



Guide to Viewing Mail in Insight

The following correspondence which is sent to your client can now be viewed in Insight instead of receiving by post.

Below is a list of examples:

| Letter Name | File Name in Insight |
|--|----------------------|
| Adviser Notice Renewals/Overdues/Lapses | Various |
| Policy Alteration | Name of Customer |
| Anniversary Letter – Adviser | Name of Customer |
| Existing Business - Superior Health Transfer | Name of Customer |
| Policy Reinstatement | Name of Customer |
| Trauma Child Cover Transfer | Name of Customer |
| Address Update | Name of Customer |
| Payment Details | Name of Customer |
| Cancellation Request | Name of Customer |

To view this correspondence log into your Insight account:

[Dashboard](#) | [AIA Website](#) | [Product Guide](#) | [User Guide](#) | [Contact Us](#)



AIA Insight Dashboard

Illustration

My Business

Policy Wordings

Forms

Enter your Adviser Code in the highlighted area below:



AIA Insight Dashboard

Illustration

My Business

Policy Wordings

Forms



Press ENTER

This screen will appear

https://ackp8iis03.aia.biz/insight/Dashboard/ChooseAdviser.aspx?ahreq=ifCUZm...

Adviser Search

Adviser Number: Agency:

First Name: **Clear All** **Search**

Last Name:

Total ANP Pending

Enter your Adviser Number and press SEARCH (need to click on the Search button cannot press Enter)

This screen will appear displaying your name

Adviser Search

Adviser Number: Agency:

First Name: **Clear All** **Search**

Last Name:

| Adviser No | Adviser Name | Agency Name | Status |
|------------|--------------|----------------------------------|------------------------------|
| 5D55FC100 | Reagan Bax | New Zealand Advice Group Limited | Active <input type="radio"/> |

OK **Close**

Click on the circle at the end of your name

| Adviser No | Adviser Name | Agency Name | Status |
|------------|--------------|-------------|-----------------------|
| | | | <input type="radio"/> |

Click OK (need to click on the OK button cannot press Enter)

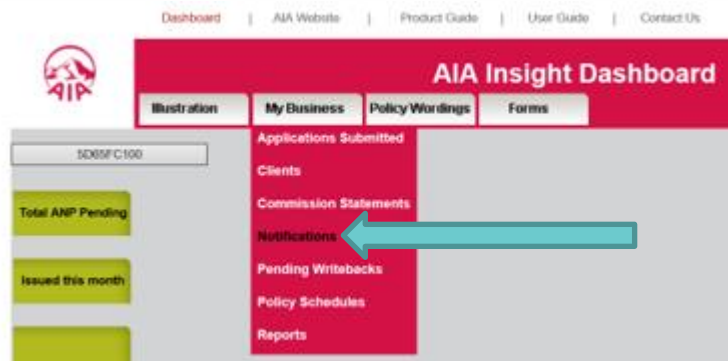
OK **Close**



Once Logged in you can view all Notifications sent to your client by clicking on MY BUSINESS



To view this correspondence click on MY BUSINESS and select NOTIFICATIONS



From here you can view all your customers notifications

Notification Documents

Your latest AIA New Zealand notification documents are available here.
For assistance please call the Customer Contact Team on Call Free 0800 800 242

You can search documents using the following filters:

Policy Number:

Document Date From:

Document Date To:

Assured's Name:

For Adviser:

Just the selected IFA Number

All IFA Numbers linked to my login name

From here:

- By clicking on SEARCH YOU CAN SEE ALL YOUR CLIENTS NOTIFICATIONS
- By adding **Policy Number** you will see all notifications relating to that customer
- By altering the dates you will see notifications for just that period

Notifications will be display – to view click on the Name under the Life Assured field

| Upload Date | Policy Number | Document Type | Life Assured |
|-------------|---------------|--|--------------|
| 31/08/2020 | | Existing Business - Superior Health Transfer | |
| 30/06/2020 | | Policy reinstatement | |
| 30/06/2020 | | Adviser Notice | |
| 29/08/2020 | | Adviser Notice | |
| 29/07/2020 | | Anniversary Letter_Adviser | |
| 28/08/2020 | | Trauma Child Cover transfer | |
| 28/08/2020 | | Address update | |
| 28/07/2020 | | Anniversary Letter_Adviser | |
| 28/07/2020 | | Adviser Notice | |