Retail Platform for Agents

Homepage, Agent Resources and Dashboards

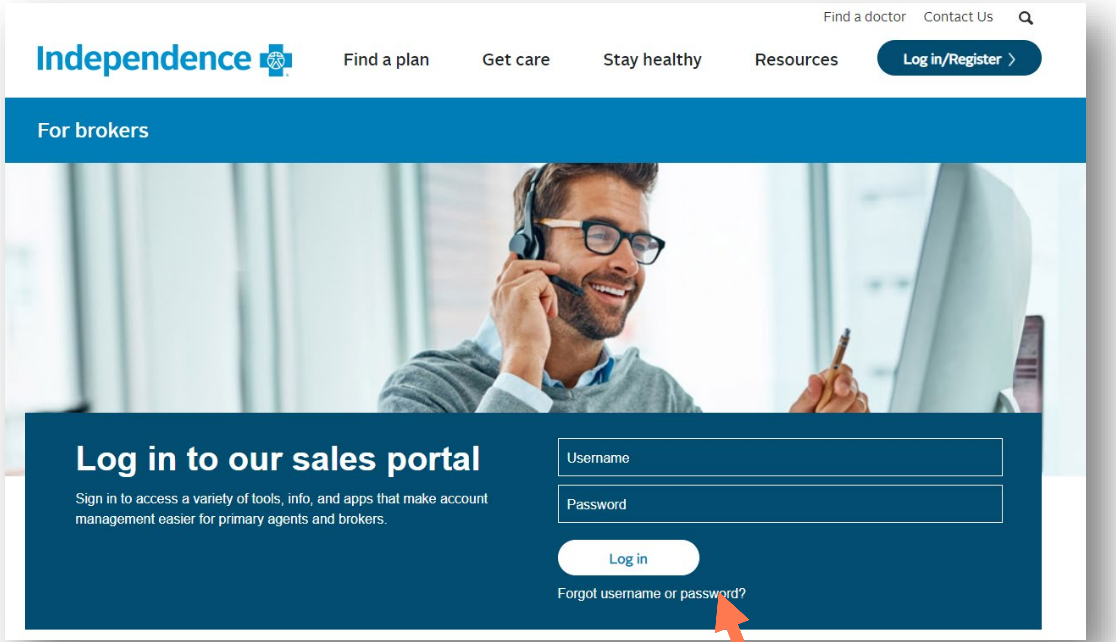
Job Aid Topics

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

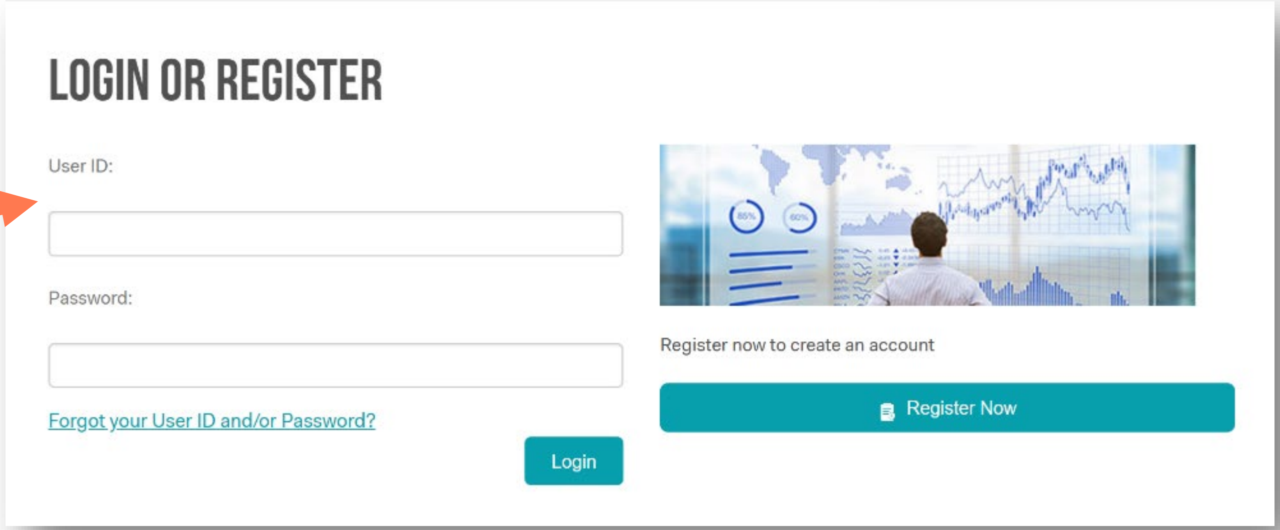
SSO login

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



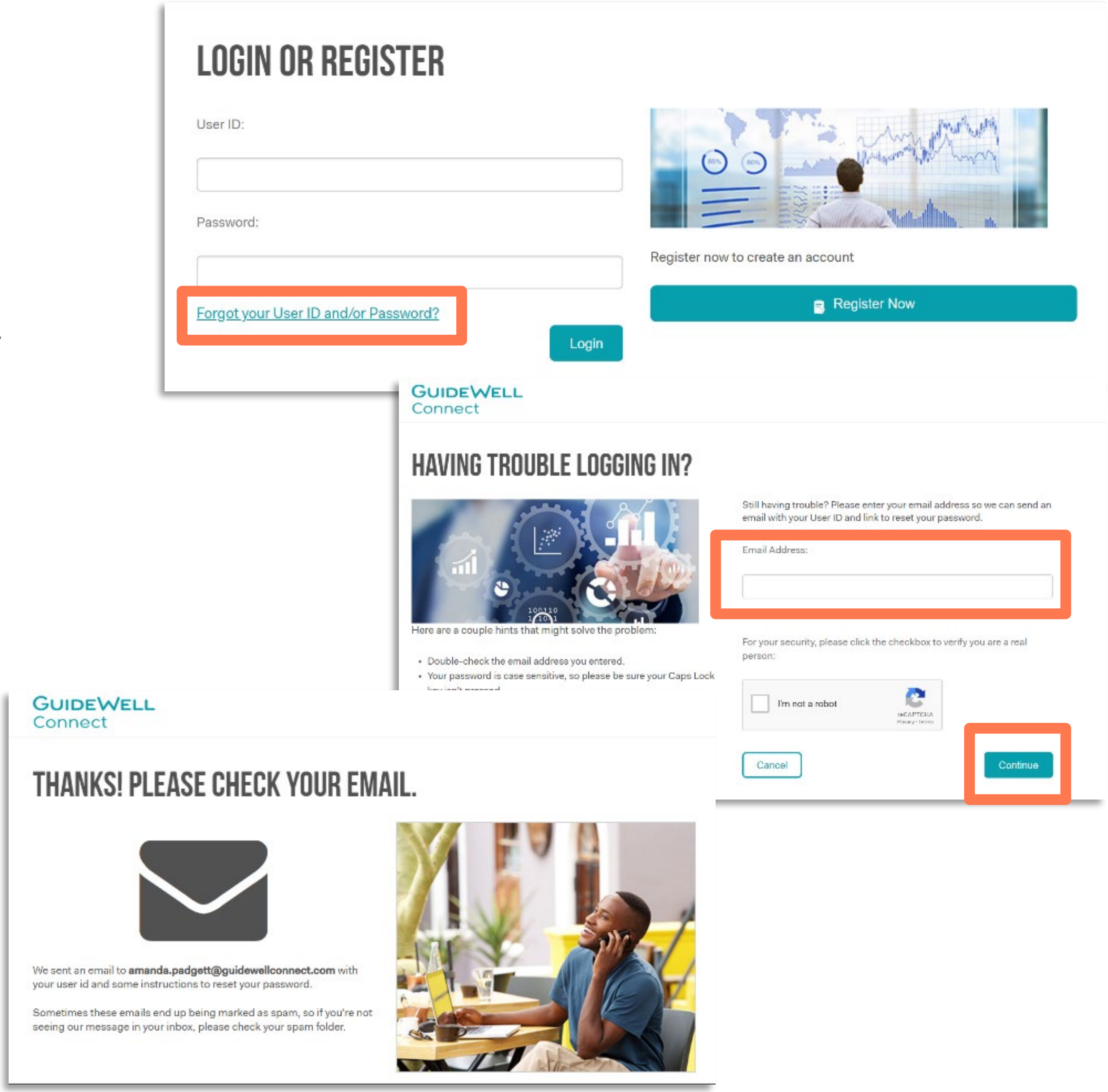
Telesales Agent SSO access

SSO login

User Access & Password Reset

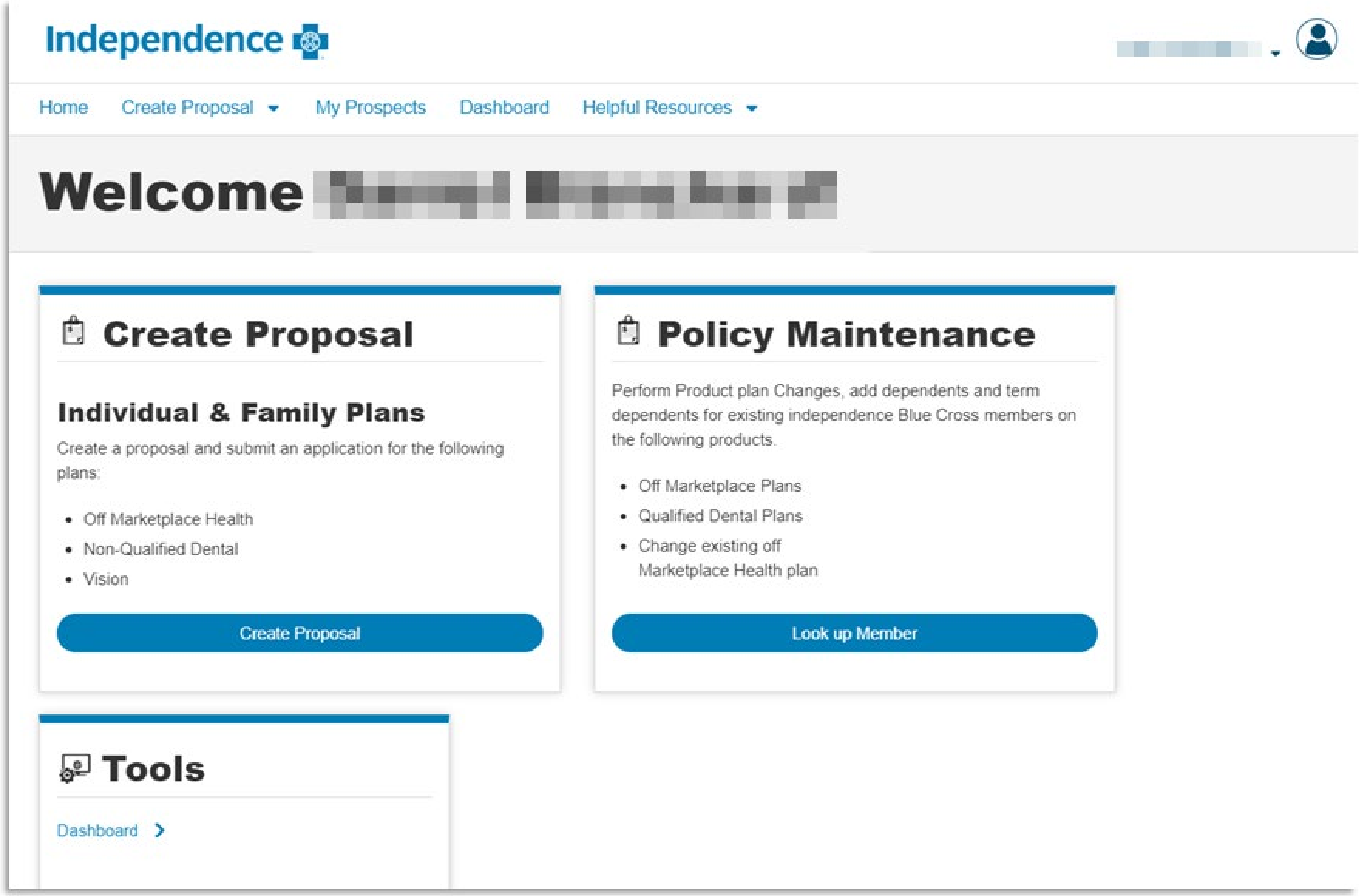
- Broker portal sites are managed by the client and would follow the procedure of the portal site for any access or password issues.

- 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.



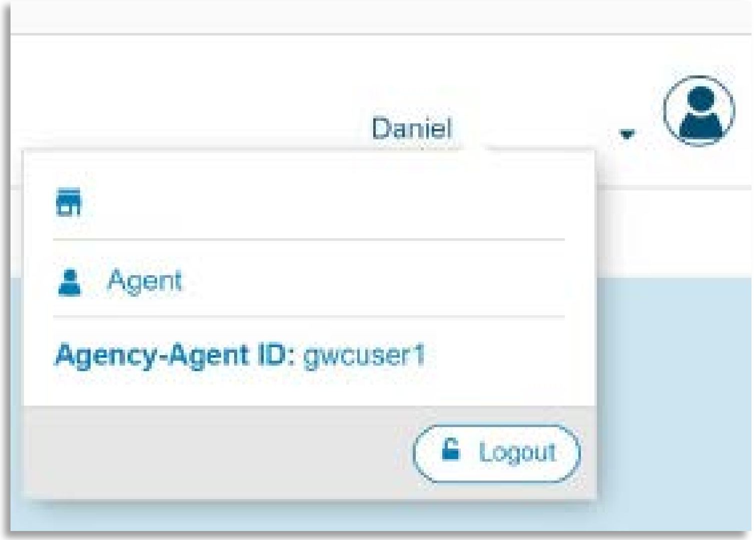
Agent Landing Page

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.

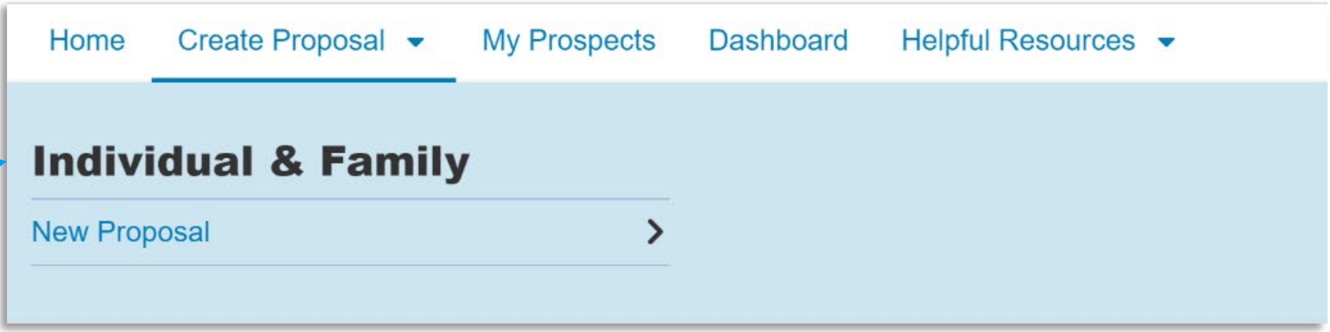


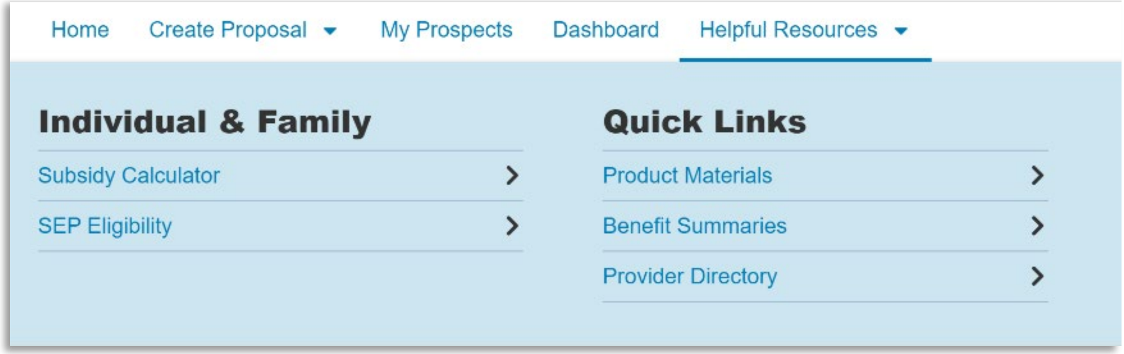
Agent Landing Page cont'd

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.

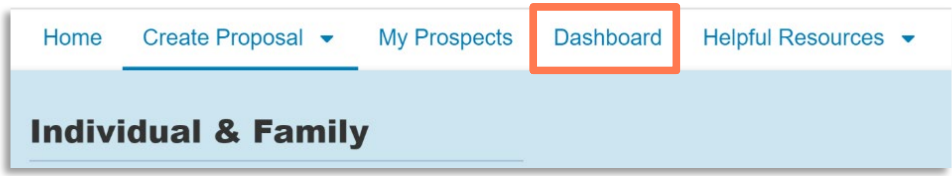


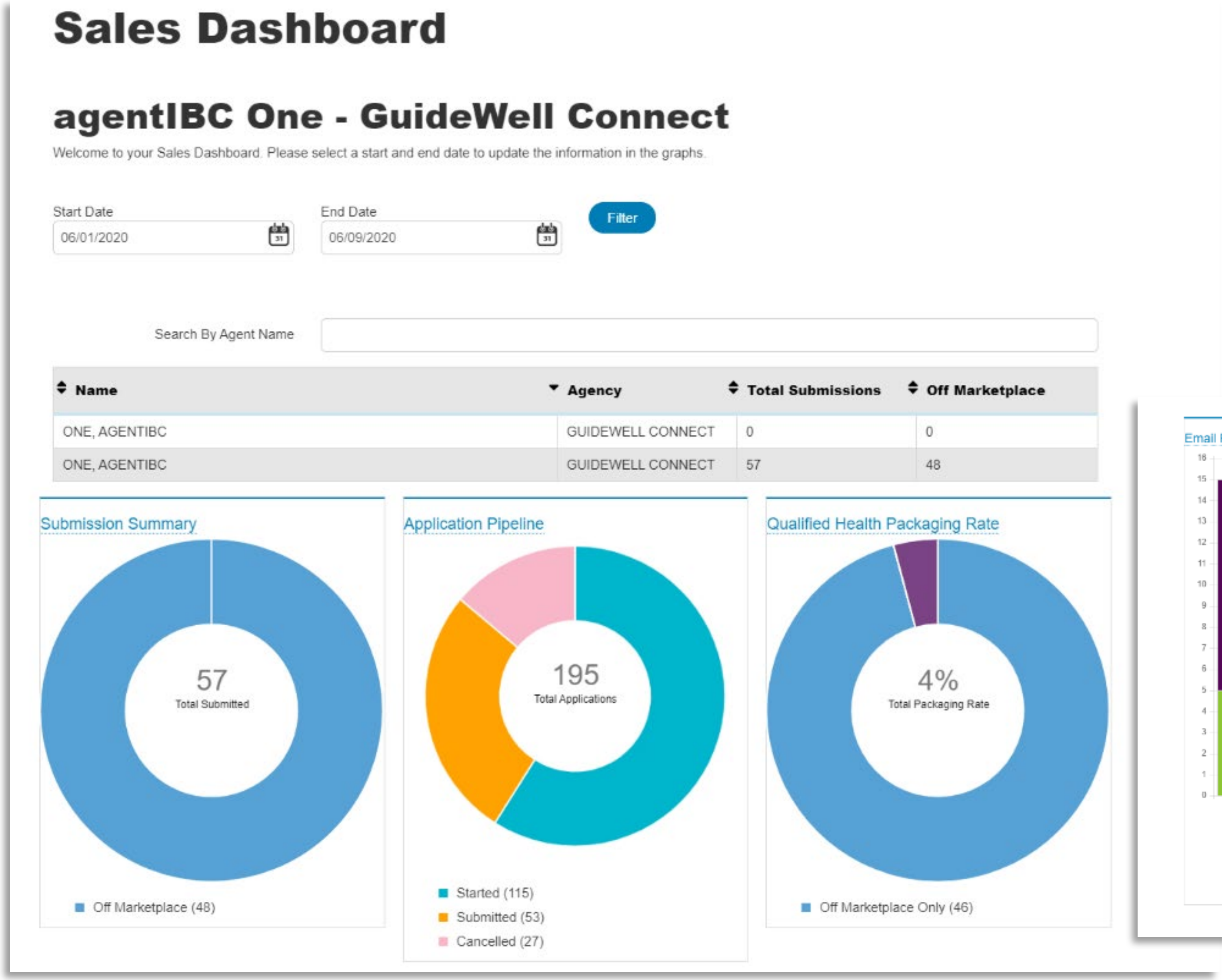
In the Global Navigation, the actions available are to Create a New Proposal, visit the My Prospects page, visit the Dashboard page and access the list of Helpful Resources, which link out to company sites.

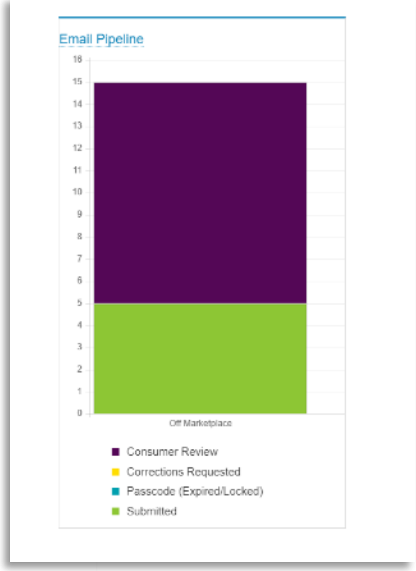




Dashboard Reporting





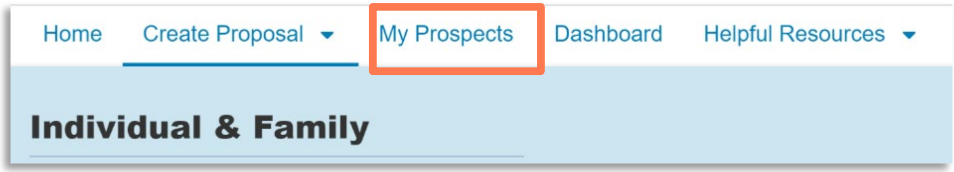


The Dashboard page offers an overview of the agent's actions between a designated timeframe.
*If the user was a super user, the view would include all the agents/agencies under their account.

Charts are available for:

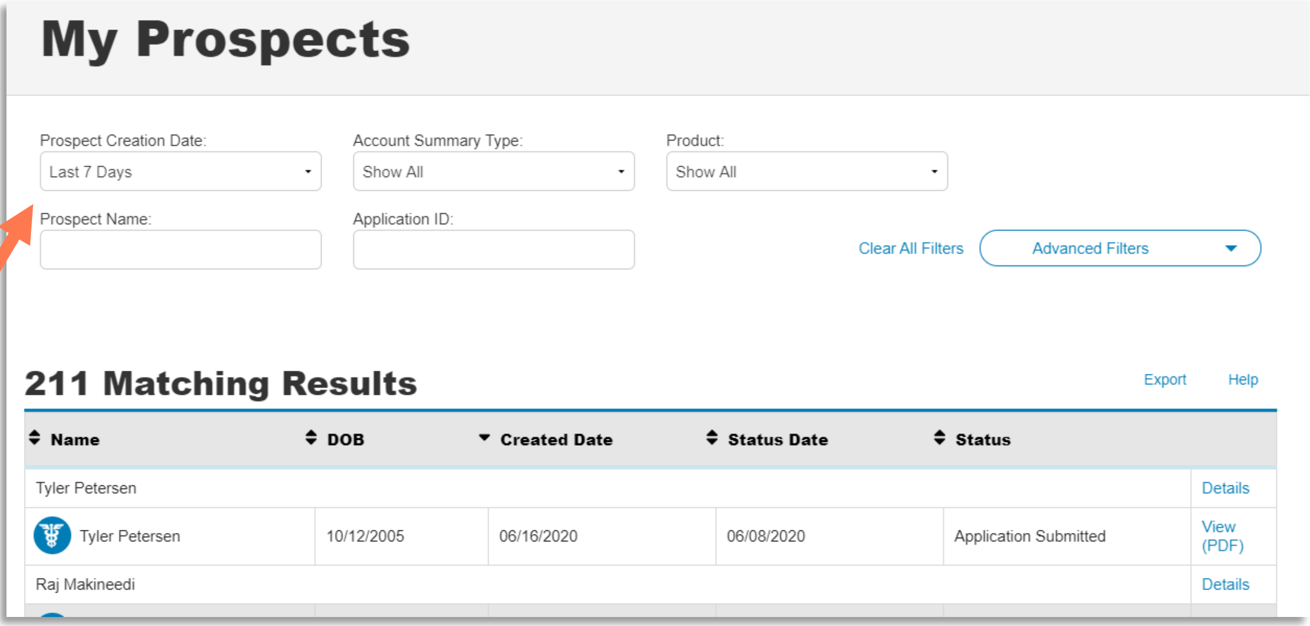
- Submission Summary for total number of applications submitted by product type
- Application Pipeline to see how many applications are in progress, submitted or cancelled
- Qualified Health Packaging Rate to see the percentage of submitted applications that were also packaged with a dental plan (with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

My Prospects Page

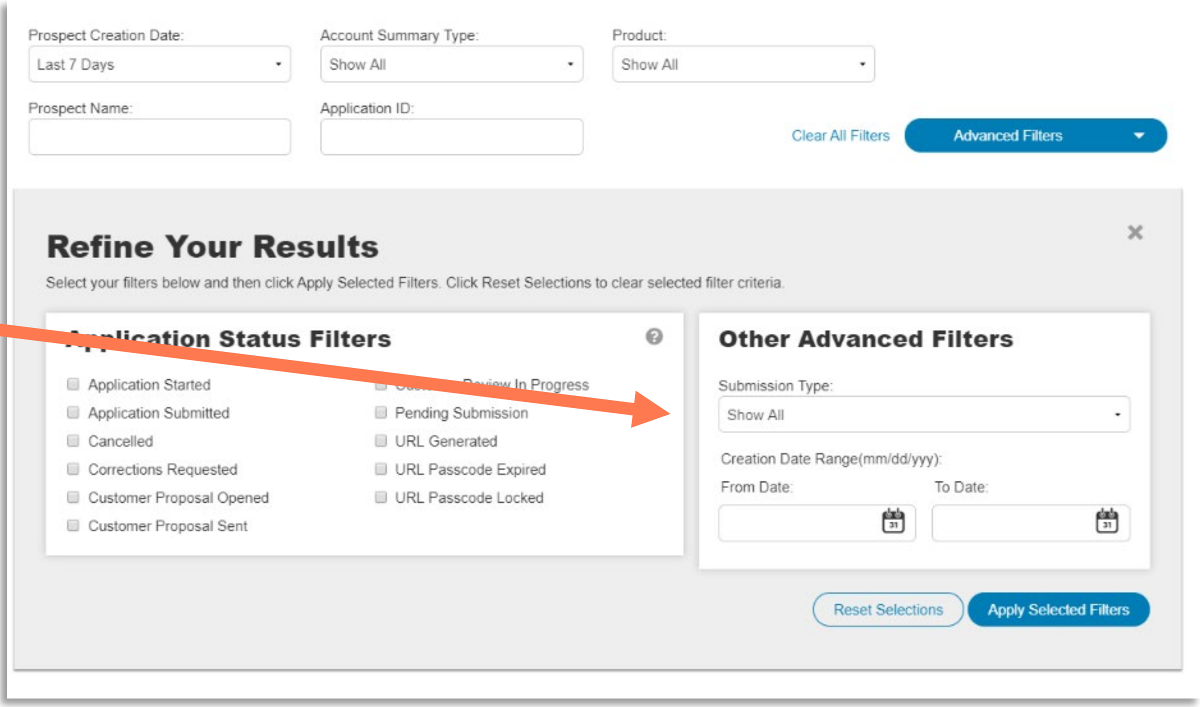


The My Prospects page includes several key actions and provides a detailed view for each prospect from the agent's activity.

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

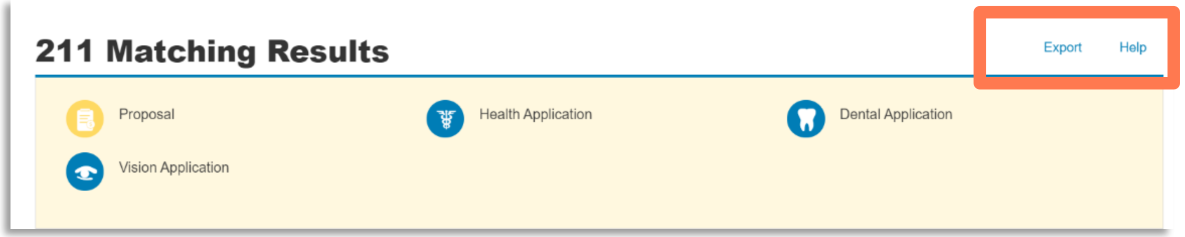


There is also an **advanced filters** view that expands the search even further to search by application status, submission type and creation date.



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 a 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)

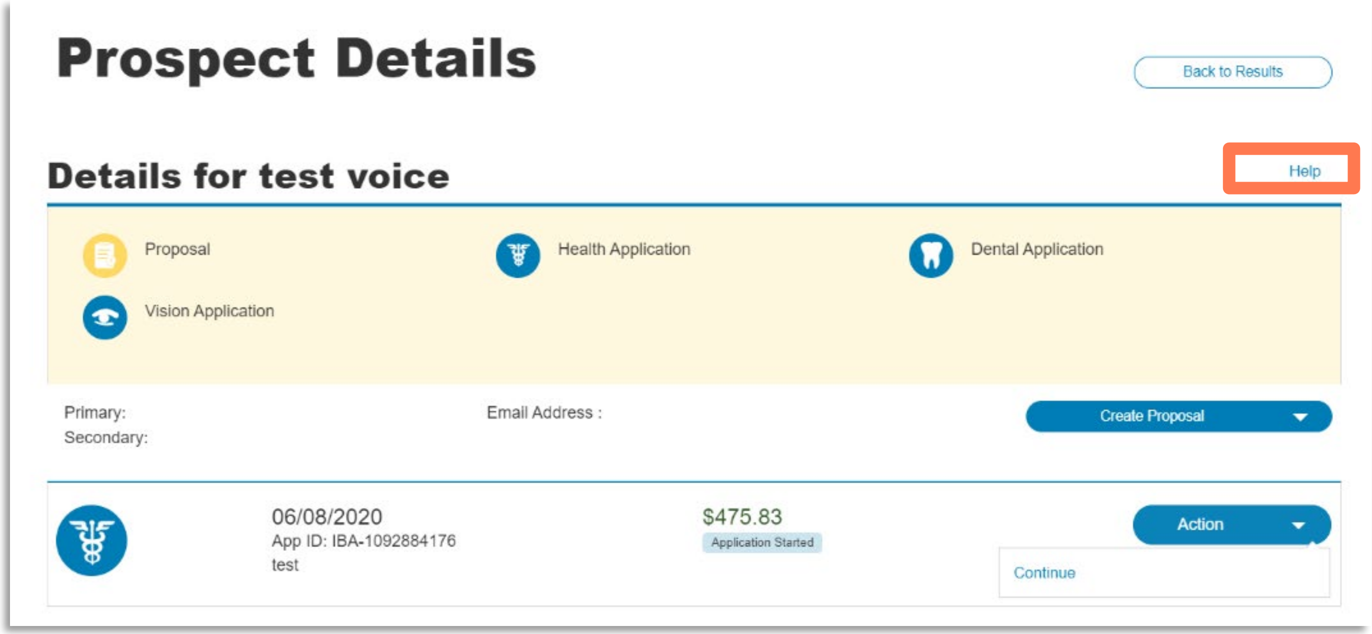
primary test					Details
primary test	05/05/1985	06/08/2020	06/09/2020	Application Started	Continue
primary test	05/05/1985	06/08/2020	06/09/2020	Application Started	Continue
spouse test	05/05/1985	06/08/2020	06/09/2020	Application Submitted	View (PDF)

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

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