



Perbadanan Insurans Deposit Malaysia
Protecting Your Insurance And Deposits In Malaysia

GUIDE TO USING THE PIDM INDUSTRY PORTAL
("MI USER MANUAL")
MI SERVICE REQUEST

ISSUE DATE : 6 AUGUST 2020



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TITLE	Guide to using the PIDM Industry Portal ("MI User Manual") MI Service Request		

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Brief Description

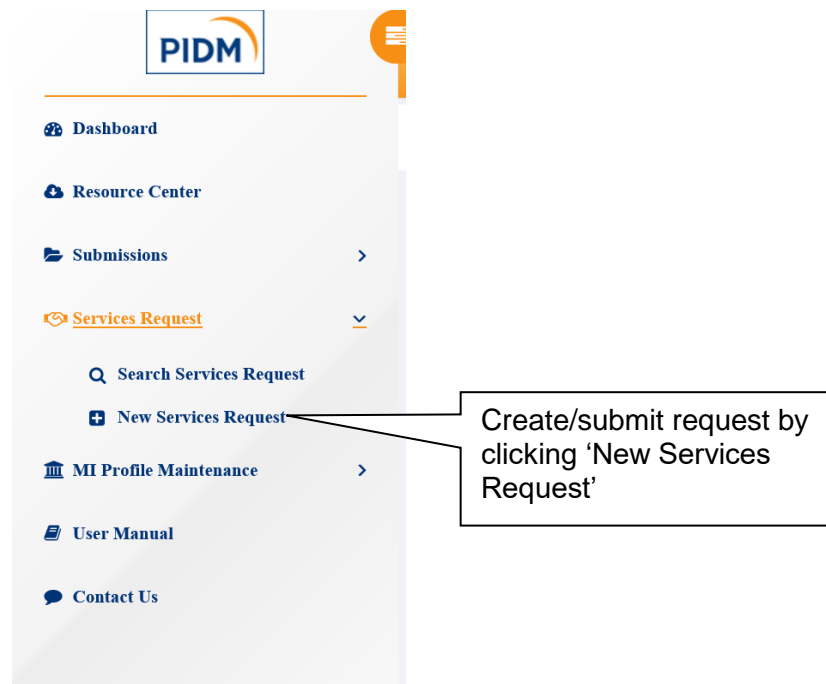
This allows authorised MIPLO/ MI Officer who has contribute access right to Services Request (SR) module to create new requests, edit the SR details, submit and discard the SR.

Basic Flow

1. Go to "Services Request" menu, then select "New Requests".
2. System redirect to a Request data entry page. System prompts user to selects a desire request type.
3. System display the request data entry form according to the selected request type.

SECTION 1: REQUEST FOR PIDM BROCHURES

Step 1: Go to "Services Request" menu, then select "New Requests". System redirect to a Request data entry page. System prompts user to selects a desire request type.



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Select Request Type

Select 'Brochures' from dropbox

- Briefing
- Briefing
- Brochures**
- Electronic Membership Representative Publication
- Printed Membership Representative Publication

Step 2: Fill in all mandatory inputs and select required brochure types and quantity.

Request Details

Request Type: Brochures

Request Reason *

Pickup Address *: Warehouse

Reference No. System auto generates the Service Request (SR) reference number upon saved/submitted

Type of Brochures	Type	Quantity (Per pack of 500 pcs)
<input type="checkbox"/>	Deposit Insurance System (EN/BM)	0
<input type="checkbox"/>	Deposit Insurance System (CH/TM)	0
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (EN/BM)	0
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (CH/TM)	0

Tick the box to select require brochure type(s)

Fill in required quantities

Save the draft SR if yet to complete

Click 'Submit' after completed all mandatory fields

Save Submit

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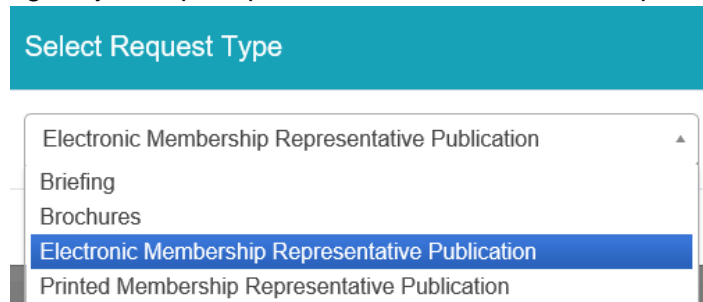
SECTION 2: REQUEST FOR PIDM MEMBERSHIP REPRESENTATION

PIDM Membership Representation available in Two (2) formats:

1. Electronic Membership Representation
2. Printed Membership Representation

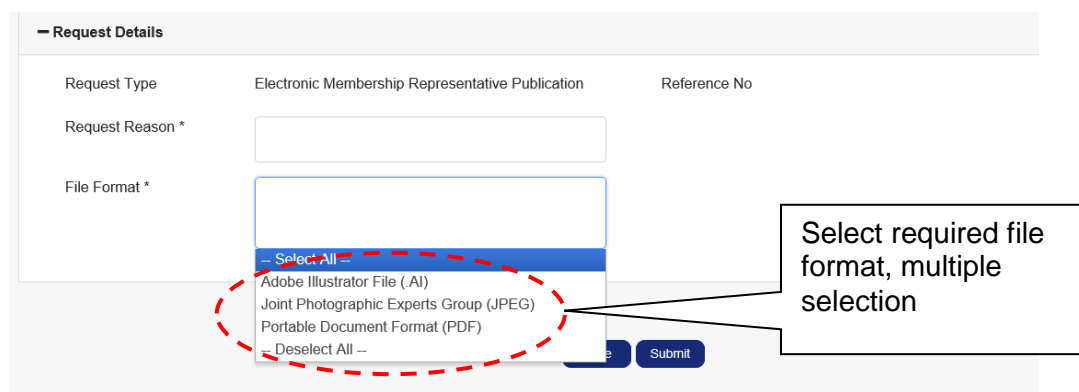
1. Electronic Membership Representation

Step 1: Go to "Services Request" menu, then select "New Requests". System redirect to a Request data entry page. System prompts user to selects a desire request type.



The screenshot shows a teal header with the text "Select Request Type". Below it is a dropdown menu with the following options: "Electronic Membership Representative Publication", "Briefing", "Brochures", "Electronic Membership Representative Publication" (highlighted in blue), and "Printed Membership Representative Publication".

Step 2: Select the file format and submit after fill in all mandatory inputs.



The screenshot shows a form titled "Request Details". It has three rows: "Request Type" with the value "Electronic Membership Representative Publication" and "Reference No"; "Request Reason *" with an empty text input field; and "File Format *" with a dropdown menu. The dropdown menu is open, showing options: "- Select All -", "Adobe Illustrator File (.AI)", "Joint Photographic Experts Group (JPEG)", "Portable Document Format (PDF)", and "- Deselect All -". A red dashed circle highlights the dropdown menu, and a callout box points to it with the text "Select required file format, multiple selection". A "Submit" button is visible at the bottom right of the form.

2. Printed Membership Representation

Step 1: Go to "Services Request" menu, then select "New Requests". System redirect to a Request data entry page. System prompts user to selects a desire request type.



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Select Request Type

- Printed Membership Representative Publication
- Briefing
- Brochures
- Electronic Membership Representative Publication
- Printed Membership Representative Publication**

Step 2: Submit after fill in the required quantity and all mandatory inputs.

Request Details

Request Type	Printed Membership Representative Publication	Reference No	
Request Reason *	<input type="text"/>		
Quantity (Pcs) *	<input type="text"/>	Mode of Delivery *	Self Collect
Pickup Address	HQ		

Fill in the reason of request and required quantity

Save Submit

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SECTION 3: REQUEST FOR BRIEFING

This is for MI that required an awareness briefing on PIDM Financial Consumer Protection Systems.

Step 1: Go to "Services Request" menu, then select "New Requests". System redirect to a Request data entry page. System prompts user to select a desired request type.

Select Request Type

- Briefing
- Brochures
- Electronic Membership Representative Publication
- Printed Membership Representative Publication

Step 2: Submit after fill in all mandatory inputs.

Request Details

Request Type	Briefing	Reference No	
Request Reason *	<input type="text"/>		
Briefing Date time *	<input type="text"/>	Briefing Duration (in minutes) *	<input type="text"/>
No of Pax	<input type="text"/>	Venue Address	<input type="text"/>

Note:

Upon the SR is submitted, system will generate email notification to the submitter, and CC to other MI LO from the same MI who has contribute access to Services Request Module and the Primary LO. Submitted request is no longer editable by MI LO.

For Brochures and Printed Membership Representative Publication request types, system will update the SR status to "Pending Requestor Sign Off" upon PIDM LO processed the

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services requests. Requestor should sign off the services request after collected the brochures or membership representative publication. However, System will auto sign off "Pending Requestor Sign Off" SRs 3 days after target collection date.

For other services request types, the SR status is updated to "Completed" upon PIDM LO processed the services request.

SECTION 4: ALTERNATE FLOWS

Edit Draft

1. User can edit a draft request anytime before submit. User can use the "Search SR" function to locate specific draft request to edit.

Discard Draft SR before submit

1. To discard a draft request, click on the "Discard" button.
2. The request status will be updated to "Discarded" and the request no longer editable.

Request Details

Request Type: Brochures Reference No: AXALIFE20200068

Request Reason *:

Pickup Address *:

	Type	Quantity (Per pack of 500 pcs)
<input checked="" type="checkbox"/>	Deposit Insurance System (EN/BM)	<input type="text" value="5"/>
<input type="checkbox"/>	Deposit Insurance System (CH/TM)	<input type="text" value="0"/>
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (EN/BM)	<input type="text" value="0"/>
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (CH/TM)	<input type="text" value="0"/>

Save Submit Discard

To edit the draft request

To submit or discard the draft request



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Abort Submitted SR before the SR is completed

1. To abort a submitted request, click on the "Abort" button.
2. The request status will be updated to "Aborted".
3. System will send "SR Aborted" email to the MI LO who aborted the request and "PIC Email", CC to other MI LO from the same MI who has contribute access to the "Services Request" Module and the Primary LO.

Request Details

Request Type	Electronic Membership Representative Publication	Reference No	AXALIFE20200067
Request Reason *	for display		
File Format *	Adobe Illustrator File (.AI) x Joint Photographic Experts Group (JPEG) x Portable Document Format (PDF) x		

Workflow Remark

Comments	<input type="text" value=""/>
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Reason/Feedback is required!

Reason is required for aborting SR

Abort

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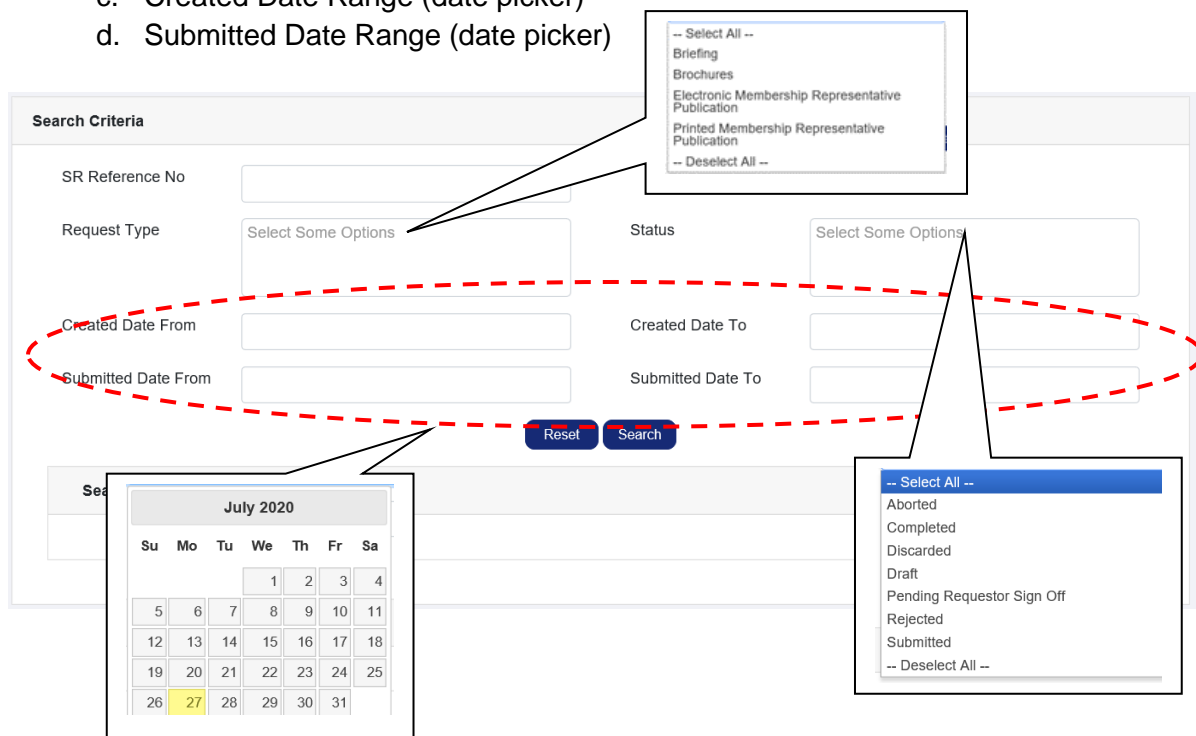
SECTION 5: SEARCH SERVICE REQUEST

Brief Description

This use case allows all user who has access right to Services Request module to search SR. MI LO can view requests created/ submitted for their own MI.

Basic Flows

1. Go to "Services Request" menu, select "Search Request".
2. System display the following search criteria:
 - a. Request Type (multi-select dropdownlist)
 - b. Status (multi-select dropdownlist)
 - c. Created Date Range (date picker)
 - d. Submitted Date Range (date picker)



The screenshot shows a search form titled "Search Criteria" with the following fields:

- SR Reference No:
- Request Type: (Callout: Multi-select dropdownlist with options: -- Select All --, Briefing, Brochures, Electronic Membership Representative Publication, Printed Membership Representative Publication, -- Deselect All --)
- Status: (Callout: Multi-select dropdownlist with options: -- Select All --, Aborted, Completed, Discarded, Draft, Pending Requestor Sign Off, Rejected, Submitted, -- Deselect All --)
- Created Date From: (Callout: Date picker for July 2020)
- Created Date To:
- Submitted Date From:
- Submitted Date To:

Buttons: