

GoBookings Training Manual

March 2020

AIA Health Insurance – confidential and proprietary information. Not for distribution.

AIA Health Insurance
with **AIA Vitality**

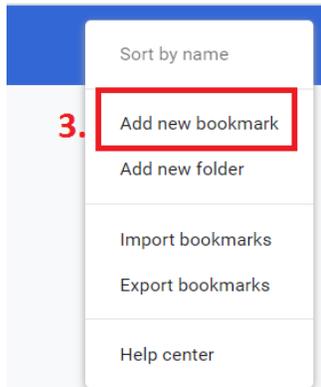


Google Chrome – Bookmark the GoBookings Form

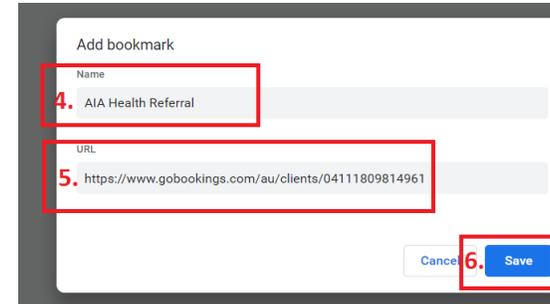
1. Launch Google Chrome, in the browser enter: chrome://bookmarks
2. Click on the 3 dots icon (*top right side*)



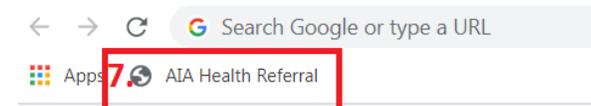
3. Select 'Add new bookmark'



4. Name: 'AIA Health Referral'
5. Type/paste URL: <https://www.gobookings.com/au/clients/04111809814961>
6. Click Save

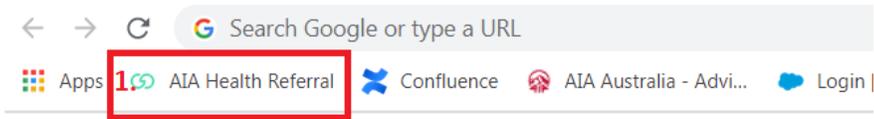


7. You can now locate this in your Bookmark Bar in Chrome

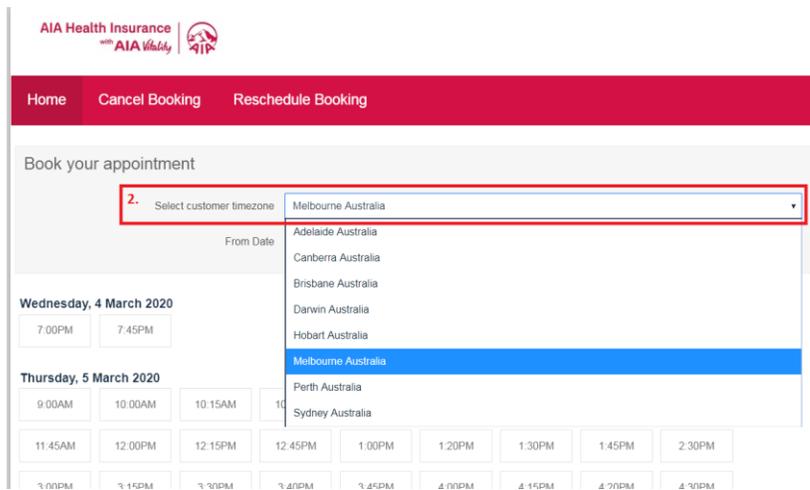


How to make an appointment in GoBookings

1. Launch Chrome and click 'AIA Health Referral' bookmark



2. Select the customer time zone from the dropdown menu

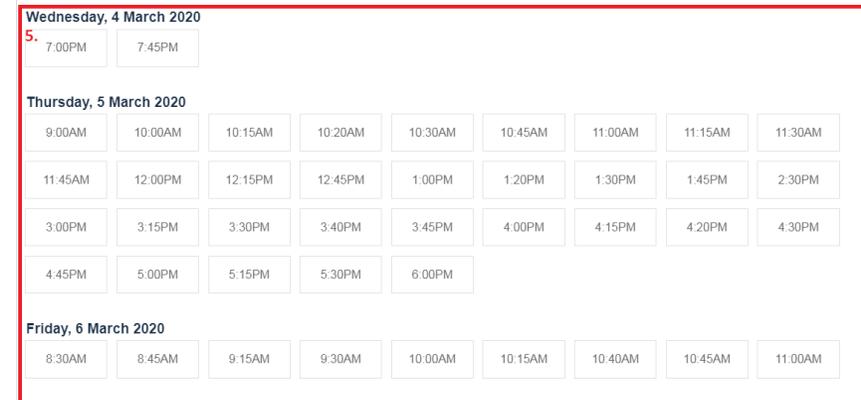


3. Chose your 'From Date'

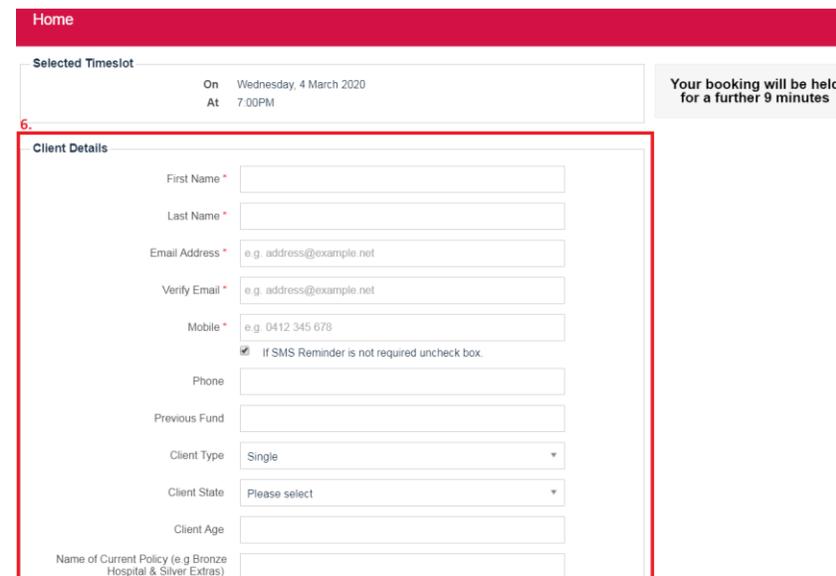
4. Click 'Search'



5. Select a date and time by clicking on the available times



6. Type in the client details, fields marked with asterisk are mandatory



How to make an appointment in GoBookings

7. Check the box once you have read and agree to the disclaimer

Advisor

By submitting the above referral, I acknowledge and agree:

that the information collected on this form may be used and disclosed by AIA Financial Services Limited and entities engaged to provide services on its behalf in accordance with the AIA Australia Privacy Policy which can be found at www.aia.com.au, including (without limitation) for the purpose of contacting the Client in relation to, and to market, products distributed by AIA Financial Services Limited;

that, as a consequence of submitting this referral, I may be eligible to receive a referral fee from AIA Financial Services Limited.

Client

By submitting the above referral, I acknowledge and agree:

that the information collected on this form may be used and disclosed by AIA Financial Services Limited and entities engaged to provide services on its behalf in accordance with the AIA Australia Privacy Policy which can be found at www.aia.com.au, including (without limitation) for the purpose of contacting me in relation to products distributed by AIA Financial Services Limited;

that, should I purchase a health insurance policy distributed by AIA Financial Services Limited, my financial adviser may be eligible to receive a referral fee of 20% of the first year premium payable under that policy from AIA Financial Services Limited.

7. I have read and agree to the disclaimer above.

8. Type in adviser details, fields marked with asterisk are mandatory

9. Click 'Confirm'

8. Adviser Details

Adviser Name *

AFSL Name *

AIA Adviser Code *

Adviser Email *

Adviser Mobile

Adviser State *

Is the client an AIA Priority Protection holder?

Additional Notes?

< Back 9. Confirm >

10. Confirmation of booking and reference number will be provided. You can use this reference number if you need to reschedule a booking.

AIA Health Insurance with AIA Vitality 

Home Cancel Booking Reschedule Booking

Your booking was successful. Your Reference is 6AD33A97.

Selected Timeslot	
Reference	6AD33A97
On	Thursday, 5 March 2020
At	11:30AM

11. Your customer will receive an email/SMS confirmation of the booking

Add_Appointment_To_...
3 KB

Hi TEST

Thank you for choosing AIA Health Insurance with AIA Vitality to discuss your health insurance needs.

Your adviser has scheduled you in for a tele-appointment to discuss how AIA Health Insurance may be able to assist. The details of your booking are:

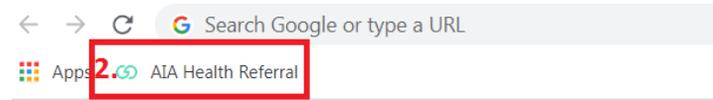
Day: Thursday, 5 March 2020

Time: 11:30am

Reference: 6AD33A97

Rescheduling an appointment in GoBookings

1. Launch Google chrome
2. Click on 'AIA Health Referral' bookmark



3. Click on 'Reschedule Booking'



4. Type in your Email and Booking Reference (Use the original email address you booked under and the Booking Reference emailed to you)
5. Click 'Reschedule Booking'

A form with two input fields. The first field is labeled 'Email' and contains the text 'nicola.mcflinn@aia.com'. The second field is labeled 'Booking Reference' and contains the text '1073842E'. Below the fields are two buttons: 'Close' and 'Reschedule Booking'. The 'Reschedule Booking' button is highlighted with a red rectangular box and has the number '5.' next to it.

6. Click 'Yes Reschedule'

Are you sure you wish to reschedule this booking?

For: TEST TEST
On: Friday, 6 March 2020
At: 11:30AM

A confirmation dialog with two buttons: 'Close' and 'Yes Reschedule'. The 'Yes Reschedule' button is highlighted with a red rectangular box and has the number '6.' next to it.

7. Your previous booking date and time will show at the top of the screen

A screenshot of the 'Reschedule Booking' page. At the top, there is a navigation bar with 'Home', 'Cancel Booking', and 'Reschedule Booking' buttons. Below this is a section titled 'Book your appointment'. It contains a dropdown menu for 'Select customer timezone' set to 'Melbourne Australia', a 'From Date' field set to 'Wednesday, 11 March 2020', and a 'Search >' button. To the right, there is a box labeled 'Previous Booking' containing the text 'TEST TEST', 'Date: Wednesday, 11 March 2020', and 'Time: 11:00AM'.

8. Choose another date and time by selecting another time slot

A screenshot of the time slot selection interface. It shows three days: Wednesday, 11 March 2020; Thursday, 12 March 2020; and Friday, 13 March 2020. Each day has a grid of time slots. For Wednesday, 11 March 2020, the slots are 12:00PM, 1:00PM, 1:20PM, 2:00PM, 3:40PM, 4:00PM, 4:20PM, 5:00PM, and 6:00PM. For Thursday, 12 March 2020, the slots are 9:00AM, 9:40AM, 10:15AM, 10:20AM, 10:45AM, 11:00AM, 11:30AM, 11:45AM, and 12:00PM. For Friday, 13 March 2020, the slots are 10:40AM, 11:20AM, 12:00PM, 12:15PM, 1:20PM, 1:45PM, 2:30PM, 3:00PM, and 3:15PM. Saturday, 14 March 2020, has slots at 9:00AM, 9:40AM, 10:20AM, 11:00AM, 11:40AM, 12:20PM, and 1:00PM.A screenshot of the confirmation page. At the top, there is a navigation bar with 'Home' button. Below this is a blue banner that says 'You are currently rescheduling a booking from 11:00AM Wed 11 Mar'. Below the banner is a section titled 'Selected Timeslot' with a table showing the new booking details: Reference 3903AAFA, On Wednesday, 11 March 2020, At 3:40PM. To the right of the table is a box that says 'Your booking will be held for a further 9 minutes'.

Rescheduling an appointment in GoBookings

10. Check the disclaimer box

11. Select 'Confirm'

I have read and agree to the disclaimer above.

Adviser Details

Adviser Name * TEST

AFSL Name * TEST

AIA Adviser Code * TEST

Adviser Email * nicola.mcflynn@aia.com

Adviser Mobile e.g. 0412 345 678

Adviser State * VIC

Is the client an AIA Priority Protection holder? Please select

Additional Notes?

< Back **11. Confirm >**

12. You will receive a confirmation of reschedule

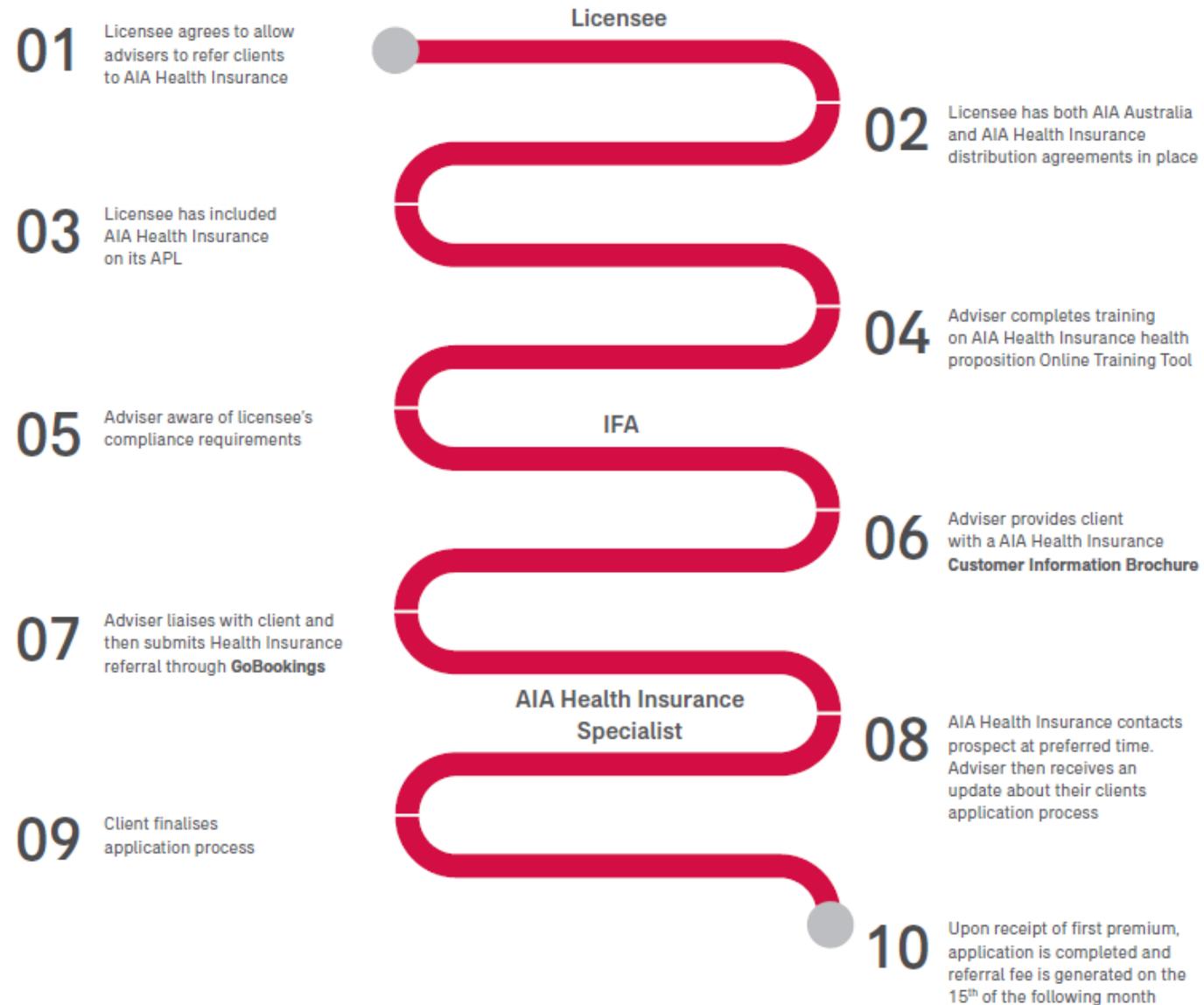
Home Cancel Booking **Reschedule Booking**

Your booking was successfully rescheduled. Your Reference is 3903AAFA.

Selected Timeslot

Reference	3903AAFA
On	Wednesday, 11 March 2020
At	3:40PM

AIA Health Insurance referral process



Disclaimer

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AIA Australia Limited (ABN 79 004 837 861 AFSL 230043)

AIA Health Insurance

with *AIA Vitality*

