AIA Connect iOS

User Guide –June 2016

Life's better with the right partner®

AIA Connect –Set Up

Download the AIA Connect iPhone app from the App Store and follow these steps

1 Enter your adviser code and password details.

2 Set a PIN for the app (you will need to confirm it a second time).

3 Once you have logged in, you will see this landing page.
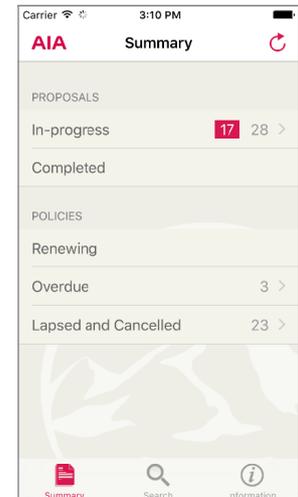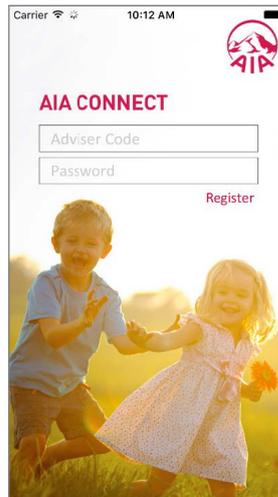
Registering other Adviser Codes

If you would like to add more Adviser codes follow these steps
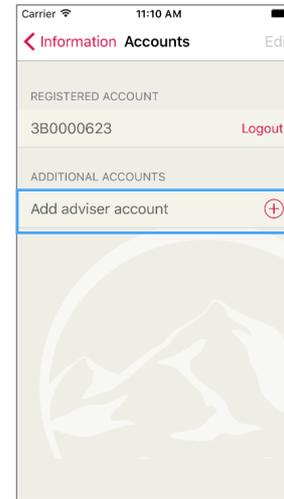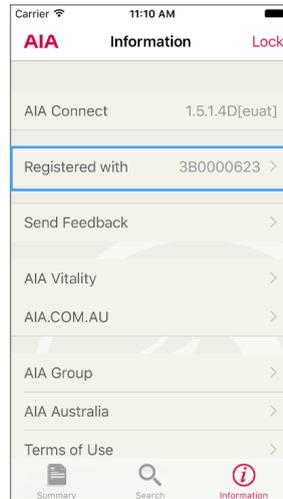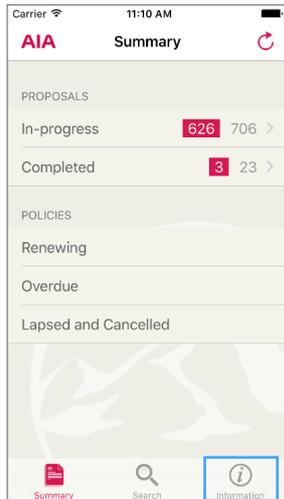
1 Click on the information icon.

2 Click on the adviser code you have already registered with.

3 Click on 'Add adviser account'.

Registering other Adviser Codes Continued...
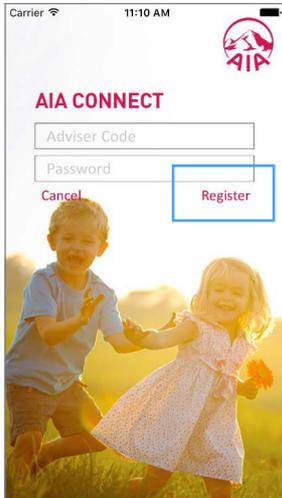
1 Enter the next adviser code details and press 'Register'.
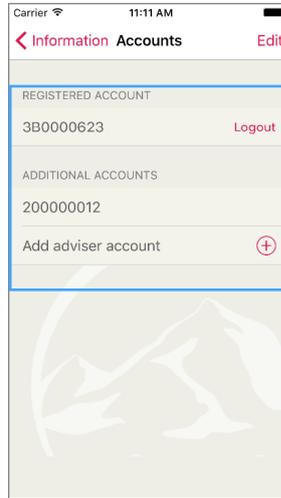
2 The new adviser code is now added. If you need to register more adviser codes, just click on 'Add adviser account' and repeat the process until they are all registered.
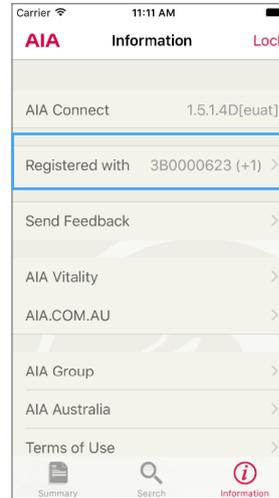
3 Navigate back using the arrow on the top left of the previous screen ‹ Information **Accounts** to see how many adviser codes have been registered.
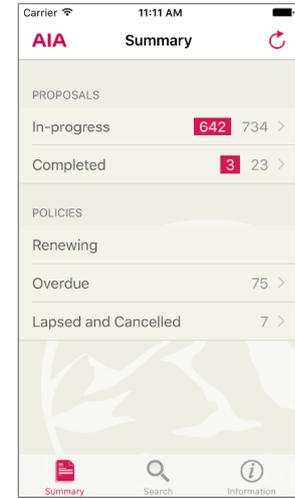
4 A summary of proposal and policy details will show in a single view for all adviser codes registered.

Proposal Report

AIA Connect updates you on proposals as they progress
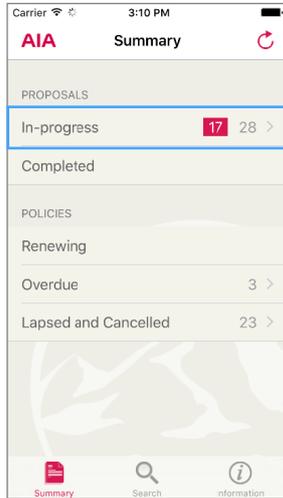
1 Select the 'In- progress' option from the main menu above.
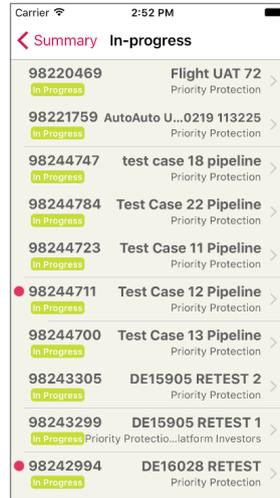
2 All proposals currently being processed will be displayed, with the most recent first. Any records with a red dot have updates that have not been viewed by the adviser.

You can also use the search function (see page 6).
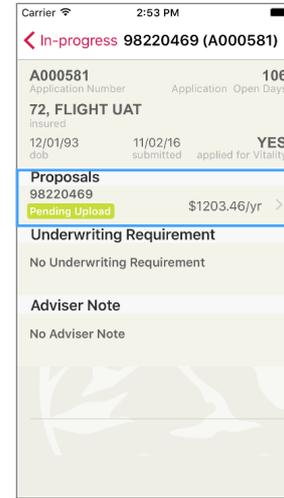
3 Select a record from the previous screen to see a summary of the application details, plus underwriting and administration requirements.

Click on 'Proposals' to see details of all proposals attached to an application.

Proposal Report Continued...
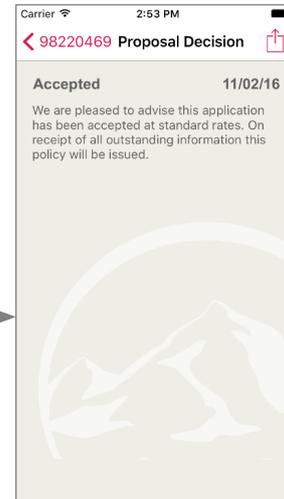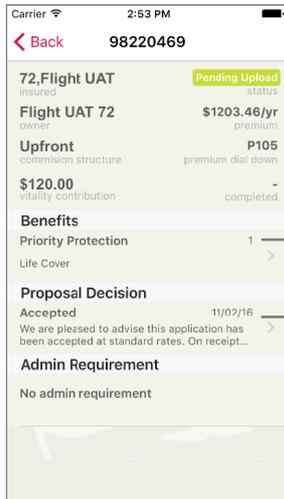
4 Clicking into a proposal will show the above screen.

5 Clicking on the 'Benefits' tab will show details of the cover and premiums for a particular proposal attached to an application.

6 If a decision has been made on a proposal it will be displayed here.

Search

How to search for proposals, policies or clients
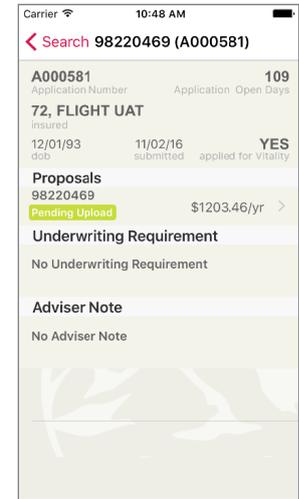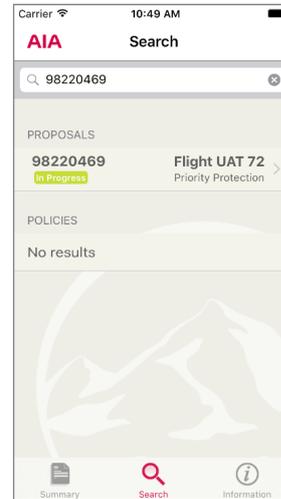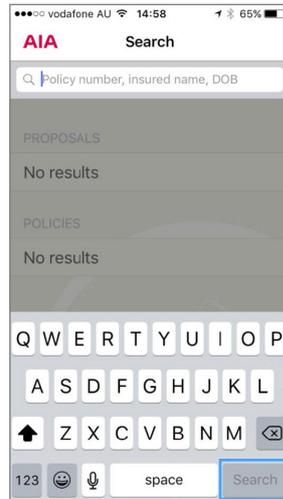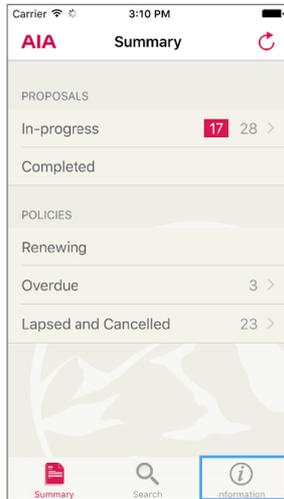
1 Click on the Search icon on the home page.

2 Enter search details to find any proposal, policy or client and then press the Search button.

3 Search results will display either as a single record or listing (depending on search criteria).

4 Details of the record can now be viewed.

Call or Email AIA Australia

You can easily contact us through AIA Connect
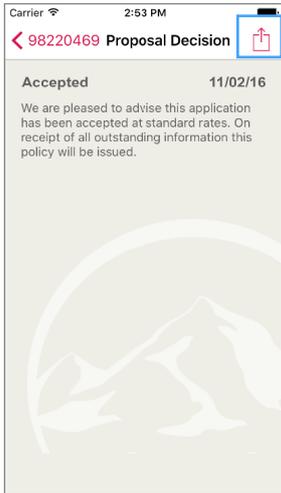
1   Click on the Share icon.
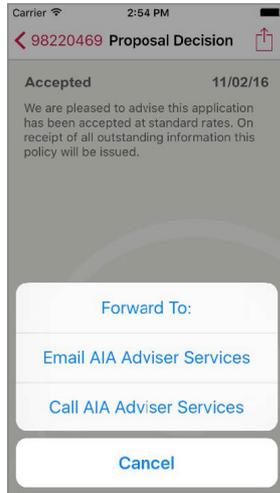
2   Select an option.
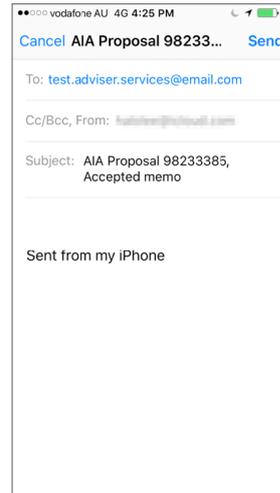
3   If the Email option is selected, the above will appear for you to enter and send your message directly to AIA Adviser Services.

4   If the Call option is selected, you will call AIA Adviser Services.