RBC Insurance

RBC Insurance Business Intelligence Centre

Business Intelligence Centre User Guide

Version 2

www.rbcinsurance.com/businessintelligencecentre

Get connected

Table of Contents

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 **Lega**l 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:

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 • **search for client information**	Allows you to search for detailed information about your clients by • client name • policy number, or • company name
Policy Inquiry	Provides a screen to • **search for a policy**	Allows you to search for detailed information about a clients policy by • policy number
Franchise Inquiry	Provides a screen to • **search for a Franchise by Franchise name** • **search for a Franchise by Franchise number**	Allows you to search for Guarantee Standard Issue® by • franchise name, or • franchise number
Representative Look Up	Provides a screen to • **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 • representative number • representative name, or • agency name
Reports	Provides links to • new business • requirements reports	Allows you to view • new business report for the representative logged in • outstanding requirements and which requirements have changed since last logged in
Compensation	Provides links to • **Independent Rep Life & LTC Commission schedule** • **Individual DI, CI, and Group Commission schedule**	Allows you to view detailed information about your compensation by • product, and • length of aging policy
Training & Development	Provides links to • **sales tools and job aids** • **processes and systems**	Allows you to view related training and development material and provides access to • reference guides • system & process guides, and • useful application job aids

Business Intelligence Centre Screen, Cont…

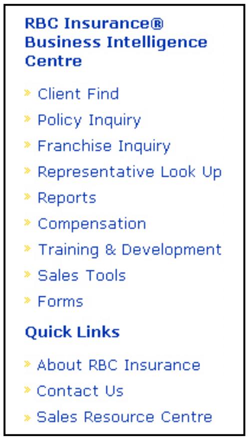
Screen contents The Business Intelligence Centre screen contains the following sections:

Heading	Contents	Description
Sales Tools	Provides links to • **client listing** • **expiry / renewal / conversion** reports	Allows you to generate a report to view • 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 • **contracting documents and forms** • **transfer rules**	Allows you to access detailed information on • 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 • **about RBC Insurance®** • **contact us**	Allows easy access to useful web pages, including • RBC Life Insurance Company information • contact information for head offices
What's New	Provides links to • **new business, and** • **site tour**	Allows you to • 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 • **Change Password**	Allows you to • 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:

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

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:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter your advisor code in the Advisor Code (also known as Representative Number) field.
See the screen sample below:


</td></tr>
<tr><td>2</td><td>Enter your user ID in the User ID field.</td></tr>
</table>

Continued on next page

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 • 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 Error in password update. Current password incorrect or new password one of past 12
6	Re-enter your new password in the **Confirm New Password** field. See the screen sample below: 
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:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Change Password link, located under the Take Action heading on the Right Navigation bar.

Result: The Change Password screen appears.

See the screen sample below:

Note: If you wish to cancel this procedure at anytime, click the Cancel button.</td></tr>
<tr><td>2</td><td>Enter your old password in the Current Password field.</td></tr>
<tr><td>3</td><td>Enter your new password in the New Password field.</td></tr>
<tr><td>4</td><td>Re-enter your new password in the Confirm New Password field.

The password you create
• 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.</td></tr>
<tr><td>5</td><td>Click the Change Password button to change your password.
Note: If a mistake was made, you will receive the following error message:
Error in password update. Current password incorrect or new password one of past 12</td></tr>
</table>

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	Contact: • the office that set up your account, or • Business Intelligence Centre assistance at: **Local** 905-606-1264 **toll-free** 1-800-669-1936 ext. 61264 **e-mail** Src-Nationaloffice@rbc.com This office will: • verify your identity • reset your account if necessary, and • give you a temporary password. The temporary password will allow you to log on and change your password to one of your own choosing. **Available 8:00 am to 5:00 pm EST, Monday to Friday**
Haven't changed your password within 90 days (or have not used BIC within 90 days)	The system will • deny you access, and • prompt you to change your password. Once your password has been changed, you will be allowed access to the Business Intelligence Centre.
Enter an incorrect password three consecutive times	The system will: • deny you access, and • deactivate your account Contact: • the office that set up your account, or • Business Intelligence Centre assistance at: **Local** 905-606-1264 **toll-free** 1-800-669-1936 ext. 61264 **e-mail** Src-Nationaloffice@rbc.com This office will: • verify your identity • reset your account, and • give you a temporary password. The temporary password will allow you to log on and change your password to one of your own choosing.
Are having technical difficulties with the WorldProtect® system	contact the RBC Insurance Life Line (Help Desk) at • 905-606-1999, or • 1-800-669-1936 ext. 61999. **Available 8:30 am to 5:30 pm EST, Monday to Friday**.

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	(If required) Click the "**Français"** link, located at the top right hand of the page. **Result:** The application converts to French language See the screen sample below:

Note: When you convert to French language or vice versa, the application will automatically default to the Business Intelligence Centre homepage

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.

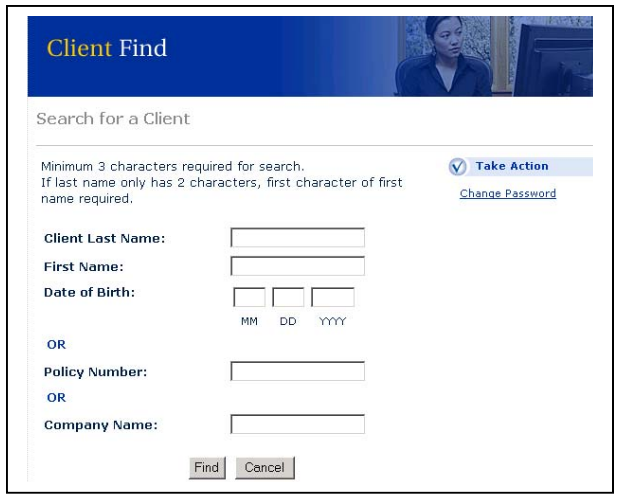
Client Find

Snapshot

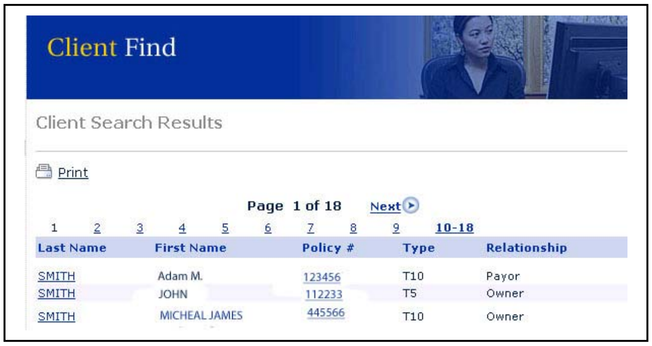
The **Client Find** feature allows you to view individual client records.

Viewing client information

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

Step	Action
1	Click the **Client Find** link, located on the **Left Navigation** bar. **Result:** The **Search For A Client** screen appears. See the screen sample below:  **Note:** If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the Business Intelligence Centre homepage.
2	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. **NOTE**: The **Company Name** field can be used for searching corporate owned policies.
3	Enter the client's last name in the **Last Name** field.
4	(Optional) Enter the client's first initial (of first name) in the **First Name** field. **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.
5	Click the **Find** button to begin the client search. **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. See screen sample on next page:

Continued on next page

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


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.
</td></tr>
<tr><td>6</td><td>
Select and click the appropriate **Client Name** link from the list provided.

Result: The **Client Details and Policies** screen appears, displaying detailed information for the selected client.

See the screen sample below:

</td></tr>
</table>

Continued on next page

Step	Action
7	(Optional) Select and click the appropriate **Policy Number** from the list provided. **Result:** The **Policy Details** screen appears, displaying detailed information for the selected client and policy. See the screen sample below:

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:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Policy Inquiry link, located on the Left Navigation bar.
Result: The Find a Policy screen appears.
See the screen samples below:

Note: If you wish to cancel this procedure at anytime, click the Cancel button. This returns you to the Business Intelligence Centre homepage.</td></tr>
<tr><td>2</td><td>Enter the policy number in the Policy Number field, located within the Policy Inquiry screen.</td></tr>
<tr><td>3</td><td>Click the Find button to begin the policy search.
Result: Detailed policy information is displayed for the selected policy.
See the screen sample below:

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.</td></tr>
</table>

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

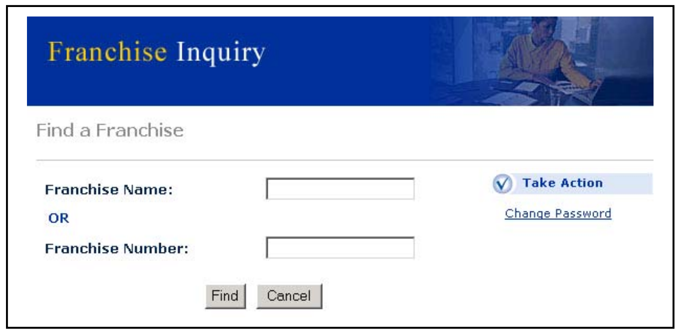
To view information for a specific franchise, follow the steps listed below:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click the **Franchise Inquiry** link, located on the **Left Navigation** bar.

Result: The **Find a Franchise** screen appears.

See the screen samples below:



Note: If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the **Business Intelligence Centre** homepage.

</td></tr>
<tr><td>2</td><td>

Search for a Franchise by **Franchise Name** – Enter the name of the Franchise being searched. Click **Find**

</td></tr>
<tr><td>a</td><td>

Result: Client Details and Policy screen appears

See the screen sample below:

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.

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.

</td></tr>
</table>

Franchise Inquiry, Cont…

Step	Action
b	Select the **Franchise Number** from the **Franchise Number** column Result: The **Franchise Policy Details** screen appears See screen sample below: 
c	Select a **Client Name**, or **Policy Number** from the list to view detailed client and policy information.
3	Or, search for a Franchise by **Franchise Number** – Enter the number of the Franchise being searched. **Click Find.** **Results:** The **Franchise Policy Details** screen appears. See screen sample below: 
b	Select a **Client Name**, or **Policy Number** from the list to view detailed client and policy information.

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.

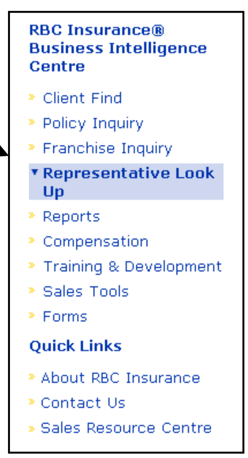
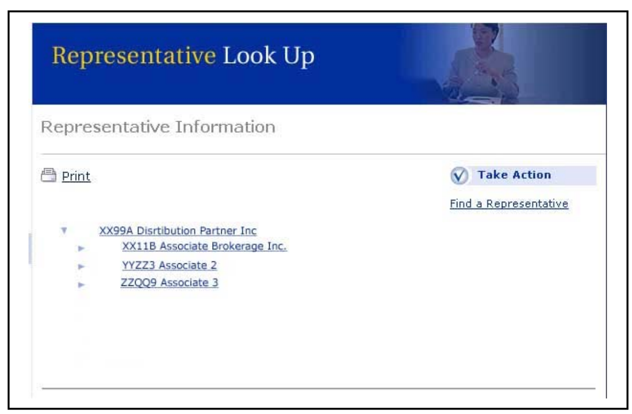
Navigating The Hierarchy

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	Click the **Representative Look Up** link, located on the **Left Navigation** bar. **Result:** The **Representative Information** screen appears. See the screen samples below:   **Note:** If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the Business Intelligence Centre homepage.
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 underlined name of any level to go to the connected **Representative Details** screen

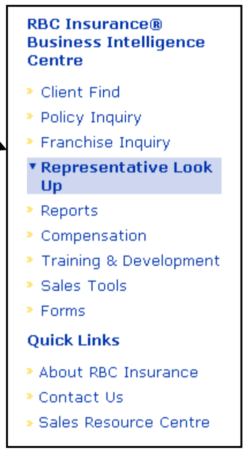
Navigating The Hierarchy Cont…

Step	Action
2.	Click on the underlined name of the desired level to open the corresponding **Representative Information** screen. The following information is shown: ▸ 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) See screen sample below: 
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	Click the **Representative Look Up** link, located on the **Left Navigation** bar. **Result:** The **Representative Information** screen appears. See the screen samples below:  
2	Click the **Find A Representative** link, located under **Take Action** on the **Right Navigation** bar. **Result:** The **Find A Representative** screen appears. See the screen samples below: 

Search For A Specific Representative Cont…

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Enter the representative's
• 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

within the Representative Look Up screen.

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.</td></tr>
<tr><td>4</td><td>(Optional)
Enter the representative's first initial (of first name) in the First Name field.

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.</td></tr>
<tr><td>5</td><td>Click the Find button to begin the representative search.

Result: An alphabetical list of the first 50 representative names meeting the search criteria is displayed.

See the screen sample below:

</td></tr>
<tr><td>6</td><td>Select and click the appropriate representative name from the list provided.

Result: The Representative Information screen appears, displaying detailed information for the selected representative.

See the screen sample below:

</td></tr>
</table>

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	Click the **New Business** link, located under **Reports** on the **Left Navigation** bar. **Result:** The **New Business Report** screen appears. **Note:** If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the Business Intelligence Centre homepage. See screen samples below:   **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.

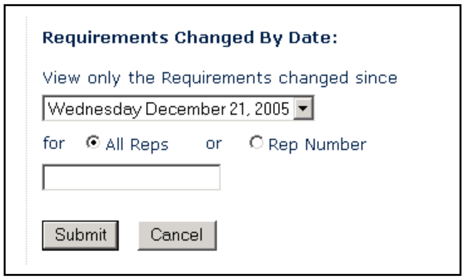
Viewing policy requirements

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

Step	Action
1	Click the **Requirements** link, located under **Reports** on the **Left Navigation** bar. **Result:** The **Requirements Report** search screen appears. **Note:** If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the Business Intelligence Centre homepage. See screen samples below: 
2	Select the requirements you wish to view. Section 1- **Outstanding Requirements Report**, Enter the representative number in the **Representative #** field, within the **Requirements Report** search screen. See screen sample below: 

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:



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:

Continued on the next page

Requirements Report, Cont…

Step	Action
4	Alternatively, you can access this feature through the **Representative Look Up** screen, also located on the **Left Navigation** bar. See the screen sample below:  **Note:** If you wish to cancel this procedure at anytime, click the **Cancel** button. This returns you to the Business Intelligence Centre homepage.
5	Enter the representative's • 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, within the **Representative Search** screen. **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.
6	(Optional) Enter the representative's first initial (of first name) in the **First Initial** field. **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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

Click the **Find** button to begin the representative search.

Result: The **Representative Information** screen appears displaying detailed information for the selected representative.

See the screen sample below:

</td></tr>
<tr><td>8</td><td>

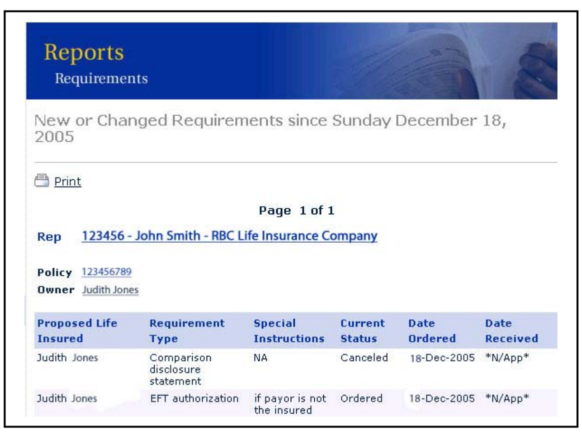
Click the **Outstanding Requirements** link, located under the **Representative Reports** heading.

Result: All policies (arranged numerically from highest to lowest policy number)

- that have outstanding requirements, and
- where the individual representative is listed as the *writing representative*

are displayed.

See the screen sample below:



Note: You can view requirements changed up to a maximum of 15 days.

</td></tr>
<tr><td>9</td><td>Click the policy number to view details for that specific policy.</td></tr>
</table>

Continued on next page

Compensation

Snapshot

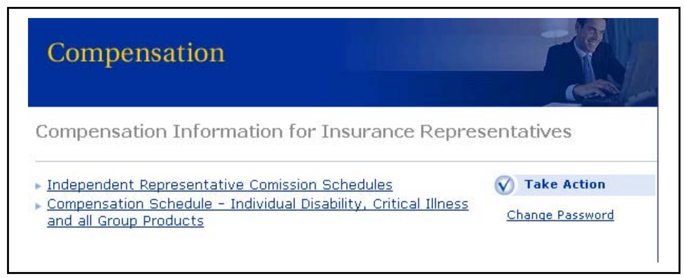
The **Compensation** link allows you to access detailed commission information for

- 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:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Click the Compensation link, located on the Left Navigation bar.
Result: The Compensation schedules appear, displaying specific commission information by product and by length of aging policy.
See the screen samples below:

</td></tr>
</table>

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	Click the **Training & Development** link, located on the **Left Navigation** bar. **Result:** The **Training & Development** listing appears, displaying specific training & development information as appropriate to you. See the screen sample below: 

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.

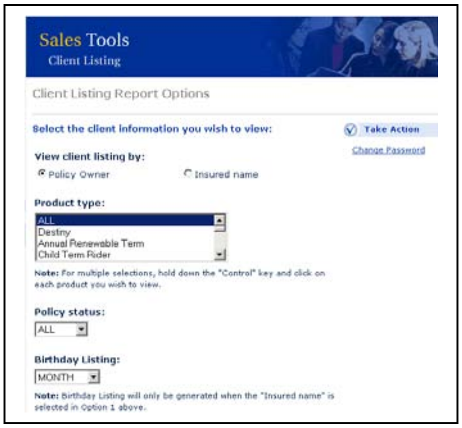
Accessing client listing

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

Step	Action
1	Click the **Client Listing** link, located under **Sales Tools** on the **Left Navigation** bar. **Result:** The **Client Listing** screen appears requesting the representative number of the clients you wish to view. See the screen samples below:   **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.
2	Enter the **Representative Number** you wish to view in the **Representative No#** field. **Result:** A search criteria is provided by • Policy Owner vs Insured Name • Product Type • Policy Status • Birthday **Note:** Only the products sold by the Representative will appear in the **Product Type** selection window See screen sample on next page:

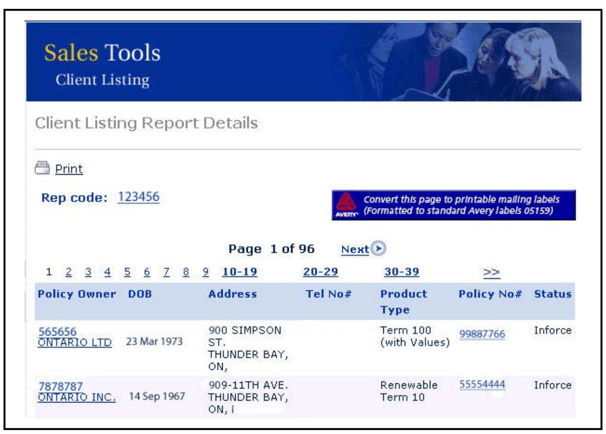
Continued on next page

Client Listing Cont…

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>3</td><td>
Select the criteria by which you want to view your clients, and click Submit

Result: The client listing details report for that Rep Code appears, providing the following information:
Name of Policy Owner or Insured
Date of Birth
Address of Policy Owner or Insured
Telephone Number
Products Sold
Policy Number
Policy Status

See screen sample below:


</td></tr>
<tr><td>4</td><td>Click the Rep code, Policy Number, or Policy Owner links to view more specific details about this client.</td></tr>
</table>

Continued on next page

Step	Action
5	(Optional) 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. Just click on this icon seen on the page  **Note:** This feature can only convert one client listing page at a time. If you have more that one page of clients, you will have to click the icon above for every page present.

Renewal / Expiry / Conversion

Accessing Renewal / Expiry / Conversion

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Renewal / Expiry / Conversion link, located under Sales Tools on the Left Navigation bar.

Result: The Policy Renewal / Expiry / Conversion screen appears requesting the representative number of the clients you wish to view.

See the screen samples below:


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.</td></tr>
<tr><td>2</td><td>Enter the Representative Number you wish to view in the Representative No# field.

Result: Any policy that is up for renewal, expiry, or conversion within the next 6 months will appear.

See screen sample below:


</td></tr>
</table>

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	(Optional) Once your renewal / expiry / conversion listing has been generated, you can convert that listing into a PDF document of already formatted mailing labels. Just click on this icon seen on the page  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.

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

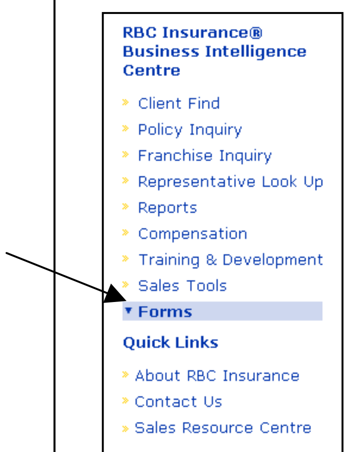
To access this information, follow the steps listed below:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click the **Forms** link, located on the **Left Navigation** bar.

Result: The **Contracting Tools** listing appears, displaying the required documents needed to write business with RBC Life Insurance Company

See the screen samples below:



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**.

</td></tr>
</table>

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	Click the **About RBC Insurance** link, located on the **Left Navigation** bar. **Result:** The **About RBC Insurance** page appears, displaying detailed company information on life and non-life products, and fee and related activities. See the screen sample below:

Contact Us

Snapshot

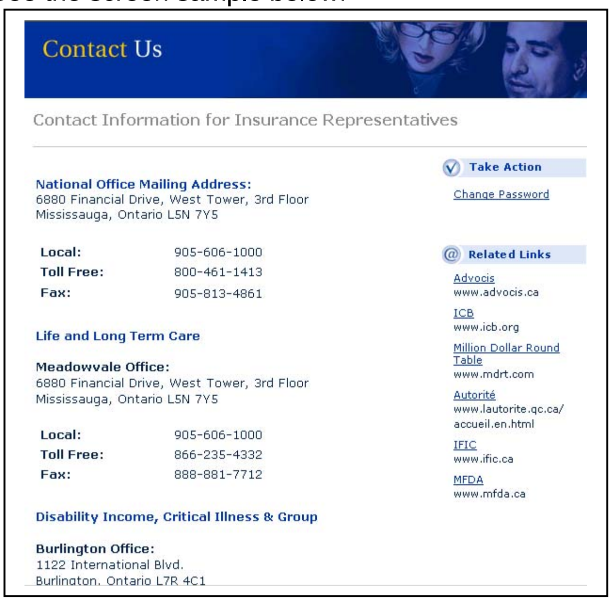
The **Contact Us** link allows you to access detailed contact information about RBC Life Insurance Company regional offices.

Accessing Contact Us

To access this information, follow the steps listed below:

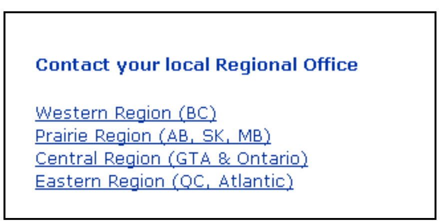
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Click the Contact Us link, located on the Left Navigation bar.

Result: The Contact Information for Insurance Representatives general listing appears, displaying specific contact information as appropriate to you.

See the screen sample below:


</td></tr>
<tr><td>2</td><td>
To locate the appropriate regional office, click on the corresponding link at the bottom of this page.

Result: The detailed contact information for the selected office is displayed.

See screen sample below


</td></tr>
</table>