Creating delegate users to leverage your agent account

This document explains what delegate users are and how to set them up in **SalesLink** to enhance account security.

If you need assistance, please call us at 866.217.2145 (toll-free) or 515.204.2268 (international) any time between 7:00 a.m. - 5:00 p.m. CST, Monday through Thursday and 7:00 a.m. - 2:00 p.m. CST, Friday.

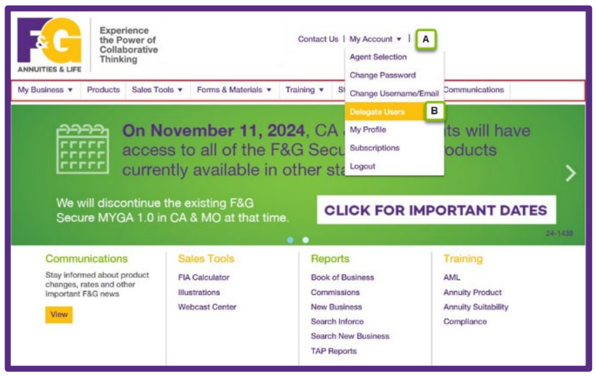
What are delegate users?

Once two-step verification is enabled, your support staff will no longer be able to access SalesLink using your login credentials.

Instead, you will have the option to add them as a **delegate user** to your account – meaning they will still be able to access and manage your SalesLink information, but now **each team member will have their own account and login credentials.**

To ensure the right team members have the right access, follow the steps below to create delegate users on your account.

1. Log into *SalesLink* and complete two-step verification.
   A. CLICK the **My Account** dropdown.
   B. CLICK **Delegate Users.**



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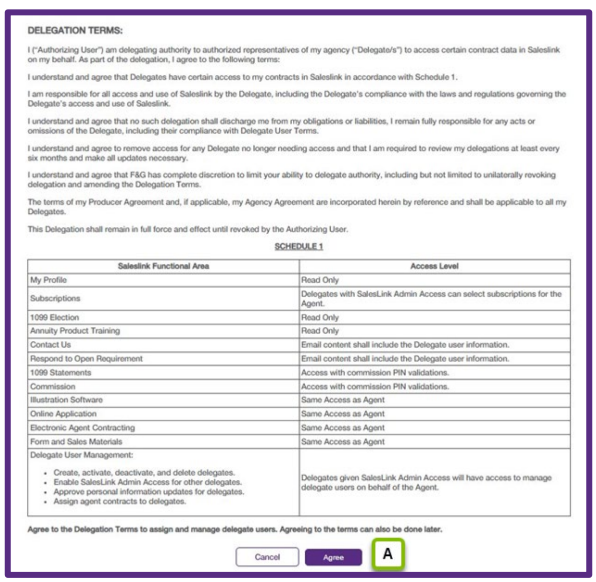
2. You will be directed to the delegation terms page the first time you add a delegate.
   A. READ the terms and CLICK **Agree.**

The terms include an overview on what a delegate user can do (see the table below for more details).

You must agree to the terms before creating any delegates. You will only need to agree to these terms once, regardless of the number of delegates you create.



DELEGATION TERMS:

I ("Authorizing User") am delegating authority to authorized representatives of my agency ("Delegate/s") to access certain contract data in Saleslink on my behalf. As part of the delegation, I agree to the following terms:

I understand and agree that Delegates have certain access to my contracts in Saleslink in accordance with Schedule 1.

I am responsible for all access and use of Saleslink by the Delegate, including the Delegate's compliance with the laws and regulations governing the Delegate's access and use of Saleslink.

I understand and agree that no such delegation shall discharge me from my obligations or liabilities, I remain fully responsible for any acts or omissions of the Delegate, including their compliance with Delegate User Terms.

I understand and agree to remove access for any Delegate no longer needing access and that I am required to review my delegations at least every six months and make all updates necessary.

I understand and agree that F&G has complete discretion to limit your ability to delegate authority, including but not limited to unilaterally revoking delegation and amending the Delegation Terms.

The terms of my Producer Agreement and, if applicable, my Agency Agreement are incorporated herein by reference and shall be applicable to all my Delegates.

This Delegation shall remain in full force and effect until revoked by the Authorizing User.

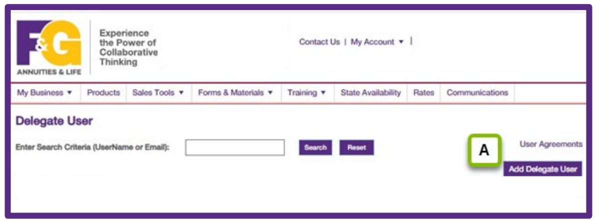
SCHEDULE 1

Saleslink Functional Area	Access Level
My Profile	Read Only
Subscriptions	Delegates with SalesLink Admin Access can select subscriptions for the Agent.
1099 Election	Read Only
Annuity Product Training	Read Only
Contact Us	Email content shall include the Delegate user information.
Respond to Open Requirement	Email content shall include the Delegate user information.
1099 Statements	Access with commission PIN validations.
Commission	Access with commission PIN validations.
Illustration Software	Same Access as Agent
Online Application	Same Access as Agent
Electronic Agent Contracting	Same Access as Agent
Form and Sales Materials	Same Access as Agent
Delegate User Management: • Create, activate, deactivate, and delete delegates. • Enable SalesLink Admin Access for other delegates. • Approve personal information updates for delegates. • Assign agent contracts to delegates.	Delegates given SalesLink Admin Access will have access to manage delegate users on behalf of the Agent.

Agree to the Delegation Terms to assign and manage delegate users. Agreeing to the terms can also be done later.

Cancel Agree A

3. You will be directed to the delegate user landing page.
   A. CLICK **Add Delegate User.**



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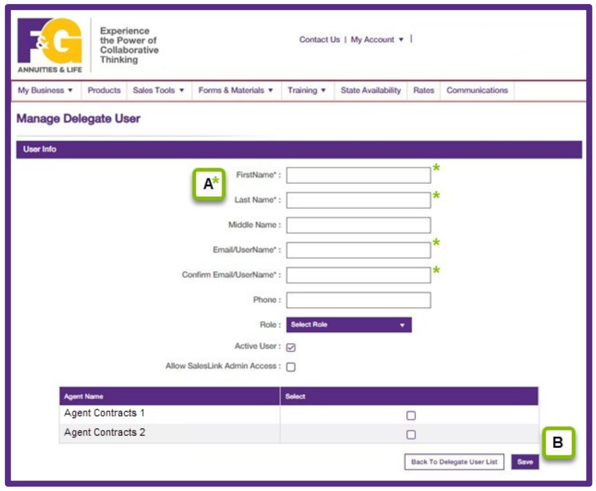
4. You will be directed to the manage delegate user page.
   A. ENTER delegate information. First Name, Last Name, Email and Confirm Email are required.
   B. CLICK **Save.**



Active User *is checked by default. Uncheck only if you want to block access to agent contracts for the delegate user.*

Allow SalesLink Admin Access *is unchecked by default. Check only if you want the delegate user to manage additional delegates and select subscriptions on your behalf (see the table below for more details).*

The ***Agent Name*** *table allows you to designate which contracts the delegate will have access to. Check the boxes of the agent names you want the delegate to have access to.*

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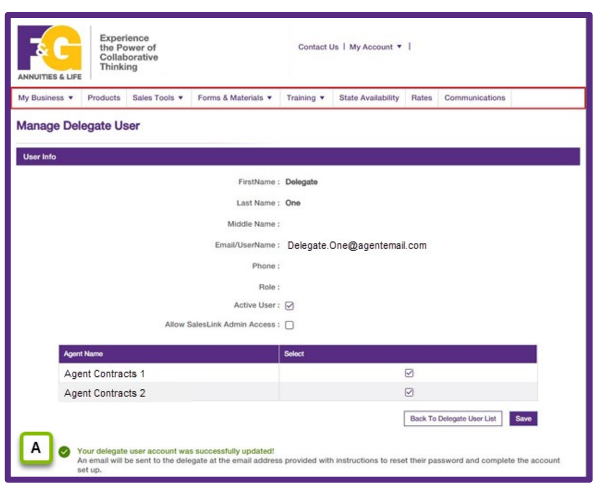
5. Your delegate user account will be created.
   A. A success message will appear and you'll be reminded that the delegate user will receive emails about their account.



Make sure to let the delegate user know that they will be receiving a Welcome message and password change email from F&G for them to access their new delegate account on SalesLink.

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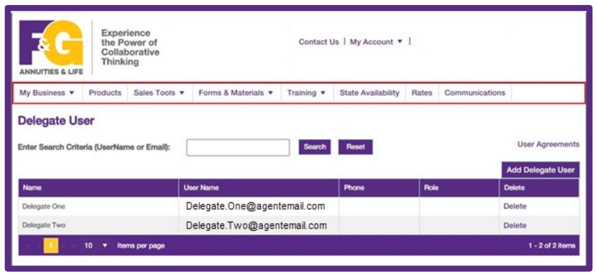
6. All created delegate users will now appear on the delegate user landing page.

To add more delegates, repeat steps 3-5.



Delegate Account Changes

You cannot change the delegate user's name, phone, email or role after the delegate is created.

*Each **delegate** user can update their own name, phone, role and email.*

***You** can activate/deactivate, delete and change the associated contracts for your delegates at any time from the delegate user landing page.*

Screens may vary slightly from those shown in this guide.

Delegate User Permissions – Standard vs. Admin User

SalesLink Functional Area	Access Level	Standard Delegate User Access	Admin Delegate User Access
My Profile	Agent contact information	READ ONLY	READ ONLY
Subscriptions	Subscription and etrack reports agent subscription preferences.	READ ONLY	UPDATE
1099 Election	Agent 1099 electronic opting in\out preferences	READ ONLY	READ ONLY
Annuity Product Training	Product training material and online product training courses	READ ONLY	READ ONLY
Contact Us	Access to contact F&G via contact us functionality in SalesLink. Email content shall include the Delegate user information.	UPDATE	UPDATE
Respond to Open Requirement	Access to contact F&G via contact us functionality in SalesLink. Email content shall include the Delegate user information.	READ ONLY	READ ONLY
1099 Statements	Delegate can access 1099 electronic statements if they have the commission pin from Agent.	READ ONLY	READ ONLY
Commission	Delegate can access the commission area of SalesLink if they have the commission pin from Agent.	READ ONLY	READ ONLY
Illustration Software	Same Access as Agent. These are Third Party applications accessed via SalesLink	UPDATE	UPDATE
Online Application	Same Access as Agent. These are Third Party applications accessed via SalesLink	UPDATE	UPDATE
Electronic Agent Contracting	Same Access as Agent. These are Third Party applications accessed via SalesLink	UPDATE	UPDATE
Form and Sales Materials	Same Access as Agent. These are Third Party applications accessed via SalesLink	UPDATE	UPDATE
Delegate User Management:	Delegates given SalesLink Admin Access will have access to manage delegate users on behalf of the agent. Including: 1. Create, activate, and deactivate delegates. 2. Enable SalesLink Admin Access for other delegates. 3. Approve personal information updates for delegates. 4. Assign agent contracts to delegates.	NO ACCESS	UPDATE