Logging in as a delegate for the first time

This document will review how to log in as a delegate user in **SalesLink** for the first time.

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.

You should have two emails from F&G in your email inbox: a Welcome to F&G email and a Password Change Request email.

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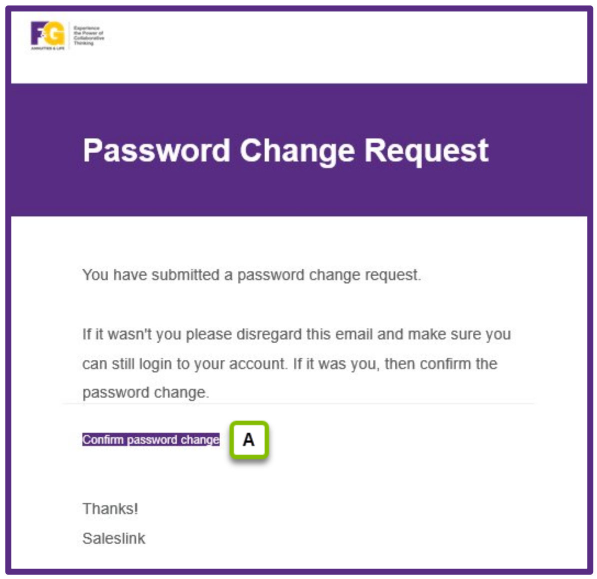
1. Open the Password Change Request email.
   A. CLICK **Confirm password change**.



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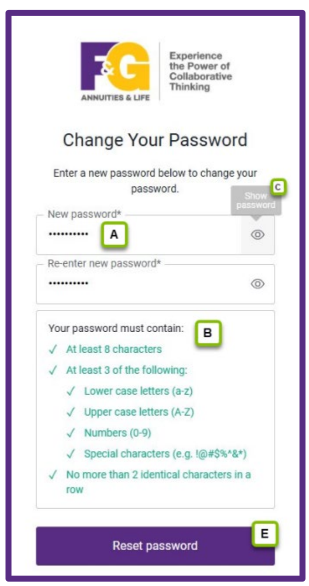
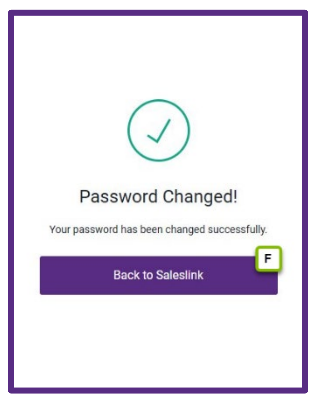
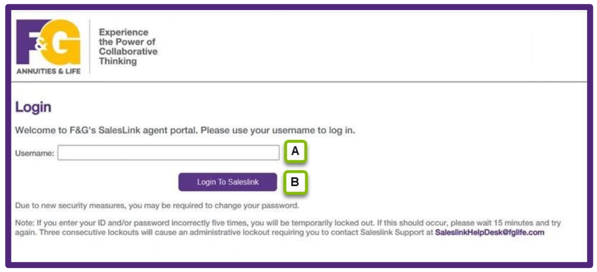
2. COMPLETE The Password reset:
   A. CLICK into one of the **Password** fields.
   B. The Required criteria will show. As each is met, the text will turn **Green.**
   C. To verify your passwords match, CLICK the **eye.**
   D. VERIFY you have them typed the way you want.
   E. CLICK **Reset password.**
   F. Your password is now ready. CLICK **Back to SalesLink.**





3. From the main login screen:
    A. ENTER your **Email address.**
    B. CLICK **Login to SalesLink.**



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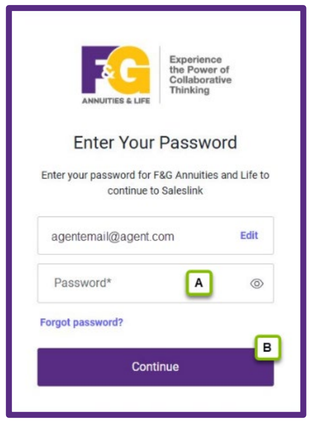
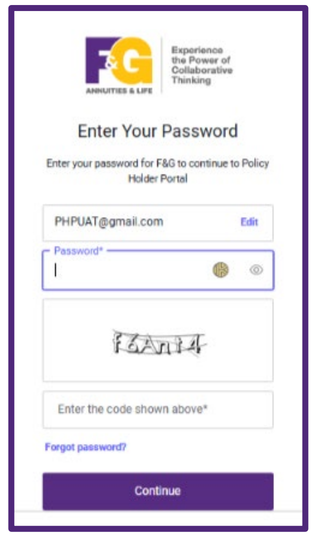
4. On the Password screen:
    A. ENTER your **Password.**
    B. CLICK **Continue.**

*You **may** encounter a captcha security code upon logging in. If you do, enter the captcha code prior to clicking **Continue.***





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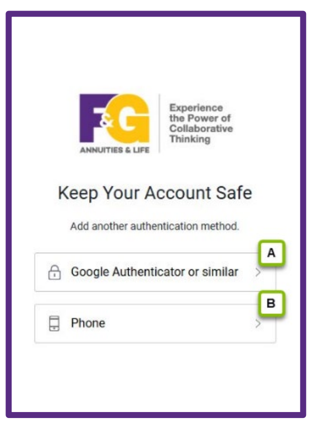
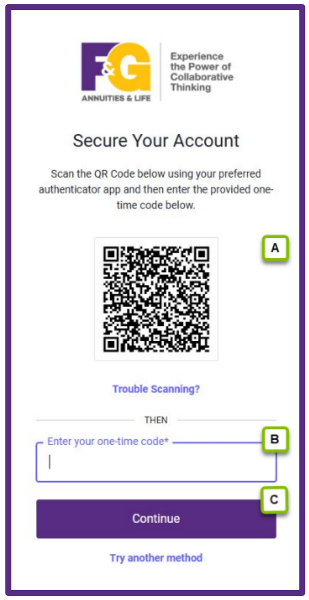
5. From the two-step verification screen, you have two options available.
    A. If you currently use an authenticator app (like Google Authenticator, DUO Mobile, etc.).
    B. Use a phone for either a Text Message (SMS) or a phone call.



OPTION A: Use an Authenticator App

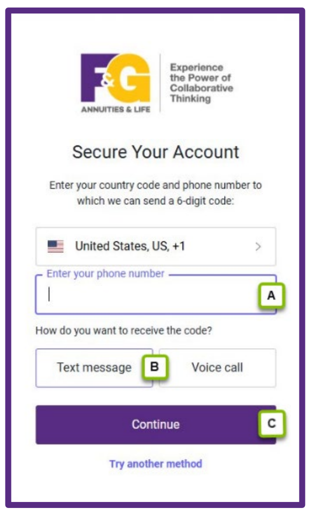
6. SELECT the button for **Authenticator**
   - A. Follow the instructions for your Authenticator App to add a new account and scan the QR code shown.
   - B. ENTER the **code** from the App.
   - C. CLICK **Continue.**

Skip to step 9.



OPTION B: Use a phone

7. SELECT the button for **Phone.**
   - A. ENTER the **Phone** number you will use.
   - B. SELECT whether you want a **Text message** or a **Voice Call.**
   - C. CLICK **Continue.**



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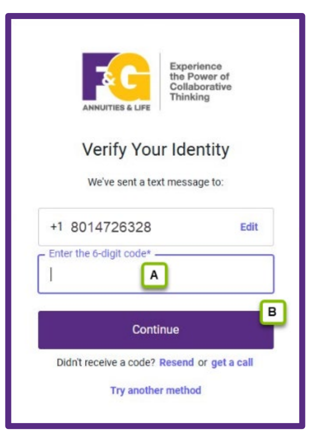
8. Once you have received the code to your chosen phone:
   - A. ENTER the **Code.**
   - B. CLICK **Continue.**



The Authentication method you select during migration will be automatically used when you log in going forward.

To switch to a different method later, you will need to call 866.217.2145 (toll-free) or 515.204.2268 (international) to have your method reset. The next time you login after it is reset, you'll be able to select a method (step 5).

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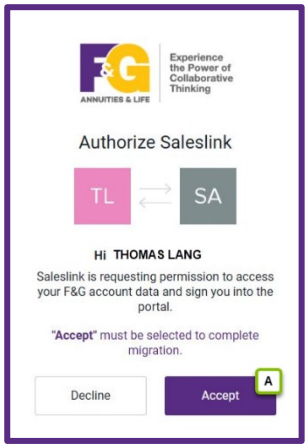
9. From the Authorization screen:
   A. CLICK **Accept** to complete your phone registration.



If you Decline this screen, your registration will be stopped and you will have to restart the login process including registering your phone/authenticator app again.

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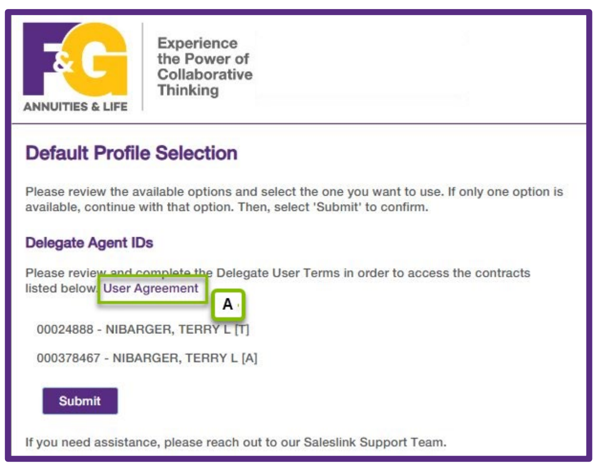
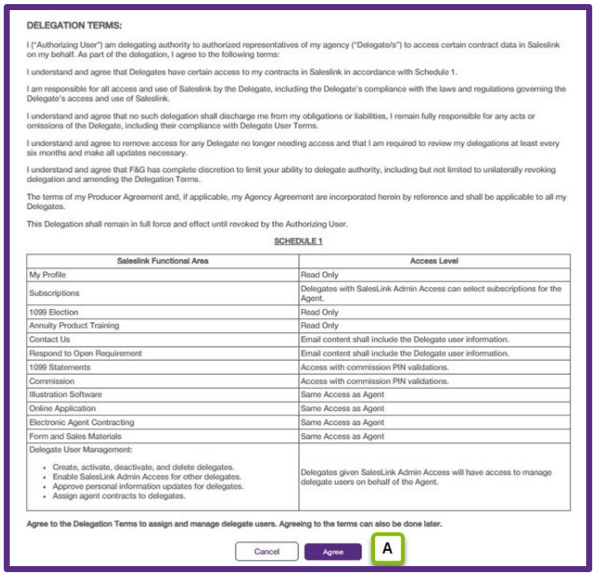
10. You will be directed to the Default Profile Selection page. This page will include all of the agent contracts that you are assigned to as a delegate but will not allow you to select an agent contract until you agree to user terms.
    A. CLICK **User Agreement** to agree to the delegate terms.



IMPORTANT: You cannot submit until you click and complete the user agreement.

11. You will be directed to the delegation terms page the first time you are added as a delegate.
    A. READ the terms and CLICK **Agree.**

The terms include an overview on what a delegate user can do. You must agree to the terms before accessing SalesLink.



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.

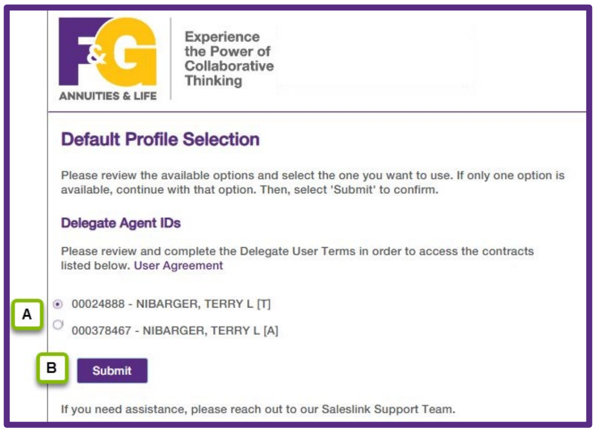
This Delegation shall remain in full force and effect until revoked by the Authorizing User.

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.

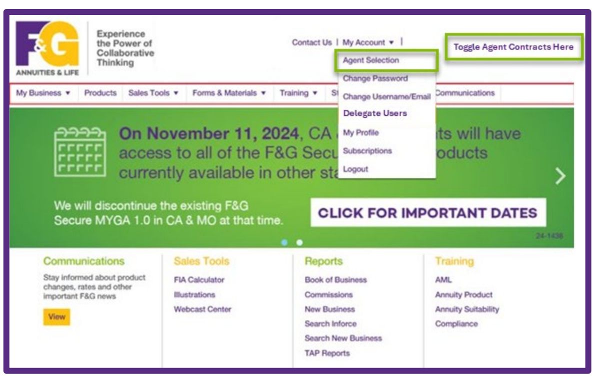
Agree to the Delegation Terms to assign and manage delegate users. Agreeing to the terms can also be done later.

12. You will return to the Default Profile Selection page and now be able to select the agent contract that you want to access.
    A. SELECT the agent contract to access.
    B. CLICK **Submit.**



13. You have now entered SalesLink and can leverage the site as a delegate user.

You will be able to toggle between agent contracts in the upper right hand corner of the SalesLink homepage. You can also update the default profile via "Agent Selection" under "My Account" on the homepage.



Screens may vary slightly from those shown in this guide.

Delegate Account Changes

Only the individual delegate can update their personal information such as name, email, phone and role.

*You may change personal information on the **Delegate User Profile** page under the **My Account** dropdown.*

***IMPORTANT:** If you change your **email,** you will be required to get approval on the change from your authorizing agent. In the meantime, your account will be suspended until the agent approves your change.*

Steps to change your email in SalesLink:

1. *Update your email address.*
    a. *Log into your **Delegate User Profile** and update your email address.*
2. *Verify your new email.*
    a. *Open the **SalesLink verification email** sent to your new address and confirm the change.*
3. *Notify your authorizing agent(s).*
    a. *Inform your authorizing agent that you made the change.*
    b. *Ask them to approve the change on their **Delegate User** page.*
    c. *If you work with multiple agents, each agent must approve the update separately.*
4. *Log in with our updated email.*
    a. *Once approval is complete, you will be able to log into SalesLink using your new email address.*