EquiTrust Agent App FAQs

Q: What electronic devices are supported by the Agent App?
A: The App is designed for mobile phone use. It can be downloaded on a tablet, but may not optimize correctly. For best results, please use the EquiTrust Agent App on a mobile phone device.

Q: What phone versions/operating systems are supported by the EquiTrust Agent App?
A: Apple - 9.2 and above
Android - Jelly Bean, Android 4.1, API level 16

Q: Who can use the Agent App?
A: The App is for agent use only at this time. It is not supported for use by marketing organizations, clients or the general public.

Q: Why does the Agent App need access to my files and photos?
A: The phone's storage will need to be accessed to download the Agent App. Also, some EquiTrust information that is not secured (such as rates and product information) will be stored on the phone for future access without needing a wifi connection.

Q: I just registered and logged into the Agent App. What alerts or new business items will I see?
A: New Business → View All: You will see last 7 days of activity.
   Sales Tools → Marketing Alerts: None will show prior to the date the Agent App was registered.

Q: Will more features or enhancements be added to the Agent App?
A: Yes, there will be future releases with additional features such as active business, illustrations and ordering supplies.

Q: If the Agent App is installed on multiple devices (phone, tablet, etc.), may the PIN be different on each device?
A: No, the PIN must be the same on all devices. All devices will recognize the most recently set PIN.

Q: The text is wrapping in random places. Why is this happening?
A: Check your phone settings to see if the "Zoom" feature or increased font size is selected.

Q: What product lines can I see?
A: You will only see information on products for which you are contracted, e.g. life, annuity or both.

Q: Can I see anything on the Agent App if I am not connected to the internet?
A: If you have been connected to the internet, wifi or cellular service in the last 30 days you will be able to see all unsecured information (everything except commissions and new business).

Q: Why is the anticipated premium amount showing $0.00 or an incorrect amount?
A: 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". The agent must click on the policy notes to see checks received. (This is also how it shows on our agent website.)

Q: How long do "withdrawn" and "declined" policies remain visible on the Agent App?
A: They remain under New Business for 7 days.
NOTE: "Not Taken" contracts will not show up in the agents New Business list. Agents may ask about this because they may have received a commission alert or see the chargeback in the commission portion of the Agent App.

Q: Why is my training history blank for Completion Date?
A: A completion date will only show once you have completed each respective training.

Q: What is the difference between an alert, a notification and a badge?
*A: An **<u>alert</u>** is a pop-up window that stops your mobile device activity and displays the detail of the notification.*
*A **<u>notification</u>** is a slim pane that slides into view for a few seconds at the top of the screen, then disappears.*
*A **<u>badge</u>** is a little dot with a number signifying the number of waiting alerts.*

Alerts:
Q: How often are new alerts sent to the Agent App?
A: New alerts are sent daily at 10:00a.m. and 3:00p.m. Central Time.

Q: Can I turn off certain types of alerts?
A: At this time all alerts must either be on or off.

Q: How do I turn off my notifications and alerts?
A: Go to: More Options → Settings. Then click, "Go to System Settings".

Q: When I get an alert that a contract/policy was mailed, why can I no longer see policy notes?
A: The contract/policy is no longer pending. Currently Agent App shows details for pending business only.

Q: How long do New Business alerts remain viewable?
A: If you have 'read' the alert and do not completely close the Agent App, it will remain in your alerts until midnight Central Time.
If you close the Agent 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 6 months have passed – whichever comes first.

Q: I cannot view the product illustration on my phone. What might be happening?
A: IOS/IPhone: Make sure your Safari browser allows for pop-ups. Go to 'Setting's' then 'Safari'. Scroll down to 'Block Pop-ups' and make sure the slide button is in the left/off position.

Q: What types of events trigger alerts in active business?
A: Annual statements, address changes, withdrawals/loans processed, death reported.

Commissions:

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

A: 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, we call to inform the agent and allow the agent 5 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:

Q: Why does a "90000 Error" message appear when I try to login or register?

A: Generally this has to do with your connections. Here are some troubleshooting solutions.

1. Restart the Wi-Fi connection
   a. Turn Wi-Fi off and back on, try to connect
   b. Try to connect to our app (register, login, etc.)
   c. If that doesn't work, try solution #2.
2. Try using just cellular
   a. Turn Wi-Fi off, make sure there are plenty of cellular service bars
   b. Try to connect to our app (register, login, etc.)
   c. If that doesn't work, try solution #3
3. Try using just Wi-Fi to connect
   a. Turn cellular service off, make sure there is a good connection to Wi-Fi
   b. Try to connect to our app (register, login, etc.)
   c. If this still does not work, please call EquiTrust Sales Support at 866-598-3694.