Quick Start Guide

FAME 2

Singapore

Clients' Navigation Guide

TABLE OF CONTENTS

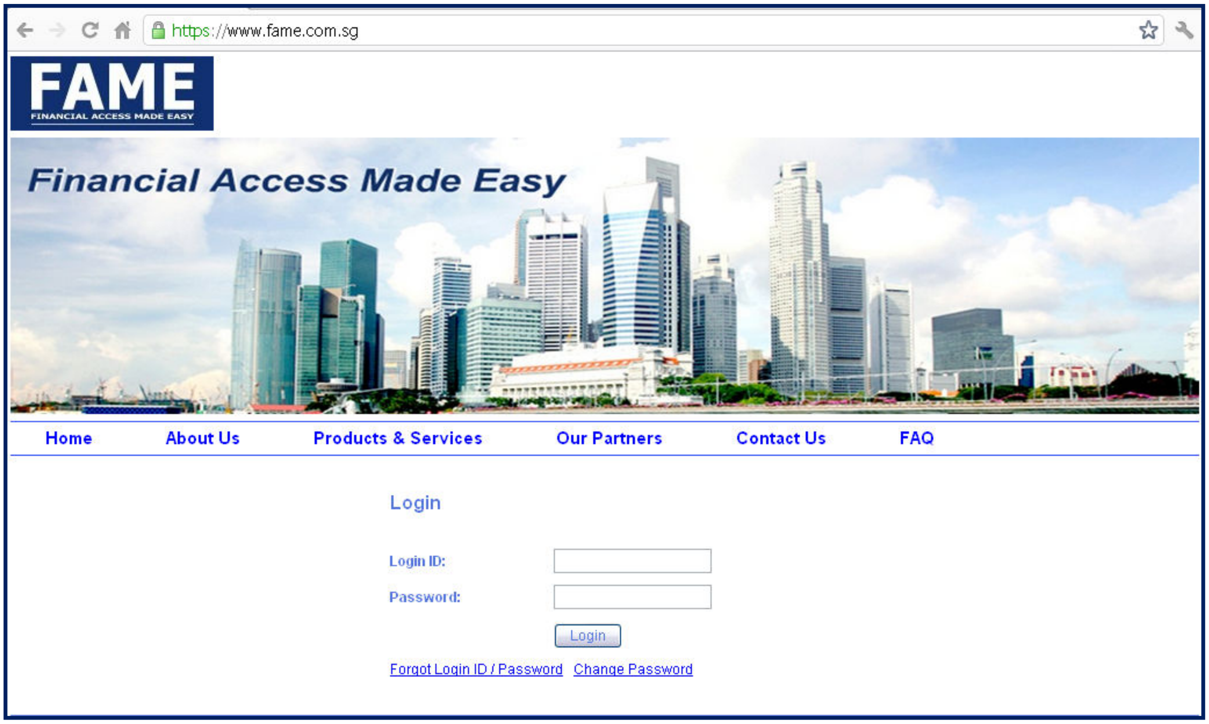
1. Logging In to the System

1.1 *Introduction*

1. Before using the functions of the system, you will first have to log in with your provided login ID and password.

1.2 *Steps*

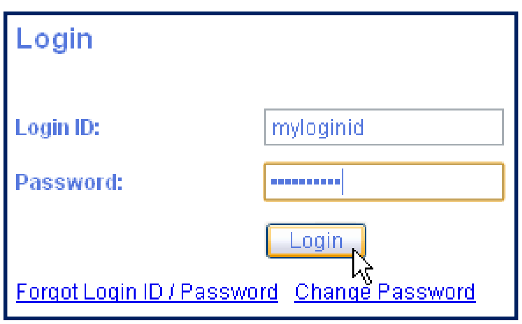
1. Navigate to the **FAME 2 website** at https://www.fame.com.sg



Screen: FAME 2 Login Page

2. Enter your **Login ID** and **Password** in the respective fields. Please note that your password is case-sensitive.

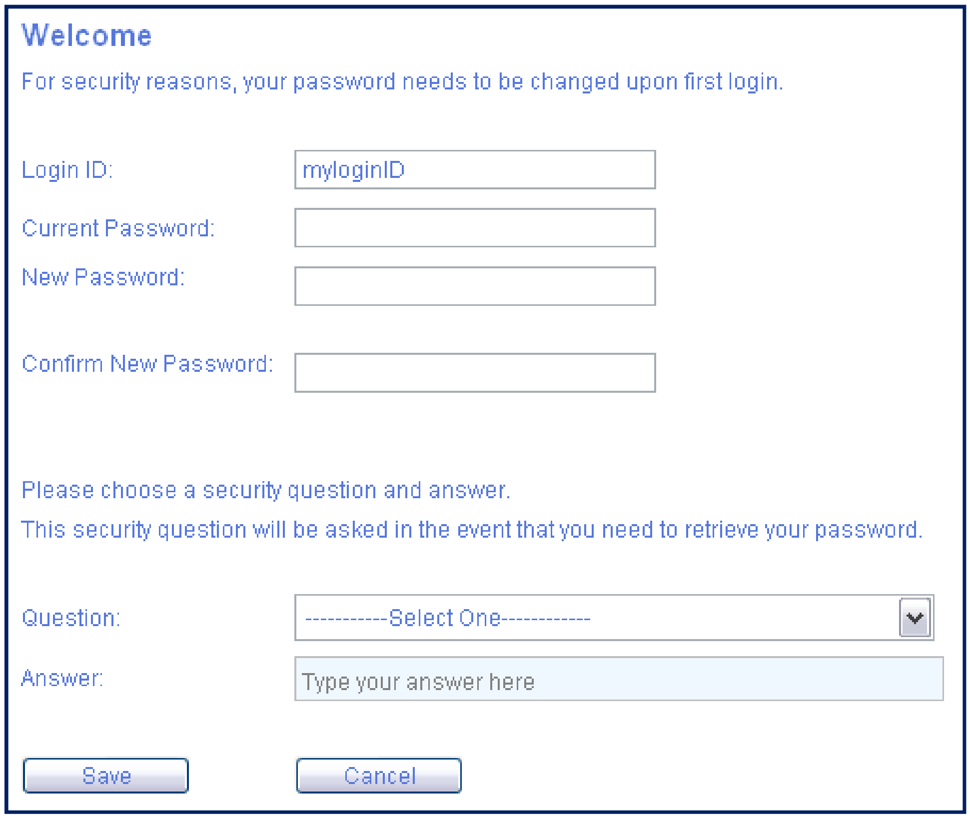
3. Click on the **Login** button.



Screen: Login ID and Password Fields

1.3 *New Login*

1. If this is your **first time** logging in to FAME, you will be redirected to a page where you can change your login ID. This change is optional.
2. You will also be prompted to **change your password** for security reasons.
3. Select a security question, or enter your own, followed by your own answer to the question. This **security question-and-answer** combination will be used for verification in the event that you need to retrieve your login ID or password (refer to 1.4).



Screen: First Login Password Change

1.4 *Change Password*

1. If you want to change your password, you can do it online via the "**Change Password**" link on the login page.
2. Enter your **Login ID** and your **Current Password**.
3. Enter the **new password** that you would like to change to and confirm it.
4. Click on the "**Save**" button to make the change.

Screen: Change Password Page

1.5 *Forgot Login*

1. If you forgot your login ID or password, you can retrieve them via the "**Forgot Login ID / Password**" link on the login page.
2. You will be prompted to enter your IC number (that was used during account opening) for verification.
3. After clicking on the "**Verify**" button, your security question will be displayed. Enter your answer in the "Answer" field.
4. Select the delivery medium for your Login ID and password before proceeding to click on the "**Submit**" button.
5. Your login ID and password will be sent to you via the selected medium.
6. More information on the delivery mediums:
   a) Successful requests via the encrypted email option will be processed and sent shortly after the request.
   b) The encrypted email option utilizes a third-party email service which requires registration upon the first visit. Subsequent visit will only require entering a password to view the contents of encrypted emails.
   c) Successful requests via the secured pin mailer option will be generated and delivered by post on the next working day.
   d) The secured pin mailer option will generate two separate mailers. One will contain the login ID and the other will contain the login password.

Screen: Forgot Login ID/Password Page

1.6 *Other Info*

1. You should receive your FAME login ID and password within 5 working days from the creation of your first FAME account.
2. Your login account will be suspended after 3 failed login attempts to ensure the security of your account. Please contact your client service officer or system administrator to reset your login account.
3. Passwords are limited to between 8 to 25 alphanumeric characters, and cannot be repeated when changing passwords. Passwords must contain at least an alphabet and a number.
4. Login IDs are limited to between 4 to 25 alphanumeric characters, and must be unique.

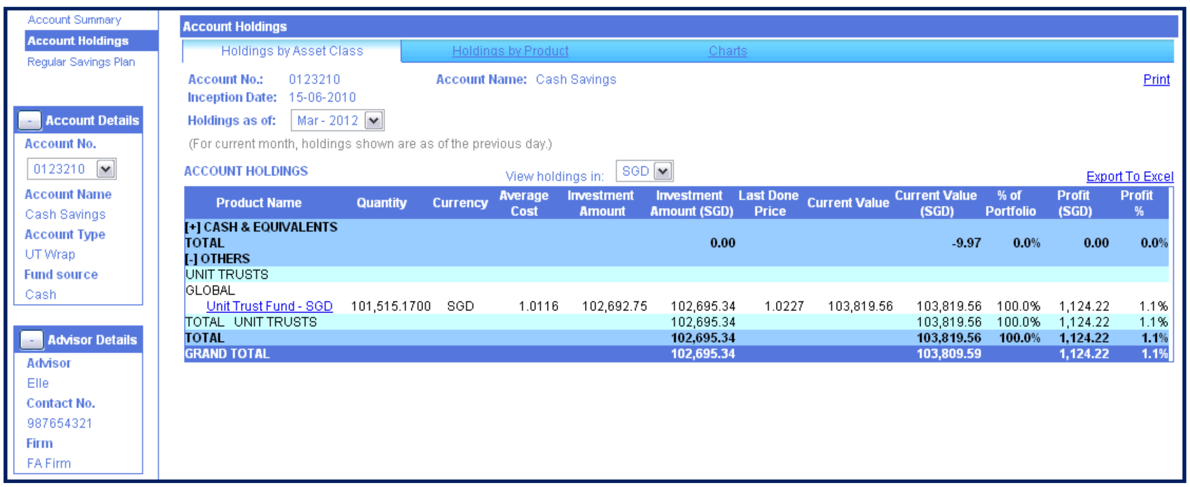
2. View Account Holdings

2.1 *Introduction*

1. You can view the holdings of your accounts on FAME here.

2.2 *Steps*

1. Navigate to the **Account Management > Account Holdings** page. The holdings of your account will be displayed in the page. If you have more than one account in FAME, the first account in numeric order will be displayed.
2. You can change the displayed account by selecting from the **Account Number** list in the menu on the left of the page.



Screen: Account Holdings Page

2.3 *Other Info*

1. If any of your accounts have a transaction portfolio pending your approval, you will see a "**Pending Approval**" link beside that account number in the **Account Summary** page.
2. Clicking on the link will direct you to the **Approve** page. (Refer to feature 3.)

Screen: Account Summary Page

3. Approve Transaction Portfolio

3.1 *Introduction*

1. You can view and approve portfolios pending your approval.

3.2 *Steps*

1. Navigate to **Transaction > Approve** page.
2. You will see all portfolios pending your approval here.

Transaction – Approve

Portfolios pending your approval are displayed below. Select a portfolio to view and approve it.
View approved portfolios here.

Portfolio No.	Portfolio Type	Account No.	Account Name.	Account Type	Fund Source	Advisor	Approver	Received Date & Time	Expiry Date & Time
P12000123	Quick Transaction	0123210	Cash Savings	UT Wrap	Cash	Elle	Il Seek	14-03-2012 12:24:20 PM	20-03-2012 12:32:45 PM

Screen: Approve Transaction Page

3. Click on a **Portfolio Number** to view and approve the portfolio.
4. Click on the **checkbox** to confirm that you agree with the portfolio recommended.
5. Click on either the **Approve** button to approve this transaction portfolio, or the **Reject** button to cancel this portfolio.

Screen: Example of a Quick Transaction Portfolio in FAME 2

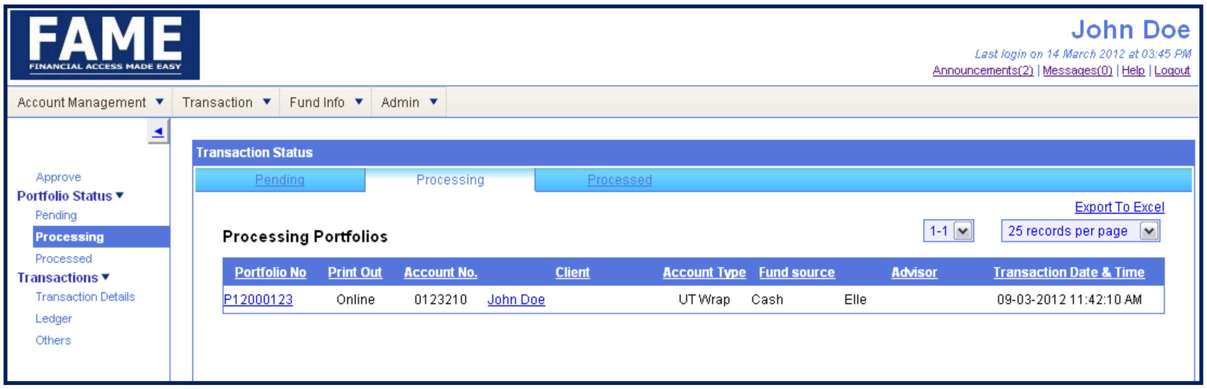
4. View Portfolio Status

4.1 *Introduction*

1. You can view portfolios that are in the pending, processing or processed stage.

4.2 *Steps*

1. Navigate to **Transaction > Portfolio Status > Pending** (or **Processing/Processed**) page.
2. Enter the **Portfolio Number** (or **Client Name/IC Number**, or **Account Number**) in the search field and click on the **Search** button.
3. Click on a **Portfolio Number** to view its details.



Screen: Processing Portfolio Page

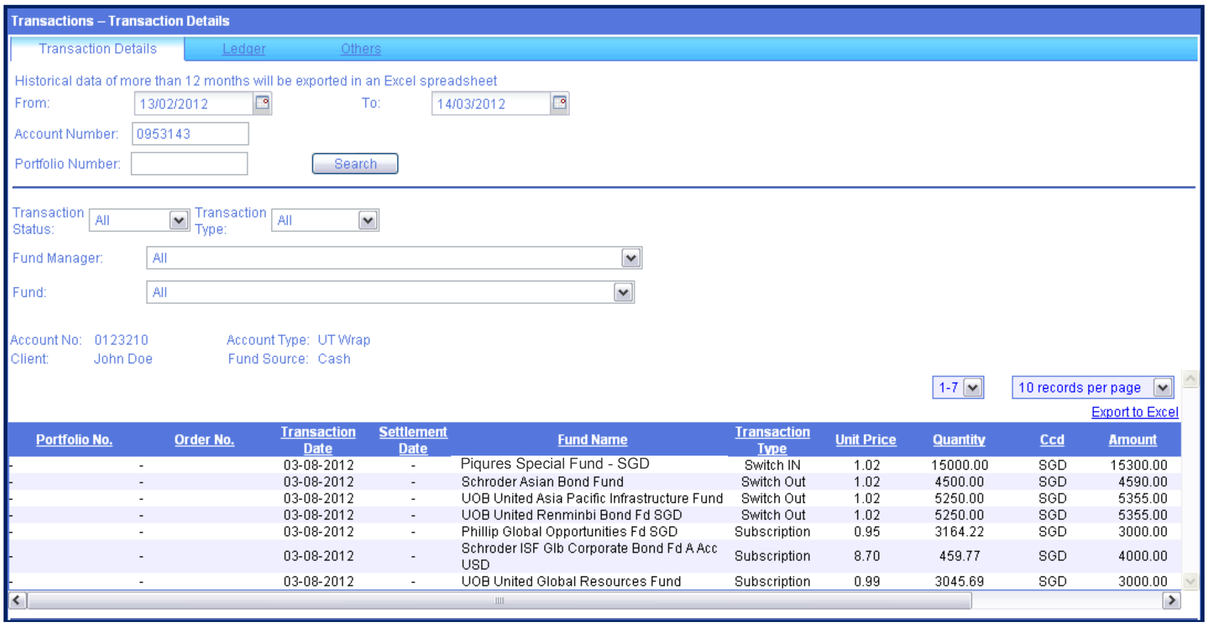
5. View Transaction Details

5.1 *Introduction*

1. You can view the details of transactions that are pending or processed by PSPL.

5.2 *Steps*

1. Navigate to **Transaction > Transactions > Transaction Details** page.
2. Select the **Period** of the transactions you want to view. (The default selection is the last 30 days.)
3. Enter the **Account Number** you want to view and click on the **Search** button to display all transactions within the selected period.



Portfolio No.	Order No.	Transaction Date	Settlement Date	Fund Name	Transaction Type	Unit Price	Quantity	Ccd	Amount
-	-	03-08-2012	-	Piqures Special Fund - SGD	Switch IN	1.02	15000.00	SGD	15300.00
-	-	03-08-2012	-	Schroder Asian Bond Fund	Switch Out	1.02	4500.00	SGD	4590.00
-	-	03-08-2012	-	UOB United Asia Pacific Infrastructure Fund	Switch Out	1.02	5250.00	SGD	5355.00
-	-	03-08-2012	-	UOB United Renminbi Bond Fd SGD	Switch Out	1.02	5250.00	SGD	5355.00
-	-	03-08-2012	-	Phillip Global Opportunities Fd SGD	Subscription	0.95	3164.22	SGD	3000.00
-	-	03-08-2012	-	Schroder ISF Glb Corporate Bond Fd A Acc USD	Subscription	8.70	459.77	SGD	4000.00
-	-	03-08-2012	-	UOB United Global Resources Fund	Subscription	0.99	3045.69	SGD	3000.00

Screen: Transaction Details Page

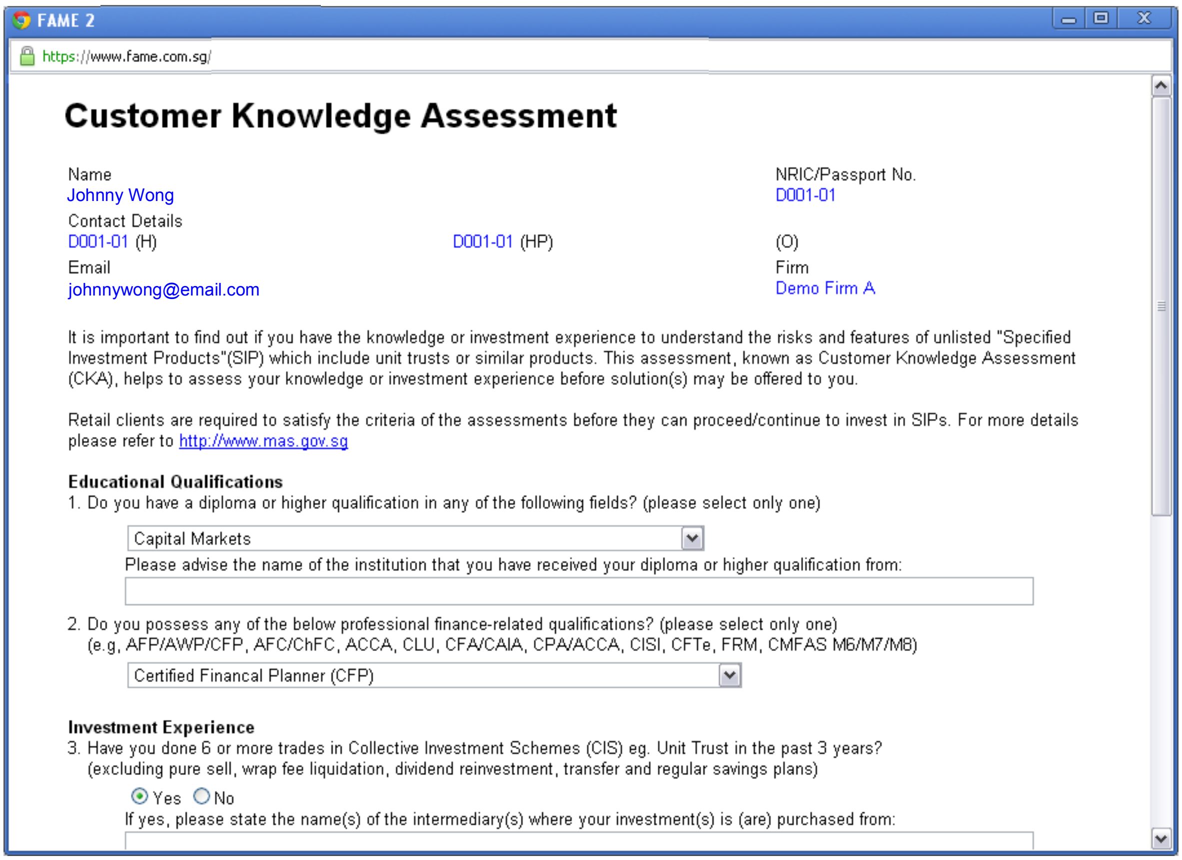
6. Update CKA

6.1 *Introduction*

1. You can update your CKA assessment online.

6.2 *Steps*

1. Navigate to **Admin > Particulars > CKA** page.
2. Select the **Update CKA** link.
3. Answer all the questions in the popup window and click on the **Submit** button.
4. Your results will be displayed to you immediately.



Screen: CKA Update Page