



AGENT APP

Quick answers to frequently asked questions



What devices are supported by the EquiTrust Agent App?

For best results, please use the EquiTrust Agent App on your mobile phone. It may be downloaded on a tablet, but could experience optimization issues.

What phone versions/operating systems are supported by the EquiTrust Agent App?

- Apple — 11 and above
- Android — 12 (Snow Cone) and above, API level 31 and above

Who can use the EquiTrust Agent App?

The app is for agent use only. It is not supported for use by Marketing Organizations, clients or the general public.

Why does the EquiTrust Agent App need access to my files and photos?

The phone's storage will need to be accessed to download the app. Also, some EquiTrust information that is not secured (such as rates and product information) will be stored on the phone so it can be accessed without a Wi-Fi connection.

I just registered and logged into the EquiTrust Agent App. What alerts or new business items will I see?

New Business → View All: You will see last seven days of activity.

Sales Tools → Marketing Alerts: None will show prior to the date the app was registered.

If the EquiTrust Agent App is installed on multiple devices (phone, tablet, etc.), will the PIN be different on each device?

No, all devices will use the same PIN.

The text is wrapping in random places. Why is this happening?

Check your phone settings to see if the “Zoom” feature or increased font size is selected.

What can I see on the EquiTrust Agent App if I am not connected to the internet?

If you have been connected to the internet, Wi-Fi or cellular service in the last 30 days, you will be able to see all unsecured information (everything except commissions and new business).

Why is the anticipated premium amount showing \$0.00 or an incorrect amount?

Only pending transfers or anticipated transfer amounts show in the dollar field. Cash with app checks do not show in the deposit screen as “anticipated amount.” You must click on the policy notes to see checks received.

How long do “withdrawn” and “declined” policies remain visible on the app?

They remain under New Business for seven days.

Note: “Not Taken” contracts will not appear in the agent’s New Business list. However, agents may still receive a commission alert or see the chargeback in the commission portion of the EquiTrust Agent App.

ALERTS

How often are new alerts sent to the app?

New alerts are sent daily at 10:00 a.m. and 3:00 p.m. Central.

Can I turn off certain types of alerts?

No, all alerts must either be on or off.

How do I turn off my notifications and alerts?

Go to: More Options → Settings. Then click, “Go to System Settings.”

When I get an alert that a contract/policy was mailed, why can I no longer see policy notes?

An overview of your pending and active business is available within the EquiTrust Agent App. For full details about your pending or active business, visit the Agent Gateway at Agents.EquiTrust.com.

How long do New Business alerts remain viewable?

If you have read the alert and do not completely close the app, it will remain in your alerts until midnight Central. If you close the app after looking at an alert, it will be gone the next time you reopen the app. If you do not look at an alert, it will remain posted as long as the contract is still pending or up to six months, whichever comes first.

Why can't I view illustrations on the app?

iOS/iPhone: Make sure your Safari browser allows for pop-ups. Go to “Settings,” then “Safari.” Scroll down to “Block Pop-ups” and make sure the slide button is in the left/off position.

What types of events trigger alerts in Active Business?

Active Business alerts are triggered for annual statements, address changes, withdrawals/loans processed and reported deaths.

COMMISSIONS

I got an alert for a chargeback. Why can I no longer see notes on the contract?

If a contract was “Not Taken” or “Free Looked,” it is no longer in a “Pending” status so it will not show in “New Business.” If the agent is not aware of the free look, the agent will be called and given five days to conserve the contract.

Last Paid: Shows last paid commission. Does not necessarily have to be this year.

YTD: Shows what has actually been deposited into their bank account.

TROUBLESHOOTING

Why does a “90000 Error” message appear when I try to log in or register?

This is usually caused by issues with your connection. Here are some troubleshooting solutions:

1. Restart your Wi-Fi connection.
2. Turn Wi-Fi off and try connecting via cellular data.

If these solutions do not resolve your connection issues, please call EquiTrust Sales Support at 866-598-3694.



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