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Memo

Attn: All EDD & Honorable Advisors / EDDs /PSDDs/ SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)

From: TDA

Copy: All Department Heads / Macau CEO / ABDD Executives

Dept: TDA

Date: 25 October 2023

Total page: 8

Subject: (A231006) **友邦數碼大使快訊 - 緊貼數碼產品貼士及情報**

最新情報

1. 新增數碼產品支援服務站 - 友邦九龍大樓

為了向財務策劃顧問在 9 月至 12 月業務關鍵時刻提供更好支援, 友邦數碼大使及技術支援成員從 2023 年 9 月 11 日起已於以下地點設立支援服務站, 以便即時協助財務策劃顧問解決在數碼產品相關之疑難。

「數碼產品支援服務站」

日期: 2023 年 9 月 11 日至 2023 年 12 月 29 日

時間: 星期一至五 上午 9 時至 1 時及下午 2 時至 6 時 (下午 1 時至 2 時可致電營業團隊 IT 熱線 +852 3108-1338)

地點: 友邦九龍大樓 13 樓 Premier Place (觀塘)

如您有任何相關查詢, 請致電 (香港 +852) 3108-1338 或電郵至 hk.helpdesk@aia.com 尋求協助。

2.Chatbot Addy – Chatbot 1st 新增電郵服務功能

為配合公司 2024 年的數碼查詢新旅程 - Chatbot 1st ,現時的 Chatbot Addy 電郵功能從 9 月 23 日起, 進行介面優化及新增以下功能提升用戶體驗, 幫助財務策劃顧問解決各類問題。

2 項新增功能包括:

1. **跟進待決事項**

- 可自行因應各類「跟進待決事項」進行查詢
- 提供連結轉載到保單查詢系統 經 iMemo 遞交,如延長申請日期 / 取消申請

➔ **優點：**方便於同一介面上遞交電郵查詢或轉載到保單查詢系統遞交其他申請

2. **通知內部已遞交之事項**

- 可提供遞交附加資料類型,包括文件或費用

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• 可提供遞交附加資料日期

➔ **優點：**Chatbot Addy 按選擇內容自動生成查詢內容, 無需輸入,方便為已遞交附加資料與內部進行跟進。

注意: 以上新增功能只適用於 Chatbot Addy 內的電郵功能。如使用保單查詢系統內的電郵服務, 則未能享用。

3. iPoS 溫馨小提示

iPoS 系統設有不同的模式, 以確保財務策劃顧問在任何時間均可使用。

即使在伺服器維護或伺服器停機的情況下, 仍可為財務策劃顧問提供有限度的服務。財務策劃顧問可在友邦營業員專頁的「現時 APP 系統狀況」了解實時情況, iPoS 各模式下的使用說明可參看以下指引:

iPoS 模式	現時 APP 系統狀況	App 應用說明
線上模式		iPoS 正常提供服務, 財務策劃顧問可線上提交保單申請以進行處理。
暫存模式*		核保維護時段。iPoS 及後台系統可提交新保單但不會提供初步核保結果。遞交申請後, 狀態會顯示為「後台處理中」。維護時段過後, 交單確認電郵等將陸續恢復。
維護模式*		登入 iPoS 時會顯示信息 「系統維護中」, 財務策劃顧問必須在沒有網絡的情況下, 使用預售模式(即離線模式)登入 iPoS 及輸入保單資料, 唯投保過程中需以在線狀態才能使用的功能將不能使用。維護時段過後, 財務策劃顧問可切換至線上模式進行保單申請實時檢查及遞交申請。

屆時將有通告列明系統目前的模式, 財務策劃顧問同時亦可在「現時 APP 系統狀況」檢視相關情況。

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數碼產品優化項目

1. iChange在 "其他申請表格"的申請所需文件新增刪除鍵, 方便移除錯誤上載的文件

如錯誤點選了「添加文件」按鈕或誤傳文件時, 可點擊刪除鍵移除錯誤上載的文件。保單服務申請教學影片可透過 eAC>TDA情報站>數碼大使實用小貼士>iChange 瀏覽, 您亦可掃瞄此二維碼登入友邦營業員專頁了解如何使用iChange「電子更改」遞交各項保單服務申請!



2.優化iPoS「健康狀況」部份, 包括疾病搜尋功能, 方便填寫健康狀況

財務策劃顧問於回答健康問題時輸入有關疾病的關鍵字, 系統會協助查找相關疾病及顯示其相關的健康問題。



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本月實用貼士

新增 iChange 申請狀況查閱及追蹤功能

各財務策劃顧問現可於保單查詢系統中使用全新推出的 iChange 申請狀況查閱及追蹤功能，方便追蹤每個保單申請，系統現提供以下申請狀況查閱：

- 等待「一次性密碼」(OTP)確認中
- 申請遞交進行中
- 申請遞交成功
- 「一次性密碼」(OTP)已過期
- 客戶拒絕確認「一次性密碼」(OTP)

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Latest News

1.New Digital Products Support Kiosk – AIA Kowloon Tower

To provide better assistance to financial planners during critical business period from September to December, Digital Champions and our Helpdesk team have provided on-site support kiosk from 11 September 2023 at the following location. In order to promptly solve financial planners' enquiries related to digital products.

"Digital Products Support Kiosk"
Date: From 11 September 2023 to 29 December 2023
Time: Monday to Friday; 09:00-13:00 and 14:00-18:00
(Please contact IT Service desk via phone +852 3108-1338 during 13:00 to 14:00)
Location: Premier Place, 13/F, AIA Kowloon Tower (Kwun Tong)

If you have any questions, please contact us via phone (Hong Kong +852) 3108-1338 or email to hk.helpdesk@aia.com for any assistance.

2.Chatbot Addy – Chatbot 1st New Email Features upgrade

To cooperate with the company's new digital enquiry journey – Chatbot 1st , Chatbot Addy email service was launched the following new functions beginning on 23rd September, 2023, along with a new interface to improve the overall user experience, and address financial planners' queries.

2 new features included:

1) Follow up pending requirements
• Make inquiries to various of pending items.
• Provide PES redirection to submit iMemo for request such as "Extend Deadline" / "Withdrawal" request.
➔ Benefit: Allow both email submission and PES redirection on a single page.

2) Notify Operation team to review submitted item
• Provide types of submitted item. (Document / Fees)
• Indicate the submission date.
➔ Benefit: Chatbot Addy will automatically generate a message to operation team based on the selected content. No manual input required.

3. Tips of iPoS

There are different modes of iPoS, to ensure that financial planners can use it **at any time**. Even under **server maintenance or server stoppage, limited services can still be provided to financial planners.** Financial Planners can check the real-time status by clicking into "Current App System Status" on Agency Corner, and refer to the following instructions.

Modes of iPoS	Current APP System Status	App Usage Guide
Online Mode	Available	iPoS is operating normally. Financial planners can submit online application for processing.
Staging Mode*	Limited	iPoS is under Underwriting Maintenance Period. New policy submission will be accepted in iPoS but preliminary underwriting result will not be available. Upon submission, status will show "Awaiting Processing". After the maintenance period, email confirmation of submission will be resumed.

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Maintenance Mode*	Limited	When financial planners log into iPoS, a message "System under maintenance" will pop up. Financial Planners must log into iPoS in Pre-sales mode without network connection and enter policy information. However, functions that require online status during the application process will not be available. After the maintenance period, financial planners can switch to online mode for "Policy Application Online Check" and submit applications.

There will be notices issued indicating the current mode of iPoS, and financial planners can also check the relevant information in "Current APP System Status".

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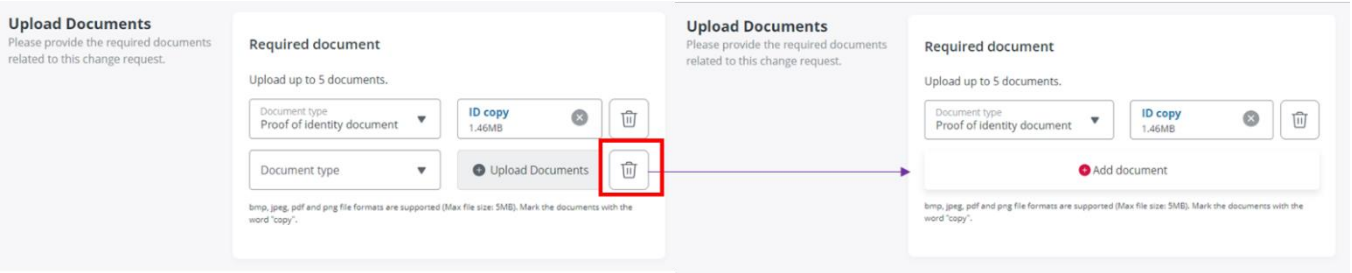
New enhancement

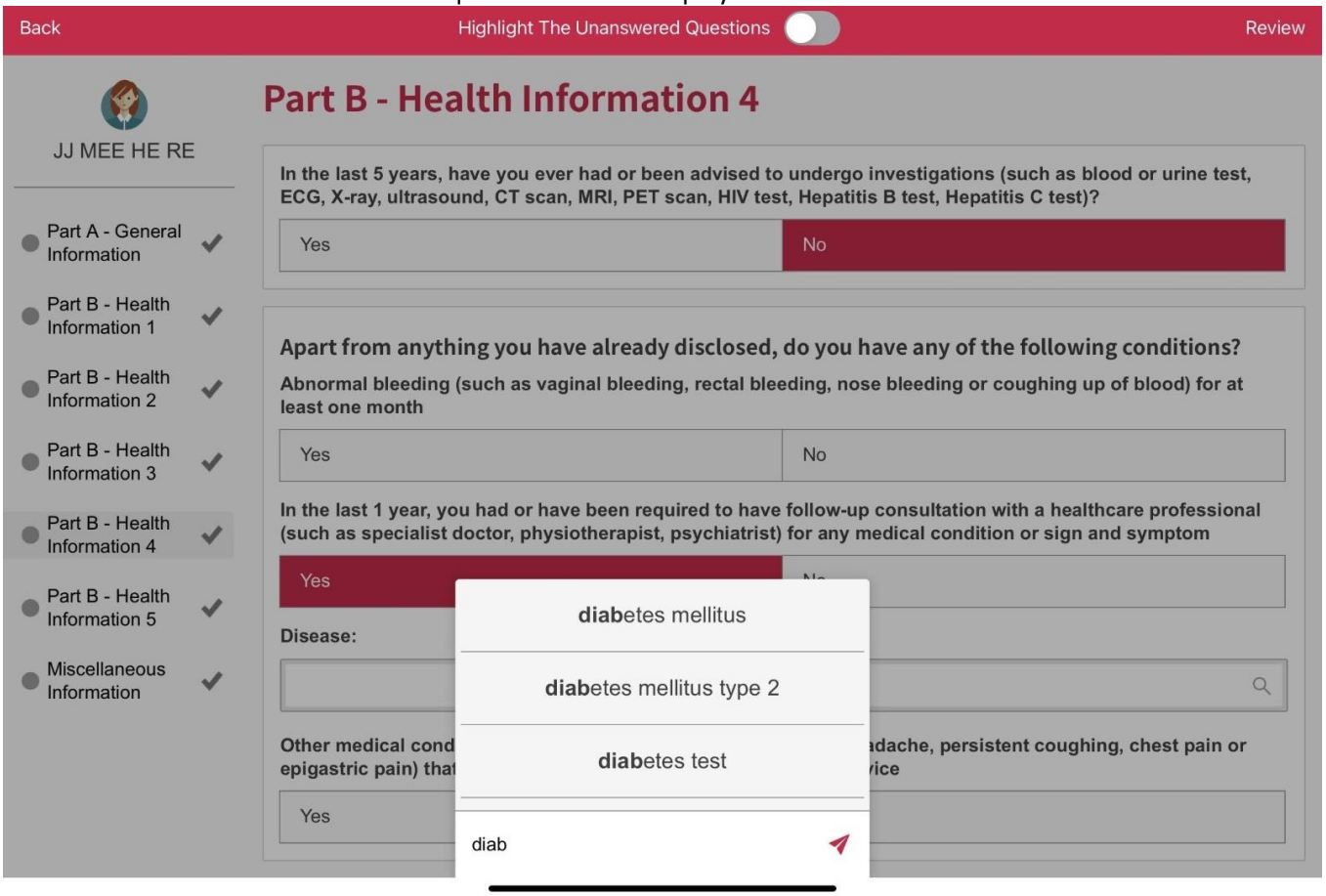
1.A new delete button under "Other request forms" on iChange, that makes it easy to remove incorrectly uploaded files

If you mistakenly click "Upload Documents" button or unnecessary documents are uploaded, you can click the delete button to remove the incorrectly uploaded file. You can visit Agency Corner (eAC) > TDA Corner> Useful Tips from Digital Champion > iChange for iChange tutorial videos. You can also scan QR code log on to Agency Corner now and get familiarize with the submission of policy service requests through iChange!



2.Enhance the "Medical information" section of iPoS, including illness search function, to facilitate customer to complete health information

Financial planners can input keywords when answering health questions, the system will suggest the most relevant illness names and associated questions will be displayed.



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This month's Top Tips

New application status tracking function on iChange

Financial planners can access the newly launched "iChange OTP submission Status" in PES, to facilitate tracking of each policy application. The system provides the following application status checking

- Waiting for "One Time Password" (OTP) confirmation
- Application submission in progress
- Application submitted successfully
- The "One Time Password" (OTP) has expired
- Customer refuses to confirm "One Time Password" (OTP)

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