

# How to leverage SalesLink<sup>®</sup> to boost productivity

## Tools, tips and tricks to make doing business with F&G more efficient

F&G's [SalesLink agent portal](#) offers an array of resources to help you do business with us.

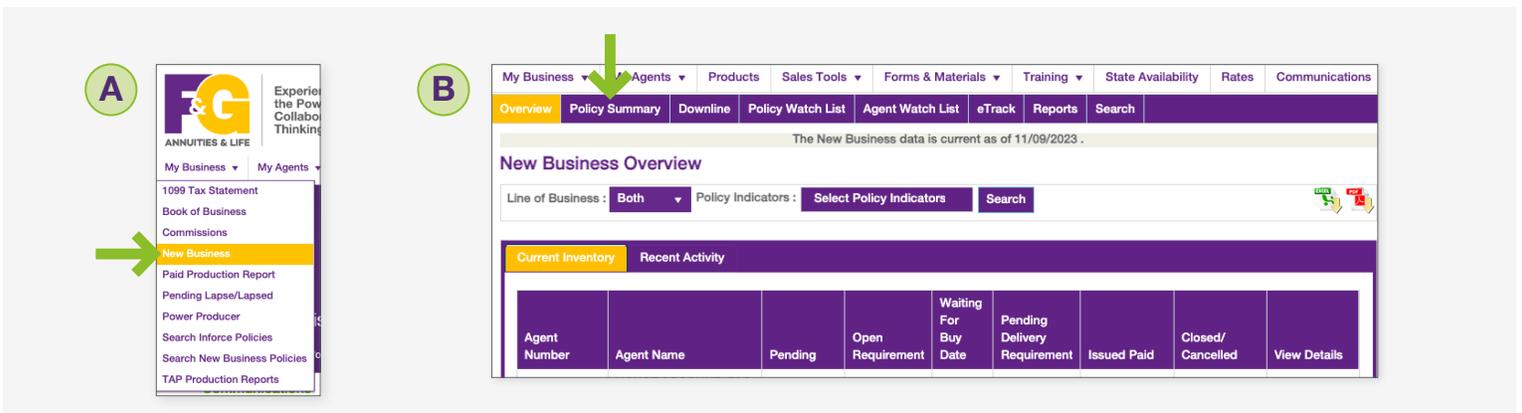
Like any site, some of its features are front and center, and others require a little more exploration. This guide will help you make the most of the *entire* site and help make your experience working with us as smooth as possible.

### Get updates on newly submitted applications

To start, hover over the SalesLink tab titled **My Business** **A**, then select **New Business**.

You'll see a screen like this **B**, providing an overview of all your pending, issued paid and canceled policies.

Explore individual cases in more detail by clicking **Policy Summary**, then clicking the policy number you'd like to check out.



**A**

**B**

The New Business data is current as of 11/09/2023 .

**New Business Overview**

Line of Business: **Both** Policy Indicators: **Select Policy Indicators** **Search**

Current Inventory		Recent Activity						
Agent Number	Agent Name	Pending	Open Requirement	Waiting For Buy Date	Pending Delivery Requirement	Issued Paid	Closed/Cancelled	View Details

The tabs you see will be tailored to your business, policy status and other factors. Some screenshots may vary.

You'll first be shown cases with active/open requirements. To see all cases, click the **By Status** tab.

# Policy Summary

Each tab offers updates on different parts of the application process, including requirements **C**, notes **D**, 1035 transfer information **E**, plan details **F** and the policy hierarchy **G**.

The screenshot shows a web application interface for 'Policy Summary'. At the top, there is a navigation bar with tabs: My Business, My Agents, Products, Sales Tools, Forms & Materials, Training, State Availability, Rates, and Communications. Below this is a secondary navigation bar with tabs: Overview, Policy Summary (highlighted), Downline, Policy Watch List, Agent Watch List, eTrack, Reports, and Search. A message states: 'The New Business data is current as of 11/09/2023.'

The main content area is titled 'New Business Details' and includes an 'Agent Information' section with fields for Agent Number and Agent Name. Below this is a section for 'Line of Business' (Annuity) and 'Policy Indicators' (Select Policy Indicators) with a Search button.

A green arrow points to the 'Policy Summary' tab in the secondary navigation bar. Below this is a table showing the status of policies:

Line Of Business	Pending	Open Requirement	Waiting For Buy Date	Issued Paid	Closed/Cancelled
Annuity	5	9	0	25	64

Buttons for 'Back to Policy List' and 'Next >>' are visible. Below is a 'Policy Information' section with a 'Contact Us' button. It displays details for a policy:

Policy Number	Application Signed	08/30/2023	Issue Date
Annuitant Name	Application Received	08/30/2023	Effective Date
Product Name: FG Guarantee-Platinum 5	System Entry	08/30/2023	Days in Current Status: 30
Status: Pending	Underwriter First Look		Last Updated: 10/20/2023

Callouts C through G are placed below the policy information table. Below this is a navigation bar for the policy summary with tabs: Requirements (2), Notes (9), 1035 Transfer (2), Plan, and Policy Hierarchy. A 'Respond to Open Requirements' button is also present.

The bottom section is a table with the following data:

Description	Applicant Name	Date Ordered	Date Received
Thank you for your application.	Primary:	10/20/2023	
Thank you for your application.	Primary:	10/20/2023	10/20/2023

## Do business digitally with the Wizard e-App

For in-depth information, including step-by-step screenshots and the process to complete an application, check out our e-App Help Page and/or the e-App Training Video. If you need access to these resources, contact [SalesDesk@fglife.com](mailto:SalesDesk@fglife.com).

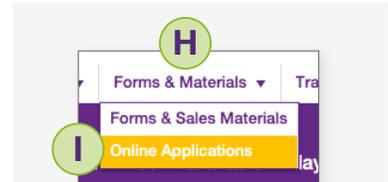
## Start with case design and generate an illustration

In SalesLink, generate an illustration and save it to your computer as a PDF. Again, resources to help you with illustrations are available. Contact [SalesDesk@fglife.com](mailto:SalesDesk@fglife.com) for more details.

Once your client is ready to apply, you're ready to jump into the Wizard e-App.

## Access the Wizard e-App

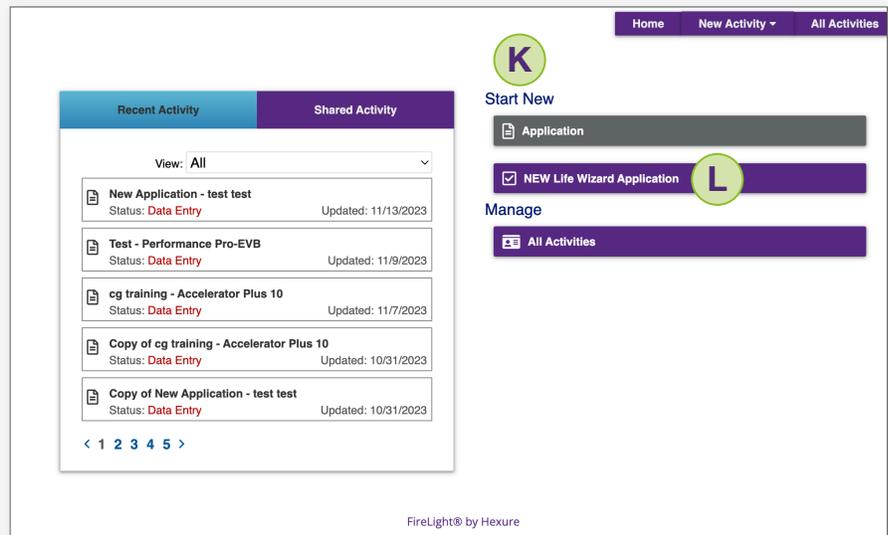
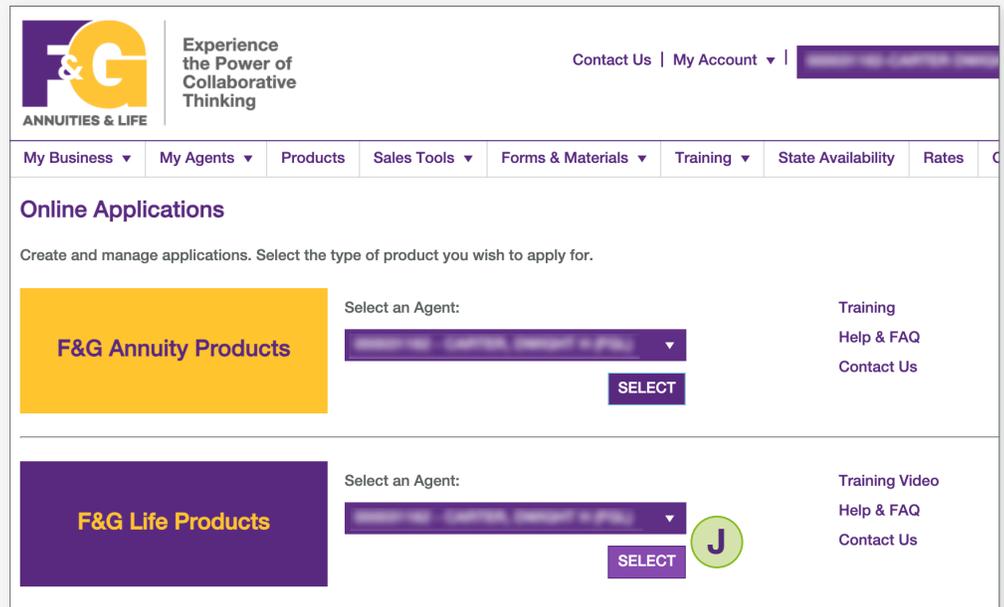
In SalesLink, hover over **Forms and Materials** **H**, then select **Online Applications** **I**. You'll see a screen like one shown below.



## Online Applications

To the right of **F&G Life Products**, choose the appropriate agent ID for the application **J**, then click **Select** to access FireLight e-App (our vendor for online applications).

In FireLight under **Start New** **K**, click **New Life Wizard Application** **L** and then follow the prompts. The client's last name usually works well for the name of the application.



## Additional tips for using the Wizard e-App

- You can check with F&G's Contracting team (800.445.6758, option 4) to make sure you're appointed in the clients' resident state.
- Answer all questions until you reach 100% completion under data entry. Use the **Open** tab or select the percentage complete **M** to jump to incomplete sections of the application.

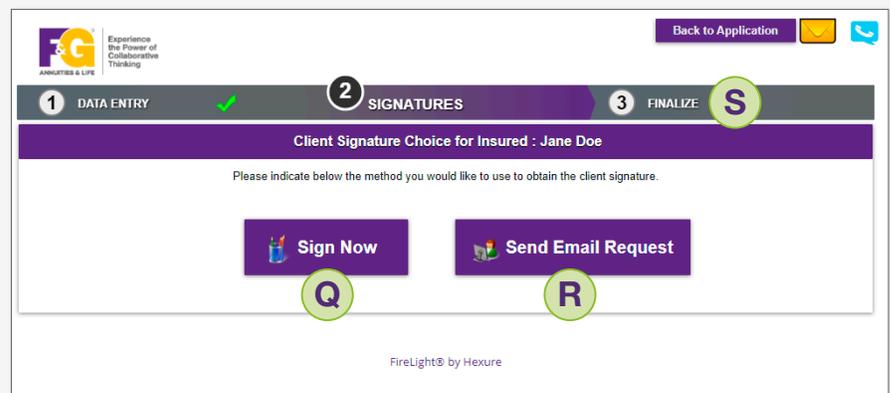
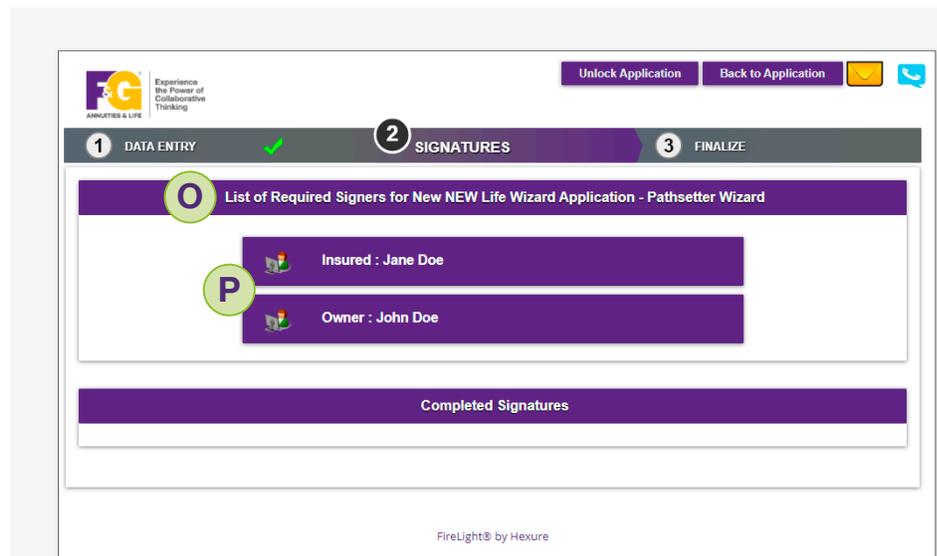


- Once complete, you're ready to have the client sign electronically—either in person or via email. Click **Continue** **N** in the upper right-hand corner, and then click **Use E-Signature**.

- Once you're on the List of Required Signers for New Application page **O**, select the appropriate signer types **P** and then click Proceed. Click **Sign Now** **Q** if the client will be signing in person or **Send Email Request** **R**.

- If the applicant represents more than one signer type, select each suitable signer type (e.g., if the client is the owner, payor and insured, then select all three). For non-resident sales, the client must electronically sign the application in their state of residence. We do allow you, as the agent, to be located in a different state.

- Once the client has signed, you'll receive an email notification. Go back to e-App, and access the application under recent activity. Follow the prompts to sign the application as the agent and finalize the application **S** for submission.



## Find information on your inforce policies

To start, hover over the SalesLink tab titled **My Business**, then select **Search Inforce Policies** to go to the overview page. There, you can:

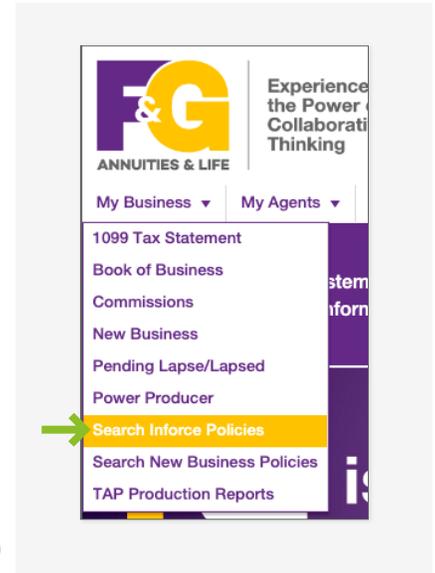
- Search by owner, insured or corporation name.
- Look up cases by policy number.

Click on the specific policy number you're interested in exploring, and you'll see a screen that looks like the screenshot below **T**.

## Policy Details

On the Policy Details screen, you can navigate among the tabs **U** (Premium, Policy Values, Interest Crediting Options, Beneficiaries, etc.) to see information for each.

You can also print documents such as annual statements, policy pages or reallocation letters by clicking on each under Document type **V**. Some documents may not be available online.



**T** [Back to Search Results](#)

### Policy Details

Policy Number		Owner(s)	
Product	F&G Pathsetter	Insured	
Policy Issue Date	10/24/2023	Underwriting Class	NON-TOBACCO
Policy Issue State	Ohio	Death Benefit ⓘ	\$100,000.00
Policy Status	Active	Surrender Value ⓘ	\$0.00
Agent Name		Agent ID	
Gender		Insured DOB	
Issue Age	40	Owner Address	
Owner Phone			

**U**

Premium **Policy Values** Interest Crediting Options Beneficiaries Additional Coverage Requirements Notes 1035 Transfer

**V** Documents

Account Value	\$66.49	Base Policy Face Amount	\$100,000.00
Surrender Charge	-\$1,397.00	Death Benefit Option ⓘ	Option A - Level
Loan Balance	\$0.00	Base Policy Death Benefit ⓘ	\$100,000.00
Surrender Value ⓘ	\$0.00		
Total Withdrawals Since Inception	\$0.00		

## Book of Business

You can now access your personal book of business via SalesLink.

Back on the home page, hover over **My Business** and click **Book of Business** **W**. From there, you'll see the screen shown below **X**.

Simply enter your agent ID or policy number and click **Search** **Y**. An online view of your report will appear. To download the full report (including additional details) into Excel, click the **Download to Excel** button.

**PLEASE NOTE:** Policies are shown by agent ID, so if you have more than one, you'll need to switch between them in the upper-right. Policies issued prior to 2012 are not available online.

## Track your business with help from Subscriptions

To get started, hover over **My Account**, then click **Subscriptions** **Z**. Scroll to the bottom of the page. Select the event that you would like to receive as an email notification. Finally, make sure you click **Update Subscriptions** at the bottom of the page. On the next page we've listed the most popular subscription options.

## Reports

- Agents receive an email with links to daily reports on New Business items including Pending, Submitted, Open & Closed cases, Waiting Buy Date and Pending Deliver Requirements and Pending Lapse.

Reports on Commissions, Contract Status and Total Annualized Production are available weekly.

The screenshot to the right shows the full list of reports as it appears in SalesLink.

## eTrack

Writing or servicing agents receive individual email notifications when an event occurs on a policy in which they're listed. Emails include a brief description of the event and a direct link to take action on SalesLink.

### Notifications are available for:

- Application status** - Submitted, Issued/Paid, Closed/Cancelled, Conditionally Issued
- Requirement information** - New requirement requested and requirement information received
- 1035 exchange information** - Requested and received, when a new note is added or when an existing 1035 is received.

## Agency Integrator

Finally, Agency Integrator reports occur daily and provide advanced insight into new business processing cycles, sales pipelines, commission reconciliation and more.

Current users of Agency Integrator can request F&G data feeds by contacting us at [FGRelationshipManagement@fglife.com](mailto:FGRelationshipManagement@fglife.com).

**1099 Electronic Election**

Fidelity & Guaranty Life is proud to provide you with your 1099 form electronically. You have elected to receive your 1099 form electronically. You may change your election at anytime in the 1099 Election section by clicking the 1099 Election tab.

**Subscription** 1099 Election

Fidelity & Guaranty Life supports your business and offers you Subscriptions. You can receive messages and reports delivering key information to help you streamline your business processes. Please follow the instructions below, selecting the Subscriptions that interest you, and your choices will be reflected in the next issues.

**1. Default Recipients**

Please enter the name and email address of the recipients who are to receive your Fidelity & Guaranty Life Subscriptions. (These are your Default recipients. You can specify Alternate recipients for each Subscription in the "Available Subscriptions" section below).

Name	Email Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

The first display name and email address is required.

**2. Available Subscriptions**

Check the appropriate box(es) next to the Subscription content you wish to receive.  
Note: Most reports are in an Excel file format. If you don't have Excel installed on your computer, you can download a free Excel Viewer directly from Microsoft (click here.)

Subscription	Frequency	Format	Use Default Recipients	Specify Alternate Recipients
<input type="checkbox"/> Commission	Payment Cycle		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> DebitActivity	Weekly	EXCEL	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> ContractStatus	Weekly		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBPending	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBSubmitted	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBOpen	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBIssued	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBClosed	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBSummary	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBWaitingBuyDt	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBPrdgDelReq	Daily		<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> NBAccordFull	Daily		<input checked="" type="radio"/>	<input type="radio"/>

## What else can SalesLink help me do?

The previous pages covered the activities you'll use SalesLink for most often. We also have tips and tricks for taking advantage of the rest of the site's features.

### Commissions

Hover over **My Business**, click **Commissions**, and you'll have access to a deep well of information on your commissions, including current and historical commissions statements and details on the hierarchy down to the individual policy.

So deep, in fact, that we've created [a standalone commissions piece](#) to help you understand everything that's available to you and what the terminology means.

#### What if my commissions aren't here?

You'll only see commission information on SalesLink if your commissions are paid directly by F&G. If you have your commissions paid through your personal agency code, you will need to be logged in under that code to see details (i.e. not logged in under the code you use to write business). If you receive commissions from your marketing organization (not directly from F&G), please contact them for support.

### TAP Production Reports

Hover over **My Business**, click **TAP Production Reports**, and you'll be able to explore past production as well as your year-to-date business and that of any of your downlines.

- The Life and Annuity Trend report can be run by selecting a year. It can be downloaded as an Excel or PDF file.
- Trend analysis displays the top five direct reports, top five writing agents, top five plans and top five products.
- Hierarchy reports list your current hierarchy and provide production broken down by line of business and different time frames.
- Activity Summary reports provide a summary of credit vs. chargebacks for your direct downlines.

The screenshot displays the SalesLink TAP Reports interface. At the top, there is a navigation bar with the F&G logo and the tagline "Experience the Power of Collaborative Thinking". Below the navigation bar, there are several tabs: My Business, My Agents, Products, Sales Tools, Forms & Materials, Training, State Availability, Rates, and Communications. The "Reports" tab is currently selected. The main content area is titled "TAP Reports" and includes a sub-section for "Agent Information" with fields for Agent Number and Agent Name. Below this, there is a dropdown menu for "TAP Year" set to 2023. The main content area is divided into four columns: Hierarchy, TAP Production Summary, Activity Summary, and Chargeback Detail (Life AND Annuity). Each column contains a brief description of the report and a download icon.

**We're here to help you with any SalesLink questions you have.**  
**Call us today at 800.445.6758 for more information.**

"F&G" is the marketing name for Fidelity & Guaranty Life Insurance Company issuing insurance in the United States outside of New York. Life insurance and annuities issued by Fidelity & Guaranty Life Insurance Company, Des Moines, IA.