

Business Intelligence Centre User Guide

Version 2



Table of Contents

Overview	3
Introduction to Business Intelligence Centre (BIC)	3
Business Intelligence Centre Layout	4
Business Intelligence Centre Screen	5
Navigation Bar and What's New	8
Accessing The Business Intelligence Centre	10
Logging On	10
Changing Your Password	12
Changing Your Language Preference	14
Logging Off	14
Business Intelligence Centre Inquiry	15
Client Find	15
Policy Inquiry	18
Franchise Inquiry	19
Representative Look Up – Navigating The Hierarchy	21
Representative Look Up – Search For A Specific Representative	23
New Business Report	25
Requirements Report	26
Compensation	30
Training and Development	31
Sales Tools	32
Client Listing	32
Renewal / Expiry / Conversion	35
Forms	37
Quick Links	38
About RBC Insurance	38
Contact Us	39

Overview

Introduction to Business Intelligence Centre

What is the Business Intelligence Centre?

The Business Intelligence Centre is an application developed by RBC Life Insurance Company. It was designed to provide you, our RBC Life and Living Benefits Insurance Representatives, with a common interface where you may access valuable

- client
- policy
- representative
- product, and
- company

information that will allow you to provide the highest level of service to your clients.

Functionality

RBC Life Insurance Company is committed to continually expanding customer service and satisfaction.

As a result of this commitment, the Business Intelligence Centre functionality will be continuously updated and appropriate enhancements will be made.

Purpose of this manual

This user guide was created in order to

- introduce you to the Business Intelligence Centre application, and
 - help familiarize you with the many important features available within the Business Intelligence Centre.
-

Intended audience

This manual was intended for use by RBC Life Insurance Company

- Representatives
- Distributors
- Administrative Staff

We welcome any

- comments, or
- suggestions

that will help strengthen our commitment to provide productive sales tools to assist you in meeting your customers' needs.

Business Intelligence Centre Layout

Snapshot

Within the Business Intelligence Centre, you have access to three main areas,

- Business Intelligence Centre Inquiry
- Reports
- Sales Tools

Business Intelligence Centre screen

The Business Intelligence Centre inquiry screen always remains present in the left navigation bar of the application, while you move around the site.

Navigation bar

The **Navigation** bar is located to the left of the screen. It provides links to various menu items within the two main screens.

Click a link to access the corresponding menu item.

Compliments and Complaints link

The **Compliments and Complaints** link, located at the bottom of your screen, provides you with a detailed version on how to compliment our staff, service or products, or how to file a complaint.

Underwriters link

The **Underwriters** link, located at the bottom of your screen, provides you with a list of underwriters covering our comprehensive range of insurance services.

Privacy link

The **Privacy** link, located at the bottom of your screen, provides you with a detailed version of the RBC Life Insurance Company's Privacy Code.

Legal Terms link

The **Legal** link, located at the bottom of your screen, provides you with legal information about:

- **Local Laws, Export Control**
- **No Warranties**
- **Trade Marks and Copyrights**
- **Internet E-mail**
- **No Endorsements**
- **No Liability**
- **Links/Software**
- **Jurisdiction**

Security link

The **Security** link, located at the bottom of your screen, provides you with a detailed version of the RBC Life Insurance Company's Security Code.

Business Intelligence Centre Screen

Snapshot

The Business Intelligence Centre screen provides links to individual

- client
- policy, and
- representative information

It also supplies you with

- reports
- administrative contact information
- compensation schedules
- training and development information (includes this user manual)
- sales tools, and
- forms

See the screen sample below:

The screenshot shows the RBC Insurance Business Intelligence Centre website. At the top right, there are links for "Contact Us", "Legal Terms", and "Français". The RBC Insurance logo is in the top left. The main header area features a blue background with the text "Welcome to the RBC Insurance Business Intelligence Centre For Insurance Representatives" and the slogan "FIRST > FOR YOU". Below this, a message states: "This is a secure website that allows authorized Life and Long Term Care insurance representatives to access client, policy and other confidential business information to serve their clients." A "Take Action" button with a checkmark icon is visible, with a "Change Password" link below it. A "Contact Us" link is also present. The left sidebar contains a "Sign Out" link, the "RBC Insurance@ Business Intelligence Centre" title, and a list of menu items: Client Find, Policy Inquiry, Franchise Inquiry, Representative Look Up, Reports, Compensation, Training & Development, Sales Tools, and Forms. Below these are "Quick Links" for About RBC Insurance, Contact Us, and Sales Resource Centre. At the bottom, there is a "What's New" section with a link to "Take the quick site tour". The footer contains copyright information: "© RBC Insurance Services Inc. 1997 - 2006" and links for "Compliments and Complaints", "Underwriters", "Privacy", "Legal Terms", and "Security". A note states "rbcinsurance.com/businessintelligencecentre is operated by RBC Insurance Services Inc."

In addition, you can

- change your password, and
- change the language on the interface

Continued on next page

Business Intelligence Centre Screen, Cont...

Screen contents The Business Intelligence Centre screen contains the following sections:

Heading	Contents	Description
Client Find	Provides a screen to <ul style="list-style-type: none"> • search for client information 	Allows you to search for detailed information about your clients by <ul style="list-style-type: none"> • client name • policy number, or • company name
Policy Inquiry	Provides a screen to <ul style="list-style-type: none"> • search for a policy 	Allows you to search for detailed information about a clients policy by <ul style="list-style-type: none"> • policy number
Franchise Inquiry	Provides a screen to <ul style="list-style-type: none"> • search for a Franchise by Franchise name • search for a Franchise by Franchise number 	Allows you to search for Guarantee Standard Issue® by <ul style="list-style-type: none"> • franchise name, or • franchise number
Representative Look Up	Provides a screen to <ul style="list-style-type: none"> • view information for all reporting representatives • search for a specific representative by name or number 	Allows you to search for detailed information about a representative by <ul style="list-style-type: none"> • representative number • representative name, or • agency name
Reports	Provides links to <ul style="list-style-type: none"> • new business • requirements reports 	Allows you to view <ul style="list-style-type: none"> • new business report for the representative logged in • outstanding requirements and which requirements have changed since last logged in
Compensation	Provides links to <ul style="list-style-type: none"> • Independent Rep Life & LTC Commission schedule • Individual DI, CI, and Group Commission schedule 	Allows you to view detailed information about your compensation by <ul style="list-style-type: none"> • product, and • length of aging policy
Training & Development	Provides links to <ul style="list-style-type: none"> • sales tools and job aids • processes and systems 	Allows you to view related training and development material and provides access to <ul style="list-style-type: none"> • reference guides • system & process guides, and • useful application job aids

Business Intelligence Centre Screen, Cont...

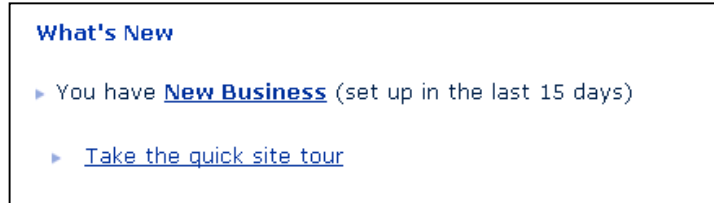
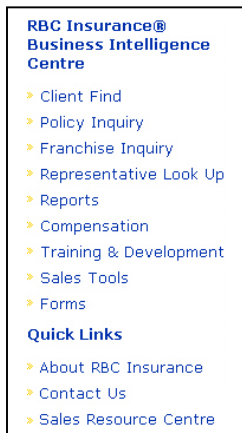
Screen contents The Business Intelligence Centre screen contains the following sections:

Heading	Contents	Description
Sales Tools	Provides links to <ul style="list-style-type: none"> • client listing • expiry / renewal / conversion reports	Allows you to generate a report to view <ul style="list-style-type: none"> • all clients listed by representative code • all clients with policies up for expiry, renewal or conversion in the next 6 months
Forms	Provides links to <ul style="list-style-type: none"> • contracting documents and forms • transfer rules 	Allows you to access detailed information on <ul style="list-style-type: none"> • obtaining an Independent Representative contract with RBC Insurance Life Insurance Company, and • how to transfer from one agency to another
Quick Links	Provides links to <ul style="list-style-type: none"> • about RBC Insurance® • contact us 	Allows easy access to useful web pages, including <ul style="list-style-type: none"> • RBC Life Insurance Company information • contact information for head offices
What's New	Provides links to <ul style="list-style-type: none"> • new business, and • site tour 	Allows you to <ul style="list-style-type: none"> • view your new business received within the last 15 days. • take a site tour to walk you through the key sections of the application
Take Action	Provides a link to <ul style="list-style-type: none"> • Change Password 	Allows you to <ul style="list-style-type: none"> • change your login password you log on with

Navigation Bar and What's New

Note: All links are accessible from the vertical **Navigation** bar, located to the left of the screen (see Business Intelligence Centre **Layout**) and the **What's New** section at the bottom of the screen.

See the following screen samples:



Accessing New Business listing

The **New Business** listing, located at the bottom of the Business Intelligence Centre homepage, under **What's New**, provides information for all *new* policies set up within the past fifteen days.

To access information for a specific policy in the listing, click the

- policy number to view policy information, or
- representative number to view individual representative information.

Note: You will only be able to view new business details for your own clients.

See the screen sample below:

Reports
New Business

New Business Report

[Print](#)

New Business (set up in the last 15 days)

Received	Life Insured	Plan Type	Policy#	Representative#
23 Dec 2005	R. U. Insured	Term 10 Renewable and Convertible	11223344	998822
21 Dec 2005	Y.J Smith	Destiny	12345678	998822
21 Dec 2005	John Doe	Destiny	98765432	998822

NB: You can also access this report through the **Report** link on the **Left Navigation bar**. See page 21 of the Business Intelligence Centre User Guide for further instructions.

Continued on next page

Navigation Bar and What's New, Cont...

Accessing What's New

The **What's New** section, located on the welcome page, provides an area for any new information that has recently been added to the site, which our Insurance Representatives should be aware of. For example.

- New functionality
- New section
- New document

Take The Quick Site Tour

Located under the **What's New** heading, [Take the quick site tour](#) link is a user friendly presentation that will highlight the key areas of the BIC application and help you navigate through the site.

Accessing The Business Intelligence Centre

Logging On

Snapshot

To access the system, enter the following address:

- www.rbcinsurance.com/businessintelligencecentre

Result: The **Login** screen appears.

In order to log on to the system, you must have:

- a valid RBC representative number (Advisor Code)
- an individual user ID, and
- a valid password

Advisor Code

The Advisor Code is a unique number. It is the number used by RBC Insurance to identify you.

User ID

Your User ID is your personal identification within BIC. It normally consists of:

- the first six letters of your last name (fewer if your last name is less than six letters), and
- the first two letters of your first name.

Example: John Smith would have a user ID of *smithjo*.

Password


The password you create

- must be between six and ten characters in length, and
- may consist of a combination of both letters and numbers (alphanumeric).

The **Password** field is **not** case sensitive.


Note: The first time you log on to BIC, you will use a password that will be provided to you.

Logging on to BIC Once you have accessed the **Login** screen, follow the steps listed below to access BIC:

Step	Action
1	<p>Enter your advisor code in the Advisor Code (also known as Representative Number) field. See the screen sample below:</p> 
2	Enter your user ID in the User ID field.

Continued on next page

Logging On, Continued

Step	Action
3	Enter your password in the Password field. See the screen sample below:
4	Click the Sign In button. Result: The Business Intelligence Centre homepage appears. Note: If you are logging on to BIC for the first time, a Login screen appears prompting you to change your password.
IF you are logging on to BIC for the first time	
5	Enter the password you have created (your new password) in the New Password field within the Login screen. The password you create <ul style="list-style-type: none"> • must be between six and ten characters in length • may consist of a combination of both letters and numbers (alphanumeric), and • cannot be the same as any of the twelve previous passwords you have used. Note: If a previous password is accidentally used, you will receive the following error message <div style="border: 1px solid black; padding: 5px; margin-top: 10px; color: red;"> Error in password update. Current password incorrect or new password one of past 12 </div>
6	Re-enter your new password in the Confirm New Password field. See the screen sample below: <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  </div>
7	Click the Change Password button to change your password. Result: The Business Intelligence Centre homepage appears.


Changing Your Password

Snapshot

For security reasons, you are required to change your password every 90 days.

Changing Your Password

To change your password *before* the 90 day period expires, follow the steps listed below:

Step	Action
1	<p>Click the Change Password link, located under the Take Action heading on the Right Navigation bar.</p> <p>Result: The Change Password screen appears.</p> <p>See the screen sample below:</p>  <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button.</p>
2	Enter your old password in the Current Password field.
3	Enter your new password in the New Password field.
4	<p>Re-enter your new password in the Confirm New Password field.</p> <p>The password you create</p> <ul style="list-style-type: none"> • must be between six and ten characters in length • may consist of a combination of both letters and numbers (alphanumeric), and • cannot be the same as any of the twelve previous passwords you have used.
5	<p>Click the Change Password button to change your password.</p> <p>Note: If a mistake was made, you will receive the following error message:</p> <div data-bbox="410 1465 1037 1535" style="border: 1px solid black; padding: 5px; color: red;"> <p>Error in password update. Current password incorrect or new password one of past 12</p> </div>

Continued on next page

Changing Your Password, Cont...

Troubleshooting Listed below are some simple solutions to problems that you may encounter when logging on.

IF you...	THEN...
Forgot your password	<p>Contact:</p> <ul style="list-style-type: none"> the office that set up your account, or Business Intelligence Centre assistance at: <p>Local 905-606-1264</p> <p>toll-free 1-800-669-1936 ext. 61264</p> <p>e-mail Src-Nationaloffice@rbc.com</p> <p>This office will:</p> <ul style="list-style-type: none"> verify your identity reset your account if necessary, and give you a temporary password. <p>The temporary password will allow you to log on and change your password to one of your own choosing.</p> <p>Available 8:00 am to 5:00 pm EST, Monday to Friday</p>
Haven't changed your password within 90 days (or have not used BIC within 90 days)	<p>The system will</p> <ul style="list-style-type: none"> deny you access, and prompt you to change your password. <p>Once your password has been changed, you will be allowed access to the Business Intelligence Centre.</p>
Enter an incorrect password three consecutive times	<p>The system will:</p> <ul style="list-style-type: none"> deny you access, and deactivate your account <p>Contact:</p> <ul style="list-style-type: none"> the office that set up your account, or Business Intelligence Centre assistance at: <p>Local 905-606-1264</p> <p>toll-free 1-800-669-1936 ext. 61264</p> <p>e-mail Src-Nationaloffice@rbc.com</p> <p>This office will:</p> <ul style="list-style-type: none"> verify your identity reset your account, and give you a temporary password. <p>The temporary password will allow you to log on and change your password to one of your own choosing.</p>
Are having technical difficulties with the WorldProtect® system	<p>contact the RBC Insurance Life Line (Help Desk) at</p> <ul style="list-style-type: none"> 905-606-1999, or 1-800-669-1936 ext. 61999. <p>Available 8:30 am to 5:30 pm EST, Monday to Friday.</p>

Changing Your Language Preference

Snapshot


The Business Intelligence Centre application provides you with the ability to change the language on the interface; allowing you to view the interface in;

- English, or
- French.

Note: The default language is *English*.

Setting your language preference

In order to set your language preference

Step	Action
1	<p>(If required)</p> <p>Click the “Français” link, located at the top right hand of the page.</p> <p>Result: The application converts to French language</p> <p>See the screen sample below:</p>  <p>Note: When you convert to French language or vice versa, the application will automatically default to the Business Intelligence Centre homepage</p>

Logging Off

Snapshot

If you wish to log off from the Business Intelligence Centre at anytime, click the **Sign Out** link located at the top-left hand side of the screen.

This returns you to the **Login** screen. Click the **Close**  button (located at the top-right corner of the screen) to close the application.

Note: For security reasons, the system will automatically log off after 30 minutes of inactivity.

Business Intelligence Centre Inquiry

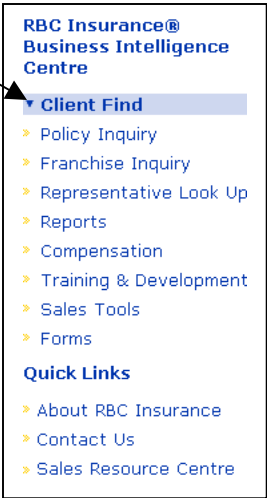
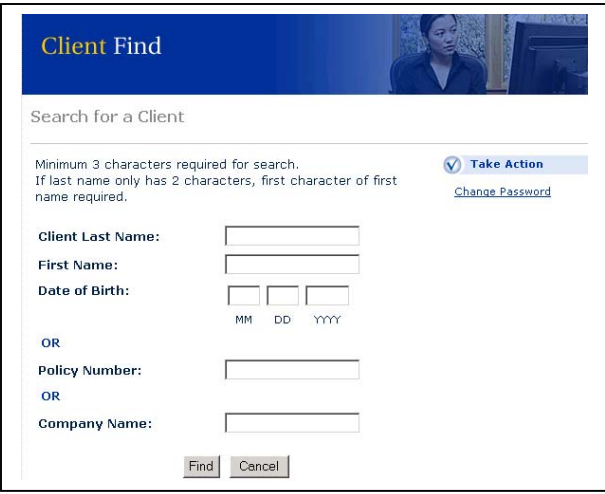
Client Find

Snapshot

The **Client Find** feature allows you to view individual client records.

Viewing client information

To view information for a specific client, follow the steps listed below:

Step	Action
<p>1</p> 	<p>Click the Client Find link, located on the Left Navigation bar.</p> <p>Result: The Search For A Client screen appears.</p> <p>See the screen sample below:</p>  <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p>
<p>2</p>	<p>Search for a client by Name, Date of Birth, Policy Number, or Company Name, depending on the information you have available. The more information that is entered, the narrower the search results will be.</p> <p>NOTE: The Company Name field can be used for searching corporate owned policies.</p>
<p>3</p>	<p>Enter the client's last name in the Last Name field.</p>
<p>4</p>	<p>(Optional) Enter the client's first initial (of first name) in the First Name field.</p> <p>Note: You do not have to enter a first initial to begin a search. However, the search process will take less time to execute if additional search criteria are entered.</p>
<p>5</p>	<p>Click the Find button to begin the client search.</p> <p>Result: An alphabetically arranged list meeting the search criteria is displayed. If there are many results, more than one page of results will be returned.</p> <p>See screen sample on next page:</p>


Continued on next page

Client Find, Continued

Step	Action																																																		
	<div data-bbox="451 296 1091 630"> <p>Client Search Results</p> <p>Print</p> <p>Page 1 of 18 Next</p> <table border="1"> <thead> <tr> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> <th>6</th> <th>7</th> <th>8</th> <th>9</th> <th>10-18</th> </tr> <tr> <th>Last Name</th> <th>First Name</th> <th>Policy #</th> <th>Type</th> <th>Relationship</th> <th colspan="5"></th> </tr> </thead> <tbody> <tr> <td>SMITH</td> <td>Adam M.</td> <td>123456</td> <td>T10</td> <td>Payor</td> <td colspan="5"></td> </tr> <tr> <td>SMITH</td> <td>JOHN</td> <td>112233</td> <td>TS</td> <td>Owner</td> <td colspan="5"></td> </tr> <tr> <td>SMITH</td> <td>MICHEAL JAMES</td> <td>445566</td> <td>T10</td> <td>Owner</td> <td colspan="5"></td> </tr> </tbody> </table> </div> <p>Note: Search results are dependent on the representative number entered when you logged on to Business Intelligence Centre. Therefore, only the names of clients associated with the specified representative number will be listed.</p>	1	2	3	4	5	6	7	8	9	10-18	Last Name	First Name	Policy #	Type	Relationship						SMITH	Adam M.	123456	T10	Payor						SMITH	JOHN	112233	TS	Owner						SMITH	MICHEAL JAMES	445566	T10	Owner					
1	2	3	4	5	6	7	8	9	10-18																																										
Last Name	First Name	Policy #	Type	Relationship																																															
SMITH	Adam M.	123456	T10	Payor																																															
SMITH	JOHN	112233	TS	Owner																																															
SMITH	MICHEAL JAMES	445566	T10	Owner																																															
6	<p>Select and click the appropriate Client Name link from the list provided.</p> <p>Result: The Client Details and Policies screen appears, displaying detailed information for the selected client.</p> <p>See the screen sample below:</p> <div data-bbox="451 953 1019 1451"> <p>Client Details and Policies</p> <p>Print</p> <p>Personal Information</p> <p>Name: ADAM SMITH Gender: Male Date of Birth: 07 Feb 1973 Language: English Smoker Status: Non-Smoker</p> <p>Current Address</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Address</th> <th>Country</th> </tr> </thead> <tbody> <tr> <td>NA</td> <td>R.R. 8 KINGSTON, ON, XXX XXX</td> <td>CA</td> </tr> </tbody> </table> <p>Policies</p> <table border="1"> <thead> <tr> <th>Number</th> <th>Type</th> <th>Client Name</th> <th>Relationship</th> </tr> </thead> <tbody> <tr> <td>123456</td> <td>NA</td> <td>J.F. SMITH</td> <td>Owner</td> </tr> <tr> <td></td> <td></td> <td>Adam T.</td> <td>Payor</td> </tr> </tbody> </table> <p>back to top</p> </div>	Type	Address	Country	NA	R.R. 8 KINGSTON, ON, XXX XXX	CA	Number	Type	Client Name	Relationship	123456	NA	J.F. SMITH	Owner			Adam T.	Payor																																
Type	Address	Country																																																	
NA	R.R. 8 KINGSTON, ON, XXX XXX	CA																																																	
Number	Type	Client Name	Relationship																																																
123456	NA	J.F. SMITH	Owner																																																
		Adam T.	Payor																																																

Continued on next page

Client Find, Continued

Step	Action												
7	<p>(Optional) Select and click the appropriate Policy Number from the list provided.</p> <p>Result: The Policy Details screen appears, displaying detailed information for the selected client and policy.</p> <p>See the screen sample below:</p> <div data-bbox="451 491 1073 987" style="border: 1px solid black; padding: 10px;">  <p>Policy Inquiry</p> <p>Policy Details</p> <p>Print</p> <p>Policy Number: 123456</p> <p>Report Highlights</p> <p>Updated:</p> <p>Coverage Information: Waiver Premium - 1978 Termflex 10 Year Renewable and Convertible Term for Amount Band 1 and 2 (50,000 to 999,999) - 1982</p> <p>NA</p> <p>Owner Information</p> <table border="0"> <tr> <td>Name:</td> <td>ADAM SMITH</td> <td>Gender:</td> <td>Male</td> </tr> <tr> <td>Date of Birth:</td> <td>07 Feb 1973</td> <td>Language:</td> <td>English</td> </tr> <tr> <td>Smoker Status:</td> <td>Non-Smoker</td> <td>Default mailing address:</td> <td></td> </tr> </table> </div>	Name:	ADAM SMITH	Gender:	Male	Date of Birth:	07 Feb 1973	Language:	English	Smoker Status:	Non-Smoker	Default mailing address:	
Name:	ADAM SMITH	Gender:	Male										
Date of Birth:	07 Feb 1973	Language:	English										
Smoker Status:	Non-Smoker	Default mailing address:											

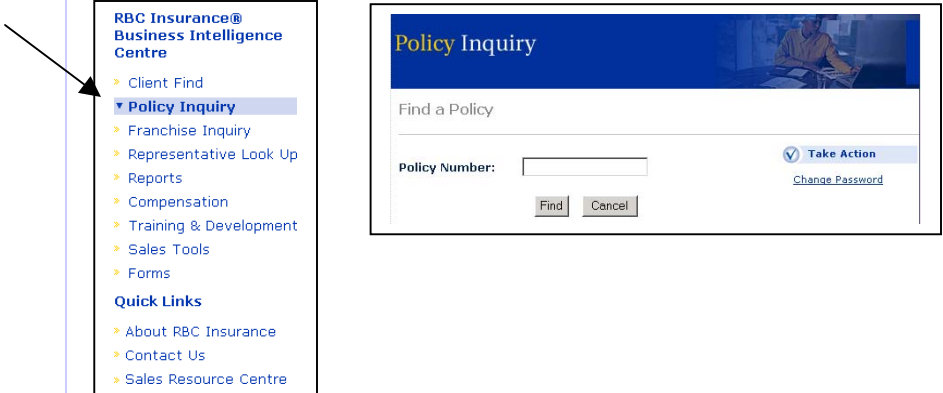

Policy Inquiry

Snapshot

The **Policy Inquiry** feature allows you to access client policy details.

Viewing policy information

To view information for a specific policy, follow the steps listed below:

Step	Action
1	<p>Click the Policy Inquiry link, located on the Left Navigation bar.</p> <p>Result: The Find a Policy screen appears.</p> <p>See the screen samples below:</p> <div data-bbox="354 571 1291 961"></div>
2	<p>Enter the policy number in the Policy Number field, located within the Policy Inquiry screen.</p>
3	<p>Click the Find button to begin the policy search.</p> <p>Result: Detailed policy information is displayed for the selected policy.</p> <p>See the screen sample below:</p> <div data-bbox="431 1283 1003 1738"></div>

Note: Search results are dependent on the representative number entered when you logged on to the Business Intelligence Centre. Therefore, only policies associated with the specified representative number will be searched by the system.

Franchise Inquiry

Snapshot



The **Franchise Inquiry** feature allows a user to search for Guarantee Standard Issue® (GSI) cases by **Franchise Name**, or perform an inquiry by **Franchise Number**, depending on the information you have available.

Viewing franchise information

To view information for a specific franchise, follow the steps listed below:

Step	Action																															
1	<p>Click the Franchise Inquiry link, located on the Left Navigation bar.</p> <p>Result: The Find a Franchise screen appears.</p> <p>See the screen samples below:</p> <div data-bbox="451 646 672 1037" style="border: 1px solid black; padding: 5px;"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> > Client Find > Policy Inquiry ▲ Franchise Inquiry > Representative Look Up > Reports > Compensation > Training & Development > Sales Tools > Forms <p>Quick Links</p> <ul style="list-style-type: none"> > About RBC Insurance > Contact Us > Sales Resource Centre </div> <div data-bbox="769 646 1432 966" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Franchise Inquiry</p> <p>Find a Franchise</p> <p>Franchise Name: <input type="text"/></p> <p style="text-align: right;">✓ Take Action</p> <p>OR</p> <p>Franchise Number: <input type="text"/></p> <p style="text-align: right;">Change Password</p> <p style="text-align: center;">Find Cancel</p> </div> <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p>																															
2	<p>Search for a Franchise by Franchise Name – Enter the name of the Franchise being searched. Click Find</p>																															
a	<p>Result: Client Details and Policy screen appears</p> <p>See the screen sample below:</p> <div data-bbox="435 1293 883 1692" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Client Find</p> <p>Client Details and Policies</p> <p>Print</p> <p>Personal information</p> <p>Name: Bargain Dollar Store Gender: Company: Date of Birth: Language: Unknown Smoker Status: *N/Avail* Tobacco Usage</p> <p>Current Address</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Type</th> <th>Address</th> <th>Country</th> </tr> </thead> <tbody> <tr> <td>NA</td> <td>123 Bargain Way Toronto, ON, L9B 9H8</td> <td>CANADA</td> </tr> </tbody> </table> <p>Policies</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Policy #</th> <th>Type</th> <th>Franchise #</th> <th>Client Name</th> <th>Relationship</th> </tr> </thead> <tbody> <tr> <td>SMPOL501</td> <td>*Missing* Product</td> <td>1672267222</td> <td>Bargain Dollar Store</td> <td>*Missing* Client Type</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Bargain Dollar Store</td> <td>Owner</td> </tr> <tr> <td>SMPOL502</td> <td>*Missing* Product</td> <td>1672267222</td> <td>Bargain Dollar Store</td> <td>*Missing* Client Type</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Bargain Dollar Store</td> <td>Owner</td> </tr> </tbody> </table> </div> <p>Note: If there is more than 1 GSI case for a single search, then an intermediary search results page will appear before this. Just click on the applicable franchise name from the list to view details.</p> <p>Search results are dependent on the representative number entered when you logged on to the Business Intelligence Centre. Therefore, only policies associated with the specified representative number will be searched by the system.</p>	Type	Address	Country	NA	123 Bargain Way Toronto, ON, L9B 9H8	CANADA	Policy #	Type	Franchise #	Client Name	Relationship	SMPOL501	*Missing* Product	1672267222	Bargain Dollar Store	*Missing* Client Type				Bargain Dollar Store	Owner	SMPOL502	*Missing* Product	1672267222	Bargain Dollar Store	*Missing* Client Type				Bargain Dollar Store	Owner
Type	Address	Country																														
NA	123 Bargain Way Toronto, ON, L9B 9H8	CANADA																														
Policy #	Type	Franchise #	Client Name	Relationship																												
SMPOL501	*Missing* Product	1672267222	Bargain Dollar Store	*Missing* Client Type																												
			Bargain Dollar Store	Owner																												
SMPOL502	*Missing* Product	1672267222	Bargain Dollar Store	*Missing* Client Type																												
			Bargain Dollar Store	Owner																												

Franchise Inquiry, Cont...

Step	Action
b	<p>Select the Franchise Number from the Franchise Number column</p> <p>Result: The Franchise Policy Details screen appears</p> <p>See screen sample below:</p>  <p>The screenshot shows a web interface titled 'Franchise Inquiry' with a sub-header 'Franchise Policy Details'. It includes a 'Print' button, the Franchise Number '1672267222', and the Franchise Name 'Bargain Dollar Store'. Below this is a 'Report Highlights' section with an 'Updated' date of '2006-09-03 14:56:11'. A table lists client information with columns for Client Name, policy #, Product Type, and Relationship. The table contains five rows of data for 'Bargain Dollar Store' with various policy numbers and missing product/relationship information. A 'back to top' link is at the bottom right.</p>
c	<p>Select a Client Name, or Policy Number from the list to view detailed client and policy information.</p>
3	<p>Or, search for a Franchise by Franchise Number – Enter the number of the Franchise being searched. Click Find.</p> <p>Results: The Franchise Policy Details screen appears.</p> <p>See screen sample below:</p>  <p>This screenshot is identical to the one in the previous step, showing the 'Franchise Policy Details' screen for Franchise Number 1672267222 and Franchise Name Bargain Dollar Store.</p>
b	<p>Select a Client Name, or Policy Number from the list to view detailed client and policy information.</p>

Representative Look Up – Navigating The Hierarchy

Snapshot

The **Representative Look Up** screen allows you to:

- Navigate through the representative hierarchy to find representative information, and
- Search for a specific representative, by name or advisor / representative code.

Note: The representative names that are shown in this list are dependent on the representative number entered during login. You will only be able to view representative information that you are authorized to view.


Navigating The Hierarchy

The hierarchy is role based and will differ depending on the rank/authority of the advisor code used to log on with.



Rules:

- A user may only view one level above their rank, but will not be able to access details to the higher level.
- A user can navigate to all levels below their rank and may view information for these levels.
- A user will always return to the original level connected to the advisor code they logged on with.

To navigate through the hierarchy to find representative information, follow the steps listed below:

Step	Action
1	<p>Click the Representative Look Up link, located on the Left Navigation bar.</p> <p>Result: The Representative Information screen appears.</p> <p>See the screen samples below:</p> <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 5px; width: 40%;"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> ➤ Client Find ➤ Policy Inquiry ➤ Franchise Inquiry <li style="background-color: #d9e1f2;">▼ Representative Look Up ➤ Reports ➤ Compensation ➤ Training & Development ➤ Sales Tools ➤ Forms <p>Quick Links</p> <ul style="list-style-type: none"> ➤ About RBC Insurance ➤ Contact Us ➤ Sales Resource Centre </div> <div style="border: 1px solid black; padding: 5px; width: 40%;">  <p>The screenshot shows the 'Representative Look Up' interface. At the top, it says 'Representative Information'. Below this, there is a 'Print' button and a 'Take Action' button with a checkmark icon. A 'Find a Representative' link is also visible. The main content area displays a tree structure with the following items: 'XX99A Distribution Partner Inc.', 'XX11B Associate Brokerage Inc.', 'YYZZ3 Associate 2', and 'ZZQQ9 Associate 3'. Each item has a right-facing arrow next to it, indicating it can be expanded.</p> </div> </div> <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p>
a	Click on the downward arrow (▼) to go back one level and collapse levels below it.
b	Click on the right-facing arrow (▶) to expand the hierarchy of the current level and view the level below it.
c	Click on the <u>underlined name</u> of any level to go to the connected Representative Details screen

Navigating The Hierarchy Cont...

Step	Action
2.	<p>Click on the underlined name of the desired level to open the corresponding Representative Information screen. The following information is shown:</p> <ul style="list-style-type: none"> ▶ Hierarchy path for the given level; ▶ Representative Reports (showing if there are any outstanding items); ▶ Contact information (including address and phone numbers); and ▶ Sales representative details (if applicable). ▶ Signing representative details (if applicable) <p>See screen sample below:</p> 
3.	Click on the downward arrow (▼) beside the name of the level at the top of the screen to go back to the original hierarchy screen.
4	Click on the  Print link at the top of any screen to print a hard copy of the displayed information.

Representative Look Up – Search For A Specific Representative

Viewing representative information

To view information for a specific representative, follow the steps listed below:

Step	Action
1	<p>Click the Representative Look Up link, located on the Left Navigation bar.</p> <p>Result: The Representative Information screen appears.</p> <p>See the screen samples below:</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="451 537 688 974"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> > Client Find > Policy Inquiry > Franchise Inquiry <li style="background-color: #0056b3; color: white; padding: 2px;">> Representative Look Up > Reports > Compensation > Training & Development > Sales Tools > Forms <p>Quick Links</p> <ul style="list-style-type: none"> > About RBC Insurance > Contact Us > Sales Resource Centre </div> <div data-bbox="792 550 1409 949"> <p>Representative Look Up</p> <p>Representative Information</p> <p>Print Take Action</p> <p style="text-align: right;">Find a Representative</p> <ul style="list-style-type: none"> XX99A Distribution Partner Inc XX11B Associate Brokerage Inc YYZZ3 Associate 2 ZZQQ9 Associate 3 </div> </div>
2	<p>Click the Find A Representative link, located under Take Action on the Right Navigation bar.</p> <p>Result: The Find A Representative screen appears.</p> <p>See the screen samples below:</p> <div data-bbox="444 1176 997 1587"> <p>Representative Look Up</p> <p>Find a Representative</p> <p>Minimum 3 characters required for search. If last name only has 2 characters, first character of first name required.</p> <p style="text-align: right;">Take Action Change Password</p> <p>Representative Number: <input type="text"/></p> <p>OR</p> <p>Representative Last Name: <input type="text"/></p> <p>OR</p> <p>First Name: <input type="text"/></p> <p>OR</p> <p>Agency Name: <input type="text"/></p> <p style="text-align: center;">Find Cancel</p> </div>

Search For A Specific Representative Cont...

Step	Action																		
3	<p>Enter the representative's</p> <ul style="list-style-type: none"> • number in the Representative Number field, or • last name in the Representative Last Name field, or • agency, branch or unit name in the Agency Name field <p>within the Representative Look Up screen.</p> <p>Note: A minimum of three characters is required for a representative search. If the last name entered has only two characters, the representative's first initial is also required.</p>																		
4	<p>(Optional)</p> <p>Enter the representative's first initial (of first name) in the First Name field.</p> <p>Note: You do not have to enter a first initial to begin a search. However, the search process will take less time to execute if additional search criteria are entered.</p>																		
5	<p>Click the Find button to begin the representative search.</p> <p>Result: An alphabetical list of the first 50 representative names meeting the search criteria is displayed.</p> <p>See the screen sample below:</p> <div data-bbox="435 947 1146 1262" data-label="Image"> <p>The screenshot shows the 'Representative Look Up' interface. At the top, it says 'Find a Representative' with a search input field. Below the input field is a 'Print' button. A table displays the search results:</p> <table border="1"> <thead> <tr> <th>Representative</th> <th>Representative #</th> <th>Status</th> <th>Routing Path</th> </tr> </thead> <tbody> <tr> <td>DONALD SMITH</td> <td>123456</td> <td>Active</td> <td>XXOO/PPQQ</td> </tr> <tr> <td>ELDON SMITH</td> <td>445566</td> <td>Active</td> <td>EE01/PP02</td> </tr> <tr> <td>LARA SMITH</td> <td>998877</td> <td>Inactive</td> <td>XXXX</td> </tr> </tbody> </table> </div>	Representative	Representative #	Status	Routing Path	DONALD SMITH	123456	Active	XXOO/PPQQ	ELDON SMITH	445566	Active	EE01/PP02	LARA SMITH	998877	Inactive	XXXX		
Representative	Representative #	Status	Routing Path																
DONALD SMITH	123456	Active	XXOO/PPQQ																
ELDON SMITH	445566	Active	EE01/PP02																
LARA SMITH	998877	Inactive	XXXX																
6	<p>Select and click the appropriate representative name from the list provided.</p> <p>Result: The Representative Information screen appears, displaying detailed information for the selected representative.</p> <p>See the screen sample below:</p> <div data-bbox="428 1493 878 1881" data-label="Image"> <p>The screenshot shows the 'Representative Information' screen for Angela Smith. It includes a 'Print' button and the following details:</p> <p>Representative Details</p> <table> <tr> <td>Representative Name: ANGELA SMITH</td> <td>Payment Status: PAY</td> </tr> <tr> <td>Representative Number: 123456</td> <td>Status: INACTIVE</td> </tr> <tr> <td>Routing Path: XXOO/RR02</td> <td></td> </tr> <tr> <td>Cheque Name:</td> <td></td> </tr> <tr> <td>Contract Date: 22 Oct 1993</td> <td></td> </tr> <tr> <td>Date Terminated:</td> <td></td> </tr> </table> <p>Representative Reports</p> <p>There are currently no clients with outstanding requirements.</p> <p>Contact Information</p> <p>Address</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Address</th> <th>Country</th> </tr> </thead> <tbody> <tr> <td>NA</td> <td>83 Empire Ave. St. John's, NF., XXX PPP</td> <td>CA</td> </tr> </tbody> </table> </div>	Representative Name: ANGELA SMITH	Payment Status: PAY	Representative Number: 123456	Status: INACTIVE	Routing Path: XXOO/RR02		Cheque Name:		Contract Date: 22 Oct 1993		Date Terminated:		Type	Address	Country	NA	83 Empire Ave. St. John's, NF., XXX PPP	CA
Representative Name: ANGELA SMITH	Payment Status: PAY																		
Representative Number: 123456	Status: INACTIVE																		
Routing Path: XXOO/RR02																			
Cheque Name:																			
Contract Date: 22 Oct 1993																			
Date Terminated:																			
Type	Address	Country																	
NA	83 Empire Ave. St. John's, NF., XXX PPP	CA																	

New Business Report


Snapshot

The **New Business Report** link located under **Reports** on the left **Navigation** bar, allows you to view

- any new business that has been entered in the system within the past 15 days for the representative number you logged on with.

Viewing New Business Report

To view the **New Business** report, follow the step listed below:

Step	Action															
1	<p>Click the New Business link, located under Reports on the Left Navigation bar.</p> <p>Result: The New Business Report screen appears.</p> <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p> <p>See screen samples below:</p> <div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div data-bbox="402 835 623 1297" style="border: 1px solid black; padding: 5px;"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> > Client Find > Policy Inquiry > Franchise Inquiry > Representative Look Up Reports <li style="padding-left: 10px;">▼ New Business <li style="padding-left: 10px;">▸ Requirements > Compensation > Training & Development > Sales Tools > Forms Quick Links > About RBC Insurance > Contact Us > Sales Resource Centre </div> <div data-bbox="737 898 1383 1226" style="border: 1px solid black; padding: 5px;"> <div style="background-color: #0056b3; color: white; padding: 5px;"> <h3>Reports</h3> <p>New Business</p> </div> <p>New Business Report</p> <p> Print</p> <p>New Business (set up in the last 15 days)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Received</th> <th>Life Insured</th> <th>Plan Type</th> <th>Policy#</th> <th>Representative#</th> </tr> </thead> <tbody> <tr> <td>23 Dec 2005</td> <td>Nancy Cho</td> <td>Term 10 Renewable and Convertible</td> <td>123456789</td> <td>123456</td> </tr> <tr> <td>23 Dec 2005</td> <td>Barbara Smith</td> <td>Term 20 Renewable and Convertible</td> <td>987654321</td> <td>654321</td> </tr> </tbody> </table> </div> </div>	Received	Life Insured	Plan Type	Policy#	Representative#	23 Dec 2005	Nancy Cho	Term 10 Renewable and Convertible	123456789	123456	23 Dec 2005	Barbara Smith	Term 20 Renewable and Convertible	987654321	654321
Received	Life Insured	Plan Type	Policy#	Representative#												
23 Dec 2005	Nancy Cho	Term 10 Renewable and Convertible	123456789	123456												
23 Dec 2005	Barbara Smith	Term 20 Renewable and Convertible	987654321	654321												

Note: Click on a Policy Number or Representative Number for a more detailed breakdown of the entry should you require it.

Requirements Report

Snapshot

The **Requirements Report** link located on the left **Navigation** bar, under **Reports** allows you to view any

- **Outstanding Policy Requirements**, relating to all or a specific representative for which you have authorization to view, by date, since you last logged in.

Viewing policy requirements

To view representative policies that have outstanding requirements, follow the steps listed below:

Step	Action
1	<p>Click the Requirements link, located under Reports on the Left Navigation bar.</p> <p>Result: The Requirements Report search screen appears.</p> <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p> <p>See screen samples below:</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="402 785 630 1272"> </div> <div data-bbox="761 785 1263 1264"> </div> </div>
2	<p>Select the requirements you wish to view.</p> <p>Section 1- Outstanding Requirements Report, Enter the representative number in the Representative # field, within the Requirements Report search screen.</p> <p>See screen sample below:</p> <div data-bbox="386 1507 763 1635"> </div>

Requirements Report, Cont...

- 3 Section 2 – **Requirements Changed by Date**, Enter the date to view which requirements have changed since you last logged in. Select either all representatives or a specific rep number only (Note: you will only be able to access the representatives that you have authorization to view).

See the screen sample below:

Requirements Changed By Date:
View only the Requirements changed since
Wednesday December 21, 2005
for All Reps or Rep Number

Result: New or Changed Requirements Since (date selected) report for the representative number entered (or for all representatives if that was the option selected) appears.

See screen sample below:

Reports
Requirements

New or Changed Requirements since Sunday December 18, 2005

Page 1 of 1


Rep [123456 - John Smith - RBC Life Insurance Company](#)

Policy [123456789](#)
Owner [Judith Jones](#)


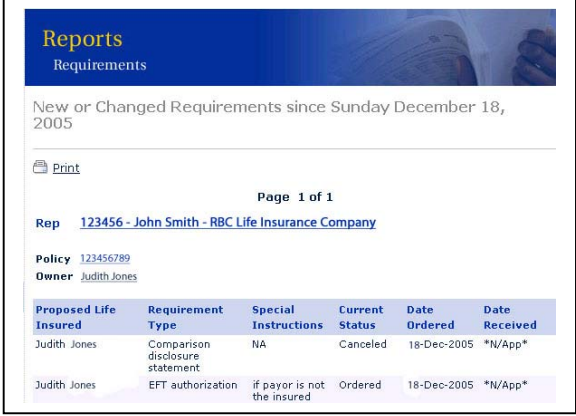
Proposed Life Insured	Requirement Type	Special Instructions	Current Status	Date Ordered	Date Received
Judith Jones	Comparison disclosure statement	NA	Canceled	18-Dec-2005	*N/App*
Judith Jones	EFT authorization	if payor is not the insured	Ordered	18-Dec-2005	*N/App*

Continued on the next page

Requirements Report, Cont...

Step	Action
4	<p>Alternatively, you can access this feature through the Representative Look Up screen, also located on the Left Navigation bar.</p> <p>See the screen sample below:</p>  <p>Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</p>
5	<p>Enter the representative's</p> <ul style="list-style-type: none"> • number in the Representative # field, or • agency, branch or unit name in the Agency Name field, or • last name in the Representative Last Name field, <p>within the Representative Search screen.</p> <p>Note: A minimum of three characters is required for a representative search. If the last name entered has only two characters, the representative's first initial is also required.</p>
6	<p>(Optional)</p> <p>Enter the representative's first initial (of first name) in the First Initial field.</p> <p>Note: You do not have to enter a first initial to begin a search. However, the search process will take less time to execute if additional search criteria are entered.</p>

Requirements Report, Cont...

Step	Action
7	<p>Click the Find button to begin the representative search.</p> <p>Result: The Representative Information screen appears displaying detailed information for the selected representative.</p> <p>See the screen sample below:</p> 
8	<p>Click the Outstanding Requirements link, located under the Representative Reports heading.</p> <p>Result: All policies (arranged numerically from highest to lowest policy number)</p> <ul style="list-style-type: none"> • that have outstanding requirements, and • where the individual representative is listed as the <i>writing representative</i> <p>are displayed.</p> <p>See the screen sample below:</p>  <p>Note: You can view requirements changed up to a maximum of 15 days.</p>
9	Click the policy number to view details for that specific policy.

Continued on next page

Compensation



Snapshot

The **Compensation** link allows you to access detailed commission information for

- Individual Life and Long Term Care products
- Individual Disability, Critical Illness, and all Group products

Accessing compensation

To access this information, follow the step listed below:

Step	Action
1	<p>Click the Compensation link, located on the Left Navigation bar.</p> <p>Result: The Compensation schedules appear, displaying specific commission information by product and by length of aging policy.</p> <p>See the screen samples below:</p> <div data-bbox="451 758 691 1192"><p>RBC Insurance@ Business Intelligence Centre</p><ul style="list-style-type: none">> Client Find> Policy Inquiry> Franchise Inquiry> Representative Look Up> ReportsCompensation> Training & Development> Sales Tools> Forms<p>Quick Links</p><ul style="list-style-type: none">> About RBC Insurance> Contact Us> Sales Resource Centre</div> <div data-bbox="764 810 1430 1073"><p>Compensation</p><p>Compensation Information for Insurance Representatives</p><ul style="list-style-type: none">> Independent Representative Commission Schedules> Compensation Schedule - Individual Disability, Critical Illness and all Group Products<p>Take Action Change Password</p></div>


Training and Development

Snapshot

The **Training and Development** link (*if applicable*) allows you to view related training and development material and provide access to reference, systems and process guides.

Accessing Training & Development

To access this information, follow the step listed below:

Step	Action
1	<p>Click the Training & Development link, located on the Left Navigation bar.</p> <p>Result: The Training & Development listing appears, displaying specific training & development information as appropriate to you.</p> <p>See the screen sample below:</p> <div data-bbox="461 716 716 1199"><p>RBC Insurance® Business Intelligence Centre</p><ul style="list-style-type: none">> Client Find> Policy Inquiry> Franchise Inquiry> Representative Look Up> Reports> Compensation▼ Training & Development> Sales Tools> Forms<p>Quick Links</p><ul style="list-style-type: none">> About RBC Insurance> Contact Us> Sales Resource Centre</div> <div data-bbox="740 749 1455 1121"><p>Training & Development</p><p>Training and Development Information</p><p>Process and Systems Guides Take Action</p><p>BIC Online User Guide Change Password</p></div>

Sales Tools

Client Listing


Snapshot

The **Sales Tools** link provides you with access to your

- **Client Listing** – An alphabetical listing of all your clients entered within our system by representative code, and
- **Renewal / Expiry / Conversion** – A listing of all your clients with policies up for renewal, expiry, or conversion within the next 6 months.

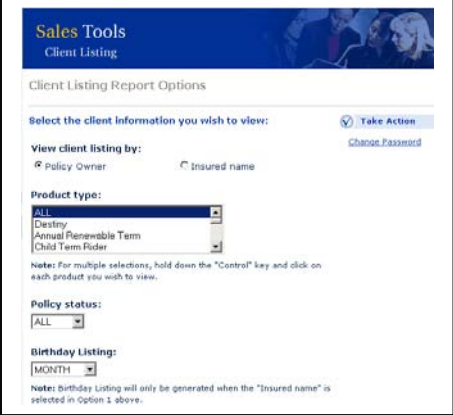
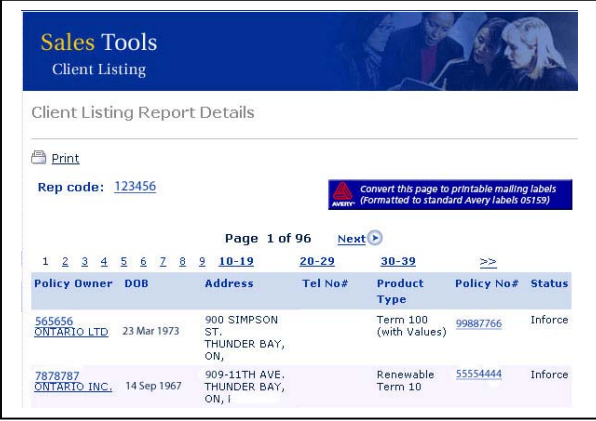
Accessing client listing

To access your **client listing** information, follow the steps listed below:

Step	Action
1	<p>Click the Client Listing link, located under Sales Tools on the Left Navigation bar.</p> <p>Result: The Client Listing screen appears requesting the representative number of the clients you wish to view.</p> <p>See the screen samples below:</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 20px;"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> > Client Find > Policy Inquiry > Franchise Inquiry > Representative Look Up > Reports > Compensation > Training & Development > Sales Tools <ul style="list-style-type: none"> > Client Listing > Renewal/ Expiry/ Conversion > Forms <p>Quick Links</p> <ul style="list-style-type: none"> > About RBC Insurance > Contact Us > Sales Resource Centre </div> <div style="border: 1px solid black; padding: 10px; flex-grow: 1;">  </div> </div> <p>Note: You will only be able to view the clients of the representative number you logged on with, or those you have authorization to view.</p>
2	<p>Enter the Representative Number you wish to view in the Representative No# field.</p> <p>Result: A search criteria is provided by</p> <ul style="list-style-type: none"> • Policy Owner vs Insured Name • Product Type • Policy Status • Birthday <p>Note: Only the products sold by the Representative will appear in the Product Type selection window</p> <p>See screen sample on next page:</p>


Continued on next page

Client Listing Cont...

Step	Action
	
3	<p>Select the criteria by which you want to view your clients, and click Submit</p> <p>Result: The client listing details report for that Rep Code appears, providing the following information:</p> <ul style="list-style-type: none"> Name of Policy Owner or Insured Date of Birth Address of Policy Owner or Insured Telephone Number Products Sold Policy Number Policy Status <p>See screen sample below:</p> 
4	<p>Click the Rep code, Policy Number, or Policy Owner links to view more specific details about this client.</p>

Continued on next page

Client Listing Cont...

Step	Action
5	<p>(Optional)</p> <p>Once your client list has been generated based on the criteria you selected, you can convert that listing into a PDF document of already formatted mailing labels.</p> <p>Just click on this icon seen on the page</p> <div data-bbox="453 468 1002 556" style="border: 1px solid black; padding: 5px;"> <i>Convert this page to printable mailing labels</i> <i>(Formatted to standard Avery labels 05159)</i></div> <p>Note: This feature can only convert one client listing page at a time. If you have more than one page of clients, you will have to click the icon above for every page present.</p>


Renewal / Expiry / Conversion

Accessing Renewal / Expiry / Conversion

To access your policy **Renewal / Expiry / Conversion** information, follow the steps listed below:

Step	Action																				
1	<p>Click the Renewal / Expiry / Conversion link, located under Sales Tools on the Left Navigation bar.</p> <p>Result: The Policy Renewal / Expiry / Conversion screen appears requesting the representative number of the clients you wish to view.</p> <p>See the screen samples below:</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="451 596 688 1083" style="border: 1px solid black; padding: 5px;"> <p>RBC Insurance® Business Intelligence Centre</p> <ul style="list-style-type: none"> > Client Find > Policy Inquiry > Franchise Inquiry > Representative Look Up > Reports > Compensation > Training & Development ▼ Sales Tools <ul style="list-style-type: none"> ▸ Client Listing ▼ Renewal / Expiry / Conversion > Forms <p>Quick Links</p> <ul style="list-style-type: none"> > About RBC Insurance > Contact Us > Sales Resource Centre </div> <div data-bbox="786 667 1338 1045" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #0056b3; color: white; padding: 5px;"> <h3>Sales Tools</h3> <p>Renewal/Expiry/Conversion</p> </div> <p>Policy Renewal / Expiry / Conversion</p> <hr/> <p>Inforce policies that have a Renewal, Expiry or Conversion date within the next 6 months</p> <p>Representative No# : <input type="text"/></p> <p style="text-align: right;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div> </div> <p>Note: You will only be able to view the clients of the representative number you logged in with, or those you have authorization to view.</p>																				
2	<p>Enter the Representative Number you wish to view in the Representative No# field.</p> <p>Result: Any policy that is up for renewal, expiry, or conversion within the next 6 months will appear.</p> <p>See screen sample below:</p> <div data-bbox="435 1339 954 1814" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #0056b3; color: white; padding: 5px;"> <h3>Sales Tools</h3> <p>Renewal/Expiry/Conversion</p> </div> <p>Policy Renewal / Expiry / Conversion</p> <p>Print</p> <p>Rep code: 23456 convert this page to printable mailing labels (Formatted to Standard Avery Labels 05150)</p> <p style="text-align: center;">Page 1 of 5 Next</p> <p>1 2 3 4 5</p> <p>Policy Number XX0022335544</p> <p>Owner Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Tel #</th> </tr> </thead> <tbody> <tr> <td>Judy Smith</td> <td>PO BOX 2334 Any city, NB XXX YYY</td> <td>800-123-4567</td> </tr> </tbody> </table> <p>Coverage Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Insured</th> <th>DOB</th> <th>Product Type</th> <th>Face Amount</th> <th>Renewal Date</th> <th>Expiry Date</th> <th>Conversion Date</th> </tr> </thead> <tbody> <tr> <td>Judy Smith</td> <td>19 Jun 1968</td> <td>Term 20</td> <td>\$ 50,000.00</td> <td>*N/App*</td> <td>25 May 2006</td> <td>25 May 2006</td> </tr> </tbody> </table> </div>	Name	Address	Tel #	Judy Smith	PO BOX 2334 Any city, NB XXX YYY	800-123-4567	Insured	DOB	Product Type	Face Amount	Renewal Date	Expiry Date	Conversion Date	Judy Smith	19 Jun 1968	Term 20	\$ 50,000.00	*N/App*	25 May 2006	25 May 2006
Name	Address	Tel #																			
Judy Smith	PO BOX 2334 Any city, NB XXX YYY	800-123-4567																			
Insured	DOB	Product Type	Face Amount	Renewal Date	Expiry Date	Conversion Date															
Judy Smith	19 Jun 1968	Term 20	\$ 50,000.00	*N/App*	25 May 2006	25 May 2006															

Renewal / Expiry / Conversion Cont...

Step	Action
3	Click the Rep Code, Policy Number, or Policy Owner links to view more specific details about this client.
4	<p>(Optional)</p> <p>Once your renewal / expiry / conversion listing has been generated, you can convert that listing into a PDF document of already formatted mailing labels.</p> <p>Just click on this icon seen on the page</p> <div data-bbox="456 499 1002 590" style="border: 1px solid black; padding: 5px;"> <i>Convert this page to printable mailing labels</i> <i>(Formatted to standard Avery labels 05159)</i></div> <p>NB: This feature can only convert one client listing page at a time. If you have more than one page of clients, you will have to click the icon above for every page present.</p>



Forms

Snapshot

The **Forms** link allows you access to pertinent forms and information required to write business with RBC Life Insurance Company

Accessing contact information

To access this information, follow the steps listed below:

Step	Action
1	<p>Click the Forms link, located on the Left Navigation bar.</p> <p>Result: The Contracting Tools listing appears, displaying the required documents needed to write business with RBC Life Insurance Company</p> <p>See the screen samples below:</p> <div data-bbox="477 739 716 1180"><p>RBC Insurance® Business Intelligence Centre</p><ul style="list-style-type: none">> Client Find> Policy Inquiry> Franchise Inquiry> Representative Look Up> Reports> Compensation> Training & Development> Sales Tools> Forms<p>Quick Links</p><ul style="list-style-type: none">> About RBC Insurance> Contact Us> Sales Resource Centre</div> <div data-bbox="935 707 1385 1171"><p>Forms</p><p>Contracting Tools</p><p>Contracting Documents & Forms</p><ul style="list-style-type: none">> Independent Representative Agreement> Application for Agreement and/or License Sponsorship> Direct Deposit Form & Void Cheque> Compensation Administrative Form (If Applicable)> Bonus Instruction Amendment for Managing General Agents<p>> Contracting Instructions</p><p>> Transfer Rules</p><p>> Request to Transfer</p></div>

Note: All applications, marketing material order forms, and other related forms are located on the **Sales Resource Centre**, which can be immediately accessed by clicking the [Sales Resource Centre](#) link on the left Navigation bar, under **Quick Links**.

Quick Links


About RBC Insurance

Snapshot

The **About RBC Insurance** link allows you to access detailed information about RBC Life Insurance Company.

Accessing About RBC Insurance information

To access this information, follow the step listed below:

Step	Action
1	<p>Click the About RBC Insurance link, located on the Left Navigation bar.</p> <p>Result: The About RBC Insurance page appears, displaying detailed company information on life and non-life products, and fee and related activities.</p> <p>See the screen sample below:</p> <div data-bbox="456 764 1170 1236"></div>

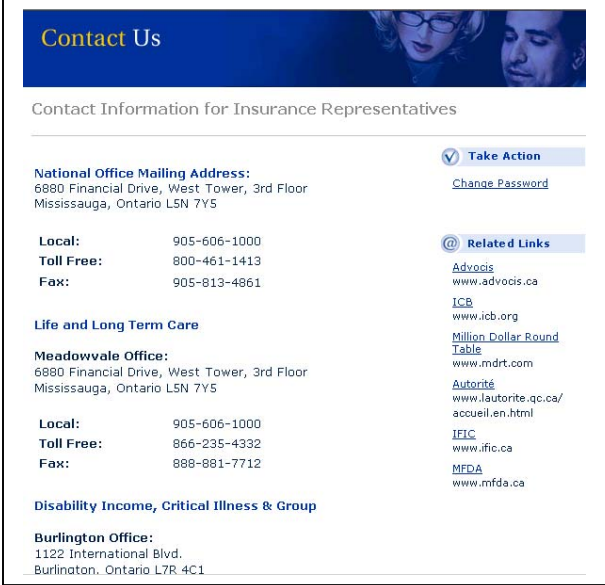
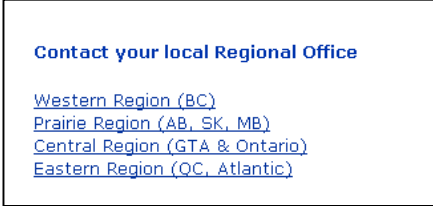
Contact Us

Snapshot

The **Contact Us** link allows you to access detailed contact information about RBC Life Insurance Company regional offices.

Accessing Contact Us

To access this information, follow the steps listed below:

Step	Action
1	<p>Click the Contact Us link, located on the Left Navigation bar.</p> <p>Result: The Contact Information for Insurance Representatives general listing appears, displaying specific contact information as appropriate to you.</p> <p>See the screen sample below:</p>  <p>The screenshot shows a page titled 'Contact Us' with the subtitle 'Contact Information for Insurance Representatives'. It features a 'Take Action' button with a dropdown arrow and a 'Change Password' link. Below this is a 'Related Links' section with icons for Advocis, ICB, Million Dollar Round Table, Autorité, IFIC, and MFDA, each with its respective website URL. The page also lists contact information for the National Office Mailing Address, Life and Long Term Care (Meadowvale Office), and Burlington Office, including local, toll free, and fax numbers.</p>
2	<p>To locate the appropriate regional office, click on the corresponding link at the bottom of this page.</p> <p>Result: The detailed contact information for the selected office is displayed.</p> <p>See screen sample below</p>  <p>The screenshot shows a page titled 'Contact your local Regional Office' with four blue hyperlinks: 'Western Region (BC)', 'Prairie Region (AB, SK, MB)', 'Central Region (GTA & Ontario)', and 'Eastern Region (QC, Atlantic)'.</p>