



尊榮數位體驗

貼身理財首選

服務零距離

◀ myRM數位隨行理專服務 操作使用手冊 ▶

聯繫理專、確認交易內容、追蹤交易進度
幫助您更有效的實現理財計劃

Standard Chartered Bank myRM provides you with digital relationship manager services. You can contact your relationship manager, confirm your transaction details and track your transaction status through myRM on Standard Chartered Internet Banking or Mobile Banking to fulfill your wealth plan.



standard
chartered
priority

目次

1

myRM 主畫面進入流程
myRM Entry Page

2

聯絡專員
Contact Your Relationship Manager

3

海外債券、外國股票及 ETF、基金交易
Bond, Equity/ETF and Mutual Fund Transactions

4

定存交易
Time Deposit Transactions

5

其他功能
Other Functions

6

解鎖簡訊密碼鎖定狀態
Unlock Your SMS OTP Service



如您對操作使用有任何疑問，請至本行官網查詢、致電本行客服、或與您的理專聯繫。

If you have any questions, please visit our website at www.sc.com/tw, call our client care center on (02) 2514-2888, or contact your relationship manager.

1

myRM 主畫面進入流程

myRM Entry Page

1.1

登入渣打行動銀行 App 或網路銀行，並點擊頁面中 **myRM** 標示

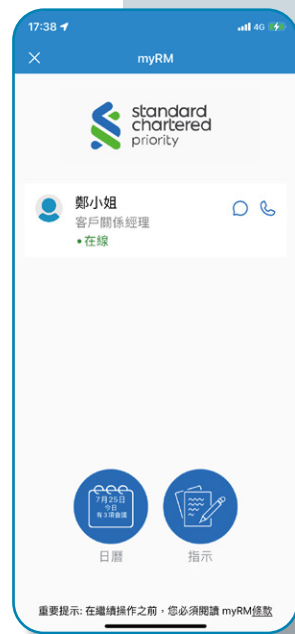
Log in SC Mobile / Internet Banking, and select **myRM** icon.



1.2

進入 myRM 主選單

Enter main page of myRM.



2

聯絡理專

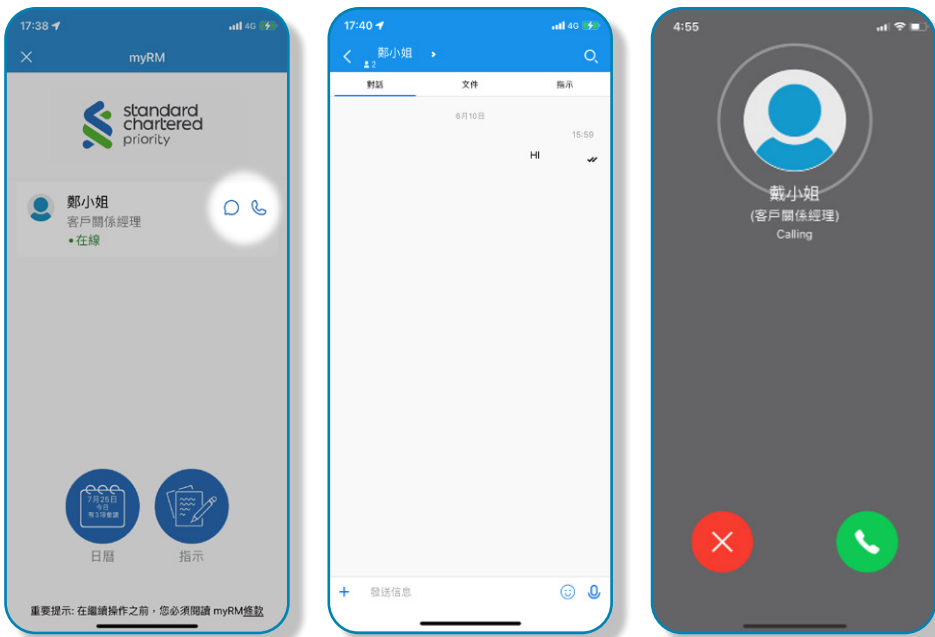
Contact Relationship Manager

2.1 透過文字、語音、視訊和理專互動

Interact with your relationship manager via text, audio, and video call

點選理專姓名右方的對話框符號開啟文字訊息功能，或點選電話符號開啟語音或視訊通話。

Select the dialog icon or phone icon on the right-hand side to start texting, calling, or video calling with your relationship manager.



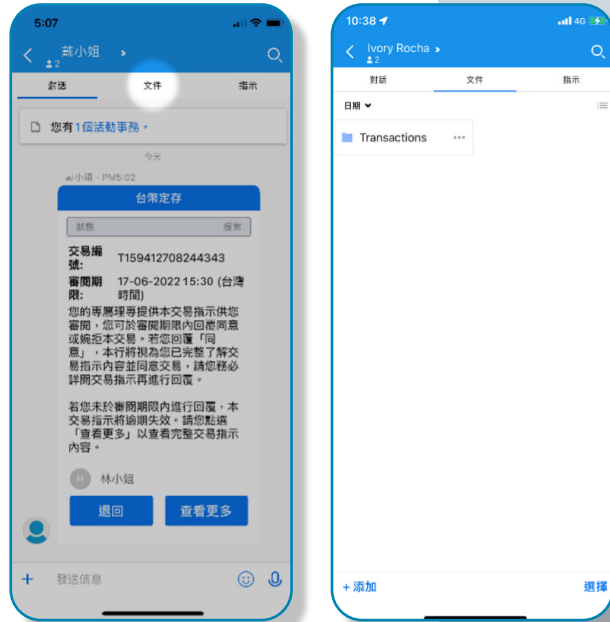
2.2

傳送文件

Send files

點選對話框上方工具列中 **文件** 功能，即可一次瀏覽所有您與理專傳送過的文件檔案。

Select the **files** function on top of the chat box in order to view all the documents shared with your relationship manager.



2.3

預約會議

Reserve a conference call

您可透過理專的協助來預約專家團隊諮詢會議。您僅需點選下方的 **日曆** 標示，即可接受或拒絕會議邀請，以及檢視會議狀態。

Your relationship manager can help you arrange a meeting with our investment advisors. Simply click the **calendar** icon to accept or decline meeting invitations, and check conference call status.



3

海外債券、外國股票及 ETF、基金交易

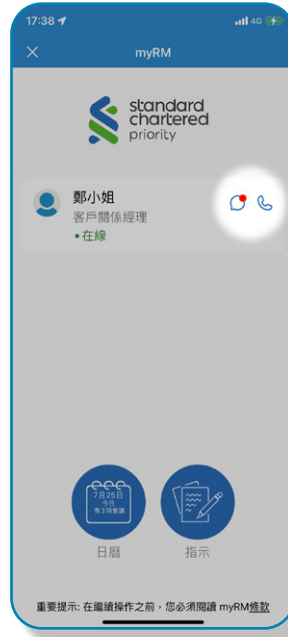
Bond, Equity/ETF and Mutual Fund Transactions

3.1 接收交易指示書

Receive transaction details

收到理專派送的交易指示訊息後，可在 myRM 聊天室中點選該交易訊息的 **查看更多** 進入交易指示書以及相關注意事項的審閱頁面。

After receiving transaction instruction details from your relationship manager, you can click **view** button to check transaction details, terms and conditions, and other documents.



3.2 審閱交易指示書內容及相關文件

Review transaction details and related documents

審閱交易指示書及相關說明文件內容，確認無誤點選 **同意**。

Review transaction details and related documents. Click **Accept** for confirmation.



3.3 OTP 簡訊密碼認證

SMS OTP authentication

系統將寄發六位數簡訊密碼至您在本行留存的手機號碼，請填寫密碼完成認證。

Our system will send out an SMS OTP code to your registered mobile phone. Please complete the authentication by entering the code received.



3.4 系統交易狀態更新

Transaction status update

系統將發送交易結果 Email 及簡訊給您，同時 myRM 平台上也會一併更新最新交易進度資訊。

System will send out transaction result email and SMS to you. You can also check your transaction status on myRM.



4

定存交易

Time Deposit Transactions

4.1 接收交易指示書

Receive transaction details

收到理專派送的交易指示訊息後，可在 myRM 聊天室中點選該交易訊息的 **查看更多** 進入交易指示書以及相關注意事項的審閱頁面。

After receiving transaction instruction details from your relationship manager, you can click **view** button to check transaction details, terms and condition and other documents.



4.2 審閱交易指示書內容及相關文件

Review transaction details and related documents

審閱交易指示書及相關說明文件內容，確認無誤點選 **同意**。

Review transaction details and related documents. Click **Accept** for confirmation.



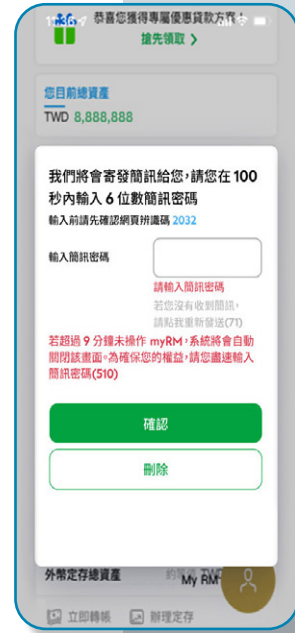
4.3

OTP 簡訊密碼認證

SMS OTP authentication

系統將寄發六位數簡訊密碼至您在本行留存的手機號碼，請填寫密碼完成認證。

Our system will send out an SMS OTP code to your registered mobile phone. Please complete the authentication by entering the code received.



4.4

系統交易狀態更新

Transaction status update

系統將寄送交易確認 Email 至您的信箱。待交易人員完成交易指示後，您會收到交易結果 Email 及簡訊通知。同時 myRM 平台上也會一併更新最新交易進度資訊。

System will send out confirmation email to you. After our dealer finishes your transaction instruction, system will send out transaction result email and SMS to you. You can also check your transaction status on myRM.



5

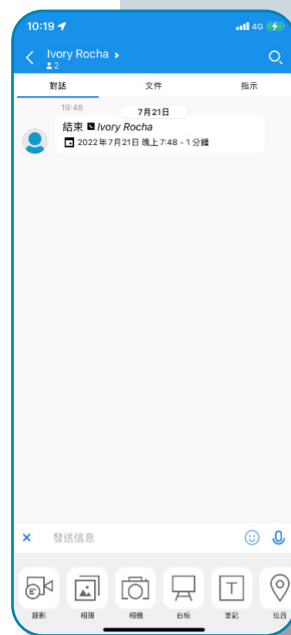
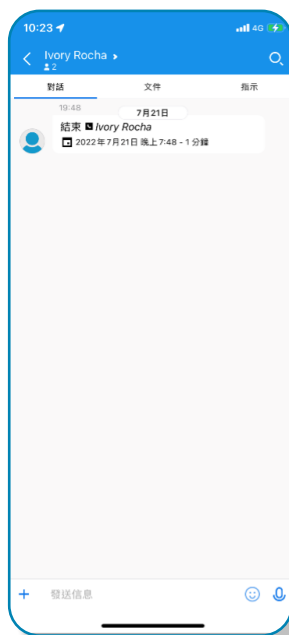
其他功能 Other Functions

5.1 開啟各式資料上傳、 表情符號、錄音

Upload documents, emojis,
and recording

點選左下角的 + 添加按鈕，即可傳送各式檔案給您的理專。您亦可使用表情符號或是錄音。

Click the button + (add) to upload different types of files to your relationship manager. You may also use emojis or recording.

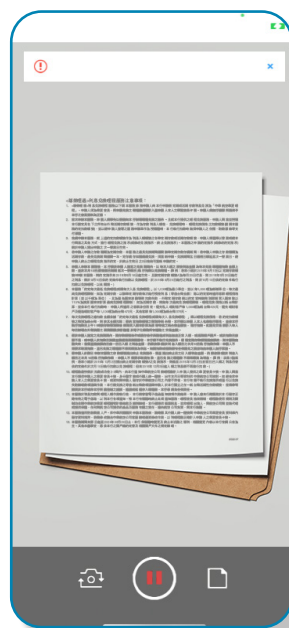


5.2 錄影、相簿、相機

Clips, Gallery & Camera

點選即可錄製影片、上傳或拍攝相片。
您亦可於錄製影片當下同時打開文件資料。

Click to upload or take videos and photos. You may also review files while taking videos.



5.3

白板、筆記

Whiteboard and Notes

點選即可開啟手繪或打字輸入模式。

Click to enable drawing or typing mode.



5.4

位置、瀏覽器、對話

Location, Web and Conversations

您可傳送您的當前位置，或透過內建瀏覽器查詢資料、截圖網頁、分享網址。您亦可直接上傳與理專的對話內容資料。

You can share your current location, or use internal browser to search information, take screenshots and share URLs. You can also upload the information from your conversation with your relationship manager.



6

解鎖簡訊密碼鎖定狀態

Unlock Your SMS OTP Service

6.1 收到 OTP 簡訊密碼鎖定通知

Receive OTP service locked notification

若您的簡訊密碼連續輸入錯誤達三次，系統將自動鎖定您的簡訊密碼服務。

If you enter the wrong SMS OTP for 3 times continuously, the system will automatically lock your SMS OTP service.



6.2 至簡訊密碼 狀態頁解鎖

Go to SMS OTP
status page to
unlock

點選左側選單

點選 **個人資料編輯與設定** 後，
點選 **個人專區**，點選
簡訊密碼狀態 至解鎖頁
面。

Click

Profile Editing and Settings

, go to **Personal Settings**

, and click

SMS OTP Status to enter
the unlocking page.



6.3

完成 OTP 簡訊 密碼認證以解鎖

Complete SMS OTP authentication to unlock

點選 **立即解鎖** 後，系統將寄發六位數簡訊密碼至您在本行留存的手機號碼，請依照指示完成解鎖。

After you click **Unlock Now**, the system will send out SMS OTP to your registered mobile phone. Please follow instructions to unlock the service.

