

註冊帳戶及登入指南 Account Registration & Login User Guide

理財顧問只需註冊一次帳戶後，該帳戶即可在使用，無須重複註冊。

Consultant only needs to register only once. After registration, no need to register again.

請注意:

- ❖ 因註冊帳戶需要發送一次性密碼到您公司電郵地址，所以在註冊前，請確保您已能接收公司的電郵

Please note:

- ❖ Since registering an account requires a one-time password to be sent to your company email address, please make sure you can receive company emails before registering.


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一次性註冊帳戶步驟 Steps for One-time Registration

1. 首先點擊“Sign In”

First click on “Sign In”

 **Sun Life** **Welcome to SunSurf**

Login

Sign In

[Reset your SunSmart MPF Password?](#)

[First Time Login Guide](#)

Access to: [SunSmart SI](#)

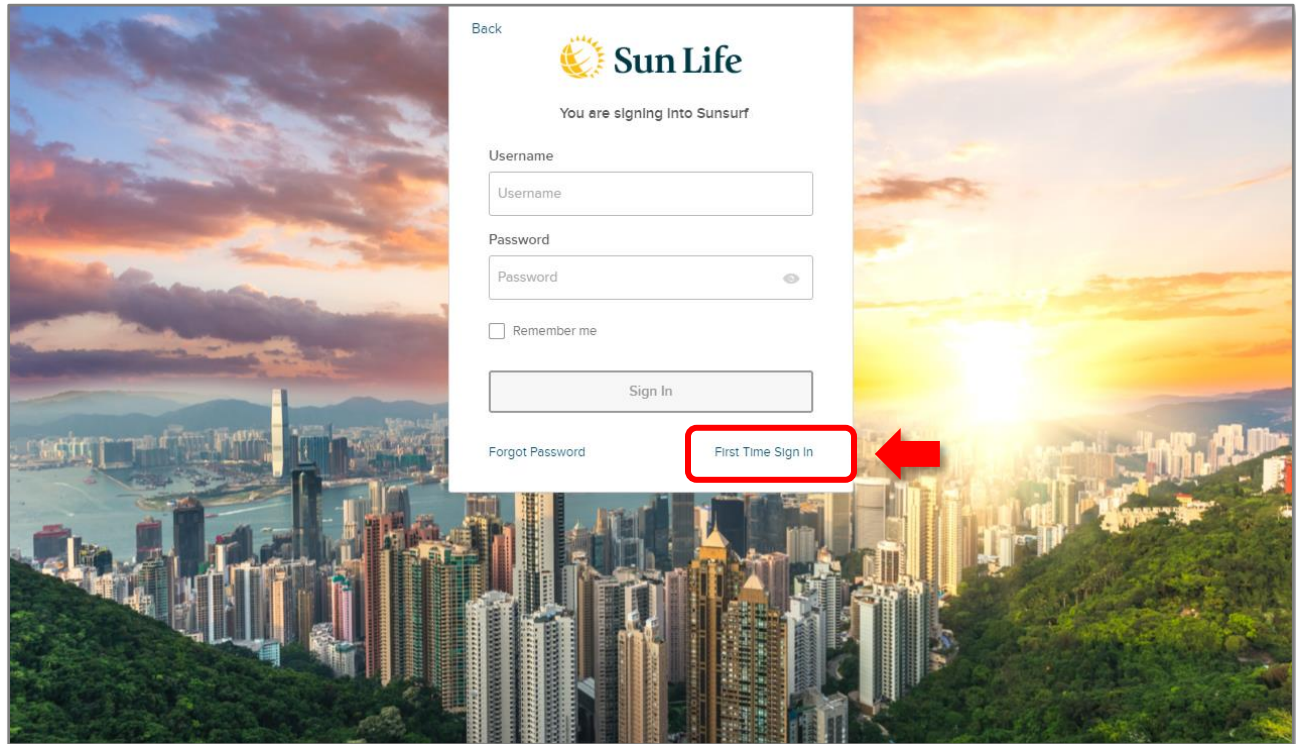
[SunOffice Browser Mode](#)

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For compatibility of this site, please refer to [here](#)

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2. 然後點擊 “First Time Sign In”
And then click “First Time Sign In”



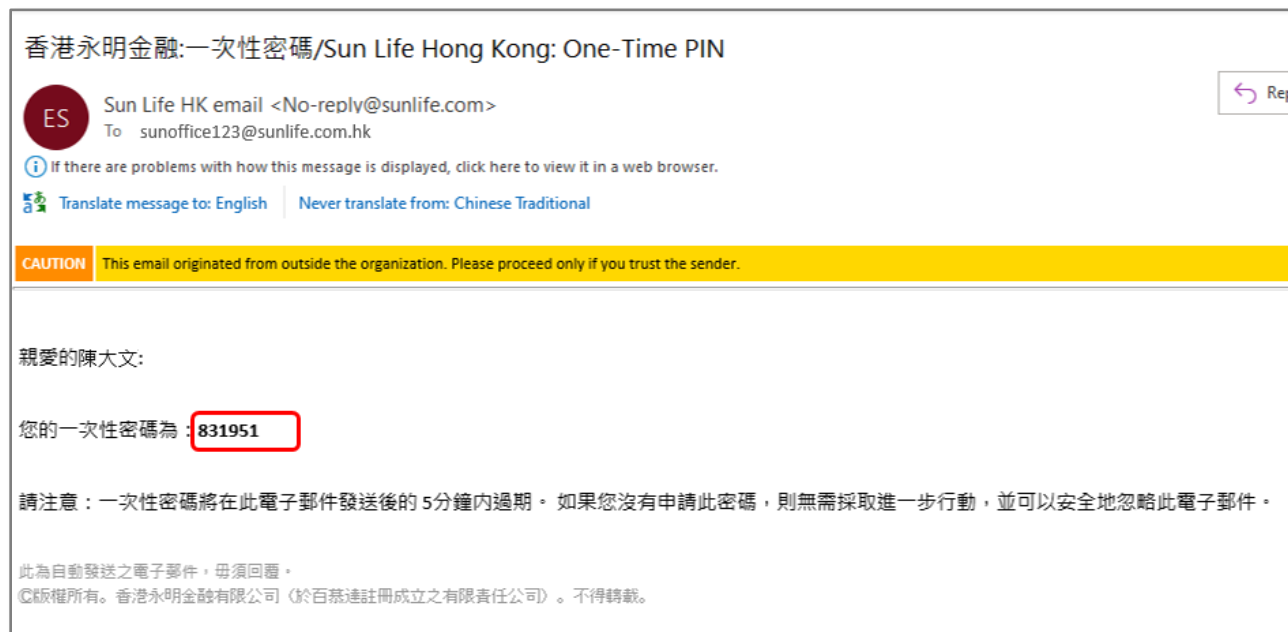
3. 輸入顧問編號及公司電郵地址，然後點擊[Submit]
Input Agent Code and Registered Company Email Address, and then click [Submit]



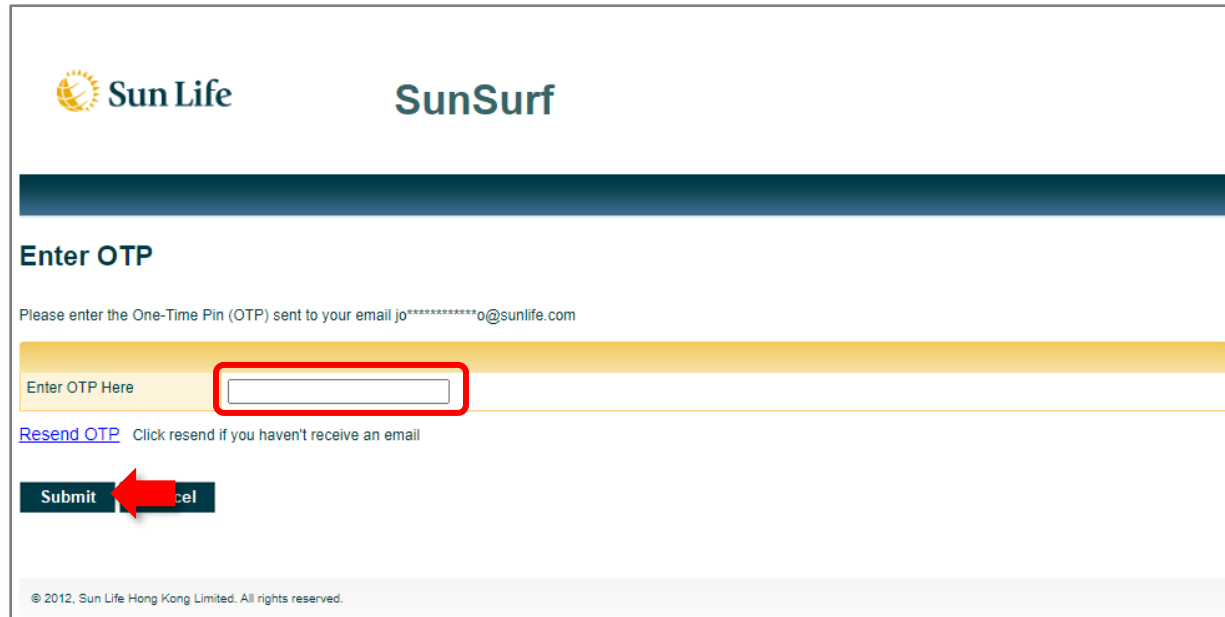
User ID	<input type="text" value="顧問編號"/>
Email Address	<input type="text" value="公司電郵地址"/> (Input the registered email address)

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4. 一次性密碼(OTP)將會隨即發送至您的公司電郵地址，並於電郵發送後5分鐘內有效
One time password (OTP) will be sent to your registered company email address and will be valid for 5 minutes

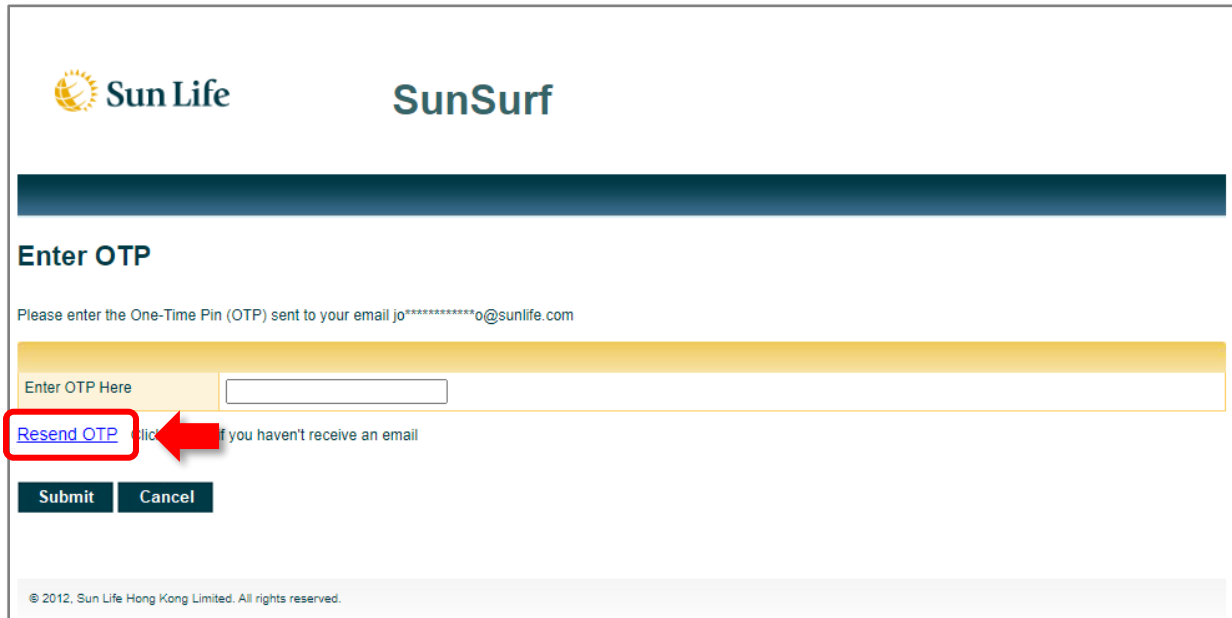


5. 輸入電郵內的一次性密碼(OTP)，然後點擊[Submit]
Input One Time Password from the email and then click [Submit]



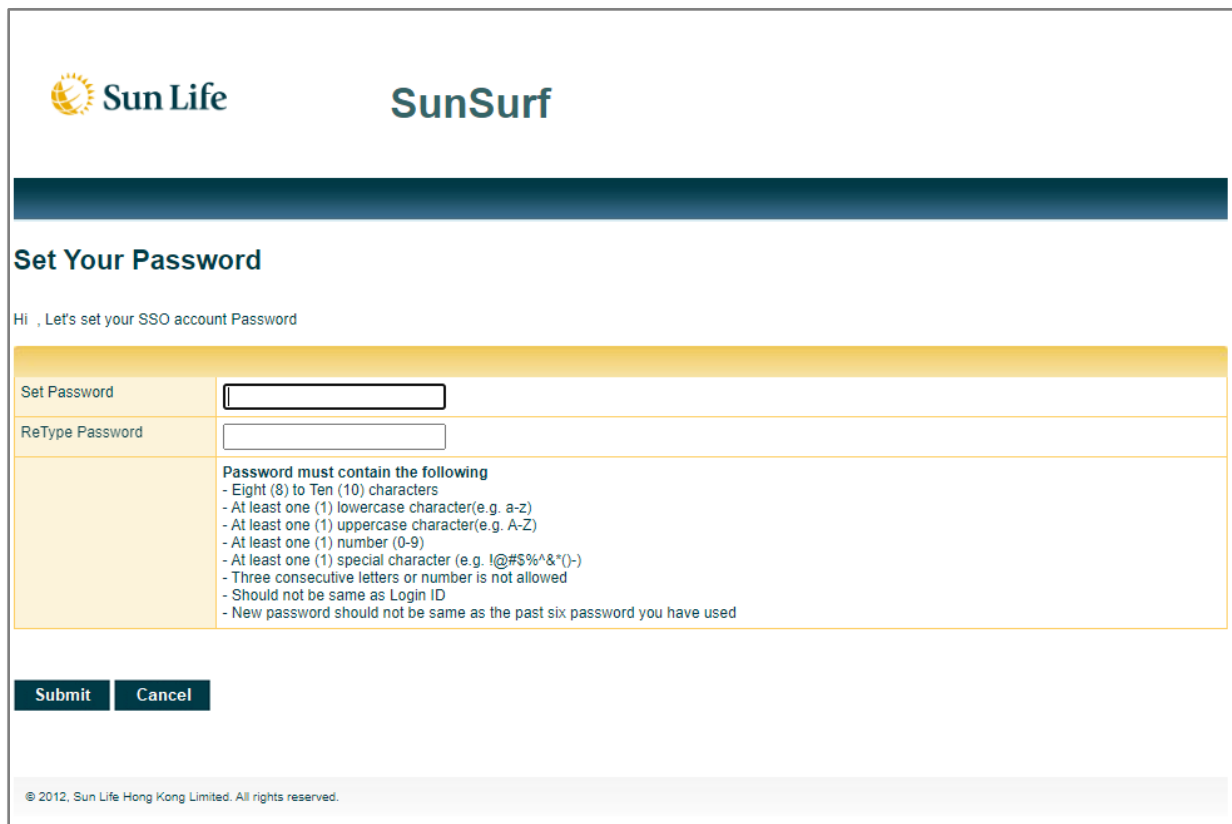
6. 若因各種原因未能成功獲取一次性密碼 (例如: 一次性密碼5分鐘後已過期) , 可點擊[Resend OTP] , 可獲取新的一次性密碼(OTP)

If you did not receive the OTP email, click on [Resend OTP] to send it again



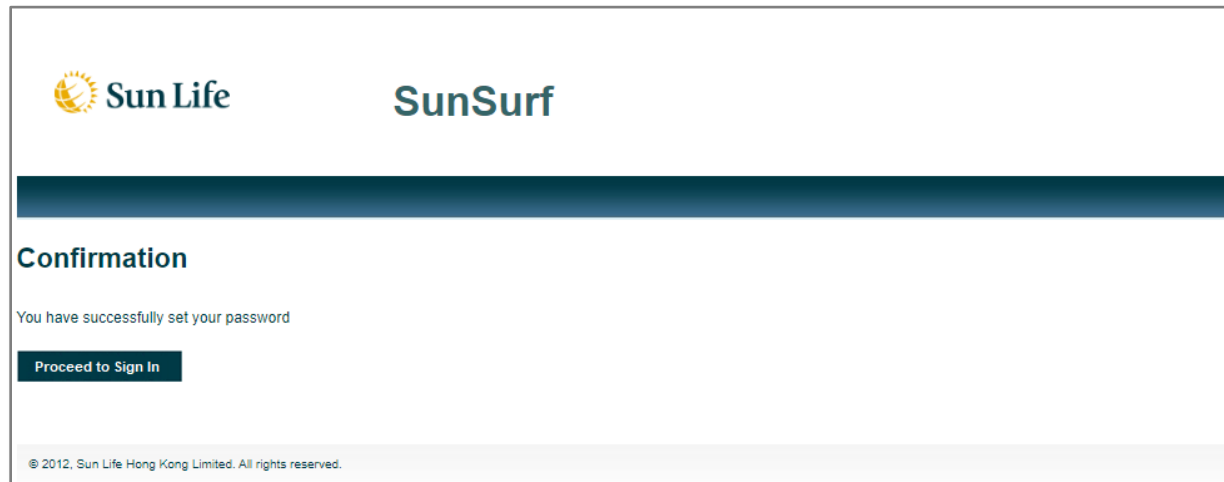
7. 提交一次性密碼後 , 設定登入密碼 , 密碼必須符合所有安全性要求

After entering OTP, you need to set your new password. The password must meet the security requirements



8. 成功設定密碼後，若出現以下畫面，即成功註冊帳戶

After setting the password, the account is successfully registered




登入 Login SunSurf

成功註冊帳戶後，可登入 SunSurf 如下：

After the account is successfully registered, you can login SunSurf as follows:

SunSurf

 **Sun Life** **Welcome to SunSurf**

Login

Sign In ←

[Reset your SunSmart MPF Password?](#)

[First Time Login Guide](#)

Access to: [SunSmart SI](#)

[SunOffice Browser Mode](#)

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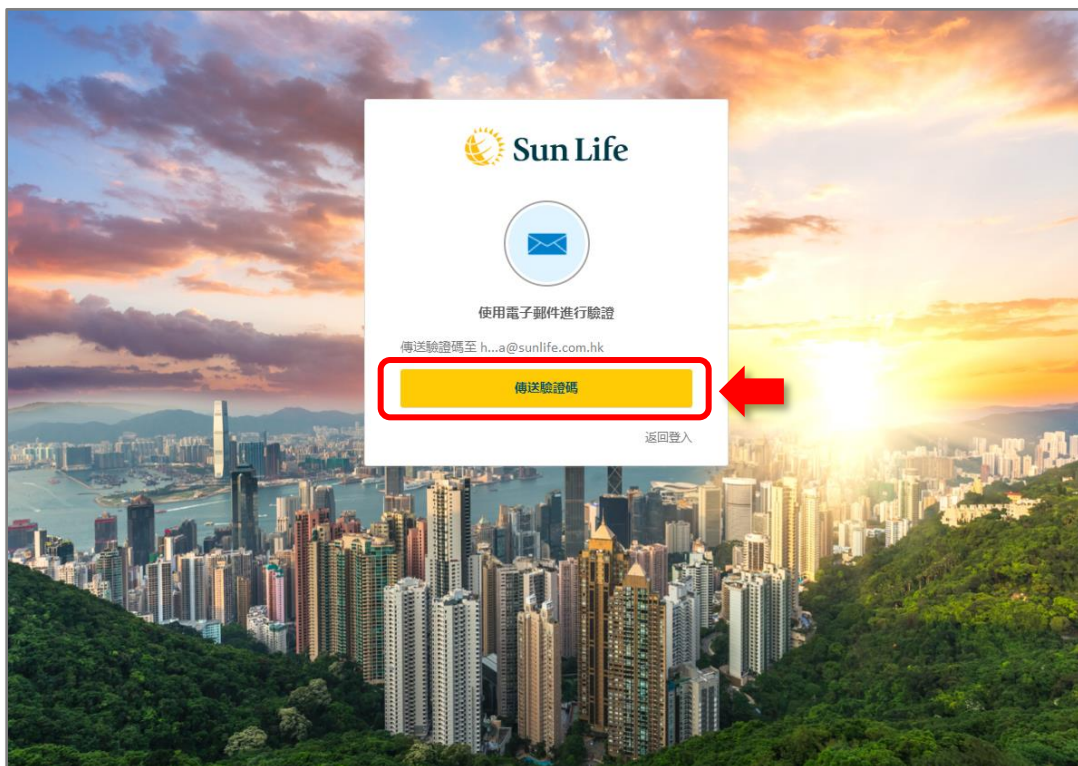
For compatibility of this site, please refer to [here](#)

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- 1) 輸入你的 **顧問編號** 和 **密碼**，然後點擊 [Sign In]
Enter your **Agent Code** and **Password**, then click on [Sign In]



- 2) 如果以下的畫面出現，點擊 [傳送驗證碼] 後，一次性驗證碼將會隨即發送至您的公司電郵地址，並於電郵發送後5分鐘內有效
If the following screen appears, after clicking [Send Verification Code], the one-time password will be sent to your company email address immediately and will be valid within 5 minutes after the email is sent



3) 輸入電郵內的一次性驗證碼，然後點擊 [驗證] 便能登入

Enter the one-time password from the email and click [Verify] to log in



請注意:

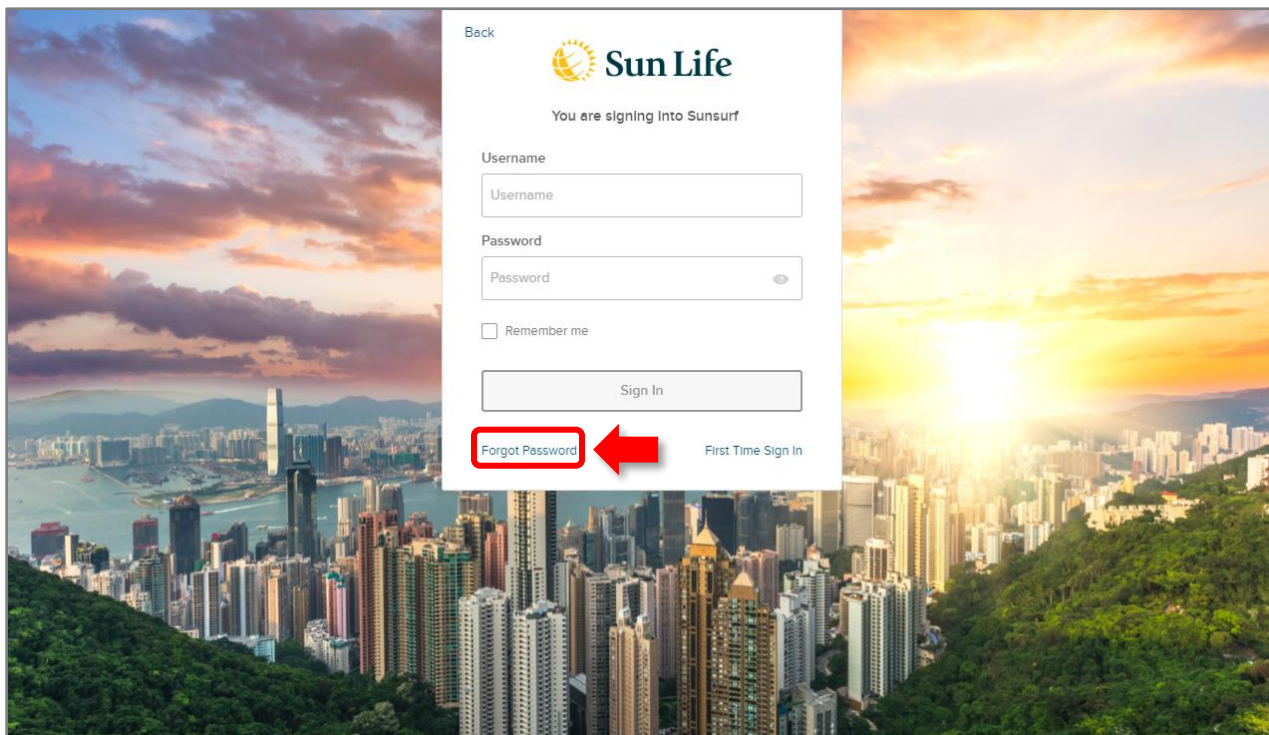
在首次登入時，您必須使用一次性驗證碼進行驗證。如果您在同一台電腦、流動裝置和瀏覽器再次登入，可能無需進行一次性驗證碼驗證。

Please note:

When logging in for the first time, you must verify using a one-time password. If you log in again from the same computer, mobile device, browser, etc., you may not need to perform a one-time password verification

忘記密碼 Forgot Password

1. 點擊 [Forgot Password]
Click [Forgot Password]



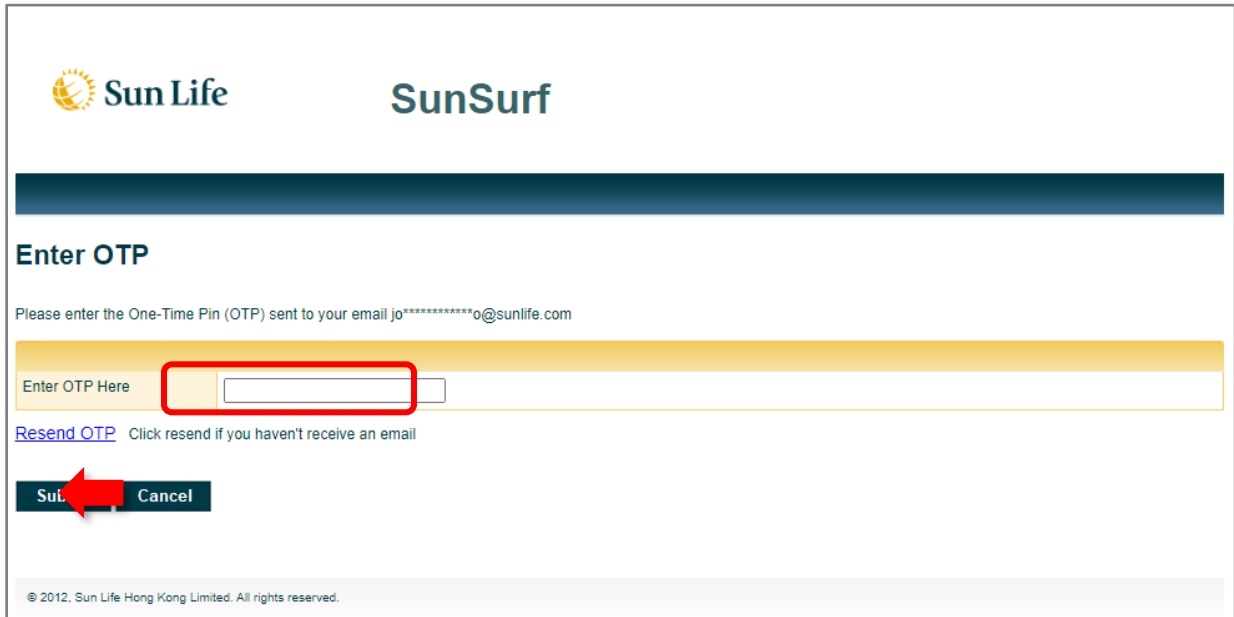
2. 輸入顧問編號及公司電郵地址，然後點擊[下一步]

Input Agent Code and Registered Company Email Address, and then click [Submit]

A screenshot of the Sun Life "Forgot Password" form. The page has a yellow header with the Sun Life logo and "SunSurf" text. Below the header, the title "Forgot Password" is displayed. A message reads: "Please enter the following information so that we may authenticate your account". There are two input fields: "User ID" with the Chinese label "顧問編號" and "Email Address" with the Chinese label "公司電郵地址" and a sub-label "(Input the registered email address)". At the bottom left, there is a "Submit" button, which is highlighted with a red box and a red arrow pointing to it from the right.

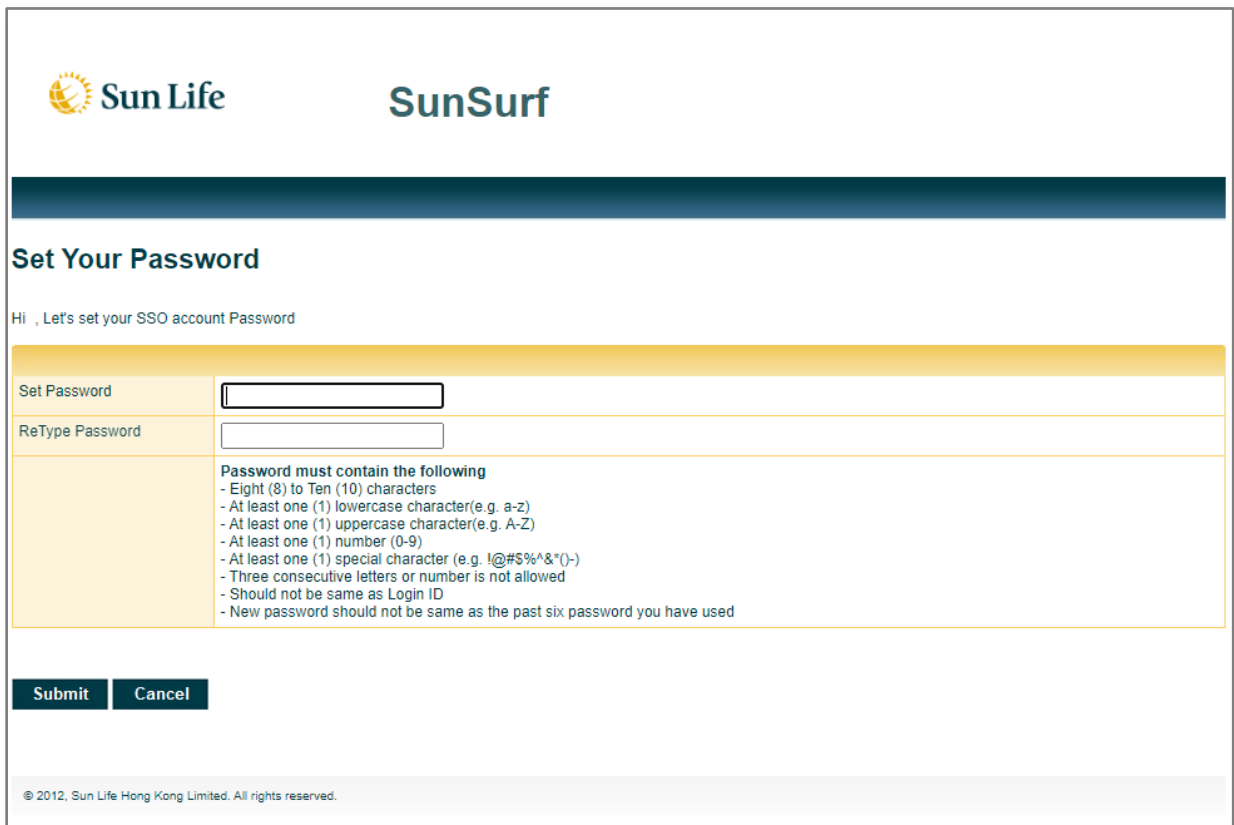
3. 輸入電郵內的一次性密碼(OTP) · 然後點擊[Submit]

Input One Time Password from the email and then click [Submit]



4. 提交一次性密碼後 · 設定登入密碼 · 密碼必須符合所有安全性要求

After entering OTP, you need to set your new password. The password must meet the security requirements



5. 成功設定密碼後，若出現以下畫面，即成功更改密碼

After setting the new password, the password is successfully reset

