

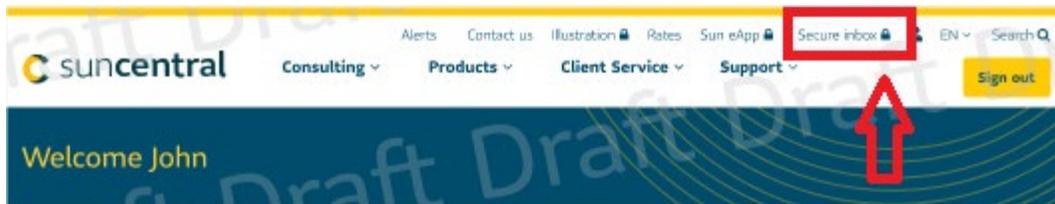
How-to guide: Secure inbox

What is the Secure inbox?

The Secure inbox is an encrypted end-to-end communication tool used to send and review correspondence between independent advisors and the Sun Life organization.

How do I find the Secure inbox?

1. To access the Secure inbox, you must first be signed in to the [Suncentral secure site](#).
2. Once you're signed in, you'll find the Secure inbox link at the top of the page.



How do I use the Secure inbox?

Messages list

When first entering the Secure InBox tool, you'll find a list of current messages. Using the yellow box at the top you can sort messages by:

- All messages – Displays all messages based on a user's access permissions. (If additional access is required, please contact suncentral@sunlife.com)
- New business messages – Displays messages related to any policy that is pending but not yet settled.
- In-force/Other messages – Displays all messages related to business that has been settled and is in force.
- Messages removed from InBox – Displays all messages moved to the Messages removed from InBox folder (similar to a trash folder) but can be restored back to the inbox in active status if needed.

In addition, each of the above views can also be sorted by date, name, contract or subject using the column headings at the top of the message list.

Secure Inbox

[All messages \(34\)](#)
[New business messages \(17\)](#)
[In-force/Other messages \(17\)](#)
[Messages removed from Inbox \(3\)](#)

View: [All messages](#)
 Advisor: [Redacted]
 Financial Centre: [Redacted]
 Messages as of 3:35 p.m. eastern time. [Refresh](#)

[Remove from Inbox](#) Sort this table by: [New messages first](#) [Go](#)

Date	Name	Contract	Subject
<input type="checkbox"/> 10/05/2018	[Redacted]	LI-[Redacted]	Ten day offer - advisor accepts or declines
<input type="checkbox"/> 08/05/2018	[Redacted]	LI-[Redacted]	Application for insurance
<input type="checkbox"/> 07/05/2018	[Redacted]	LI-[Redacted]	Application for insurance
<input type="checkbox"/> 05/05/2018	[Redacted]	LI-[Redacted]	Application for insurance

Individual messages

Selecting a message from the list opens that specific communication. From here, the Secure inbox acts similar to standard email with information on the receiving party, contract number and subject listed at the top. Here you can also select New business requirements, View all messages in the associated request, or Activity for this contract to find additional information regarding this correspondence.

Below this, you can choose from four options:

- Back to Inbox – Returns the user to the messages list.
- Act on message now – Allows the user to reply to this message.
- Mark message as new – Marks this message as unread/new.
- Remove from Inbox – Moves this message to the Messages removed from Inbox folder (can be restored if needed).

[home](#) > secure inbox

Message

Advisor: [Redacted] [New business requirements](#)
 Financial Centre: [Redacted] [View all messages in the associated](#)
 Client: [Redacted] [Activity for this contract](#)
 Contract: [Redacted]
 Subject: [AML corporate search required - WHS](#)

[Back to Inbox](#) [Act on message now](#) [Mark message as new](#) [Remove from Inbox](#)

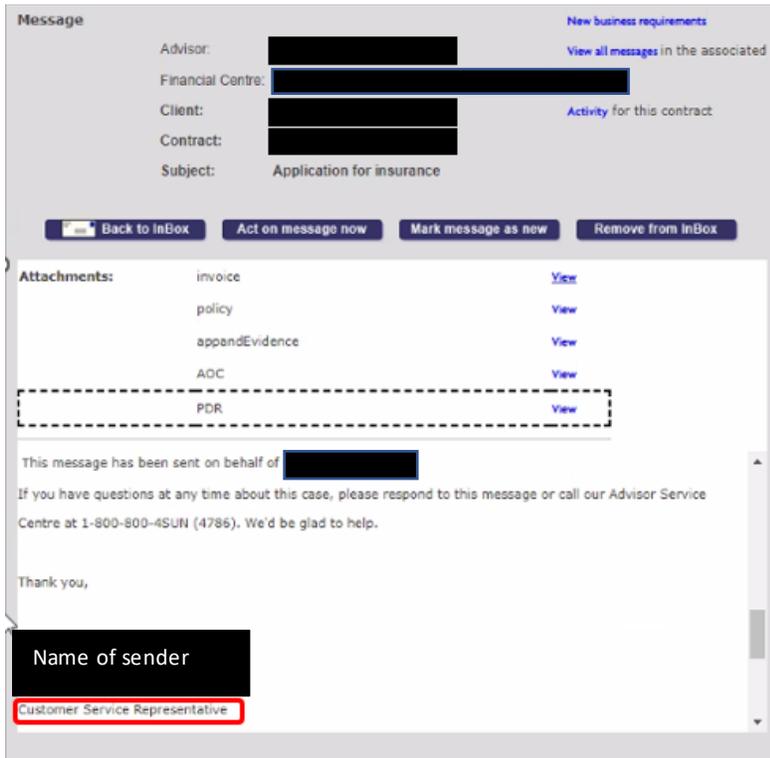
Contract: LI-[Redacted]
 Client: [Redacted]

To reply, click on "Act on message now" when viewing this message in your Activity Centre.

Hello,

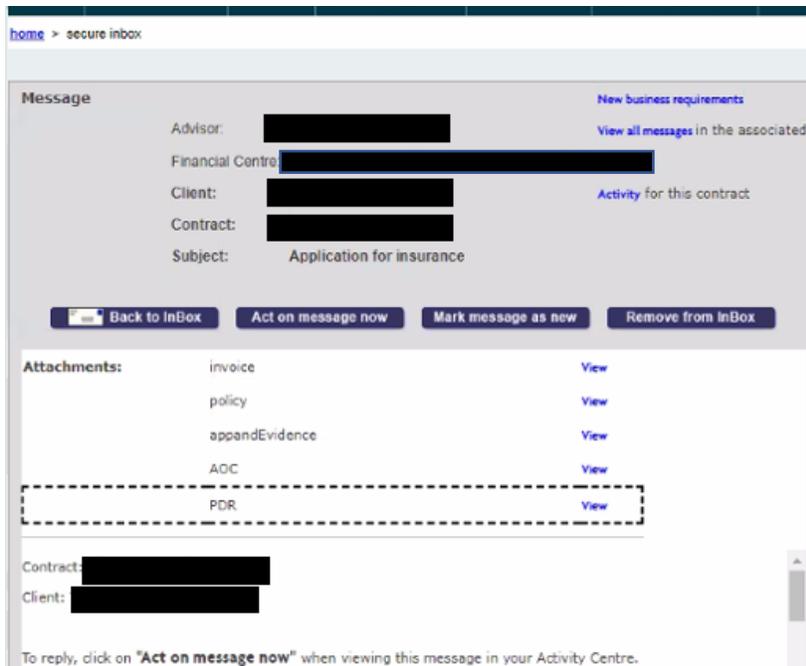
You have named a corporation as the owner of this application. Since there are multiple individuals involved in the corporation, we require

In order to identify the sender of a specific message, open that message and scroll to the bottom.



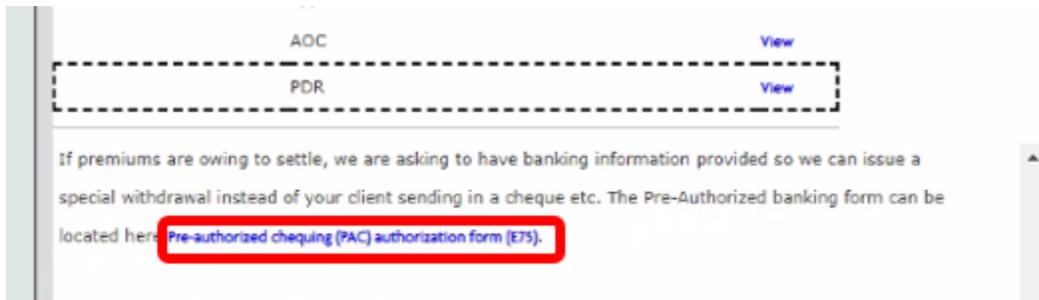
Attachments

If a message arrives with one or more attachments, they will be listed just above the message copy. To access an attachment, select the corresponding View link.



Embedded links

If a form is linked in the message copy, for example:



Selecting the link will display the following message:

Please wait...

If this message is not eventually replaced by the proper contents of the document, your PDF viewer may not be able to display this type of document.

You can upgrade to the latest version of Adobe Reader for Windows®, Mac, or Linux® by visiting http://www.adobe.com/go/reader_download.

For more assistance with Adobe Reader visit <http://www.adobe.com/go/acrreader>.

Windows is either a registered trademark or a trademark of Microsoft Corporation in the United States and/or other countries. Mac is a trademark of Apple Inc., registered in the United States and other countries. Linux is the registered trademark of Linus Torvalds in the U.S. and other countries.

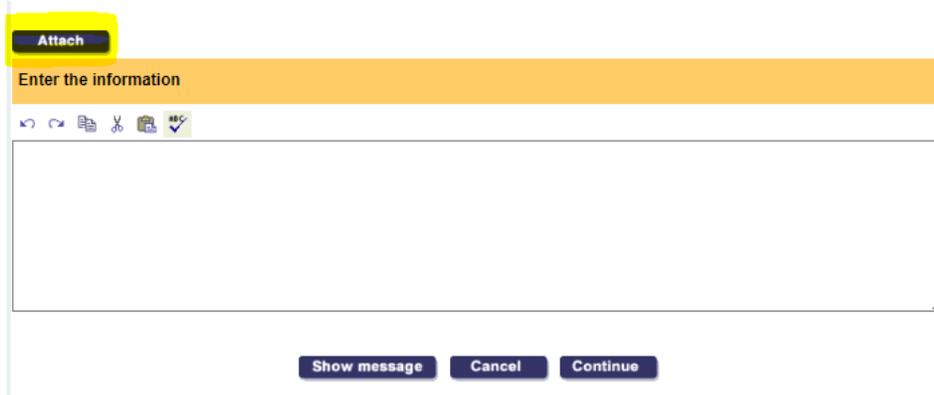
Instead of selecting the link, please download the form to the desktop folder of your computer and open it in your PDF reader (or other appropriate software). To download the form, [please select here to learn detailed steps](#).

Adding attachments to a message

At the bottom of the message from Sun Life, select Act on message now.



Above your reply, select Attach to attach files to your message (20MB total limit for attached files).



When done, enter your message and select Continue, then select Submit.

Message retention periods:

	Unread message	Viewed message
Number of days before message moves to Messages removed from InBox folder	21	90
Number of days message remains in Messages removed from InBox folder	7	7

Once removed from **Messages removed from InBox** folder, messages can only be accessed via Activity Centre.