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Memo

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

From: Grace Yan
Head of Service

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 25 October 2023

Total page: 2 + Appendix 1, 2, 3

Subject:(Ref : A231051) Chatbot Addy - 新增『查詢已遞交文件(新單)』&『查詢繳費狀況』功能
Chatbot Addy - New Function of "Submitted Document Status (New Application)" and "Premium Status"

為配合公司 2024 年的數碼查詢新旅程 - Chatbot 1st，Chatbot Addy 將由 2023 年 10 月 27 日起，新增 2 項狀況查詢功能，協助財務策劃顧問隨時查詢新單的已遞交文件 / 已繳費用的記錄。

Chatbot Addy 的 **2 項新增**查詢**功能:**

1) 『查詢已遞交文件(新單)』
- 輸入需查詢已遞交文件的新單保號碼
- 選擇遞交文件的日期
- Chatbot Addy 按照輸入的資料，查找文件遞交日期前後 14 天的內部系統記錄

2) 『查詢繳費狀況』
- 輸入需查詢繳費記錄的保單號碼
- 選擇繳費方式（自動轉賬 / 非自動轉賬）
- 選擇繳費日期
- Chatbot Addy 按照輸入的資料，查找內部繳費系統記錄
- 同一功能，可以輸入 Vitality 會員號碼，查詢 Vitality 已遞交費用記錄(只適用於非自動轉賬付款)

新功能優點:
透過自助方法，簡單快捷地解答財務策劃顧問最經常查詢的問題 - "內部是否已收妥遞交文件/繳費？"

(詳情參閱附件 2 及 3－功能使用說明)

相關附件:

附件 1: Chatbot Addy 入口，新增功能入口
附件 2:『已繳交文件狀況查詢功能』使用說明
附件 3:『繳費狀況查詢功能』使用說明

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To tie in with the launch of the Company's new digital enquiry journey in 2024 – Chatbot 1st, Chatbot Addy will launch 2 status checking functions beginning from October 27th, 2023. The new functions enable Financial Planners to inquire internal records regarding submitted documents for new applications, or Paid fees of a policy at any time.

2 New Enquiry Functions of Chatbot Addy:

1) **"Submitted Document Status (New Application)"**
   - Enter policy number of new application of which submitted documents needs to be enquired.
   - Select submission date of the document.
   - Chatbot Addy will search in internal system and provide records before and after 14 days of the submission date based on the information given,

2) **"Premium Status"**
   - Enter policy number of which payment record needs to be enquired.
   - Select payment method (autopay / non-autopay).
   - Select payment date.
   - Chatbot Addy will search in internal payment system based on the information provided.
   - In the same function, you can input Vitality Membership ID to inquire membership payment records (applicable only to non-auto pay payment).

Benefits of new functions:
By enabling these digital self-help tools, Financial Planners can easily resolve one of the most frequently asked questions: "Has internal department received my submitted document / paid fees?"

(For details, please refer to Appendix 2 and 3 – User manual)

Appendix:

Appendix 1: Chatbot Addy entry points + New functions entry
Appendix 2: User manual for "Submitted Document Status (New Application)" function
Appendix 3: User manual for "Premium Status Checking" function

Regards,



Grace Yan

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附件 1 – Chatbot Addy 入口

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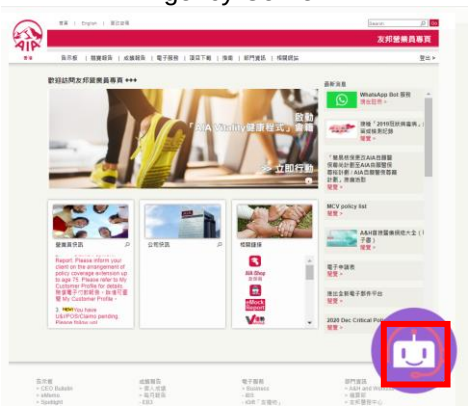


PES

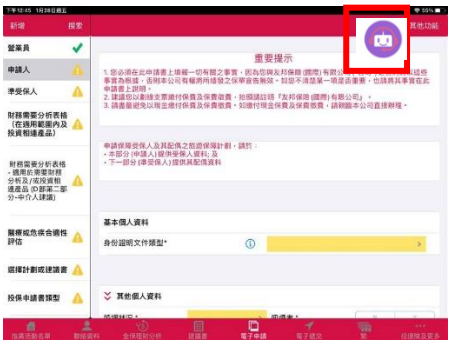


iEngage - iChat



iPoS

按下「電子申請」>「新增電子申請 」> 選擇語言 > 按下右上角Chatbot Addy 圖示



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附件 2 – “ 已繳交文件狀況查詢功能” 使用說明

<table>
<tr>
<td>
</td>
<td>1. 於主目錄選擇”熱門工具”

2. 選擇其中 1 項 功能
• 已繳交文件狀況查詢
• 繳費狀況查詢</td>
</tr>
<tr>
<td>
</td>
<td>1. 選擇 → “已繳交文件狀況查詢”

<u>2. 輸入 3 項資料</u>
• 部門 ： 核保
– 賠償/保戶服務（11 月推出）

• 保單號碼
（限於保單的服務營業員）

• 查詢日期:
- 輸入查詢日期
○ 日期範圍由 10/13 起
○ 過去 3 個月內的日子
- 系統會搜尋輸入的『查詢日期』及其前後 14 天的所有記錄</td>
</tr>
</table>

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3. 查詢結果－成功搜尋文件記錄

- 如結果多於 5 項 →按『顯示更多』
- 結果顯示輸入查詢日期的前後 14 日內的紀錄



4. 查詢結果－未有文件記錄

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附件 3 – “ 繳費狀況查詢功能” 使用說明

<table>
<tr>
<td>
</td>
<td>1. 於主目錄選擇”熱門工具”

2. 選擇其中 1 項 功能
• 已繳交文件狀況查詢
• 繳費狀況查詢</td>
</tr>
<tr>
<td>
</td>
<td>1. 選擇 → 繳費狀況查詢

2. 輸入 3 項資料
• 繳費途徑
○ 自動轉賬
○ 非自動轉賬

• 保單號碼
（限於保單的服務營業員）

• 查詢日期</td>
</tr>
</table>

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附件 3.1 – 繳費狀況查詢功能 - 自動轉賬使用說明



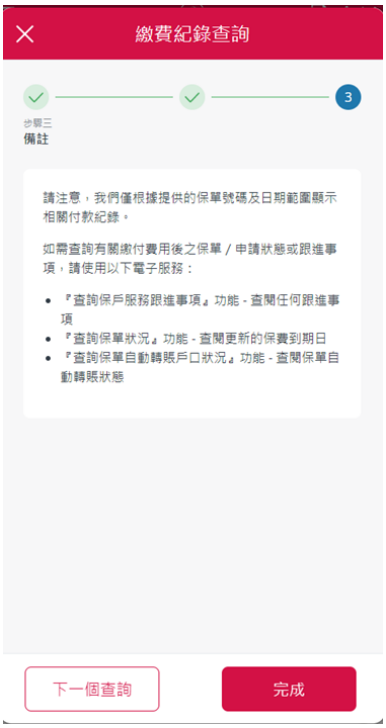
1. 繳費途徑 → **選擇“自動轉賬”**

- **輸入保單號碼**
  （限於保單的服務營業員）

- **輸入查詢日期**
  - 查詢日期 = 選擇**(從)**『今天』至過去 12 個月內的日子
  - 『今天』= 使用功能的當天日期
  - 搜尋範圍 = **(從)**『今天』至過去的 12 個月內
  - 搜尋系統的自動轉賬記錄
    - **從** 輸入的『查詢日期』
    - **到**『今天』

例：
『今天』：10/24/2023
『查詢日期』:1/1/2023
搜尋範圍：10/24/2023 – 10/24/2022 (12 個月內)
搜尋記錄：1/1/2023 – 10/24/2023





2. **查詢結果 – 狀況成功的自動轉賬記錄**

- **自動轉賬記錄顯示**
  - 轉賬金額
  - 貨幣
  - 相關日期
  - 狀況

3. **按『下一步』**
- 提供備註 / 注意事項
- 顯示的搜尋記錄根據提供資料所得出
- 記錄並不代表內部最終審批結果
- 提供查詢途徑（如需查詢）

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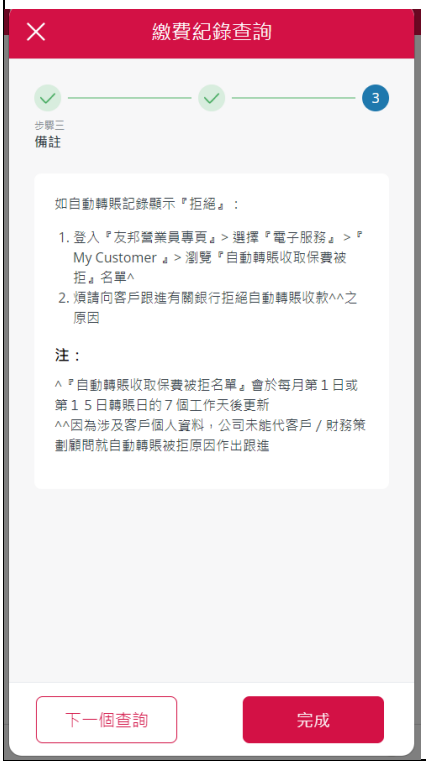

4. **查詢結果 – 狀況為拒絕/進行中的自動轉賬記錄**

   - **進行中** = 自動轉賬尚未完成，未知最後結果
   - **拒絕** = 自動轉賬不成功

5. **按『下一步』**
   - 提供『自動轉賬被拒』跟進步驟
   - 基於自動轉賬涉及客戶個人私隱，AIA 未能提供進一步跟進

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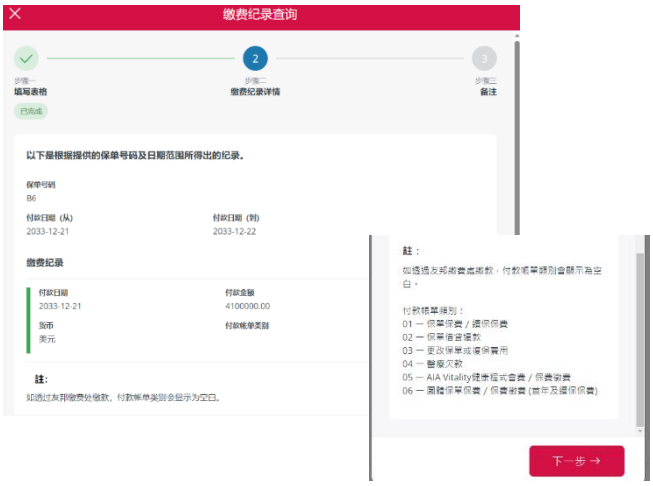
附件 3.2 – 繳費狀況查詢功能 - 非自動轉賬使用說明



1. 繳費途徑 → 選擇“非自動轉賬”

- **輸入保單號碼**
  （限於保單的服務營業員）

- **輸入付款日期**
  - 付款日期：從『今天』至過去 12 個月內的日子
  - 可輸入 1 個日期，或日期範圍（最多 5 日）



2. **查詢結果 – 成功搜尋記錄**
- 記錄顯示
  - 付款金額
  - 貨幣
  - 相關日期
  - 付款賬單類別

3. **按『下一步』**
- 提供備註 / 注意事項
- 顯示的搜尋記錄根據提供資料所得出
- 記錄並不代表內部最終審批結果
- 提供查詢途徑（如需查詢）

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4. 查詢結果 – 沒有結果

5. 按『下一步』

- 提供備註 / 注意事項
- 顯示的搜尋記錄根據提供資料所得出
- 記錄並不代表內部最終審批結果
- 提供查詢途徑（如需查詢）

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附件 3.3 – 繳費狀況查詢功能 – Vitality 非自動轉賬使用說明



1. 繳費途徑 → 選擇“非自動轉賬”

- 輸入 Vitality 會員號碼
- 輸入查詢日期
  - 選擇日期：由『今天』至過去 12 個月內的日子
  - 可輸入 1 個日期，或日期範圍（最多 5 日）





2. **查詢結果** –成功搜尋記錄

- 記錄顯示
  - 付款金額
  - 貨幣
  - 相關日期

3. **按『下一步』**
- 提供備註 / 注意事項
- 顯示的搜尋記錄根據提供資料所得出
- 記錄並不代表內部最終審批結果
- 提供查詢途徑（如需查詢）

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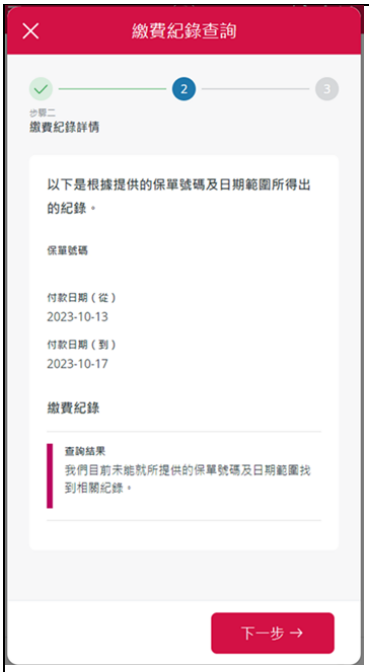



4. **查詢結果** –沒有結果

5. **按『下一步』**
   - 提供備註 / 注意事項
   - 顯示的搜尋記錄根據提供資料所得出
   - 記錄並不代表內部最終審批結果
   - 提供查詢途徑（如需查詢）

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Appendix 1 – Chatbot Addy entry points

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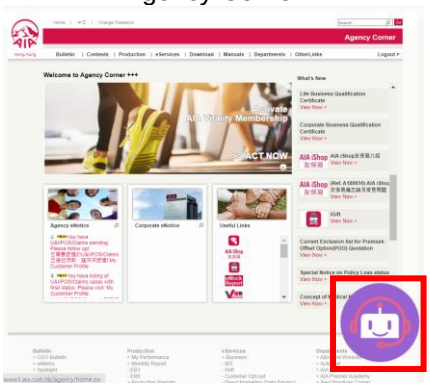
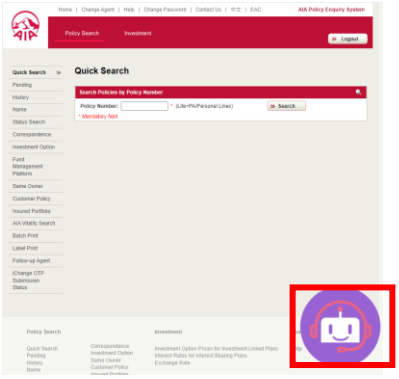


PES

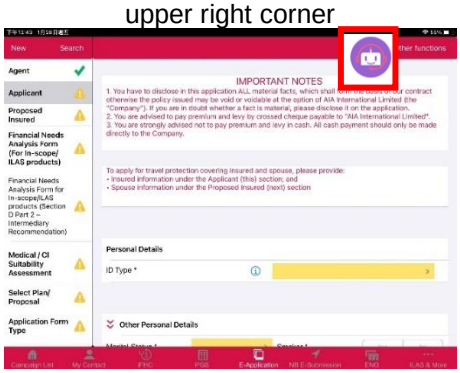


iEngage - iChat



iPoS

Click “e-Application”> “Create new E-Application”> Select language > Click Chatbot Addy’s icon on the upper right corner



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Appendix 2 – User Manual for "Submitted Document Status



1. **Select "Popular Tools" under main menu.**

2. **Select one of the functions.**
- Submitted Document Status Checking
- Payment Status Checking



1. **Select → "Submitted Document Status Checking".**

2. **Provide 3 pieces of information.**
- **Department** : Underwriting
  - Claims / POS (by November)

- **Policy Number**
  (Limited to Servicing Agent)

- **Document Submission Date**:
  - Select submission date.
    - Any date after 10/13
    - Within 3 months from today's date
  - System will revert the before and after 14 days of the provided document submission date.

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<table>
<tr>
<td>
</td>
<td>3. Result －Success case

• If there are more than 5 results → press “show more”.

• The presented results include the before and after 14 days of the provided document submission date.</td>
</tr>
<tr>
<td>
</td>
<td>4. Result – No Result</td>
</tr>
</table>

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Appendix 3 – User Manual for "Payment Status Checking" function

	**1. Select "Popular Tools" under main menu.** **2. Select one of the functions.** • Submitted Document Status Checking • Payment Status Checking

	**1. Select "Payment Status Checking"**
	
	2. Provide 3 pieces of information.
	• **Payment Channel**
	  ○ Auto pay.
	  ○ Non – Auto pay.
	
	• **Policy number**
	(Limited to Servicing Agent only)
	
	• **Document Submission Date**

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Appendix 3.1 – Payment Status Checking - Auto Pay manual



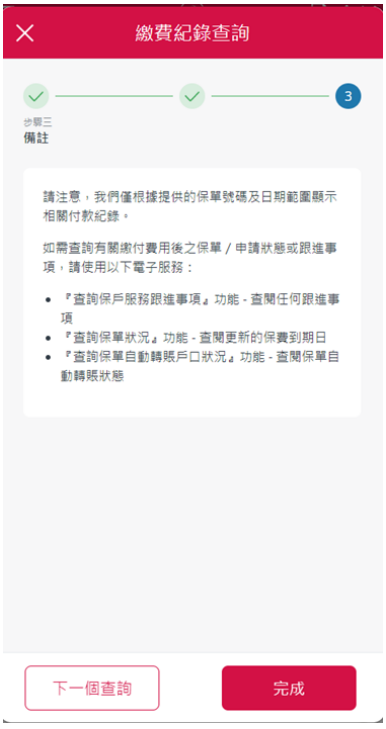
1. Select → Auto Pay payment channel.

- **Input Policy number**
  (Limited to Servicing Agent only)

- **Input Enquiry Date**
  - Enquiry Date = Select any dates (**From)"Today** "to the past 12 months.
  - **"Today"** = The current date
  - Search Range = **(From)** Today to the past 12 months
  - System reverts records ranges
    - **From** provided Enquiry Date
    - **To"** Today"

Example：
"Today" = 10/24/2023
Enquiry Date :1/1/2023
Search Range: 10/24/2023 - 10/24/2022 (Within 12 months)
Records: 1/1/2023 - 10/24/2023





2. Payment Record information - Success Auto Pay case

- Auto Pay record Display
  - Auto Pay Amount
  - Currency
  - Transaction Date
  - Status

3. Press "Next "

- Remarks and notes
- Searching result(s) based on the provided information.
- Result does not represent the decision of the respective operation team.
- Suggested ways to inquire (if needed)

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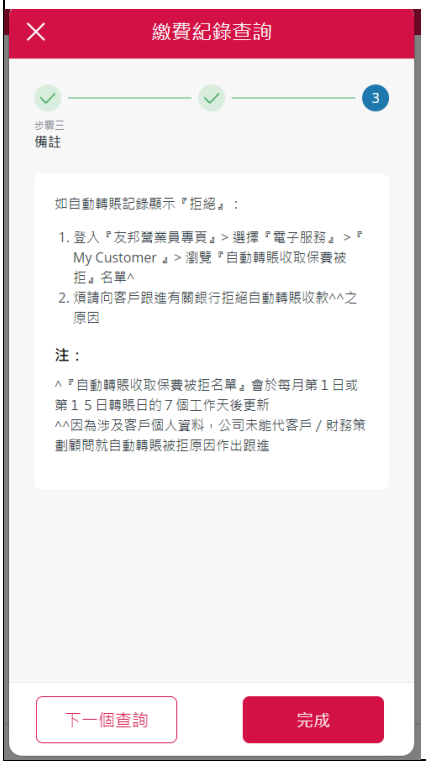

4. **Payment Record information - Rejected / Pending Auto Pay case**

- **Pending** = Auto pay transaction is in progress. Result to be confirmed
- **Rejected** = Unsuccessful Transaction

6. Press" Next"

- Provide follow up procedures for Rejected case.
- Due to Auto pay involves customer's personal information, AIA not permitted to conduct any follow up actions.

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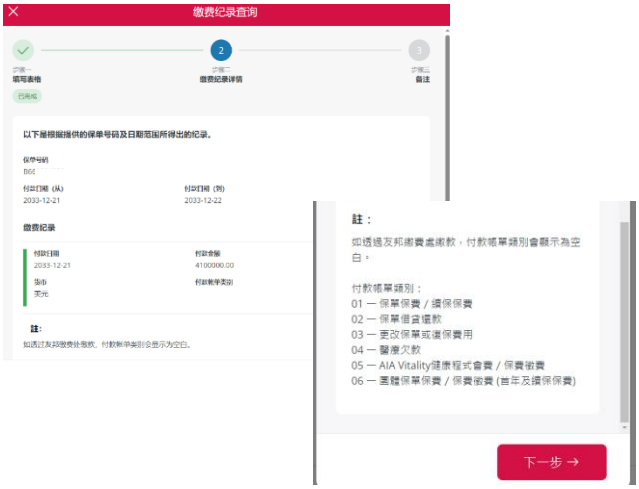
Appendix 3.2 – Payment Status Checking - Non Auto Pay manual



Payment Channel → Non-Auto Pay payment channel

- **Input Policy number**
  (Limited to Servicing Agent only)

- **Input Payment Date**
  - Select Date:
    - Any dates from “Today” to the past 12 months
    - Can be a specific date, or a maximum date range of 5 days



6. Result – Success case

- Record display
  - Paid amount
  - Currency
  - Dates
  - Bill Type

7. Press “Next”

- Remarks and notes
- Searching result(s) based on the provided information.
- Result does not represent the decision of the respective operation team.
- Suggested ways to inquire (if needed)

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8. Result – No record found.

9. Press “Next”

- Remarks and notes
- Searching result(s) based on the provided information.
- Result does not represent the decision of the respective operation team.
- Suggested ways to inquire (if any)

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Appendix 3.3 – Payment Status Checking - Vitality manual



1. Payment Chanel →" non-Auto pay payment channel

- **Input Vitality membership number**

- **Input Payment Date**
  - Select Date:
    - Any dates from "Today" to the past 12 months
    - Can be a specific date, or a maximum date range of 5 days





10. Result - Success case

- Record Display
  - Paid Amount
  - Currency
  - Dates

11. Press "Next"

- Remarks and notes
- Searching result(s) based on the provided information.
- Result does not represent the decision of the respective operation team.
- Suggested ways to inquire (if any)

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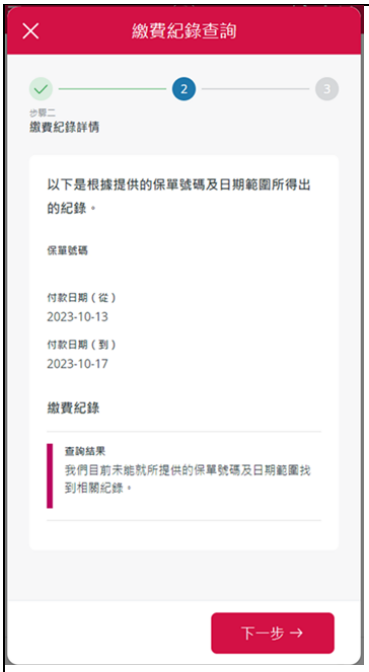



12. Result – No records found

13. Press “Next”

- Remarks and notes
- Searching result(s) based on the provided information.
- Result does not represent the decision of the respective operation team.
- Suggested ways to inquire (if any)