

# USER GUIDE

Personalize staff access to your EquiTrust business through delegate accounts

Guide to using delegate accounts on Agents.EquiTrust.com

Did you know you can authorize delegate access for each of your office team members to the EquiTrust agent website — Agents.EquiTrust.com? Delegate accounts provide secure access to business data categories you designate.

## You're in the driver's seat

For your delegate accounts, you can manage:

• Who gets access

• Password reset

• Scope of their access

- Deletion of delegate accounts as needed
- Modification of access parameters

Let's get started.

# FOR AGENTS

#### Adding delegates

Start by logging in to your account on the agent website, and then follow these steps:

• Click on your display name in the upper right corner to open your Agent Account Profile.

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• Click on the Add Delegate tab.

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Personal and Security Information	Change Password	Multi Factor Authenti	cation (MFA) Setup	Add Delegat	Profile Hist	tory						
Add Delegate												
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• Complete the fields for the delegate and click Add Delegate.

• The delegate can have access — permissions — to your private information in one or more categories. Select these now and click Save Permissions.

	Ma	anage Delegate Permissions	×
anı	lf y app Age	ou wish to allow delegate access to your private information for the categories shown below, please indicate permissions by checking the propriate boxes. If a box is not selected, your delegate will not have access to the category but will have access to all other items on the ent website (forms, webinars, Marketing News, and many others.).	my
		Commissions	
		Illustrations	
	•	My Business	
		Pending/Active Agents	
			-
		Save Permissions Cancel	

- When the delegate has been added, you'll see a "Success!" message, and within minutes, the delegate will receive an email with a secure registration link.
- After the delegate has registered, a confirmation email will be sent to you and the delegate.

**PRO TIP:** Want to add more delegates? Under the "Success!" message, click Add Another Delegate to repeat the process and add all your delegates.

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Add Delegate										
By adding "Delegate", I understand ti	hat I am granting to	this individual access to confidential inform	ation. I further unde	erstand that if this indiv	vidual terminates emp	oloyment with	n me or my	company	I will remo	ve
his/her Agent Gateway access imme	ediately.									
First Name	First Name									
Middle Initial	Middle Initial									
Last Name	Last Name									
Email	Email									
Email	Email									

## What if the registration link doesn't work?

The secure registration link will expire if it's not used within 72 hours, but you can resend the link.

- Navigate to Manage Delegate under your Agent Account Profile. Click Resend Registration for the appropriate delegate. This option will appear 72 hours after the delegate email has been sent.
- The delegate will receive a new registration email and link.

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# Managing delegate accounts

Under the Manage Delegate tab, you have the power to perform several tasks:

- Disable multi-factor authentication
- Authorize a password reset for a delegate
- Change permissions
- Delete a delegate account

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Joe Smith	Joe Smith.	12345		Reset Password	d Manag	e Permissions	Delete	
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# Two ways to reset a delegate password

If a delegate's password is forgotten or expires, a password reset authorization may be initiated in one of two ways:

- You as the authorizing agent may click Reset Password under the Manage Delegate tab.
- Call EquiTrust Sales Support at 866-598-3694.

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Personal and Security Information	Change Password	Multi Factor Authentication (MFA) Setup	Add Delegate	Manage Delegate	Profile History				
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Active Delegates									
Name	User Nan	ne							
Joe Smith	Joe.Smith.	12345		Reset Passwo	rd Manag	e Permissions	D	elete	
3									

- The delegate will receive an email with a secure link to reset the password.
- When reset, you and the delegate will each receive an email confirmation.

#### **Delegate registration**

When the authorizing agent submits the Add Delegate request, the delegate receives a welcome email including a secure link to register a delegate account under the agent's authority.

Welcome to the EquiTrust Agent Gateway Website!
At the request of EquiTrust Agent, 12345, you have been granted secured access as a delegate to the same account.
While portions of the Website do not require login, your secured access provides easy access to your business and other secured marketing resources.
Please register your secured access right away Start by visiting the Agent Gateway Website. (Important: Use this link to initiate your delegate access; normal navigation to the website will not establish your access.)
You will then be prompted to set up your login credentials. Upon login, you will be prompted to select one of three authentication methods: security questions, text message security code or authentication app will be necessary to perform certain functions on the Agent Gateway website.
Learn More
The linked printable flyer provides additional information and navigation tips. Click Here
Questions?
Call EquiTrust Sales Support at 866-598-3694.
We look forward to working with you!

**PRO TIP:** This secure link must be used to register the delegate account; registering through standard agent website access is not possible.

- The registration email link opens the Account Registration form on the agent website. The form is pre-populated with the delegate's name and email address.
- Click Continue.

Joe Middle Name e.g. Middle Name Last Name Smith imail Address test@itest.com	First Name			
Middle Name e.g. Middle Name Last Name Smith imail Address test@itest.com	Joe			
e.g. Middle Name Last Name Smith Tmail Address test@itest.com	Middle Name			
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Smith Email Address test@test.com	Last Name			
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- The delegate's user name assigned can't be changed take note as it will be needed later in the process.
- Create and confirm a password; click Next.

Delegate Username		
Joe Smith 12345		
Password		
Confirm Password		
Your password must be at least eight (9) cha	anacters long and contain:	
Une lowercase character     One uppercase character		
One number		
<ul> <li>One special character</li> </ul>		
Your password rannet contain your account	name or parts of the your full name.	

# Setting up multi-factor authentication (MFA)

This step is required only once for each delegate.

- Choose from the MFA options shown below, then click Register.
  - $\checkmark$  Security questions for account recovery
  - ✓ Text message security code
  - ✓ Authentication app security code

Account Registration	
Multi Factor Authentication (MFA) Setup	
IMPORTANT: Only one MFA method is required to register your account. The thre text message security code or authentication app security code.	e MFA options are: security question
Certain functions on the Agent Gateway website require either text message or a	uthentication app.
Security Questions for Account Recovery	~
Text Message Security Code	×
Authentication App Security Code	~
Back Register	

• View the Terms of Service and click I Accept.

Terms of Service	ж
TERMS AND CONDITIONS OF USE	
Equilibrium Life insurance Company ("Equilibrium"), gives you the ability to access contant on this website ("Site"), www.equituum.com. You can use this field for au product information, equivalent accession and effekts tools ("Chine Activities"). You may use this title only if you agree, which and officiation to the estimate and conditions of use ("Terms"). Please real to Fermi candital before containing. If you do not agree to the Terms, you must leave this alte. The Terms are in addition to any other agreements between you and Equilibrium.	
Equilibrium reserves the right to modify or change the Terms at any time without prior notice to you. Such modification or change shall be effective upon poting by float/sust on this Site. You agree to be bound to any changes to the Terms when you use this Site after any such change is possible.	
DISCLAIMER	
The materials on this the (including without literation), all software) are provided "to it's and without warvances of any kind wither expresses or implied. The the future science pressibility possible is (p_GMTHMI discussed as a set of the materials) and periodize purpose, or non-information provides and the including and the including and the materials and be unintermated to exclude the materials and the discussed as a set of the material and the materials and be unintermated to exclude the materials and the materials and the materials and the materials and the discussed of the discussed as a set of the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the material and the discussed as a set of the discussed as a set of the discussed as a set of the material and discussed as a set of the discussed as a set of the discussed as a set of the discussed as a septical set of the discussed as a set of the discussed as a set of the discussed as a septical set of the discussed as a set of the discussed as a set of the discussed as a set of the discussed as a septical set of the discussed and discussed as a set of the discus as a set of the discussed as a set of the discuss	
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C have read the terms	

- When authentication is validated, click Register; you'll see a confirmation message.
- The delegate can now log in.



• Both the delegate and the authorizing agent will receive a confirmation email.

#### Logging in to the delegate account

Navigate to the sign-in page on the agent website.

- Select Sign In and complete the delegate user name and password.
- Complete MFA validation.

Sign In	Register
Sign in with your username and passwor	rd.
You may need to re-register if your accou	unt has been inactive for an extended period of time; click the Register tab.
Please contact us at 866-598-3694 if you	u are having difficulties.
Username	
Joe.Smith.12345	
Password	
	۲
I forgot my username and/or password	
	Login
	Login

• The delegate now has secure access to the agent website, including the designated permission fields.

#### Managing delegate profile changes

It's easy to make updates to a delegate profile.

• Click the delegate's display name in the upper right corner.

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- On the Agent Delegate Profile page, the delegate may:
  - ✓ Update their display name under Personal & Security
  - ✓ Update MFA setup
  - ✓ View their profile history

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#### Can someone have a delegate account for more than one agent?

Yes! Support personnel who assist more than one agent may have multiple delegate accounts. Data accessible under each delegate account is unique for each respective authorizing agent.

Questions? Contact Sales Support at 866-598-3694 or <u>Sales.Support@EquiTrust.com</u>.



# 866-598-3694 • Sales.Support@EquiTrust.com • Agents.EquiTrust.com

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