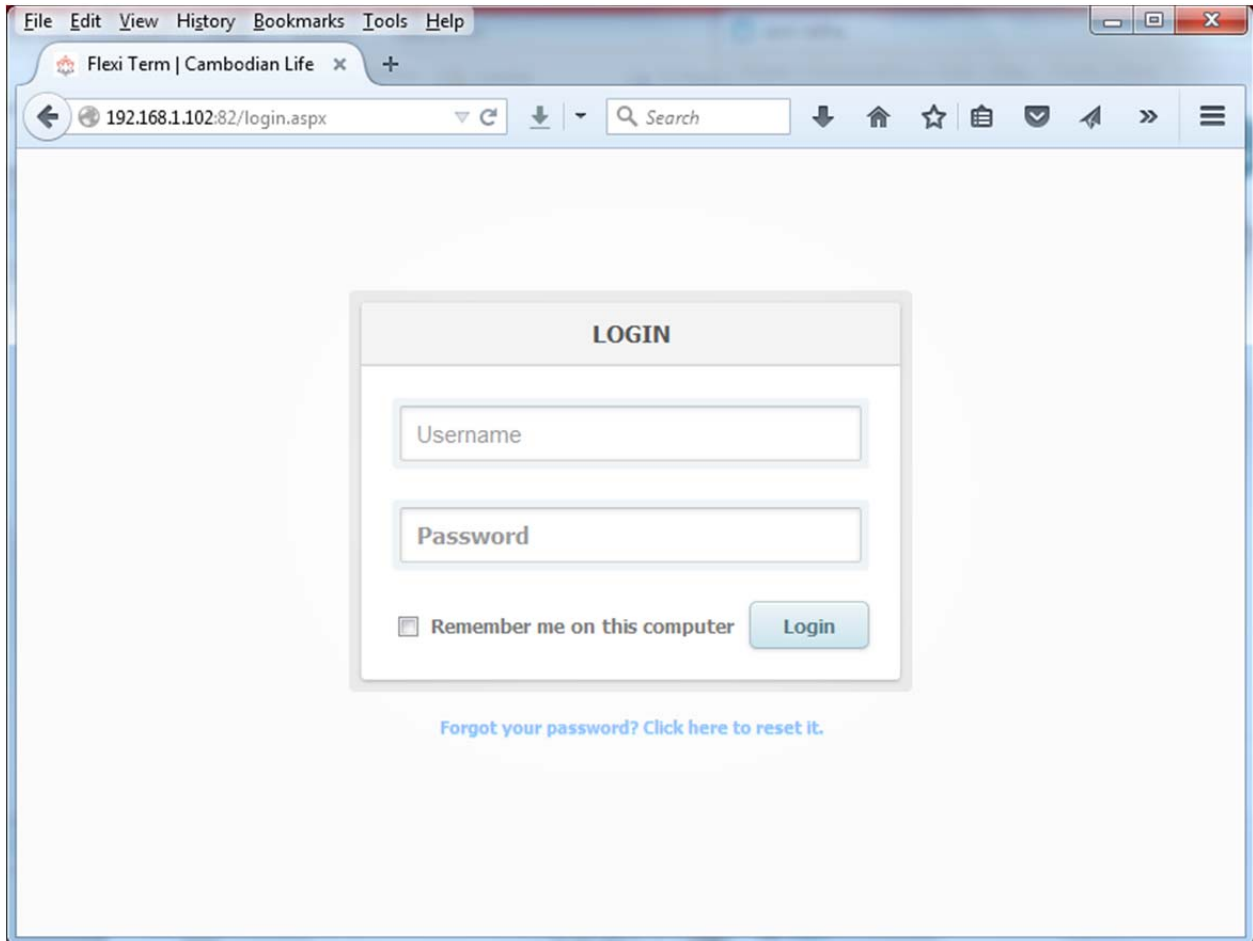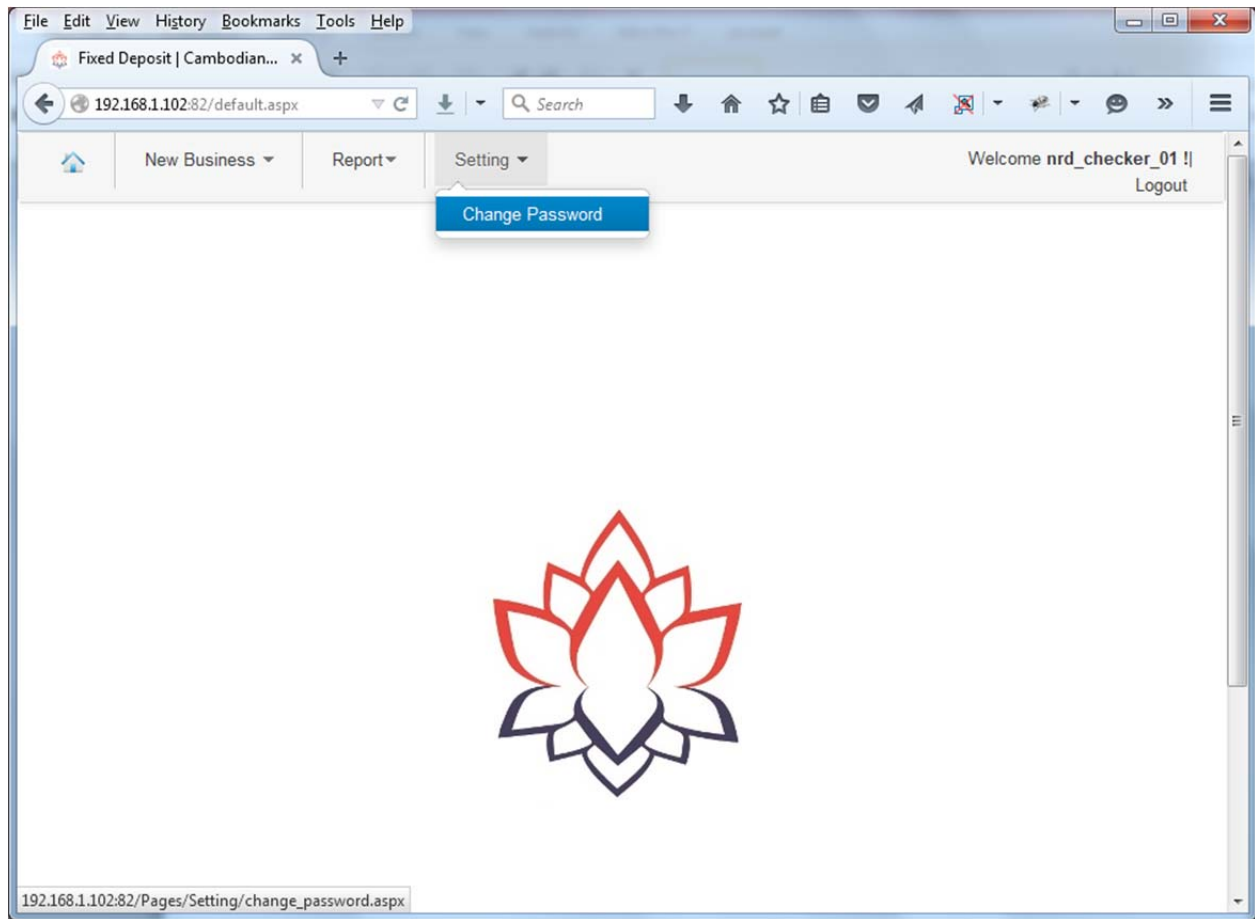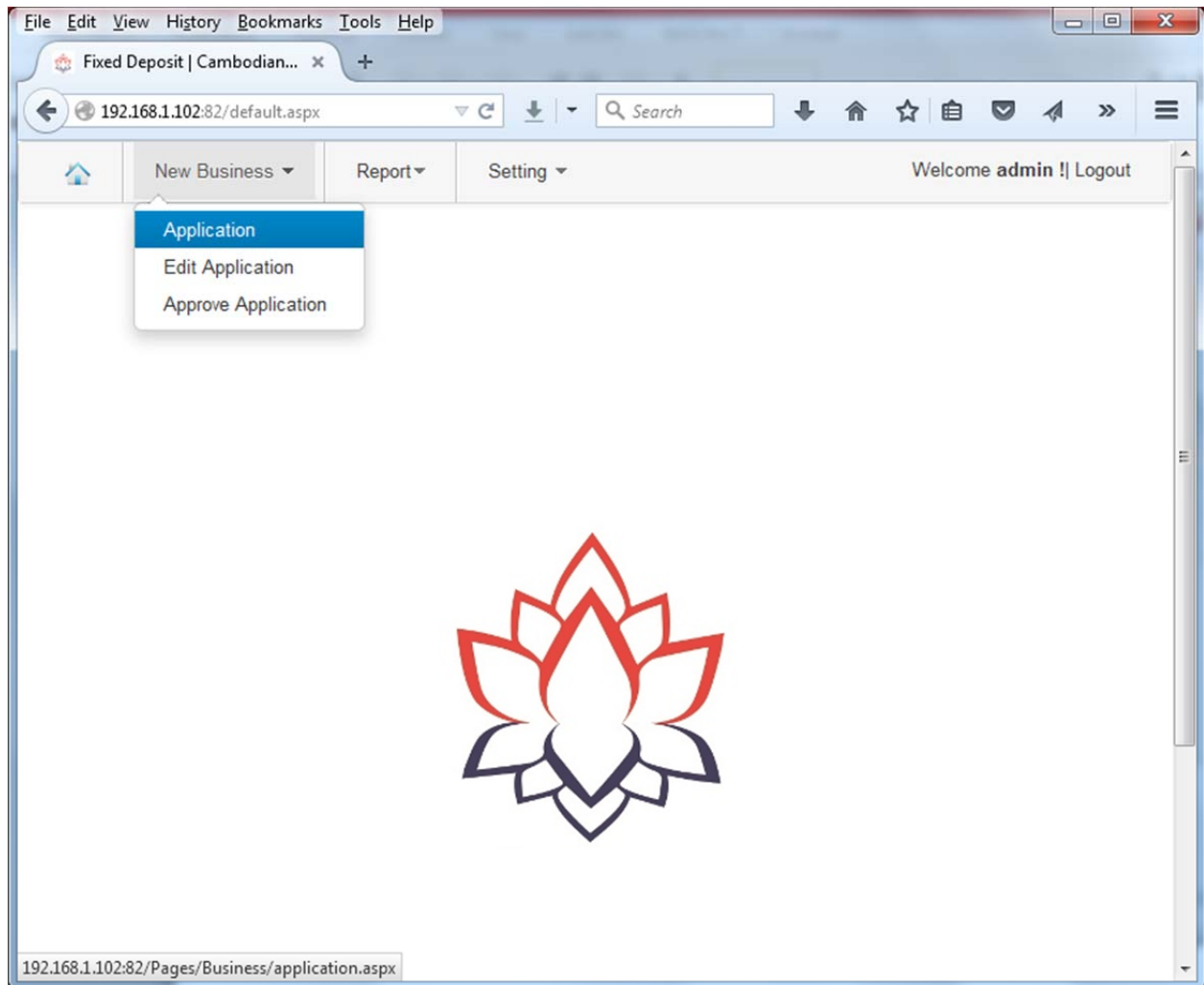# System Guide line for Phillip

1. Open Internet Browser and input the application web address (Will be provided)

2. Input UserName and Password → Login

3. Change Password → Setting → Change Password

4. Application Entry → New Bussiness → Application (For only Creator)

Input Bank Account information and Insured's Information (Sum Assured and Premium are automatically filled base on FD amount and maximum SA per life (USD20, 000.00); Select Effective Date and then choose the FD period; DOB must be between 18-60 years old; If CIF number is already exist then system will automatically load existing customer data from database to fill in the form).

Add Beneficiaries (Total share percentage cannot be over or less than 100%)

5. Edit Saved Application → New Business → Edit Application (For only Creator)
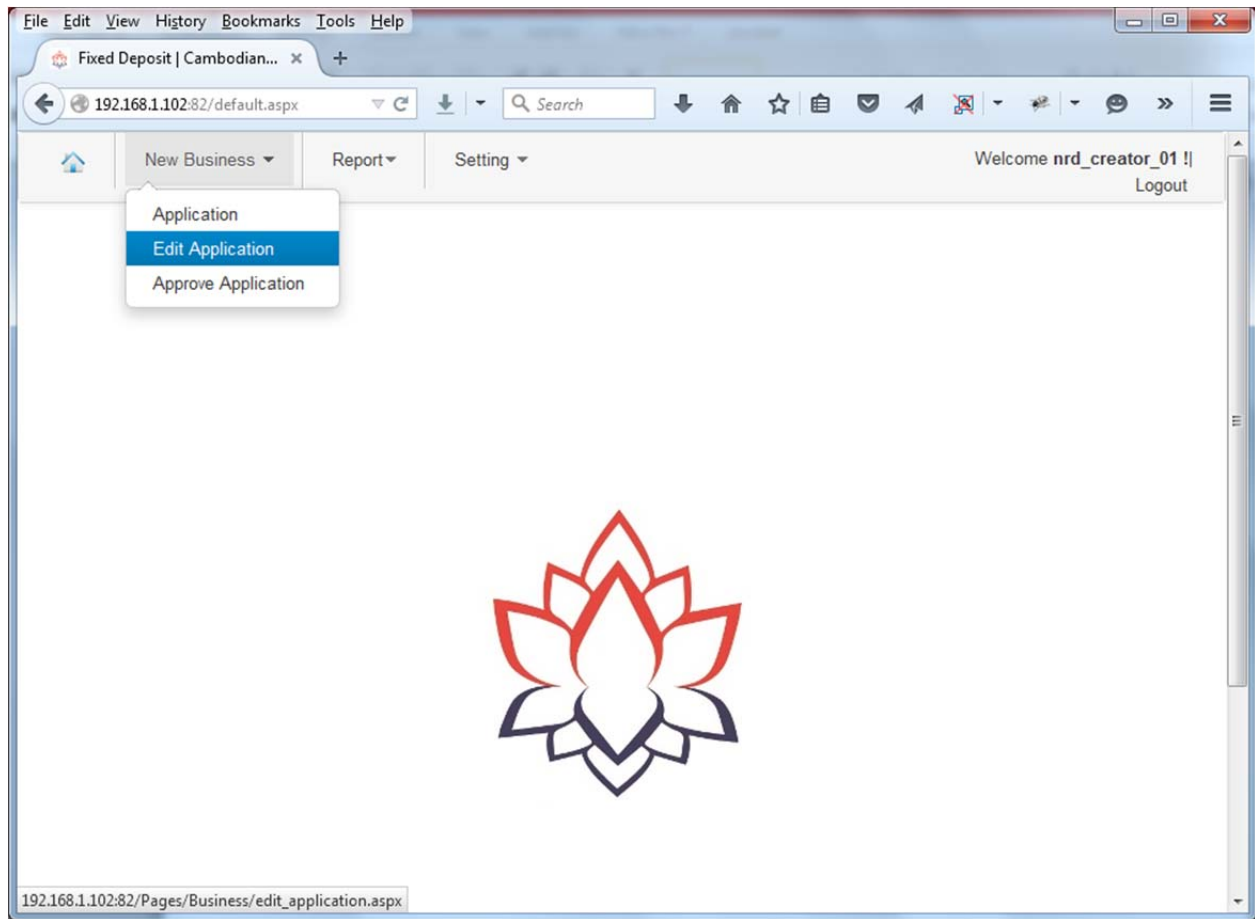
Select specific application to edit and click Edit (New Record will have status 'Pending'; Edited Record will have status 'Updated'; Approved Record will have status 'Approved'). User can edit only record with status 'Pending' and 'Updated'.

	Branch	Bank Account No.	Customer ID.	Surname	First Name	DOB	Gender	ID No.	ID Type	Fixed Deposit	Sum Insure	Premium	Residential	Created On	Status
☑	0001	N001203	N001203	N001203	TESTING	04-05-1983	M	N001203	I.D Card	$2,000	$2,000	$4	Y	27-09-2016	Pending
☐	0001	NRD001	N001200	NRD001	TESTING	05-08-1997	M	NRD001	I.D Card	$10,000	$10,000	$50	Y	27-09-2016	Pending
☐	0001	NRD002	N001202	NRD002	TESTING	04-02-1980	F	N001202	I.D Card	$30,000	$20,000	$42	Y	27-09-2016	Pending

Edit any wrong information and click Update to save

6. Approve application → New Business → Approve Application (For only Checker)
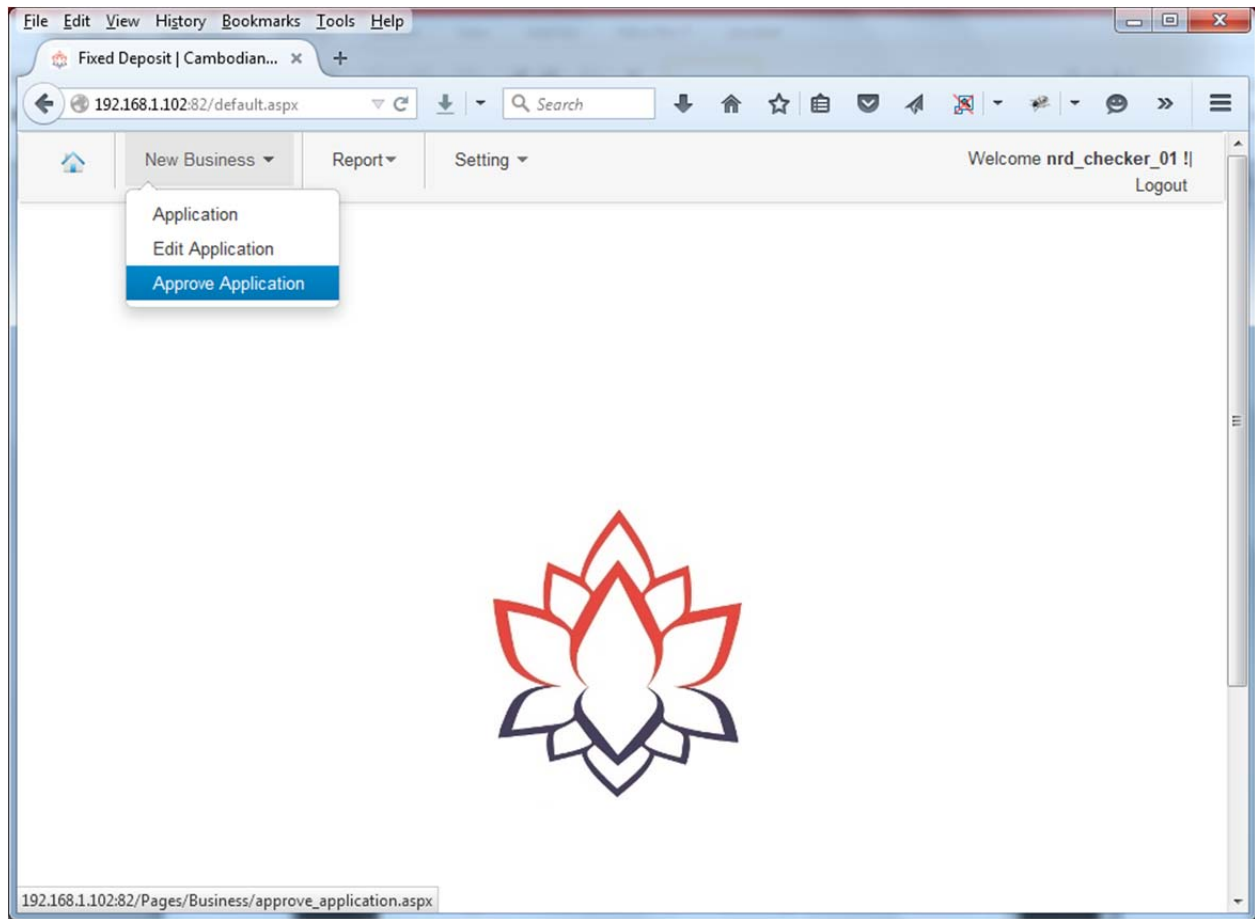
Approve: Select any record to approve → Click Approve Button

Review all the inputted data → Click OK to approve the application

Reject: Select any record to reject → Click Reject Button
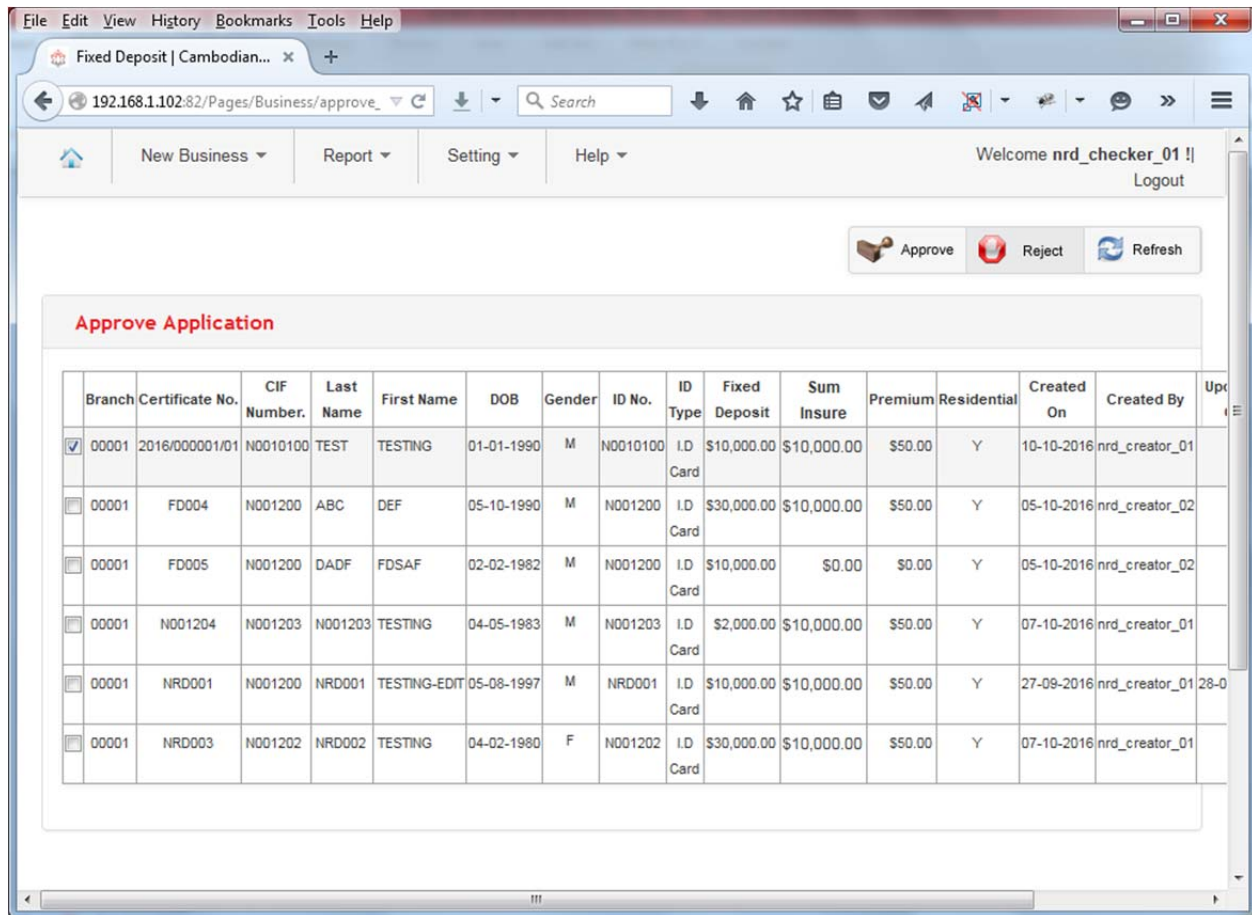
7. Renewal Process→ New Business → Application → Tick check box Renewed → Type Old FD Certificate Number Then system will automatically load all existing FD data → Check and edit the data such as Certification Number, FD amount, Beneficiary, and so on then Save.(For only Creator)

8. Check Application List Report → Report (For only Checker and Bank Admin)

a. Application Report to see all approval applications
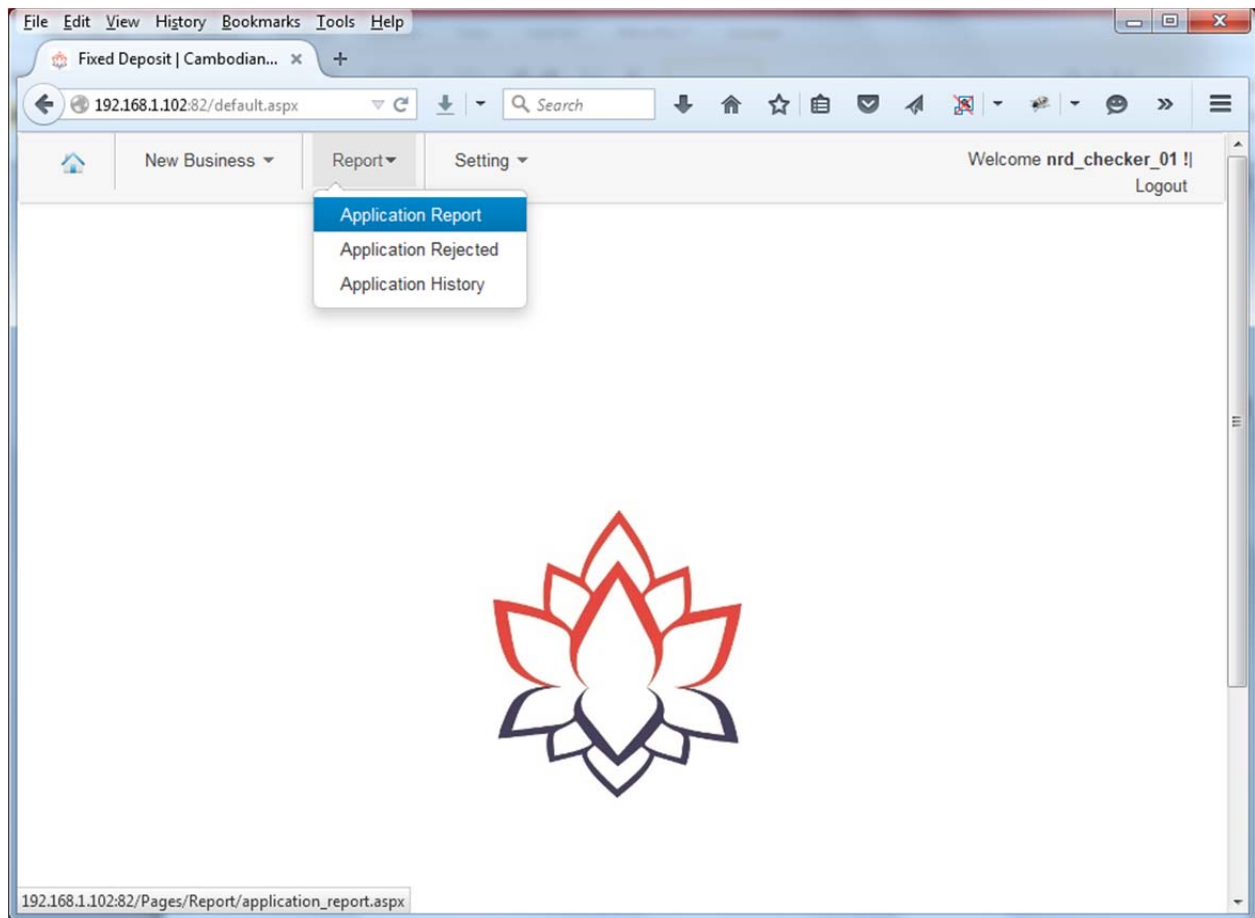
b. Application Rejected to see all rejected applications
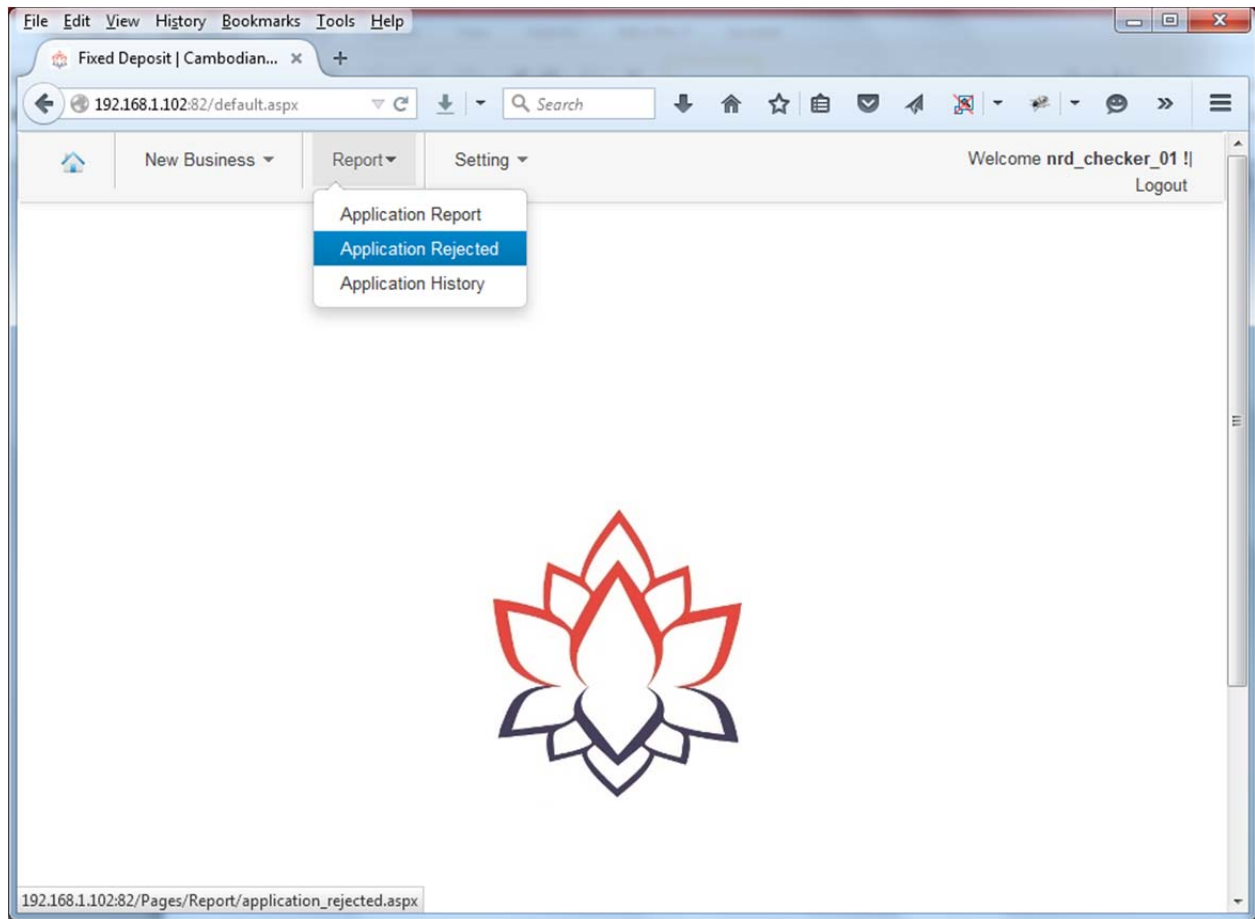
c. Application History to see all input applications
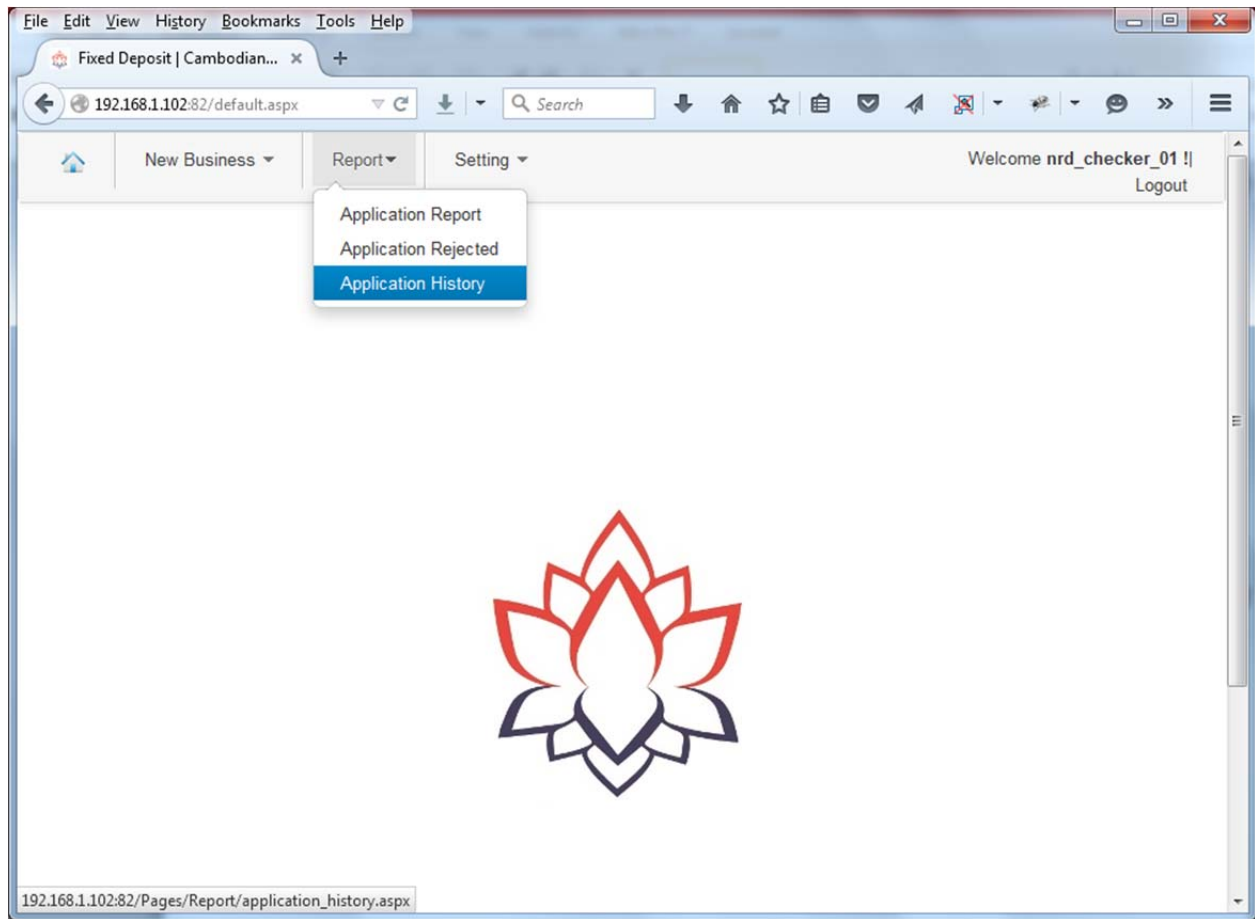
Note: In all reports page there are three buttons as Search to filter data in the list, Print to print report and Excel to export data from the list to excel in detail.
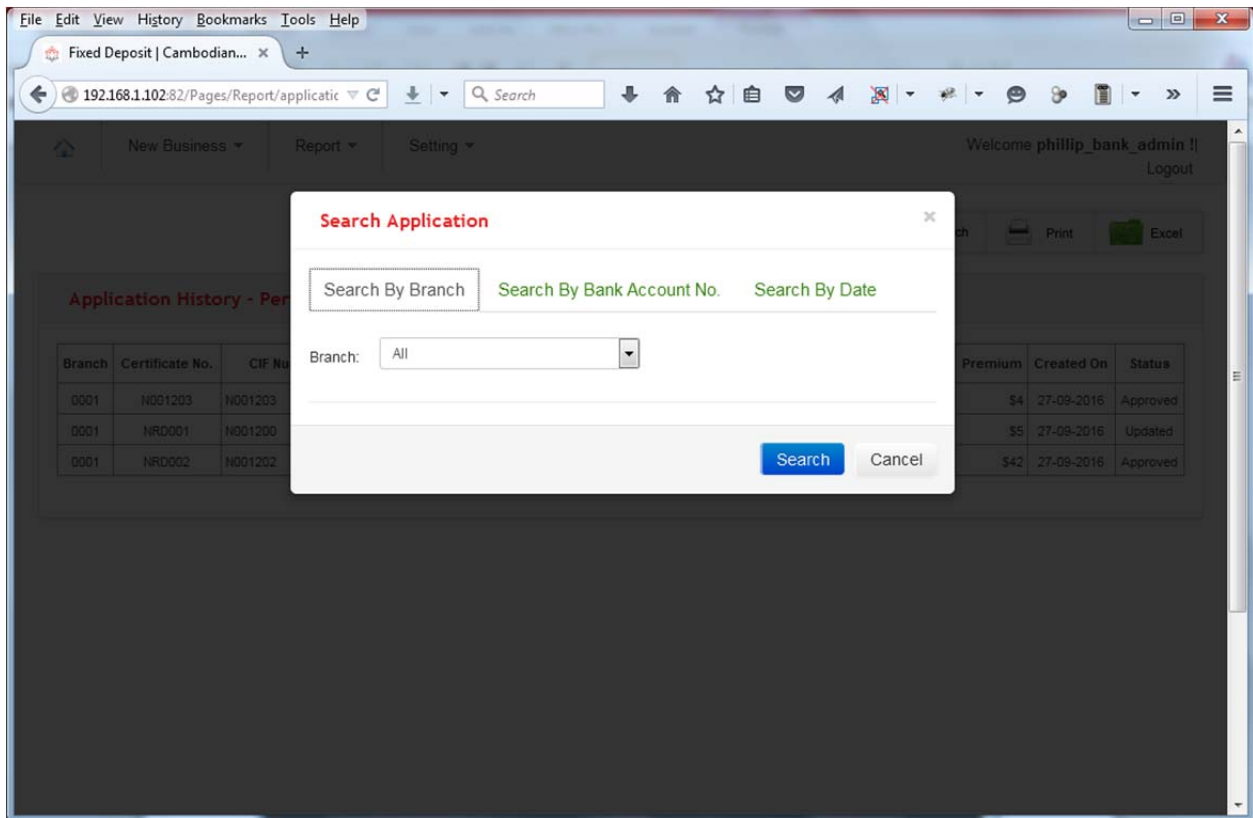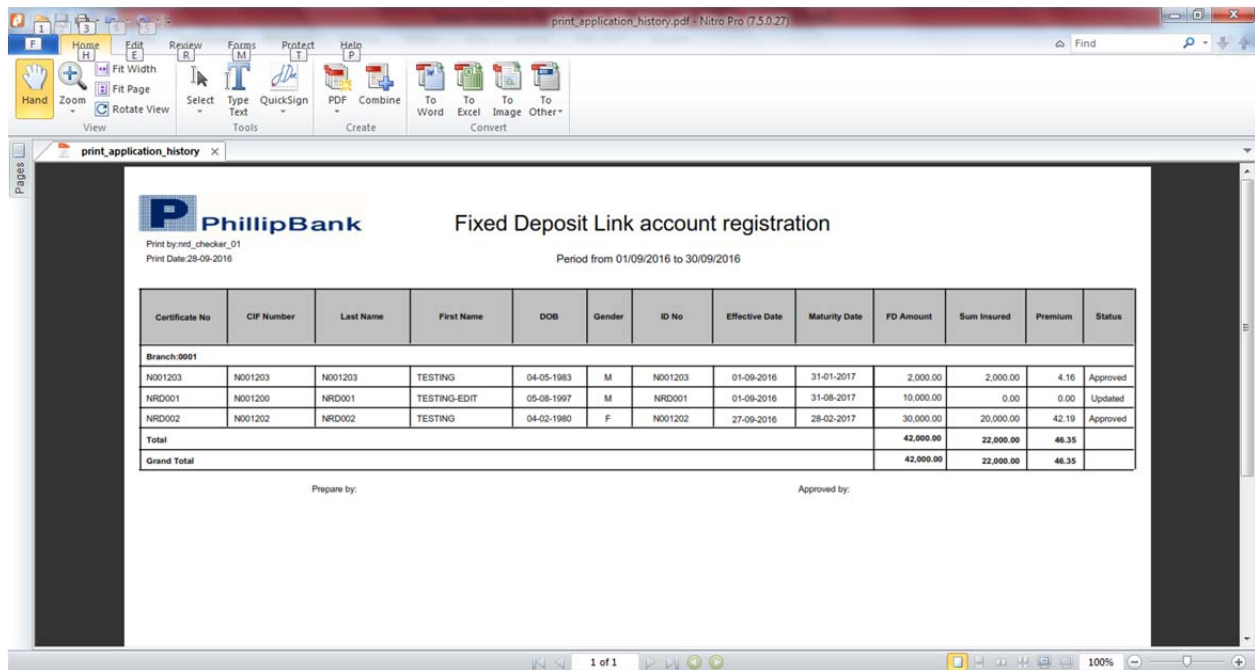
+ Search (Search or filter by Branch (Bank Admin), Bank Account No, and Date range)

+ Print

+ Excel

Branch	Certificate No.	CIF No.	Surname	First Name	DOB	Gender	ID No.	ID Type	Residential?	Bene's Name	Beneficiary's ID No.	Bene's ID Type	Beneficiary's Relationship	Created On	Sum Insure	Premium	Status
0001	N001203	N001203	N001203	TESTING	5/4/1983	M	N001203	I.D Card	Y	Sub Testing	N001203-1	I.D Card	SON	9/27/2016	$2,000	$4	Approved
0001	N001203	N001203	N001203	TESTING	5/4/1983	M	N001203	I.D Card	Y	Sub Testing	N001203-2	I.D Card	DAUGHTER	9/27/2016	$2,000	$4	Approved
0001	NRD001	N001200	NRD001	TESTING-EDIT	8/5/1997	M	NRD001	I.D Card	Y	Sub Testing	NRD001-1	I.D Card	BROTHER	9/27/2016	$0	$0	Updated
0001	NRD001	N001200	NRD001	TESTING-EDIT	8/5/1997	M	NRD001	I.D Card	Y	Sub Testing 1	NRD001-2	I.D Card	FATHER	9/27/2016	$0	$0	Updated
0001	NRD001	N001200	NRD001	TESTING-EDIT	8/5/1997	M	NRD001	I.D Card	Y	Sub Testing 2	NRD001-3	I.D Card	DAUGHTER	9/27/2016	$0	$0	Updated
0001	NRD002	N001202	NRD002	TESTING	2/4/1980	F	N001202	I.D Card	Y	Sub Testing	NRD002-1	I.D Card	WIFE	9/27/2016	$20,000	$42	Approved

9. Unauthorized Page (when you access unauthorized page then the system will load a restriction message page then you can click the arrow button to go back to system home page)