

Retail Platform for Agents

Homepage, Agent Resources and Dashboards

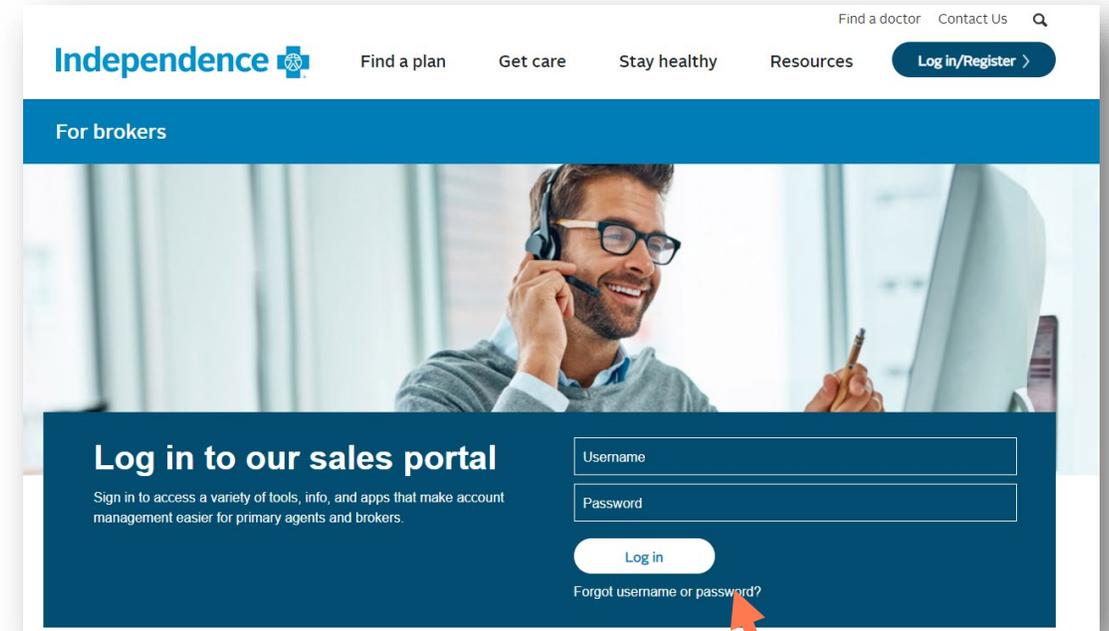
Job Aid Topics

- SSO login: Broker vs Telesales
 - User access & password reset
- Global Navigation
- Dashboard reporting
- My Prospects page and actions on prospect records

SSO login

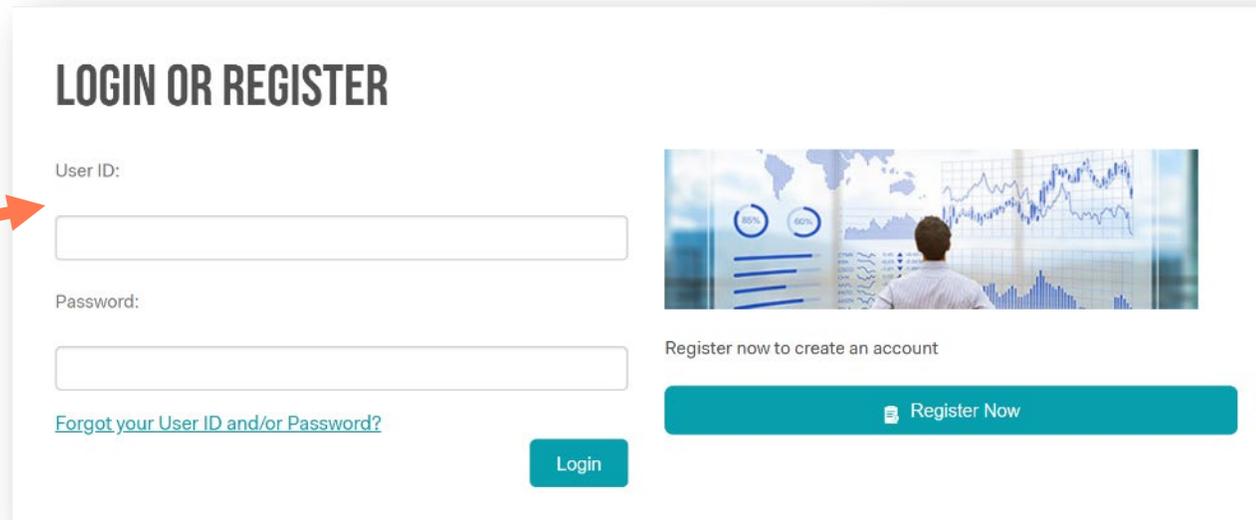
SalesConnect has SSO (Single Sign On) login enabled for both Brokers and Telesales agents. Each login is accessed by the CRM system or agent/broker portal available to the agents per each system set up.

The agents will use a single set of credentials to log in and be able to access the SalesConnect agent site.



Broker sales portal access

Telesales Agent SSO access



SSO login

User Access & Password Reset

- Broker portal sites are managed by the client and would follow the procedure of the portal site for any access or password issues.
- Telesales login has a link on the login page that the agent can selection if they need to reset their password or recover their User ID.
 - User will enter email address associated to agent account and click 'Continue'/'
 - System will send the user and email with their user ID and instructions to reset password, if needed.

LOGIN OR REGISTER

User ID:

Password:

[Forgot your User ID and/or Password?](#)

Login



Register now to create an account

Register Now

GUIDEWELL
Connect

HAVING TROUBLE LOGGING IN?



Here are a couple hints that might solve the problem:

- Double-check the email address you entered.
- Your password is case sensitive, so please be sure your Caps Lock is turned on.

Still having trouble? Please enter your email address so we can send an email with your User ID and link to reset your password.

Email Address:

For your security, please click the checkbox to verify you are a real person:

I'm not a robot



Cancel

Continue

GUIDEWELL
Connect

THANKS! PLEASE CHECK YOUR EMAIL.



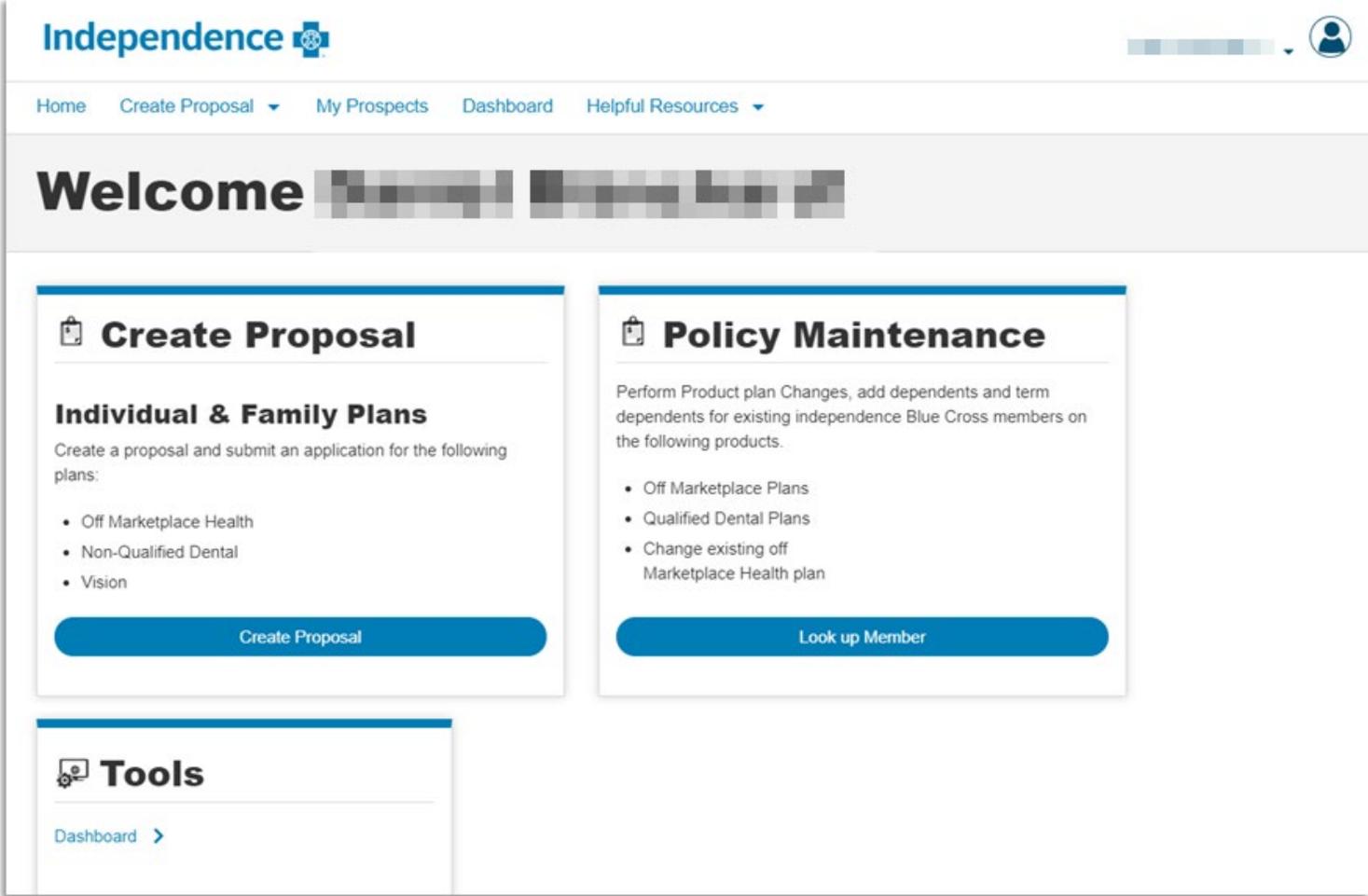
We sent an email to amanda.padgett@guidewellconnect.com with your user id and some instructions to reset your password.

Sometimes these emails end up being marked as spam, so if you're not seeing our message in your inbox, please check your spam folder.



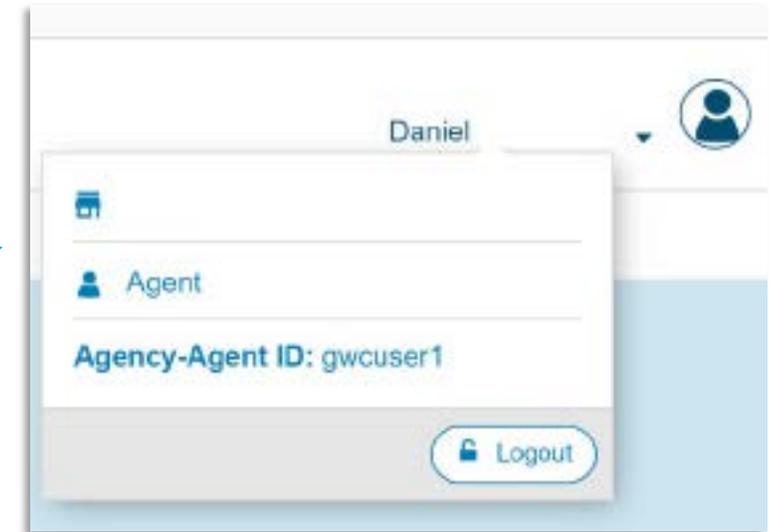
Agent Landing Page

The SalesConnect Agent Landing page has several options for the agent to choose from in order to take action to create proposals, look up a member for Policy Maintenance, find resources and access their dashboard.

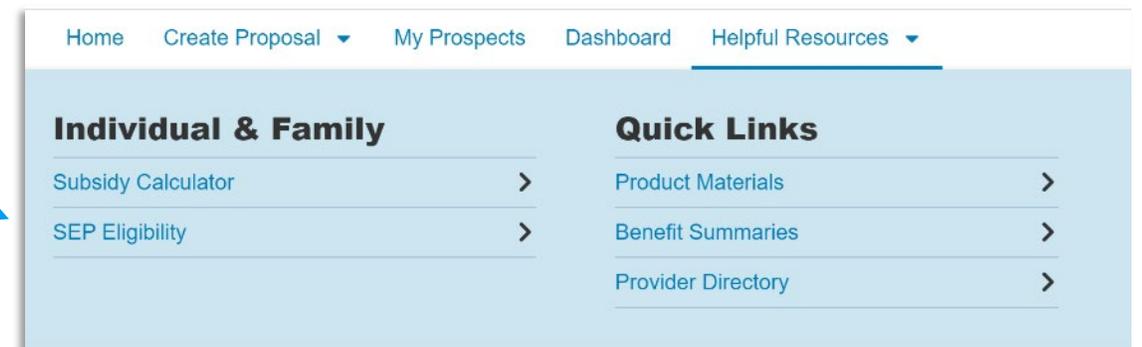
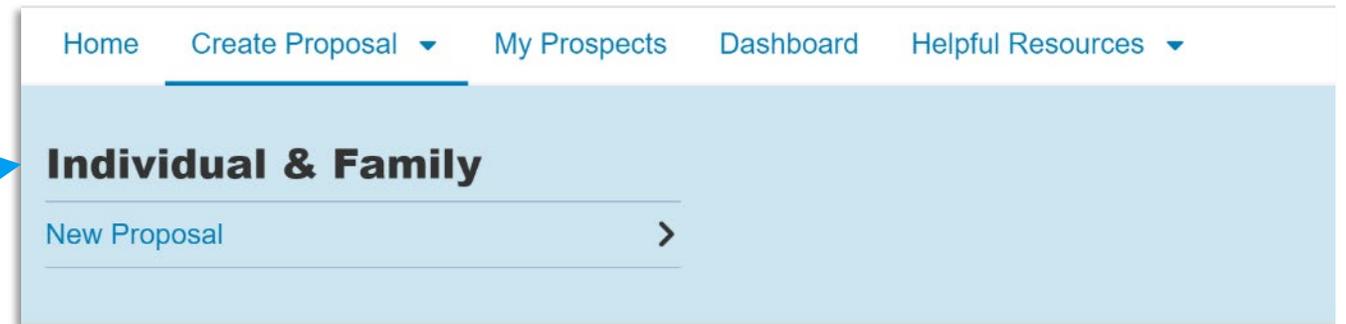


Agent Landing Page cont'd

In the top right-hand corner, the agent information and user role is listed. This is also where the agent can log out if needed.



In the Global Navigation, the actions available are to Create a New Proposal, visit the My Prospects page, visit the Dashboard page and access the list of Helpful Resources, which link out to company sites.



Dashboard Reporting



Sales Dashboard

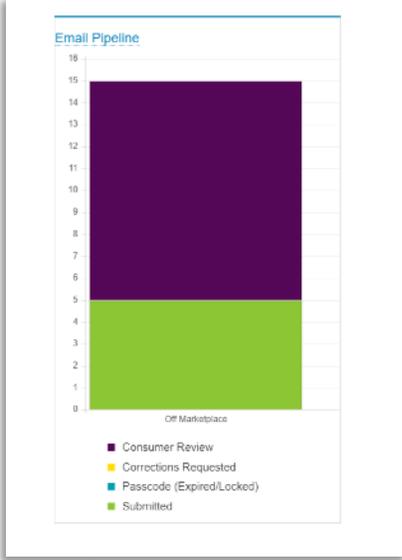
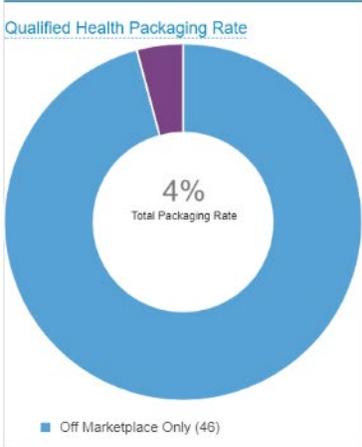
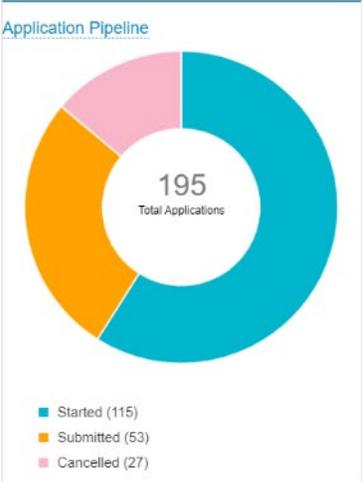
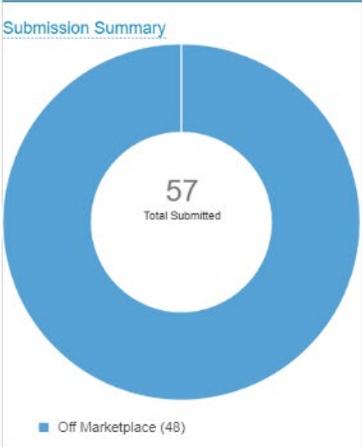
agentIBC One - GuideWell Connect

Welcome to your Sales Dashboard. Please select a start and end date to update the information in the graphs.

Start Date: 06/01/2020 End Date: 06/09/2020

Search By Agent Name:

Name	Agency	Total Submissions	Off Marketplace
ONE, AGENTIBC	GUIDEWELL CONNECT	0	0
ONE, AGENTIBC	GUIDEWELL CONNECT	57	48



The Dashboard page offers an overview of the agent's actions between a designated timeframe.

*If the user was a super user, the view would include all the agents/agencies under their account.

Charts are available for:

- Submission Summary for total number of applications submitted by product type
- Application Pipeline to see how many applications are in progress, submitted or cancelled
- Qualified Health Packaging Rate to see the percentage of submitted applications that were also packaged with a dental plan (with the same quote)
- Email Pipeline to track those applications sent through Email Submission type

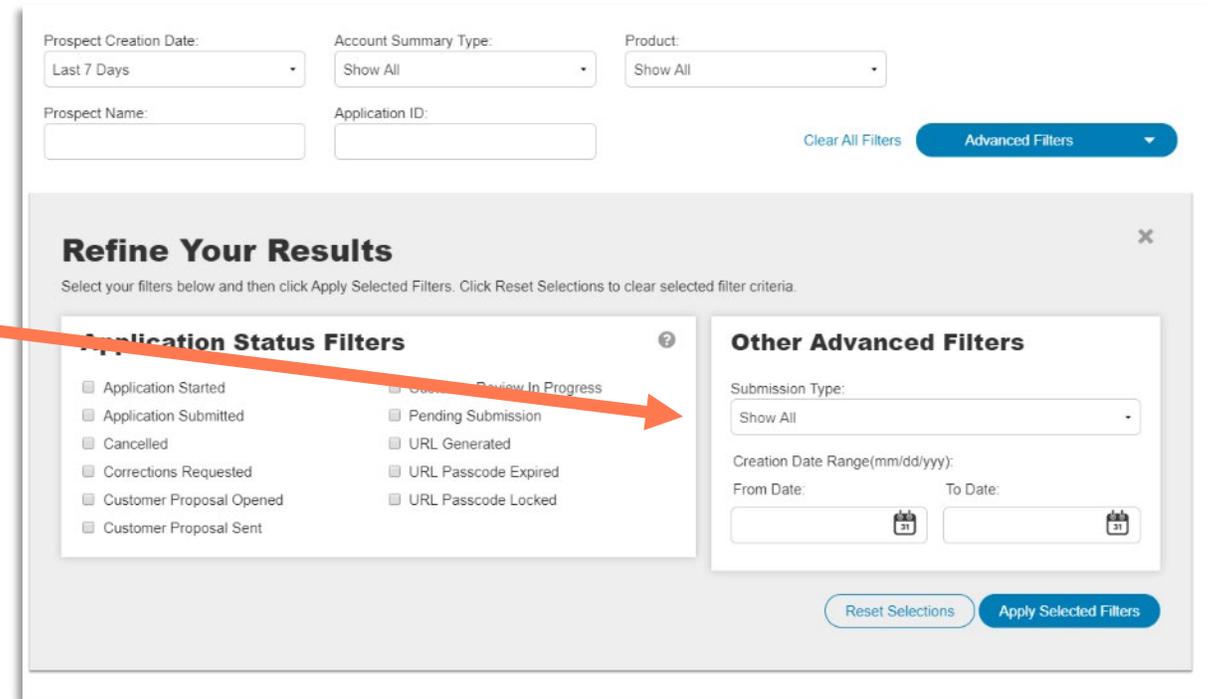
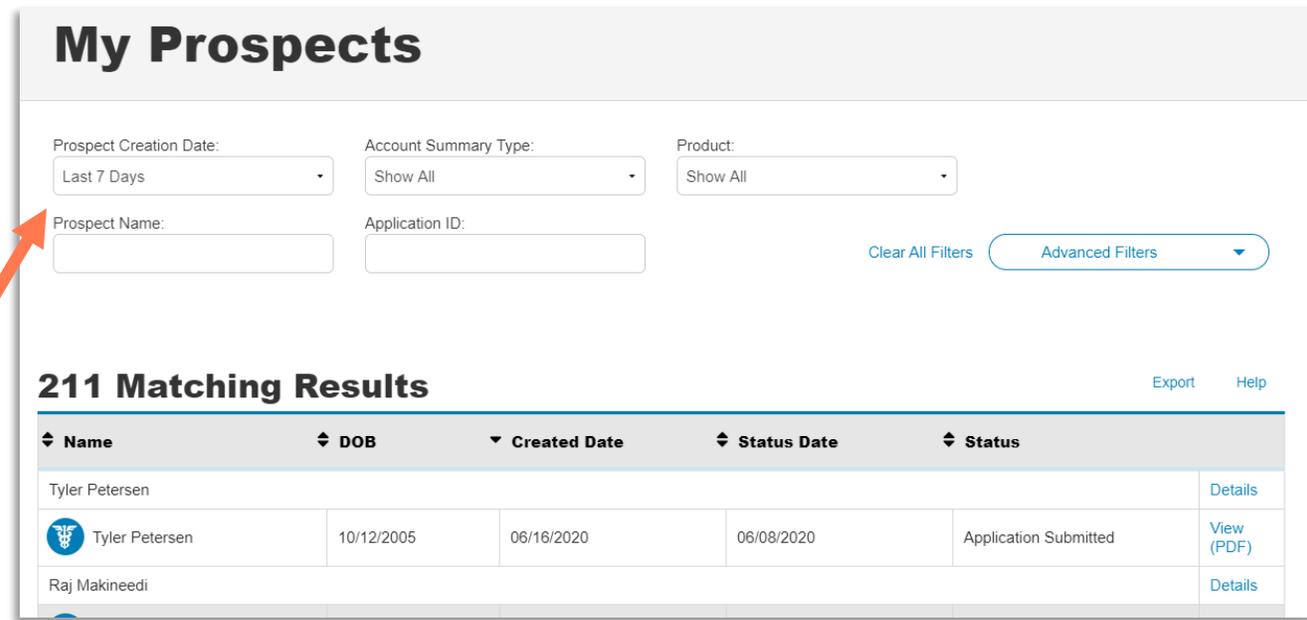
My Prospects Page



The **My Prospects** page includes several key actions and provides a detailed view for each prospect from the agent's activity.

- At the top, the search can be restricted to a time frame, account type, product, prospect name or application ID.

There is also an **advanced filters** view that expands the search even further to search by application status, submission type and creation date.



My Prospects Page cont'd

There is a Help link that expands to the icon keys so that the agent can pick out a particular status or product via the unique icons.

The agent can also export their prospect list with the Export function, which downloads the current list of results to an Excel file.



The Prospect listing can display multiple records such as proposals, applications in progress, applications submitted and applications needing action on behalf of the agent. The actions on the right-hand side direct the agent to the prospect details and any actions specific to each record under the prospect.

Select the '**Details**' link to open the prospect's record (shown on the next slide)

primary test					Details
 primary test	05/05/1985	06/08/2020	06/09/2020	Application Started	Continue
 primary test	05/05/1985	06/08/2020	06/09/2020	Application Started	Continue
 spouse test	05/05/1985	06/08/2020	06/09/2020	Application Submitted	View (PDF)

My Prospects Page cont'd

Once the **Details** link is selected, the user is brought to the **Prospect Details** page.

After submission, the Prospect's details available include:

- Prospect name
- Primary phone number
- Secondary phone number
- Email Address
- Application Submission Date
- Application ID
- Primary Applicant Name
- Premium Amount
- Product/ Plan Name
- Application Status

Help provides you the details based on the icons for each proposal/ application:

- Proposal
- Pharmacy Application
- Dental Application
- Off Marketplace Application (Health)
- Vision Application

The screenshot displays the 'Prospect Details' page. At the top right, there is a 'Back to Results' button. Below the title, a 'Help' button is highlighted with a red box. The main content area features a yellow header with four application categories: Proposal (document icon), Health Application (caduceus icon), Dental Application (tooth icon), and Vision Application (eye icon). Below this, there are input fields for 'Primary:' and 'Secondary:' email addresses, and a 'Create Proposal' button. A table below shows application details for a specific application:

	06/08/2020 App ID: IBA-1092884176 test	\$475.83 Application Started	Action	Continue
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My Prospects Page cont'd

The **Action Menu** allows for actions based on the prospect record.

Example Actions Include:

- View PDF (output) for submitted applications
- Continue an In Progress Application
- View, Copy and Check Status of proposals
- Generate New Passcodes for Applications sent via Email Submission Type

Prospect Details

[Back to Results](#)

Details for Tyler Petersen

[Help](#)

Primary: Secondary:	Email Address :	Create Proposal		
	11/08/2020 App ID: IBA-1092884219 Tyler	\$391.06 Customer Review In Progress	Action	Generate New PassCode
	11/08/2020 App ID: IBA-1092884218 Madhu	\$21.94 Application Started	Action	Continue
	06/16/2020 App ID: IBA-1092883742 Tyler	\$292.15 Application Submitted	Action	View PDF
	06/11/2020 Proposal ID: 1668513 Test	Health	Action	View Details
	06/11/2020 Proposal ID: 1668513 Test			Copy Proposal
				Check Status