



Perbadanan Insurans Deposit Malaysia
Protecting Your Insurance And Deposits In Malaysia

**PIDM INDUSTRY PORTAL:
USER GUIDE – SERVICES REQUEST**

ISSUE DATE : 6 APRIL 2026



Perbadanan Insurans Deposit Malaysia
Protecting Your Insurance And Deposits In Malaysia

Ref No	PIDM/UG4-A3/2026 (IPS-SR)	Issued on	6 April 2026
TITLE	PIDM INDUSTRY PORTAL: USER GUIDE – SERVICES REQUEST		

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Notice for Change in Terminology:

Existing terms reflected in this document	Updated terms reflected in the PIDM Industry Portal
MI Users	MI Users / Others
Member Institution	Member Institution / Others
MI	MI / Others
MI Officer	MI Officer / Others

Please note that there is no implication on the function and usage of the PIDM Industry Portal resulting from the update above.

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1.0 BRIEF DESCRIPTION

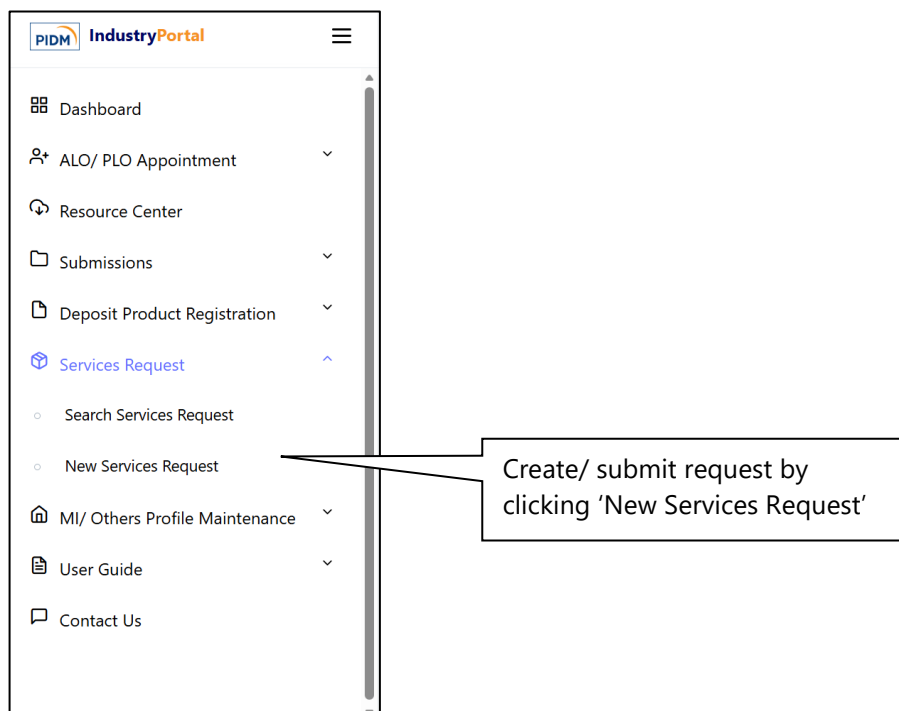
1.1 This allows authorised MI Primary Liaison Officer (MIPLO) / MI Officer who has contribute access right to the Services Request (SR) module to create new requests, edit the SR details, submit and discard the SR.

2.0 BASIC FLOW

- Go to “Services Request” menu, and select “New Services Request”.
- System redirects to a request data entry page. System prompts user to select a request type.
- System displays the request data entry form according to the selected request type.

3.0 SECTION 1: REQUEST FOR PIDM BROCHURES

3.1 **Step 1:** Go to “Services Request” menu, and select “New Services Request”. System redirects to a request data entry page. System prompts user to select a request type.



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Select Request Type

Request Type

Brochures

Briefing
 Brochures
 Electronic Membership Represen...
 Printed Membership Representat...

Select 'Brochures' from dropdown list, and then click 'Next'.

3.2 **Step 2:** Fill in all mandatory inputs (*) and select required brochure types and quantity.

Request Details

Request Type	Brochures	SR Reference No										
Request Reason *	<input type="text"/>	<input type="text"/>										
Pickup Address *	Warehouse <input type="button" value="x"/> <input type="button" value="v"/>	PIC for Collection *										
PIC for Collection Contact No	<input type="text"/>	Vehicle Registration No *										
Type of Brochures *	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Type</th> <th style="width: 20%;">No. of Pack (200 pcs per pack)</th> </tr> </thead> <tbody> <tr> <td>Deposit Insurance System (CH/TM)</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Deposit Insurance System (EN/BM)</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Takaful and Insurance Benefits Protection System (CH/TM)</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Takaful and Insurance Benefits Protection System (EN/BM)</td> <td style="text-align: center;">0</td> </tr> </tbody> </table>		Type	No. of Pack (200 pcs per pack)	Deposit Insurance System (CH/TM)	0	Deposit Insurance System (EN/BM)	0	Takaful and Insurance Benefits Protection System (CH/TM)	0	Takaful and Insurance Benefits Protection System (EN/BM)	0
Type	No. of Pack (200 pcs per pack)											
Deposit Insurance System (CH/TM)	0											
Deposit Insurance System (EN/BM)	0											
Takaful and Insurance Benefits Protection System (CH/TM)	0											
Takaful and Insurance Benefits Protection System (EN/BM)	0											

System auto generates the Services Request (SR) reference number when saved/ submitted

Fill in the required quantity

Save the draft SR if yet to complete

Click 'Submit' after completing all mandatory inputs

4.0 SECTION 2: REQUEST FOR PIDM MEMBERSHIP REPRESENTATION

4.1 PIDM Membership Representation Publications are available in two (2) formats:

- Electronic Membership Representation
- Printed Membership Representation

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Electronic Membership Representation Publication

4.2 **Step 1:** Go to “Services Request” menu, and select “New Services Request”. System redirects to a request data entry page. System prompts user to select a request type.

Select Request Type

Request Type

- Briefing
- Brochures
- Electronic Membership Representation Publication
- Printed Membership Representation Publication

4.3 **Step 2:** Select the file format, and submit the SR after completing all mandatory inputs (*).

Request Details

Request Type	Electronic Membership Representation Publication	SR Reference No
Request Reason *	<input type="text"/>	
File Format *	<ul style="list-style-type: none"><input type="checkbox"/> SELECT ALL<input type="checkbox"/> Adobe Illustrator File (.AI)<input type="checkbox"/> Joint Photographic Experts Group (JPEG)<input type="checkbox"/> Portable Document Format (PDF)	<input type="button" value="Submit"/>

Select required file format. Multiple selections are allowed.

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- 4.4 **Printed Membership Representation Publication**
Step 1: Go to “Services Request” menu, and select “New Services Request”. System redirects to a request data entry page. System prompts user to select a request type.

Select Request Type

Request Type

Printed Membership Representation Publication x ▲

Briefing

Brochures

Electronic Membership Representation Publication

Printed Membership Representation Publication

- 4.5 **Step 2:** Submit the SR after completing the required quantity and all mandatory inputs (*).

Request Details

Request Type	Printed Membership Representation Publication	SR Reference No
Request Reason *	<input type="text"/>	
Quantity (Pcs) *	<input type="text"/>	Mode of Delivery * Self Collect x ▼
Pickup Address	HQ x ▼	
PIC for Collection *	<input type="text"/>	PIC for Collection Contact No <input type="text"/>
Vehicle Registration No *	<input type="text"/>	

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5.0 SECTION 3: REQUEST FOR BRIEFING

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

5.2 **Step 1:** Go to “Services Request” menu, and select “New Services Request”. System redirects to a request data entry page. System prompts user to select a request type.

Select Request Type

Request Type

Briefing

Briefing

Brochures

Electronic Membership Representation Publication

Printed Membership Representation Publication

5.3 **Step 2:** Submit the SR after completing all mandatory inputs (*).

– Request Details

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

5.4 Upon the SR being submitted, the system will generate an email notification to the requestor, with CC to the MIPLO and other MI Liaison Officer (LO) from the same MI who has contribute access to the Services Request module. Submitted request is no longer editable.

5.5 For Brochures and Printed Membership Representation Publication request types, the system will update the SR status to "Pending Requestor Sign Off" upon being processed by PIDM LO. Requestor should sign off the services request after collection of the brochures or printed membership representation publication. However, the system will auto sign off the SR status "Pending Requestor Sign Off" 3 days after target collection date.

5.6 For other service request types, the SR status is updated to "Completed" upon being processed by PIDM LO.

6.0 SECTION 4: ALTERNATE FLOWS

Edit Draft

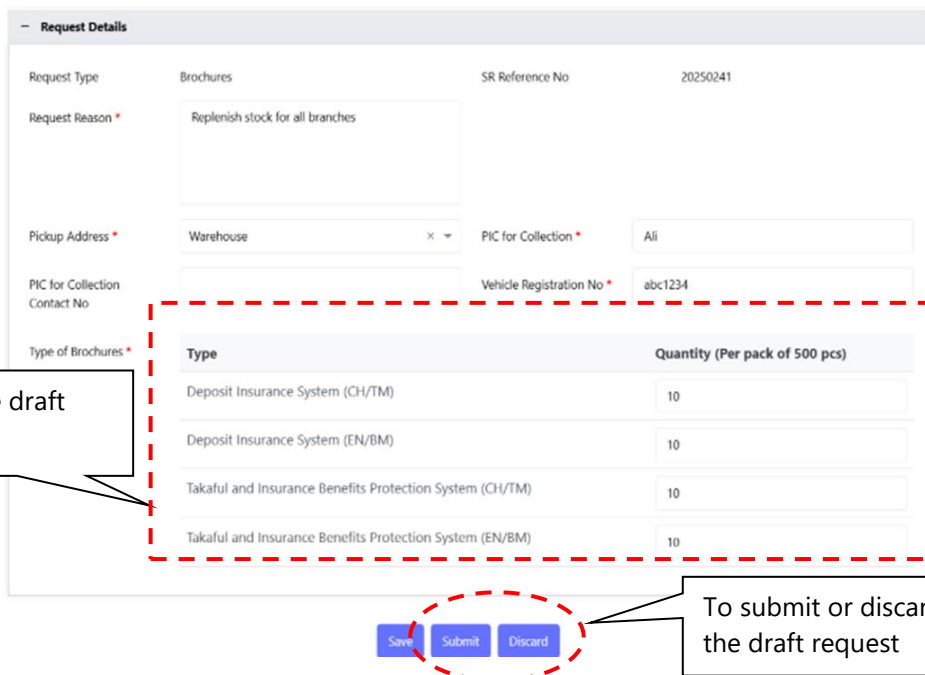
6.1 User can edit a draft request anytime before submitting. User can use the "Search Services Request" function to locate specific draft request to edit.

6.2 Click "Submit", and the request status will be updated to "Submitted". The SR is no longer editable.

Discard Draft SR Before Submitting

6.3 To discard a draft request, click the "Discard" button.

6.4 The request status will be updated to "Discarded" and the request is no longer editable.



Type	Quantity (Per pack of 500 pcs)
Deposit Insurance System (CH/TM)	10
Deposit Insurance System (EN/BM)	10
Takaful and Insurance Benefits Protection System (CH/TM)	10
Takaful and Insurance Benefits Protection System (EN/BM)	10

To edit the draft request

To submit or discard the draft request

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Abort Submitted SR Before the SR is Completed

- 6.5 To abort a submitted request, click the "Abort" button.
- 6.6 The request status will be updated to "Aborted".
- 6.7 System will send "SR Aborted" email to the MI LO who had aborted the request and CC to the MIPLO and other MI LO from the same MI who has contribute access to the "Services Request" module.

Request Details

Request Type	Brochures	SR Reference No	20250242										
Request Reason *	to replenish												
Pickup Address *	Warehouse	PIC for Collection *	All										
PIC for Collection Contact No		Vehicle Registration No *	abc1234										
Type of Brochures *	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Type</th> <th style="width: 20%;">Quantity (Per pack of 500 pcs)</th> </tr> </thead> <tbody> <tr> <td>Deposit Insurance System (CH/TM)</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Deposit Insurance System (EN/BM)</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Takaful and Insurance Benefits Protection System (CH/TM)</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Takaful and Insurance Benefits Protection System (EN/BM)</td> <td style="text-align: center;">0</td> </tr> </tbody> </table>			Type	Quantity (Per pack of 500 pcs)	Deposit Insurance System (CH/TM)	1	Deposit Insurance System (EN/BM)	1	Takaful and Insurance Benefits Protection System (CH/TM)	0	Takaful and Insurance Benefits Protection System (EN/BM)	0
Type	Quantity (Per pack of 500 pcs)												
Deposit Insurance System (CH/TM)	1												
Deposit Insurance System (EN/BM)	1												
Takaful and Insurance Benefits Protection System (CH/TM)	0												
Takaful and Insurance Benefits Protection System (EN/BM)	0												

Workflow Remark

Comments

Abort

Workflow remark is required for aborting a submitted SR

7.0 SECTION 5: SEARCH SERVICE REQUEST

Brief Description

- 7.1 This allows all users who has access right to Services Request module to search a SR. MI LO can view requests created/ submitted for their own MI.

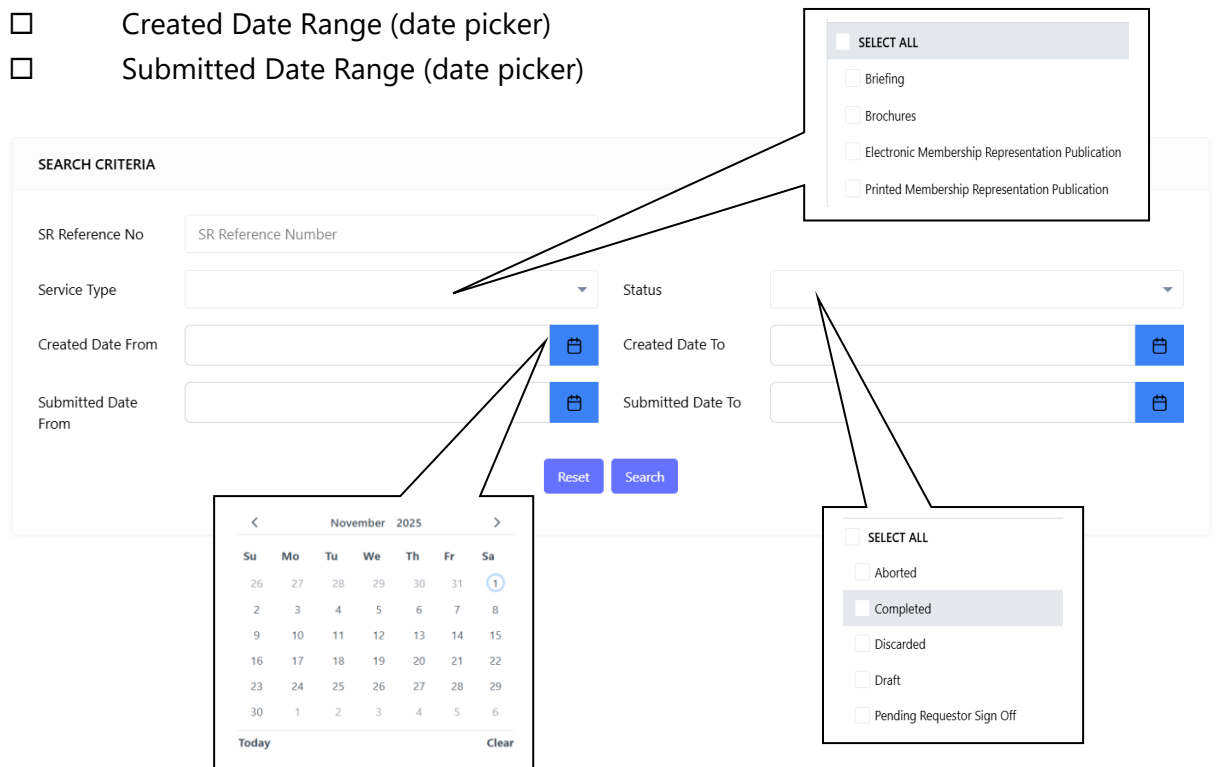
Basic Flows

- 7.2 Go to "Services Request" menu, and select "Search Services Request".

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7.3 System displays the following search criteria:

- Request Type (multi-select dropdown list)
- Status (multi-select dropdown list)
- Created Date Range (date picker)
- Submitted Date Range (date picker)



The screenshot shows a search criteria form with the following fields and callouts:

- SR Reference No:** Text input field with placeholder "SR Reference Number".
- Service Type:** Multi-select dropdown menu. Callout shows options: SELECT ALL, Briefing, Brochures, Electronic Membership Representation Publication, Printed Membership Representation Publication.
- Status:** Multi-select dropdown menu. Callout shows options: Aborted, Completed, Discarded, Draft, Pending Requestor Sign Off.
- Created Date From/To:** Date pickers with calendar icons. Callout shows a calendar for November 2025 with the 1st highlighted.
- Submitted Date From/To:** Date pickers with calendar icons.
- Buttons:** "Reset" and "Search" buttons.

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