapter	Section	Item																
III	A	Account Activation																
III	R	Profile Maintenance																
III	U	Variation of Registration																
III	V	CPD submission																

The Consultant Management Module is responsible for handling the registration, profile maintenance, compliance, and operational processes for consultants within the FIMM Registration System. This module ensures that consultants meet regulatory requirements, maintain compliance, and manage their professional status efficiently.

Sub-Modules of the Consultant Management Module:

1. **First Time Login** – Guides for Group B & C in setting up their accounts.
2. **Registration** – Facilitates the registration of new consultants (Group A), including identity verification and document submission.
3. **Appeal for Exam Result** – Provides a process for consultants to appeal their examination results.

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4. **Appeal for Fee Waiver** – Enables consultants to request a waiver for specific fees.
5. **Profile Maintenance** – Enables consultants to manage and update their personal and professional details.
6. **Variation of Registration** – Allows consultants to modify their registration details or update their associated distributor.
7. **CPD** – Consultant to attend training and obtain CPD points for their Renewal and Re-registration.
8. **Renewal** – Manages the annual renewal process for consultants, including compliance checks.
9. **Appeal for Revocation** – Facilitates the appeal process for consultants whose registrations have been revoked.
10. **Forget Password** – Provides a password recovery process for consultants.

System access

The FCS system application is accessible only to registered users. Each user must use 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.

Users from **Group A** will need to create a new account from the main login page (Chapter III, Section F Registration). Users from **Group B and C** will be required to activate their account (Chapter III, Section A Account Activation).

For security reasons:

1. Users should keep their login credentials confidential.
2. Passwords should be changed periodically to enhance security.
3. 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**.

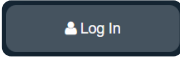
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3. The **login page** will appear, allowing users to enter their credentials.
4. For consultant please login using NRIC (without “ - “) / Active Passport

Log in

Access the Login Page

For those in **Group B & C (Existing Consultant)** and have activated their account please login as define in this section. If you have not activate your account, please do so by following the instructions provided in **Section A – First Time Login** (For Existing Consultant – active and inactive status).

1. For **Group A**, please follow provide guidelines as outline in this section.
 - a. On the homepage, locate the ‘Log in’  button and click it.
 - b. In the **User ID** field, enter your registered **NRIC / Active Passport number without “ - “**.
 - c. In the **Password** field, enter your **password**.

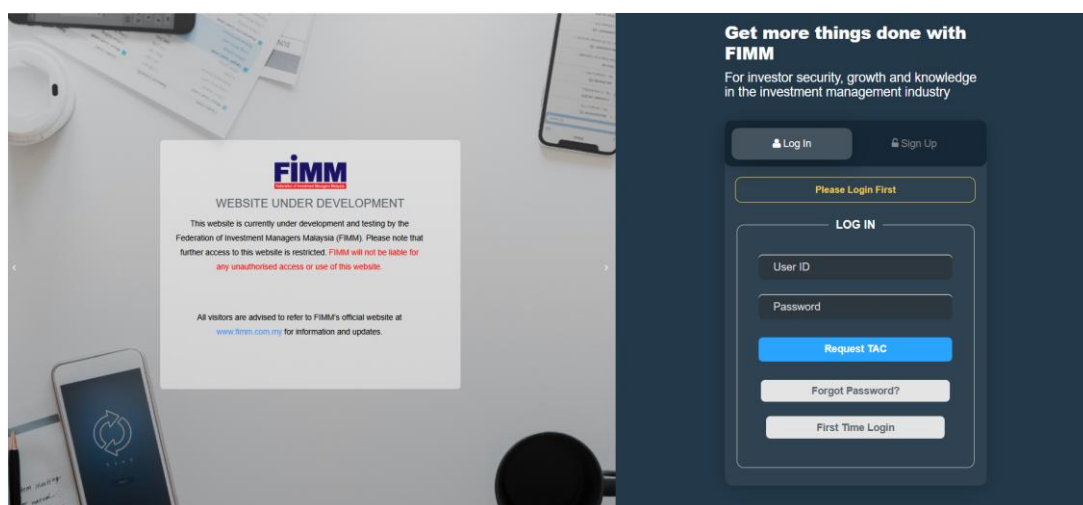



Figure 1: FCS Homepage Display

2. Enter Your Credentials

- a. System will show sign in page; User need to insert these items:
 - i. User ID
 - ii. Password
 - iii. TAC (for 2FA)

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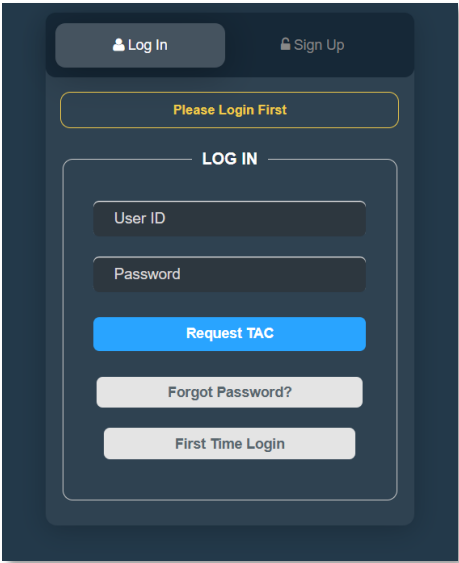


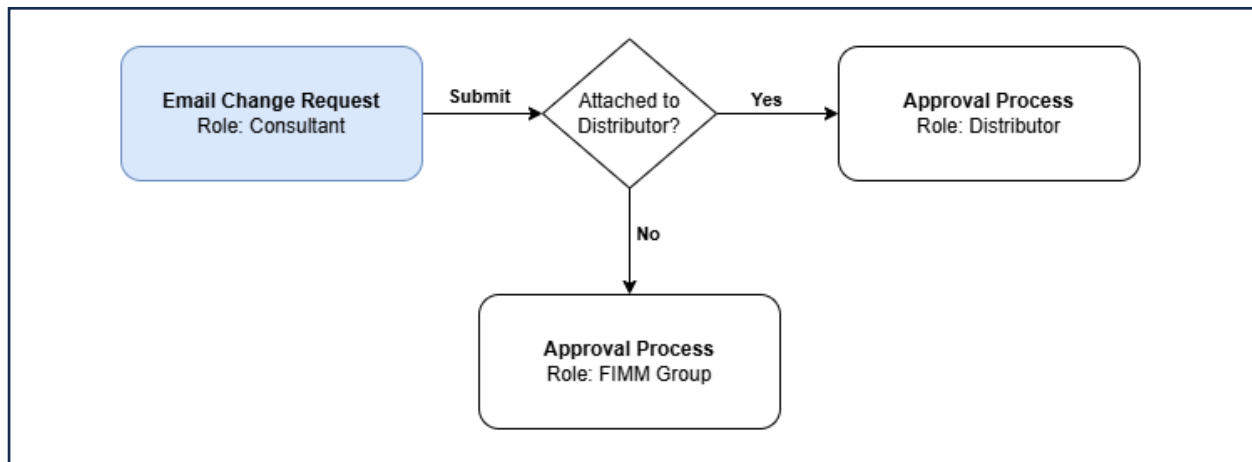
Figure 2: Log in Display

3. Successful Login

- a. Click  button to login to the system.

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Forget Password



Reset Password

1. On the Log In Page, locate the 'Forgot Password' button and click it.

Forgot Password?

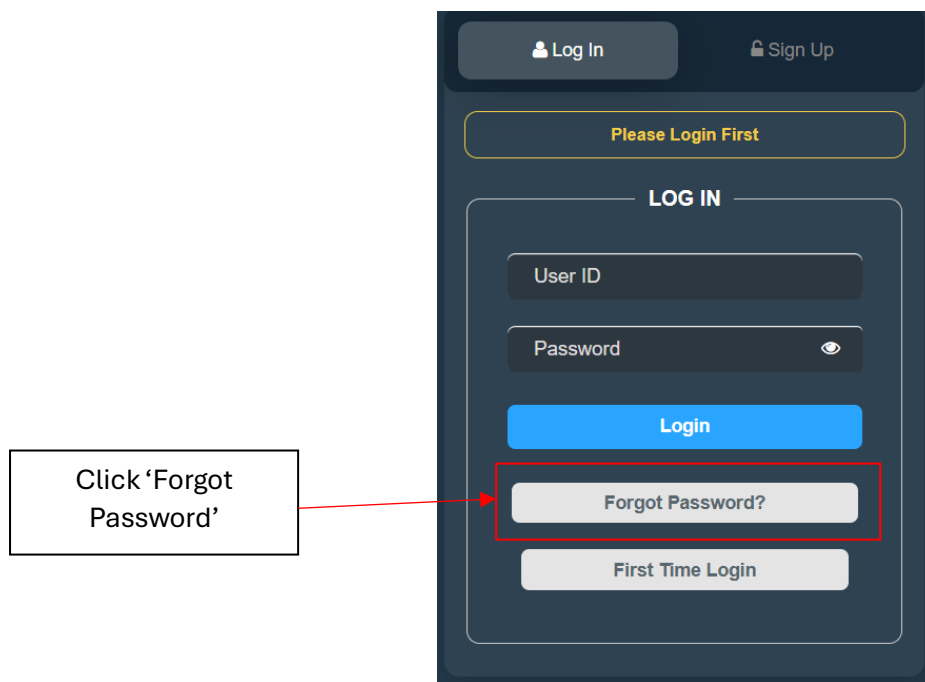




Figure 3: Login Page

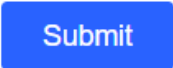
2. System will display popup box to enter the NRIC/Passport No.

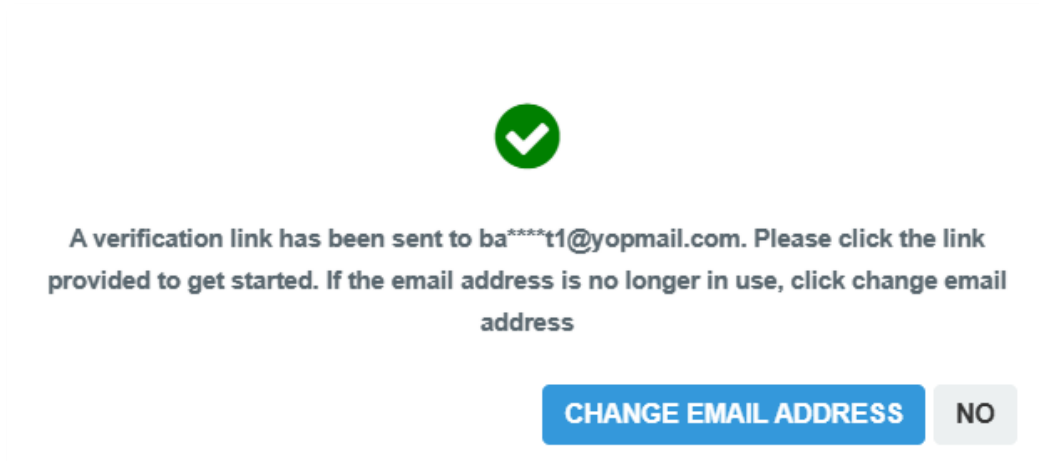
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The image shows a 'Forgot Password' pop-up window. It has a title bar with a close button (X). Below the title bar, there is a section labeled 'User ID'. Inside this section, there is a text input field with the placeholder text 'Please enter your user ID'. Below the input field, there is a smaller line of text: 'Please enter the NRIC/Passport number without any dashes or spaces for consultant'. At the bottom right of the pop-up, there is a blue 'Submit' button.

Figure 4: Forgot Password Pop Up Box


3. User need to fill in detail in required field and click  .
 - NRIC No (Malaysian)
 - Passport No (Non-Malaysian)
4. System will display a prompt message.



The image shows a prompt message box. At the top center, there is a green circular icon with a white checkmark. Below the icon, the text reads: 'A verification link has been sent to ba****t1@yopmail.com. Please click the link provided to get started. If the email address is no longer in use, click change email address'. At the bottom right, there are two buttons: a blue 'CHANGE EMAIL ADDRESS' button and a grey 'NO' button.

Figure 5: Change Email Address Prompt Message

5. Please review the registered email address displayed.

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- a. If the registered email address is correct, click No and proceed to verify the email and reset the password (continue with steps 6 to 10).
 - b. If you are unable to access the registered email address, please click on “Change email address” to update your new email. (continue at the “Email Change Request” section after step 10)
6. User need to check their email for the reset password link.

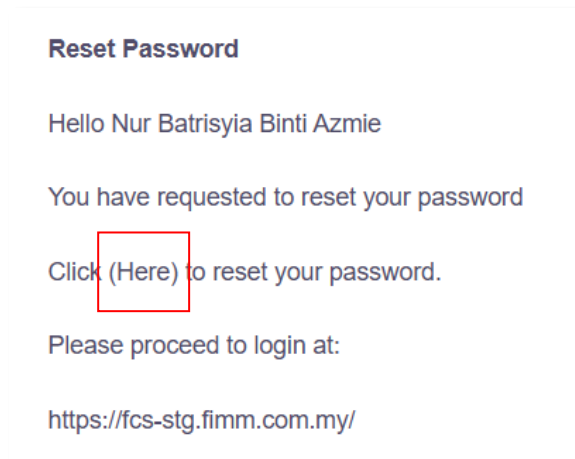


Figure 6: Reset Password Link

7. Click ‘(Here)’ to reset your password.
8. User will redirect to the Reset Password Page.

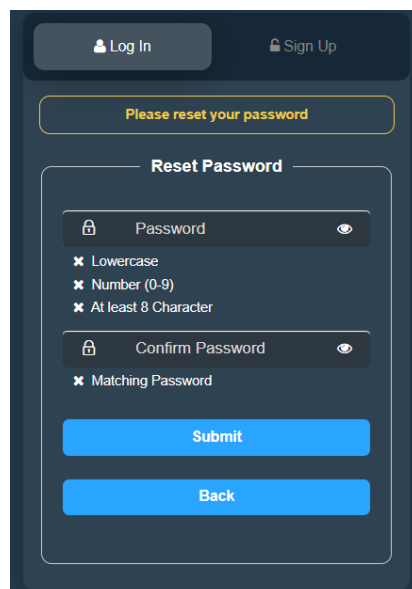


Figure 7: Reset Password Page

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9. Enter details in required field. (Password must match to continue reset the password and met the password strength requirement)

- Password
- Confirm Password

10. Click  and user is able to login to FIMM System.

Email Change Request

1. On the Log In Page, locate the 'Forgot Password' button and click it.



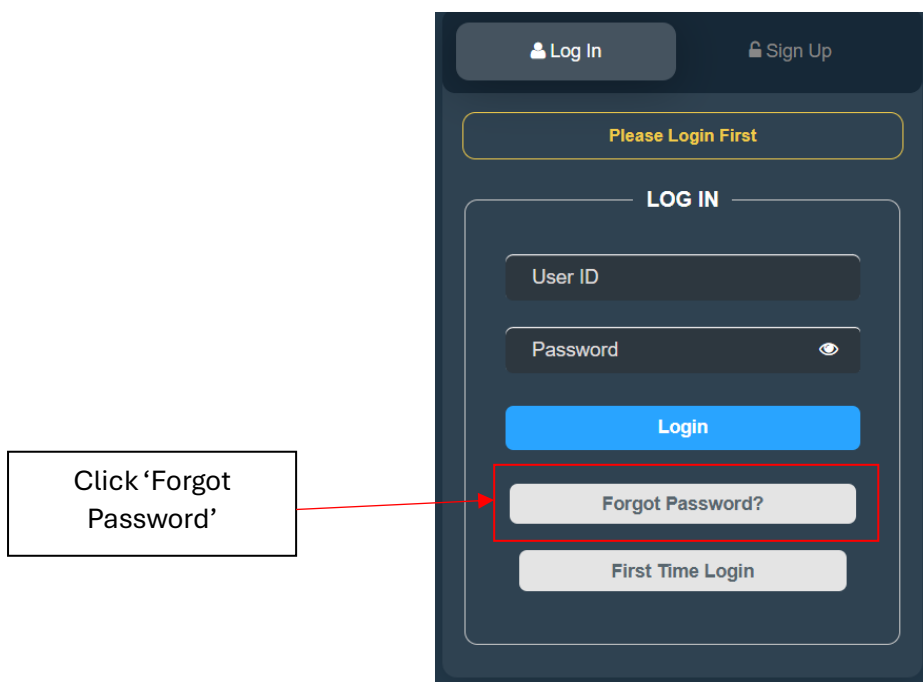




Figure 8: Login Page

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

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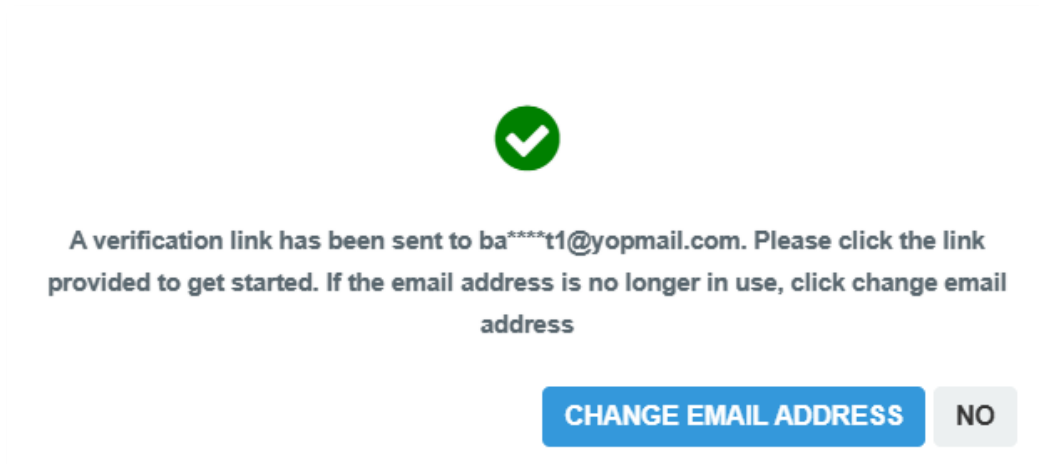
The image shows a 'Forgot Password' pop-up box. It has a title bar with a close button (X). Below the title bar, there is a section labeled 'User ID'. Inside this section, there is a text input field with the placeholder text 'Please enter your user ID'. Below the input field, there is a smaller line of text: 'Please enter the NRIC/Passport number without any dashes or spaces for consultant'. At the bottom right of the box, there is a blue 'Submit' button.

Figure 9: Forgot Password Pop Up Box

3. User need to fill in detail in required field and click

- NRIC No (Malaysian)
- Passport No (Non-Malaysian)


4. System will display a prompt message.



The image shows a prompt message box. It features a green checkmark icon at the top center. Below the icon, the text reads: 'A verification link has been sent to ba****t1@yopmail.com. Please click the link provided to get started. If the email address is no longer in use, click change email address'. At the bottom right, there are two buttons: a blue 'CHANGE EMAIL ADDRESS' button and a grey 'NO' button.

Figure 10: Change Email Address Prompt Message

5. Consultant clicks **CHANGE EMAIL ADDRESS** button.
- System will display email change request form to fill in with details:

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- NRIC/Passport No (Auto populate based on registered NRIC/Passport No)
- New Email Address
- 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

Figure 11: Email Change Request form

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