FAME 2

Client User Guide



Phillip Securities Pte Ltd

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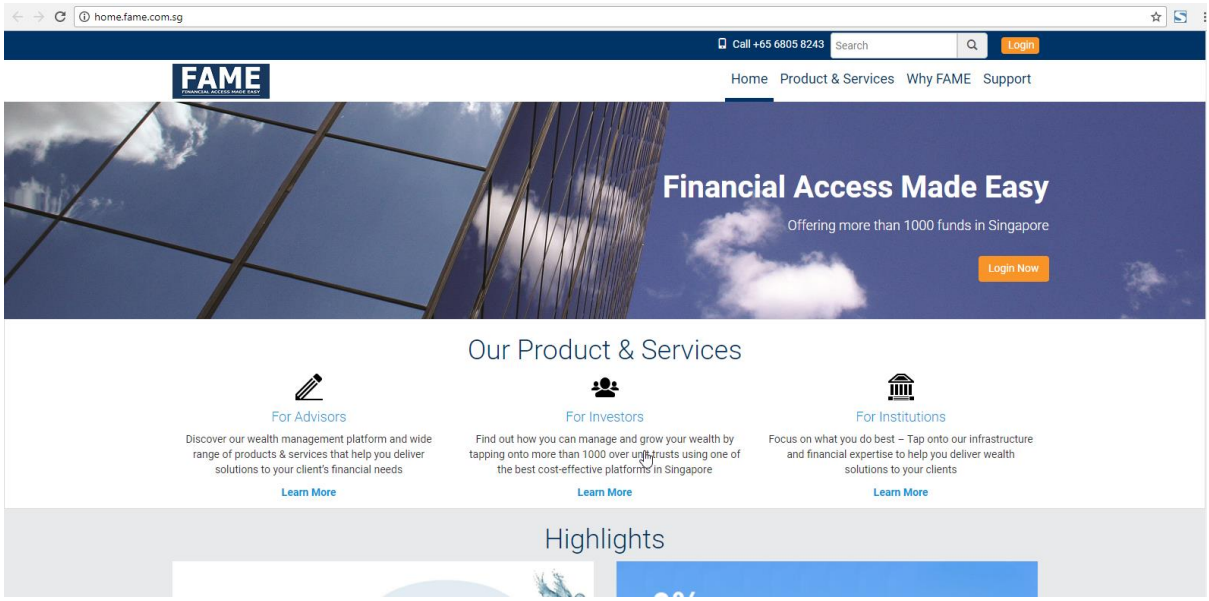
1. Logging In to the System

1.1 Introduction

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

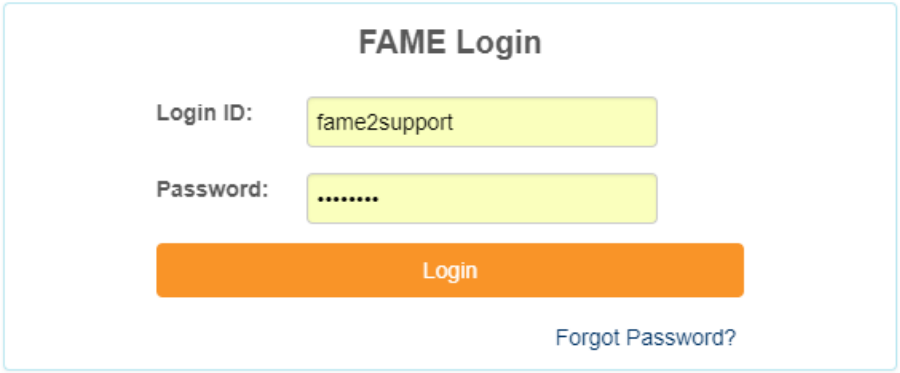
1.2 Steps

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



2. Click **Login** button (Top right hand side)

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



4. Click **Login** button

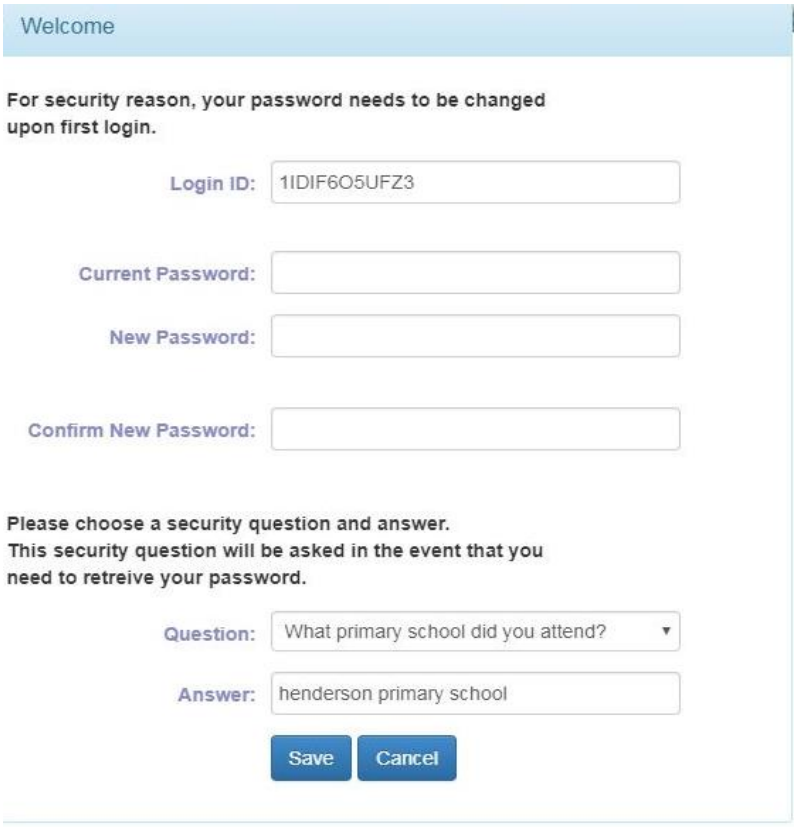
1.3 New Login

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. If you do not want to change you current login ID, just fill in your current ID in this page.



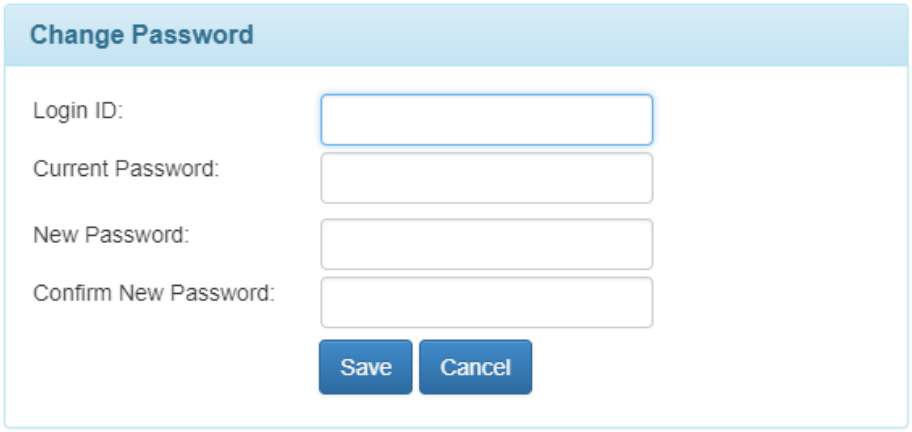
2. You will also be prompted to **change your password** for security reasons.

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.



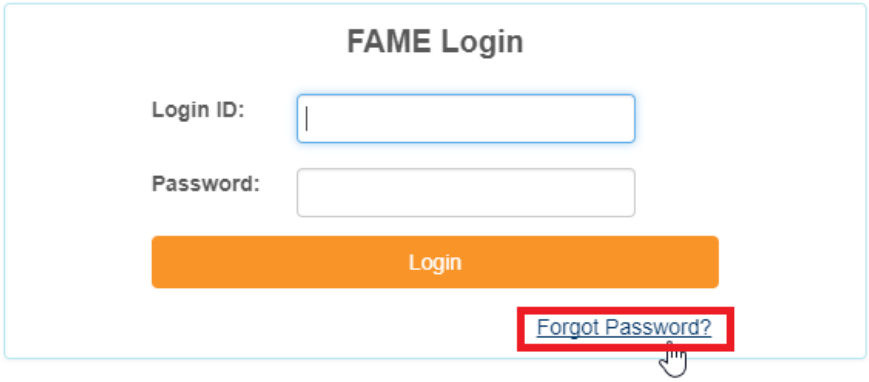
1.4 Change Password

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



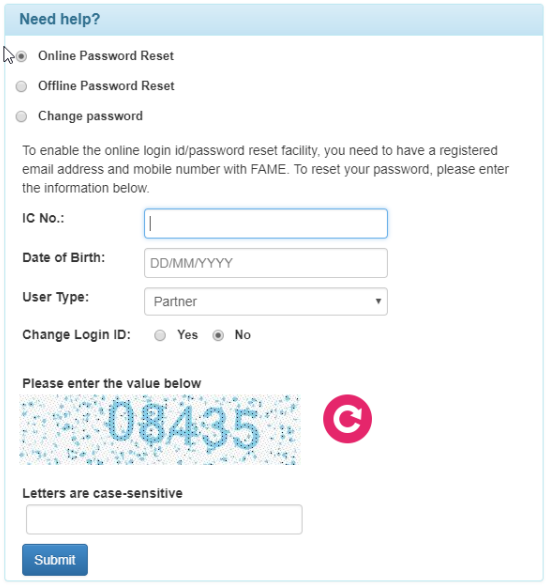
1.5 Forget Password

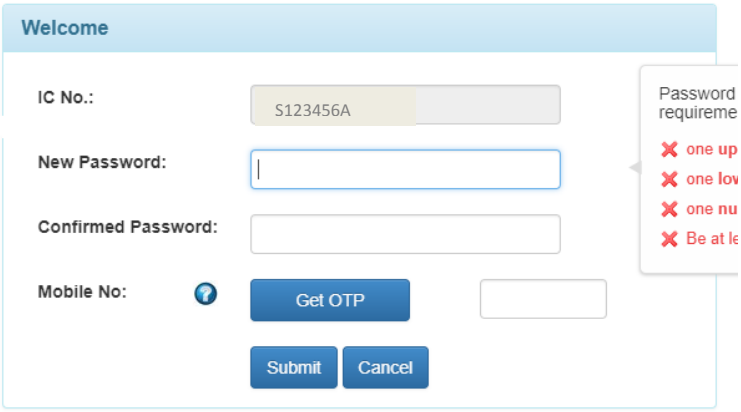
1. If you forgot your password, you can retrieve them via the **"Forgot Password? "** link on the login page.



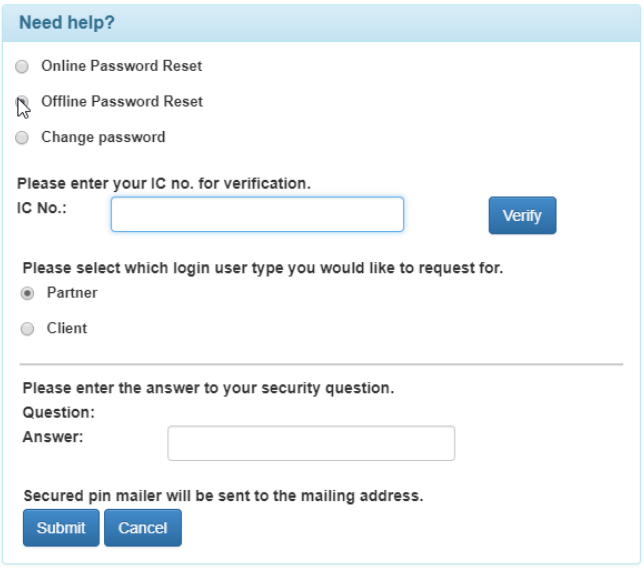
2. You will be prompted to choose your prefer way to find your password - Online or Offline.

3. For online password reset, after filling in all the info and click submit, an email will be processed and sent shortly after request. Open the link in the email and enter your new password.



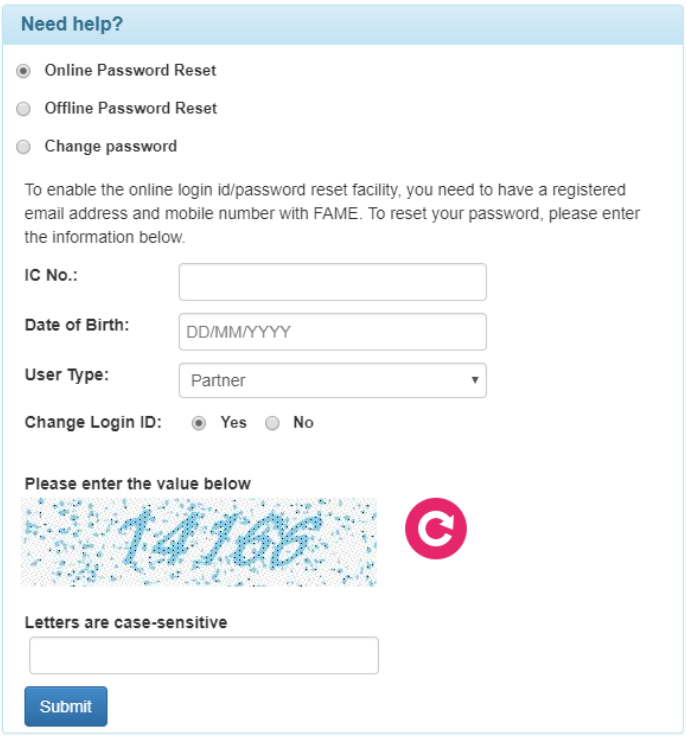


4. For offline password reset, after filling all then info and click submit, a pin mailer will be generated and delivered by post on the next working day.

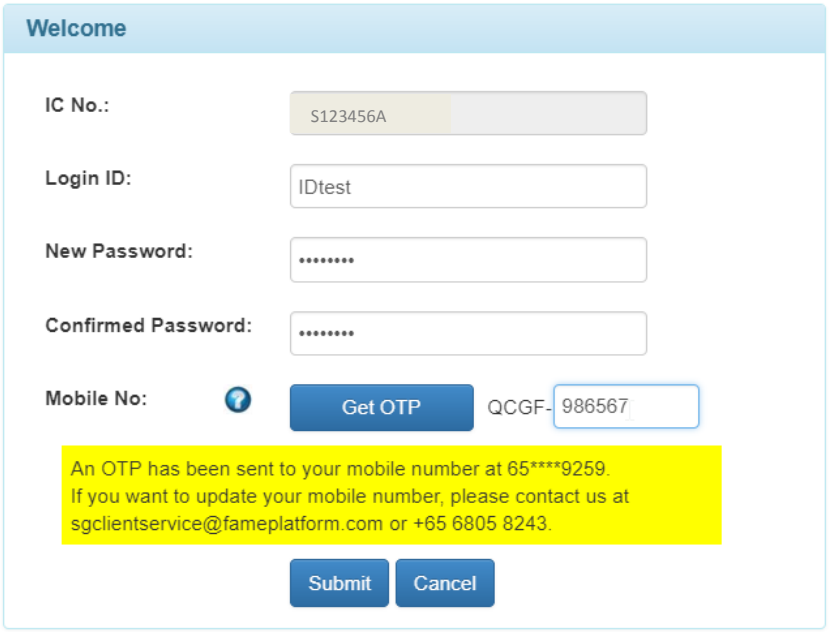


1.6 Change Login ID

1. If you forgot your ID or want to reset your ID, you can do it online by clicking the "**Forgot Password?**" link on the login page.
2. Choose **Online Password Rest** and fill in all the info
3. Choose **"Yes"** for **Change Login ID**, click **Submit** and an email will be processed and sent shortly after request



4. Open the link in the email and entre your new ID and password.



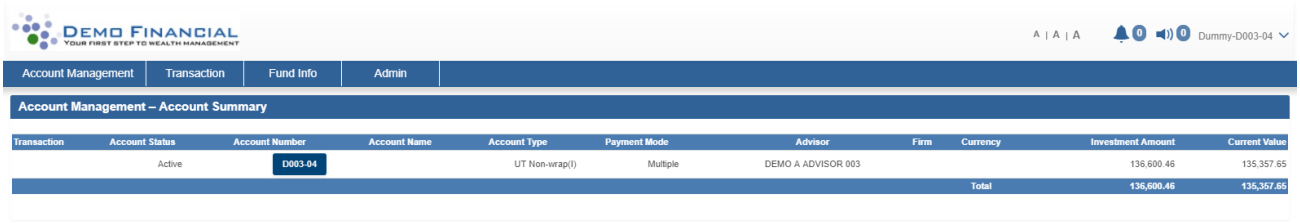
2. View Account Holdings

2.1 Introduction

You can view the holding details of your accounts in FAME

2.2 Steps

1. After Login, the page will show you the Account Summary of all your accounts.
   By clicking the account number, it will direct you to the account holding page of that account



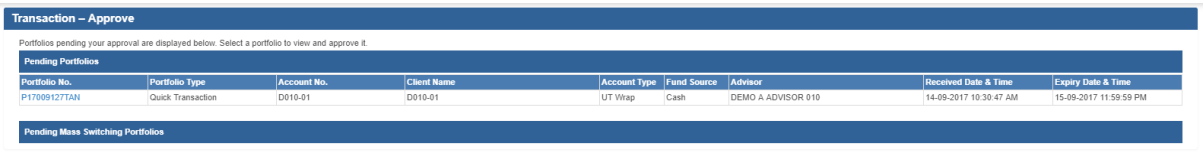
3. Approve Transaction Portfolio

3.1 Introduction

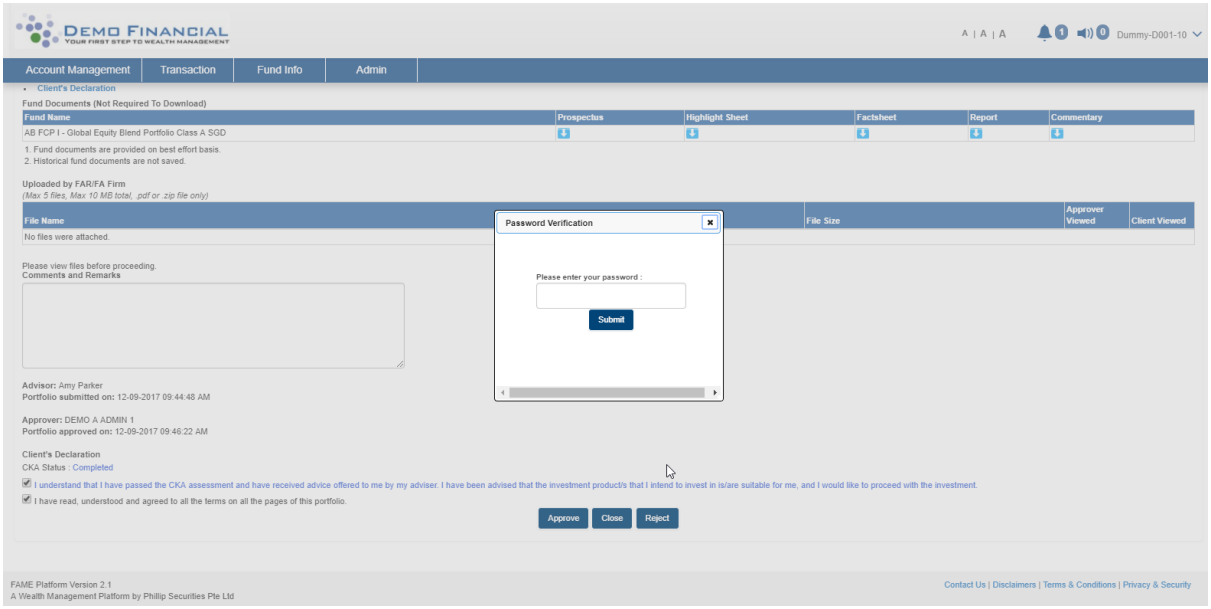
You can view and approve pending portfolio

3.2 Steps

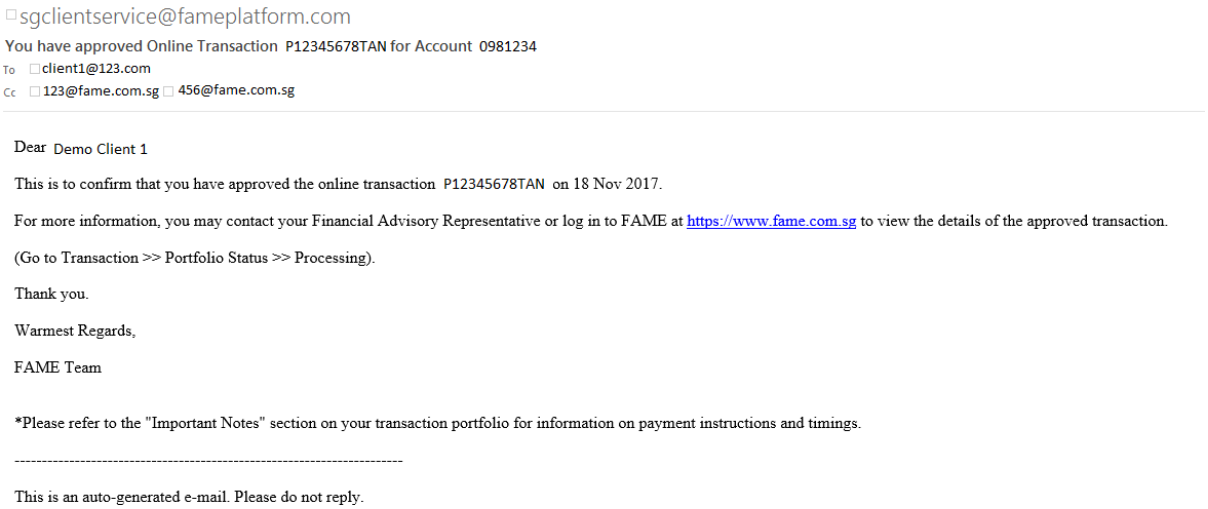
1. Navigate to Transaction > Approve page
   OR click pending approve in the account summary page



2. You will see all portfolios pending your approval here.
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.
6. Enter your password to complete the approval



7. A notification email will be sent to your email and cc you advisor.



sgclientservice@fameplatform.com

You have approved Online Transaction P12345678TAN for Account 0981234

To client1@123.com

Cc 123@fame.com.sg 456@fame.com.sg

Dear Demo Client 1

This is to confirm that you have approved the online transaction P12345678TAN on 18 Nov 2017.

For more information, you may contact your Financial Advisory Representative or log in to FAME at https://www.fame.com.sg to view the details of the approved transaction.

(Go to Transaction >> Portfolio Status >> Processing).

Thank you.

Warmest Regards,

FAME Team

*Please refer to the "Important Notes" section on your transaction portfolio for information on payment instructions and timings.

This is an auto-generated e-mail. Please do not reply.

4. View Portfolio Status

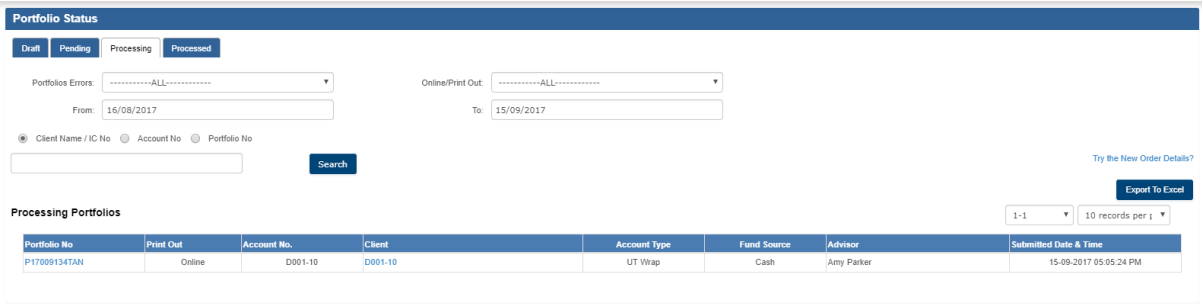
4.1 Introduction

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



5. View Transaction Details

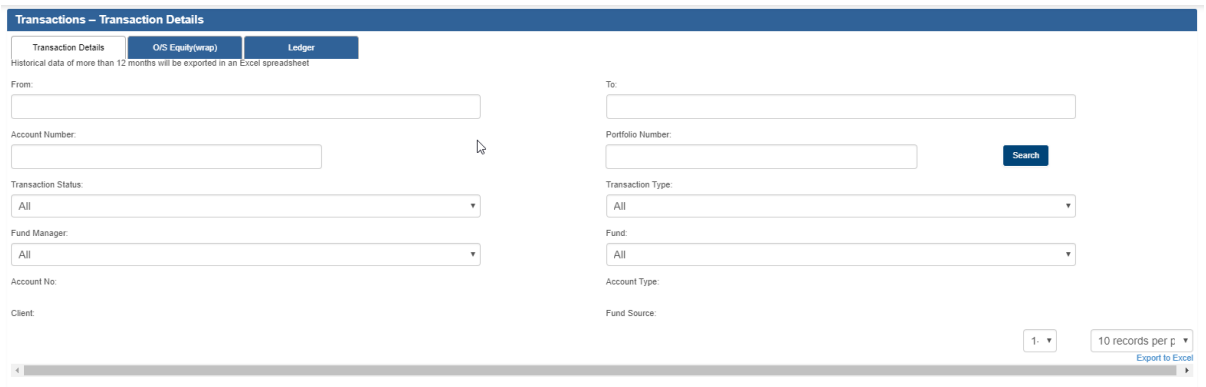
5.1 Introduction

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

5.2 Steps

1. Navigate to Transaction > Transactions > Transaction Details page.
2. Select the Period of the transactions you want to view.

Enter the Account Number you want to view and click on the Search button to export all transactions within the selected period as excel.



6. Update CKA

6.1 Introduction

You can update your CKA assessment online.

6.2 Steps

1. Navigate to Admin > Particulars > CKA page.
2. Select the View 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.

