

Staff Savings Scheme App



User Guide




Date
April 20, 2018


Compiled By:
Akinyemi Olusegun

Version:
1.0.1

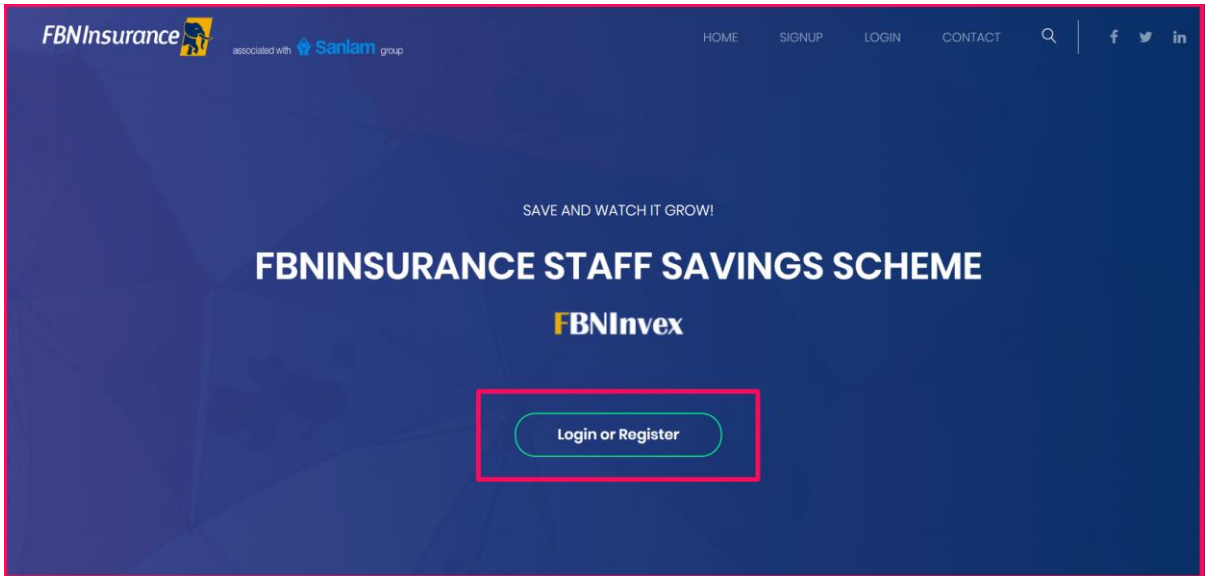
Application URL: <http://fbnlife-sv10/FBNIvex>

 This guide is compatible with FBNIvex version 1.4. All instructions and procedures listed are as applicable to FBNIvex version 1.4. Any mismatch encountered should be reported to the designated support desk.
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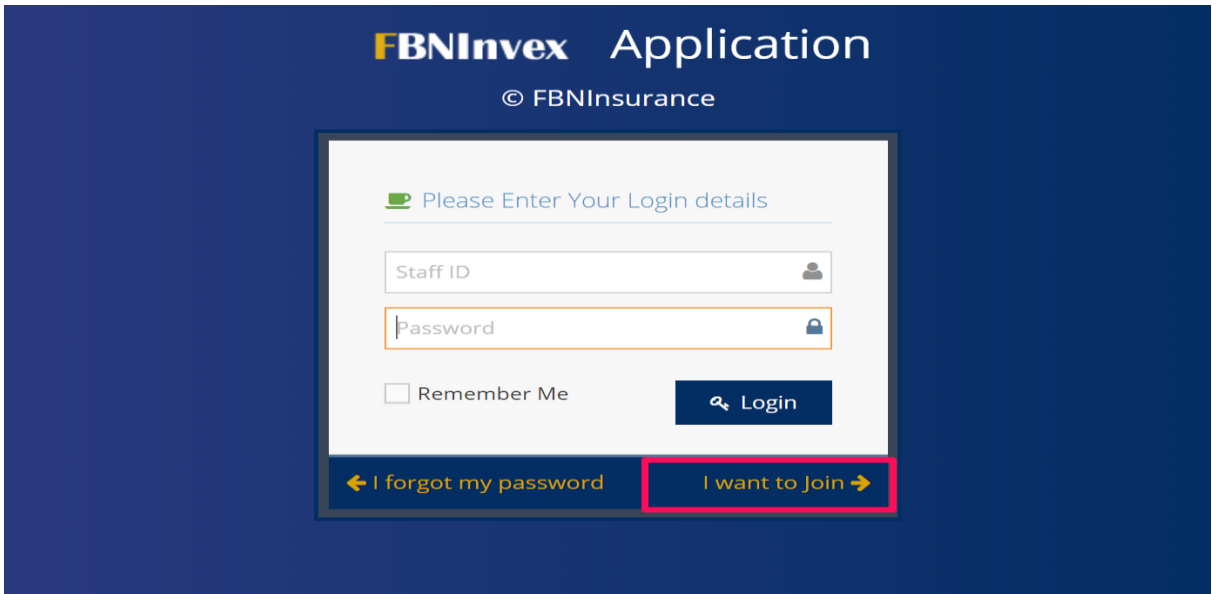
New Entrance/Registration Process

 This module is for employees who are ready to join the scheme. This is an opt-in or registration point.

Prospective participants can connect to the given URL (<http://fbnlife-sv10/FBNInvex/>). Click on "Join/Register".



Click on "I want to join" link



Complete the registration form and click on "Register"

FBNInvex Application
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New Member Registration

Enter your details to begin:

Staff ID
FIC00255

Email
segun.akinyemi@fbninsurance.com

Telephone no.
0803473475

First Name
Akinyemi

Surname
Olusegun

Monthly Deduction Amount
20000

Start Deduction From:
May 2018

Plan Duration
12

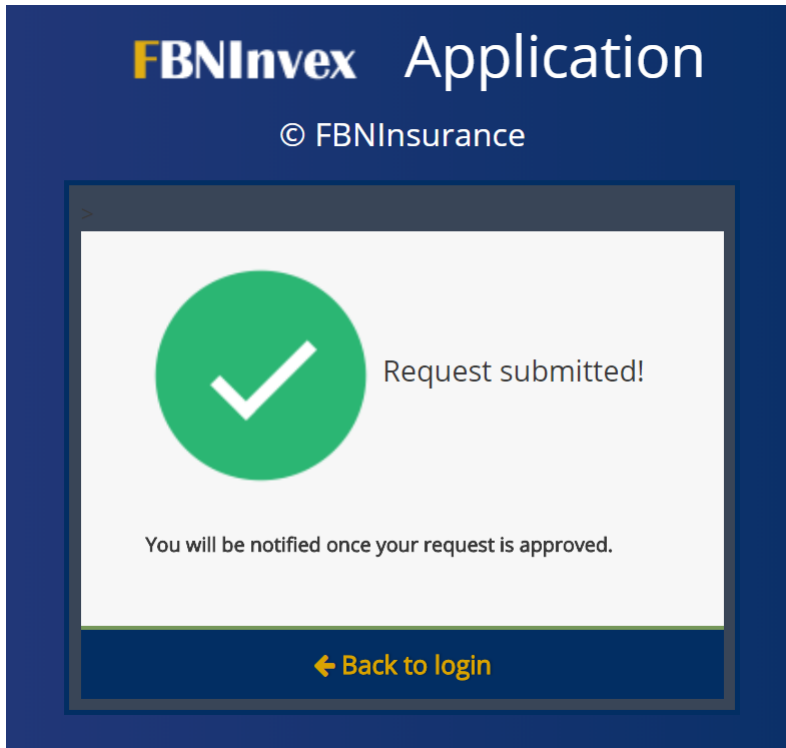
Payroll Source
FBN General Insurance

Password

Repeat password

I accept monthly deduction mandate.

A success message will be displayed.

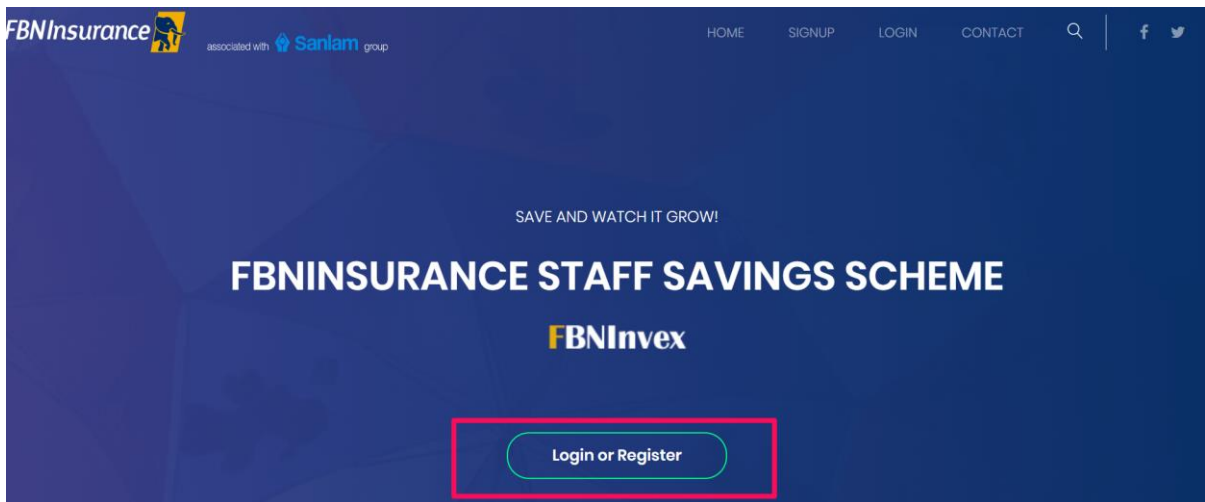


Login



Existing users can sign on to the application to manage their scheme.

On the application home page, click on "[Login/Register](#)" button.



Next, supply username and password and click on "[Login](#)" button.

FBNInvex Application

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Please Enter Your Login details

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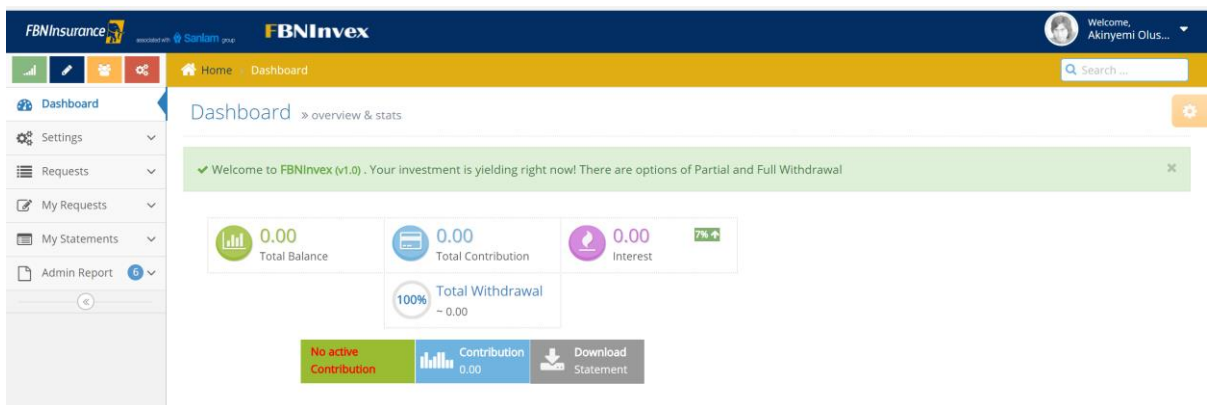
🔒

Remember Me

Login

← I forgot my password
I want to Join →

The system will display your investment dashboard/landing page as shown below.



Increase/Decrease Contribution

i Scheme Participants can make changes to their monthly contribution. It can either be increased or decreased.

To increase or decrease monthly contribution, click on **"My requests"** => Click on **"Increase/Decrease Contribution"**. The change request screen will be displayed.

Complete the form and click on **"Apply"**.

The screenshot displays the FBN Insurance and FBNInvex web application interface. The top navigation bar includes the logos for FBN Insurance (associated with Sanlam group) and FBNInvex. Below the navigation bar, there are several icons and a breadcrumb trail: Home > Change Request. On the left, a sidebar menu contains 'Dashboard', 'My Requests' (highlighted with a red circle), 'Withdrawals' (highlighted with a red circle), 'Increase/Decrease Contribution', 'Deposit Fund', and 'My Statements'. The main content area is titled 'Change Request' and contains the following form fields:

- Type:** A dropdown menu with 'Increase' selected.
- Old Amount:** 10000
- New Contribution:** A text input field containing '20000'.
- With Effect From:** A dropdown menu with 'May' selected and '2018' shown in a separate dropdown.

At the bottom of the form is a blue button labeled 'Apply' with a checkmark icon. To the right of the form is a section titled 'Existing Change Requests' which displays 'No record yet'.

Withdrawal



Participants can request for partial or full withdrawal.

Click on **"My Requests"** => **"Withdrawal"** => Complete the withdrawal form and click on **"Submit"**

Dashboard

My Requests

Withdrawals

Increase/Decrease Contribution

Deposit Fund

My Statements

New Withdrawal

Investment Balance 20,092.33 7% ↑

Withdrawal Type: Partial Withdrawal

Reason for Withdrawal: Personal

Amount: 20000

Receiving Bank Name: FirstBank

Account Name: Sadiq Amao

Account Number: 077238283822

Submit

Exist

No record

Deposit Funds

i Support staff whose contribution/deduction is not driven by payroll. Any participant who wishes to invest funds outside payroll.

Click on "My Requests" => "Deposit Fund" => Complete the deposit form and click on "Submit"

View Statements

i This enable scheme participants view invest statements and schedules.

To view statements, click on "My Statement"

	Opening Balance	Withdrawal	Interest on Opening Balance	Contribution	Interest on Contribution	Closing Balance	Comment
<input type="checkbox"/>	0.0000	0.00	0.0000	10,000.00	0.0000	10,000.0000	New Contribution
<input type="checkbox"/>	10,000.0000	0.00	1.9178	0.00	0.0000	10,001.9178	
<input type="checkbox"/>	10,001.9178	0.00	1.9182	0.00	0.0000	10,003.8360	
<input type="checkbox"/>	10,003.8360	0.00	1.9185	0.00	0.0000	10,005.7545	
<input type="checkbox"/>	10,005.7545	0.00	1.9189	0.00	0.0000	10,007.6734	
<input type="checkbox"/>	10,007.6734	0.00	1.9193	0.00	0.0000	10,009.5927	
<input type="checkbox"/>	10,009.5927	0.00	1.9196	0.00	0.0000	10,011.5124	
<input type="checkbox"/>	10,011.5124	0.00	1.9200	0.00	0.0000	10,013.4324	
<input type="checkbox"/>	10,013.4324	0.00	1.9204	0.00	0.0000	10,015.3528	
<input type="checkbox"/>	10,015.3528	0.00	1.9208	0.00	0.0000	10,017.2735	
<input type="checkbox"/>	10,017.2735	0.00	1.9211	0.00	0.0000	10,019.1946	