Activate two-step verification for your account

This document will review how to update your account in **SalesLink**, using our two-step verification process.

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.

1. Visit *SalesLink.*
   A. ENTER your Username as normal.

   B. CLICK **Login to SalesLink.**

2. You will be directed to enter your password.
   A. ENTER your Password.

   B. CLICK **Login to SalesLink**.

If you are also a policyholder, you will be asked to authenticate your Policyholder Portal (PHP) account and then will be able to access both SalesLink and PHP using the same email and password.

3. When your account is ready to activate two-step verification, you will have an option to defer, if needed. You will see a countdown of days until the activation is required.

   A. To Defer: CLICK **Defer** this update until next time and login as normal.

   B. To continue the process: CLICK **Authenticate my account now.**

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If you stop and exit at any time during this update process, it will reset and you can start over on your next visit.

4. Complete fields for all future SalesLink logins.

   A. Enter and confirm your email. Your name will populate OR enter your name.

   B. CLICK **Update** once all the fields are complete and correct.

Your email can be different than your appointment record. **You will need access to this email for verification purposes and your email will be your Username after the activation is complete.**

5. The information entered will be verified, and you will see a success message. You will receive one of two success messages depending on whether or not your existing password matches our new requirements.

Scenario 1: Your password *does* match our new requirements. Make sure to verify your account prior to logging in again.

Continue to Step 6.

**Scenario 2:** Your password *does not* match our new requirements.

Skip to Step 8.

6. You will receive an email message asking you to do a verification. Open your email client and access the **Verify Your Email** message.
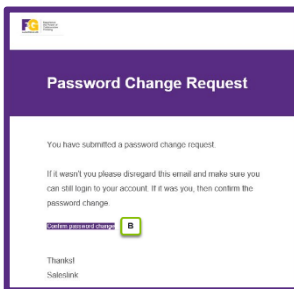
   A. CLICK **Confirm my account.**

7. Once the verification has been completed, you will receive a success message. At this point you are ready to return to SalesLink and continue the login process.

Skip to Step 10.
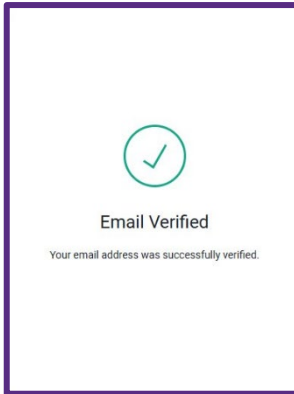
8. Open the email account you used for registration.

   A. OPEN the **Password change request** email.

   B. CLICK **Confirm password change.**

9. 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.**
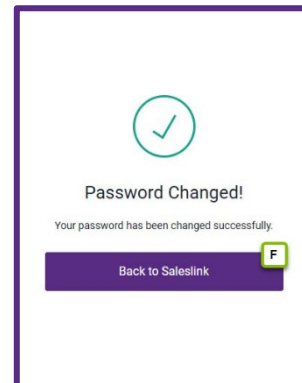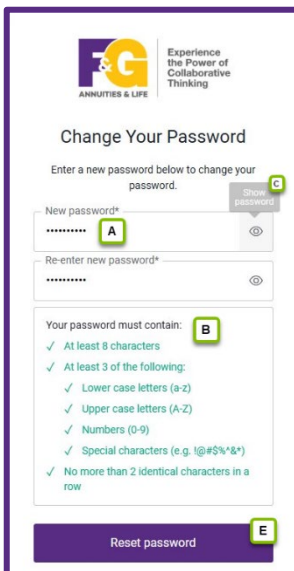
10. From the main login screen:

   A. ENTER the email address you used for registration. This is your **Username.**

   B. CLICK **Login to SalesLink.**

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11. 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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12. 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

13. 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 16.

OPTION B: Use a phone

14. 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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15. Once you have received the code to your chosen phone:

    A. ENTER the **Code.**

    B. CLICK **Continue.**

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

To switch to a different method later, you can call 866.217.2145 (toll-free) or 515.204.2268 (international) to reset your method. The next time you login after it is reset, you'll be able to select a method (Step 12).

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16. From the Authorization screen:

   A. CLICK **Accept** to complete your phone registration
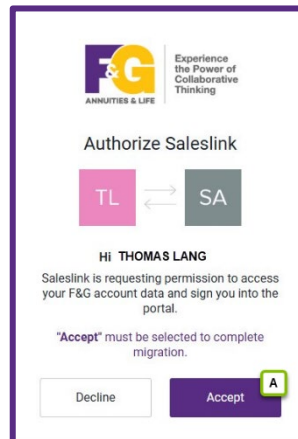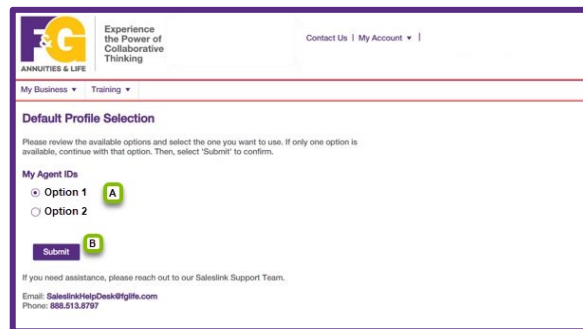

If you Decline this screen, your registration will be stopped and you will have to restart the login process including registering your phone/authenticator app again.

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17. You will be asked to select a default profile (Agent ID) for future logins.
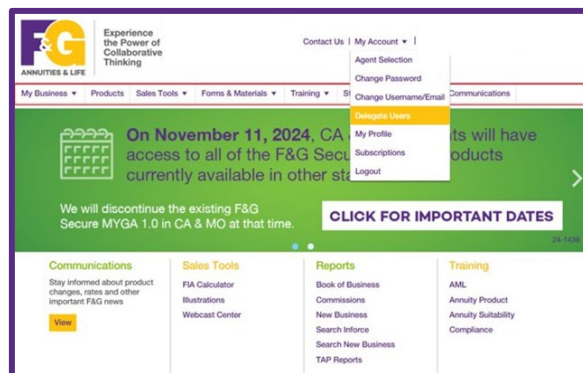
   A. CLICK your preferred Agent ID.

   B. CLICK **Submit**.

The default ID can be changed at any time.

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18. You have now entered SalesLink and can leverage the site as you have previously.

If you rely on members of your team to help you manage your business in SalesLink, you can add a **Delegate User** via **My Account.** Learn more here.

Screens may vary slightly from those shown in this guide.