

# Navigating the Agent Portal - Tips

Remember your User Name and Password. You will need these to login to the NLG website.

The best way to learn all that is available to you on the website is to go in and explore. You cannot break anything, there is a depth of information waiting for you there.

## Main Menu Topics

- **MY Dashboard:** provides you the most common reporting tools you will need to manage your business. Real time information is listed regarding pending business, business at risk, commissions, and more.
- **New Business:** shows all new business policies, all policies with outstanding requirements, etc.
- **Compensation:** provides access to Premium Reports, Commission Statements and calendar.
- **Marketing:** provides consumer approved marketing materials including recruiting tools, sales literature and marketing programs.
- **Training/Product:** gives access to Life and Annuity product information, Sales Strategies, Education Center, Training Calendars, and more.
- **Inforce:** provides information on existing policies, life persistency reports, and inforce illustrations.

To edit your profile or your password, go to My Profile on the home page in the upper right hand corner. When complete be sure to select Update to save your information.

By selecting Notifications in My Profile, and entering a mobile number, you can subscribe to text messages for New Business, Commissions and Customer Service notifications.

## Onboarding Process

To find information and materials to help you through the Onboarding process, go to Training/Product and select Getting Started with NLG

- **Contracting:** Select Getting Appointed. Under additional resources you will find our E-Contracting Modules
- **eApp:** Select Submitting Business. Under Additional Resources select the e-App Overview and Training Modules; this will bring you to a second page which includes Training Modules (new!). There are three tutorials to help you – Start a New Case, eSignature, and View My Cases.
- **Training Power Point Presentations and Tip Sheets:**
  - Navigating the Website (Welcome)
  - Contract and Licensing (Getting Appointed)
  - New Business (Submitting Business)
  - Underwriting (Submitting Business)
  - Suitability (Submitting Business)
  - Replacements (Submitting Business)
  - Commissions (Getting Paid)
- **Onboarding Agent – eKit:**
  - Onboarding Agents (Getting Appointed)

## Business Tools

To order printed materials (application kits, marketing brochures, etc.), select Forms & Materials Search under Business Tools on the Main Menu. You can also review your Recent Orders to check on shipping information.

- You can run illustrations, new and in-force from the website.
- To access our electronic application process go to IGOe®-App.
- To find the most recent marketing materials available go to Business Tools – Top 12.
- **Correspondence:** used to view client correspondence records.
- **Upload Documents:** used to upload Life or Annuity applications and related documents.
- **CoBrand OnDemand:** your online source for personalized, professionally developed marketing materials.
- **Agent Payment Center** allows you to pay non-resident state appointment fees and agent debt or other monies due NLG. You should only make payments here if you have receive an appointment fee invoice, a commission debt letter or an agency invoice, etc.
- **Errors and Omissions:** your connection to CalSurance.
- **Interest Rates:** the Current Life Rates and Rate Histories for both Life and Annuity.
- **Corporate Gifts:** online store of merchandise exclusive to NLG.

### Compliance

- **NL Group Compliance** is Market Conduct & Compliance information
- **Technology and Security** is Security Guidance Manual; Wireless Router Configuration, Email Encryption; and more.

## Questions/Issues:

If you have an issue while on the website and would like a callback from our support team, select **Call Me** in the upper right hand corner of your screen. Provide a phone number, brief description of your issue and the best time to call. *Requests received before 3:00 p.m. ET will be returned the same day, after 3:00 p.m. ET will be returned the next business day.*