

New Coded Advisor User Guide

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STEP 1: Sunlife's Email Set Up

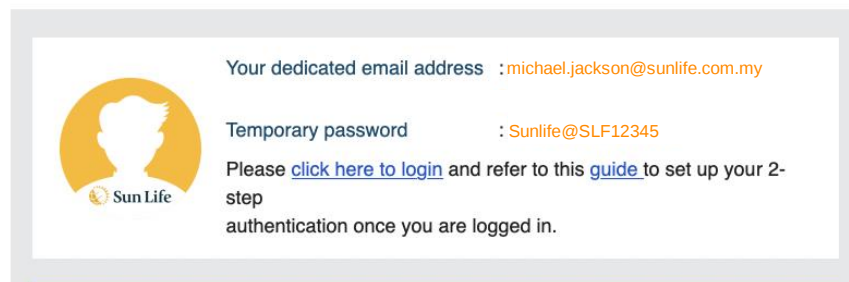
1. Upon coding, you will receive Welcome email from Sunlife to setup Sunlife's email.



Dear MICHAEL JACKSON
Welcome to Sun Life!

We are excited to have you with us and here's some useful information to kickstart your journey with Sun Life.

At Sun Life Malaysia, we are dedicated not just to remain relevant in today's world, but also to excel with the power of digitalization. As part of our Digital Enterprise ambition, you are equipped with a dedicated sunlife.com.my email address – powered by Google Workspace along other fantastic Google tools which makes it so easy for you to manage work email separately, collaborate with colleagues, and connect with Clients.

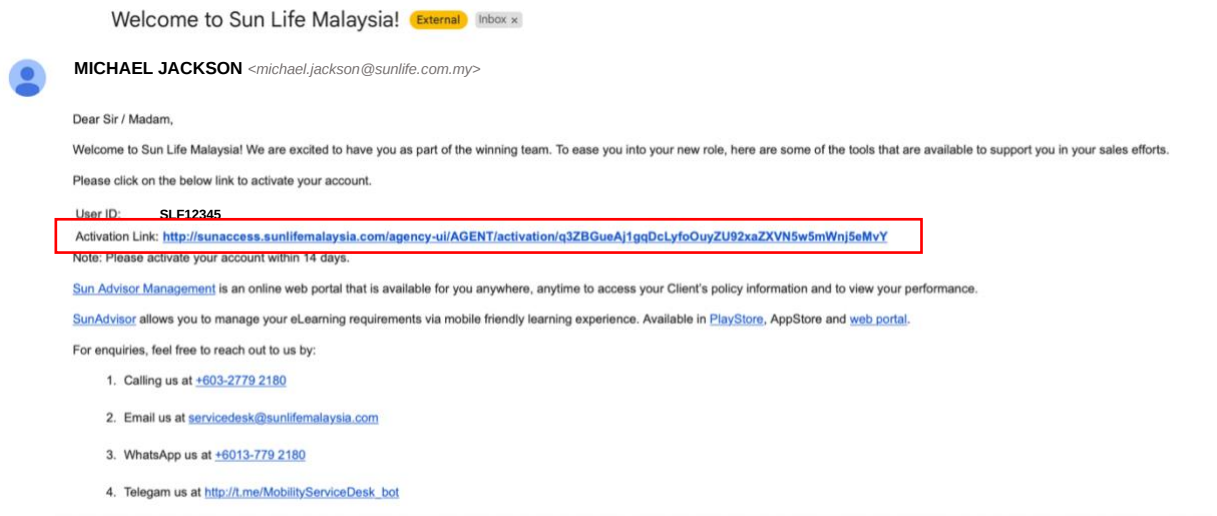


STEP 2: Sun Advisor Management (SAM) Activation & Sun Smart Installation

After setup the email, login to Sunlife's email. You will receive another 2 email from Sunlife.

1. Welcome email to activate Sun Advisor Management (SAM) account.
2. Guide to install SunSmart apps

Welcome email to activate Sun Advisor Management (SAM) account



Follow the instruction to setup SAM account. If you face any issue/problem while setting up the SAM account, please contact Mobility Service Desk via Telegram (http://t.me/MobilityServiceDesk_bot)

Guide to install SunSmart apps

Please do the pre-checking item as shows below, before continue with SunSmart installation.

Dear MICHAEL JACKSON

A sunny welcome to SunSmart, our convenient 24/7 sales tool that helps you keep track of your client database and assist you in performing your sales.

To ensure a smooth installation and login access, kindly take note of the following:

1. Register a User ID in SunSAM. You will receive the login details via email from sunaccess@sunlifemalaysia.com and do note that the same User ID and Password for SunSAM will be applied to SunSmart as well.

1. Ensure your iPad is equipped with the iOS 16.5.1 version and above.

- a) To check the iOS version, go to Settings > General > About.
- b) To download the update, go to Settings > General > Software Update.

1. Download SunSmart via iPad, follow simple step below:

Step 1 Go to Setting Ipad – Safari – Request Desktop Website – Turn OFF All Website

Step 2 Go to Safari Search google and search Websites <https://ds510.awmdm.sg/> in google

Step 3 Enter Group ID: DIRECTAGENCY

Step 4 Enter Enrollment Token

Email: servicedesk@sunlifemalaysia.com

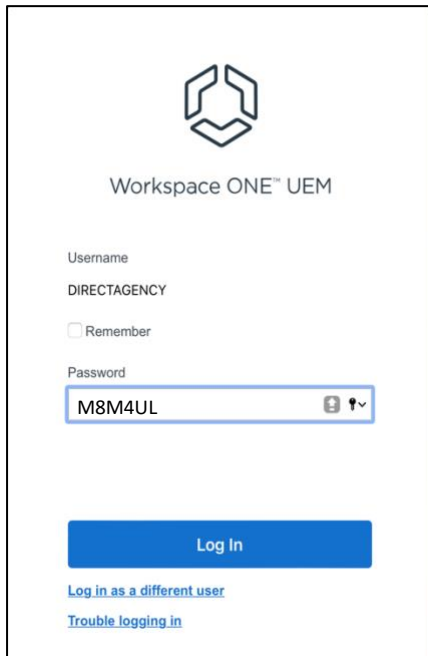
Token: M8M4UL expires 12/21/2023 3:57:00 PM

Pre-checking items

Copy and paste link in the Safari.

TOKEN

- Go to Safari and copy and paste link given in the email as show above.
- Key in the Username : DIRECTAGENCY
- Password is the TOKEN stated in the email. Please take note that the TOKEN is unique and has expiry date. Please ensure login before the TOKEN is expired.



Workspace ONE™ UEM

Username
DIRECTAGENCY

☐ Remember

Password
M8M4UL

Log In

[Log in as a different user](#)

[Trouble logging in](#)

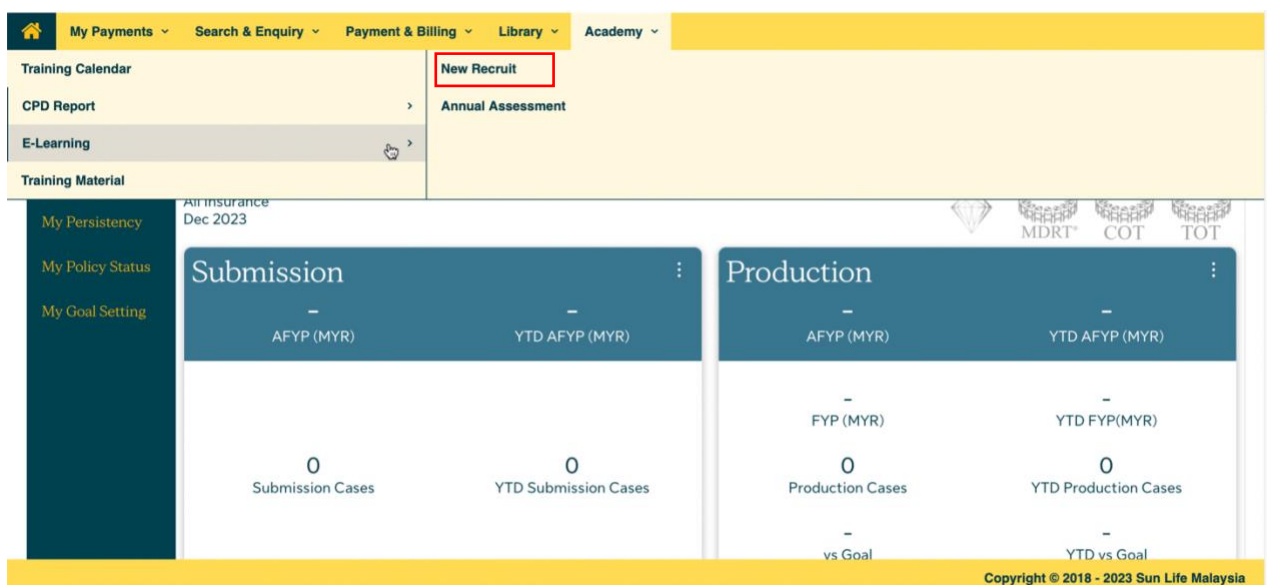


SunSmart installation Guide

- If you do not receive an email to download SunSmart, please contact Mobility Service Desk via Telegram (http://t.me/MobilityServiceDesk_bot) and request link to download SunSmart apps.

STEP 3: eLearning Completion

- To complete the eLearning Modules, login to SAM account.
- Click at *Academy>E-Learning>New Recruit*



The screenshot shows the SAM account dashboard with a navigation menu on the left and a main content area. The navigation menu includes: My Payments, Search & Enquiry, Payment & Billing, Library, Academy, Training Calendar, CPD Report, E-Learning, Training Material, My Persistency, My Policy Status, and My Goal Setting. The main content area has a 'New Recruit' button highlighted in a red box. Below this, there are two large sections: 'Submission' and 'Production'. Each section displays metrics for AFYP (MYR), YTD AFYP (MYR), FYP (MYR), YTD FYP (MYR), and Submission/Production Cases. The values for Submission and Production Cases are currently 0. The footer of the dashboard reads 'Copyright © 2018 - 2023 Sun Life Malaysia'.

- You are required to do and **PASS** all 5 eLearning modules.

Description :	Compulsory (to complete within 1st 6 month from appointed date)
Platform :	e-learning
CPD Hours :	30 CPD
Passing Mark :	80%

Please ensure you have completed all 5 modules as per requirement

Module 1: Introduction

Training Material

You are required to read through the training material prior to the assessment

[▶ Start](#)

Module 2: Compliance

Training Material

You are required to read through the training material prior to the assessment

[▶ Start](#)

Module 3: Takaful as a Business

Training Material

You are required to read through the training material prior to the assessment

[▶ Start](#)

Module 4: Products

Training Material

You are required to read through the training material prior to the assessment

[▶ Start](#)

Module 5: ILP Guidelines

Training Material

You are required to read through the training material prior to the assessment

[▶ Start](#)

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IMPORTANT:

You only can start to submit proposal via SunSmart after **24 hours** complete and passed all 5 elearning modules.

- Alternative to SunSmart apps, proposal also can be submitted via website at <https://sunsmartw.sunlifemalaysia.com/login>



SunSmart Web Version User Manual

HAPPY SELLING 😊