

SWISS LIFE NETWORK PLATFORM
FOR YOUR INFORMATION AND OUR COLLABORATION

Dashboard Guide

Login to EB-Life

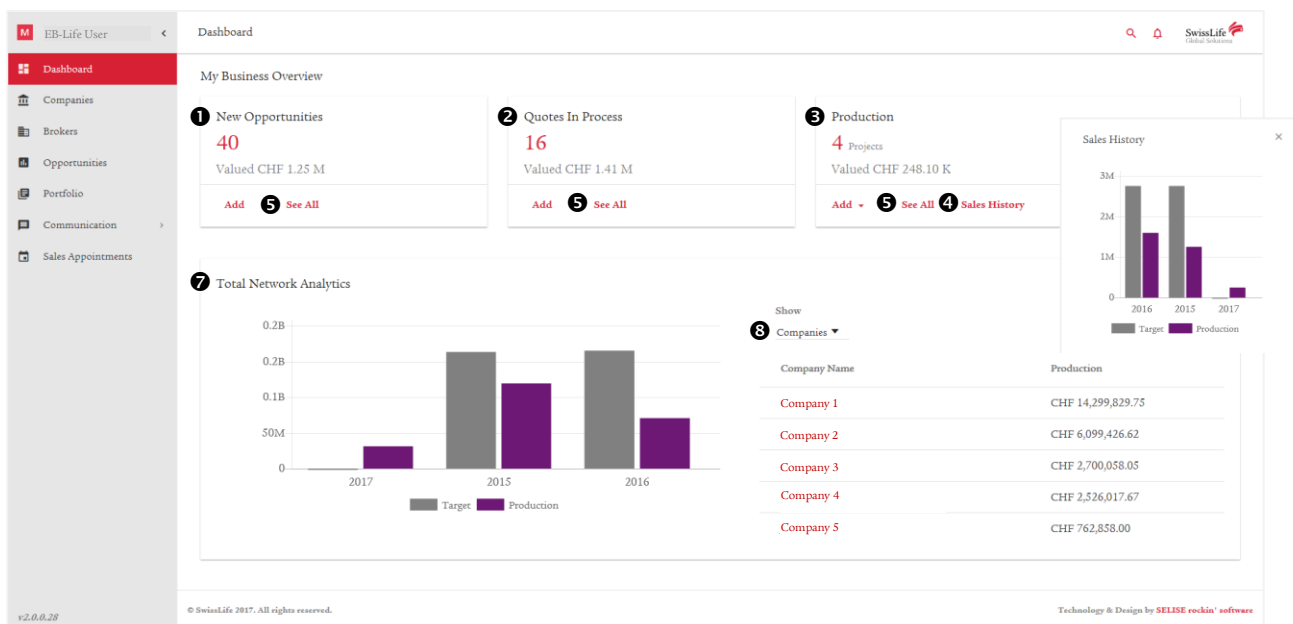
Connect on <https://www.swisslifecorporateclients.com> (Google Chrome recommended) and login with your Email, your Password and the Activation Code sent by sms.

➔ If you do not have access to *EB-Life*, please fill in the form on <http://www.swisslife-global.com/online-services/EB-Life/EB-Life-request.html>.

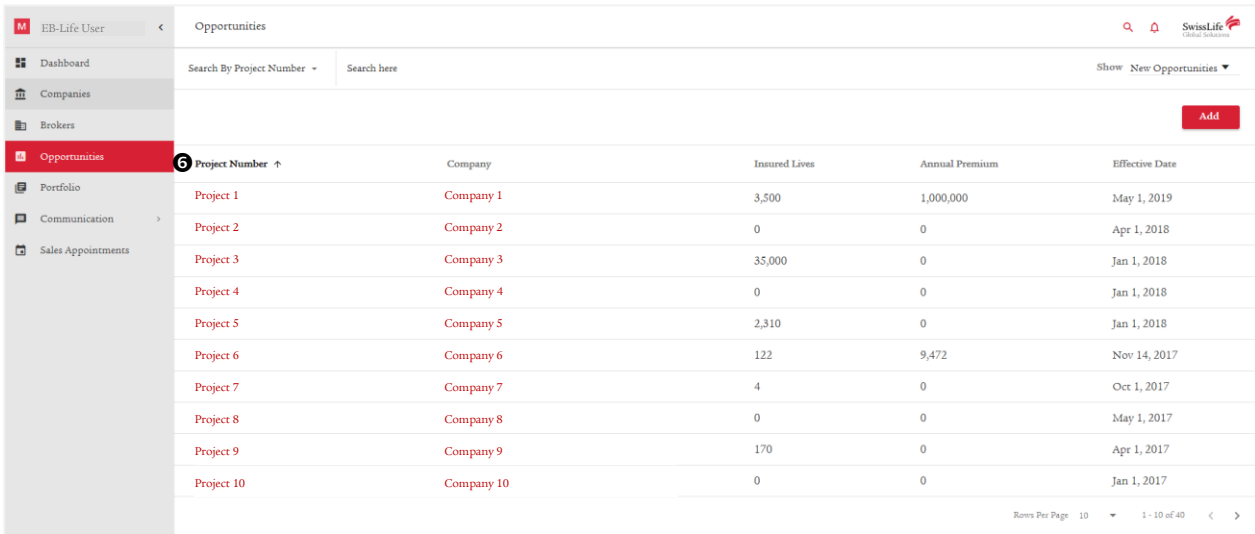
➔ If your access is denied or if you face login problems, please contact us via employeebenefits@swisslife.com.

Personal Sales Overview

The 3 boxes in the top half of the Dashboard give you an overview of your current sales activities:



- ➊ <New Opportunities> indicates the overall number of opportunities for which no quote is issued yet.
- ➋ <Quotes In Process> shows the overall number of open quotes and the related potential new business volume.
- ➌ <Production> shows the total number of new contracts concluded in the current year.
- ➍ Click on <Sales History> to see the respective target achievement.
- ➎ Click on <See All> to easily access the full list of opportunities, quotes or concluded contracts.



Project Number	Company	Insured Lives	Annual Premium	Effective Date
Project 1	Company 1	3,500	1,000,000	May 1, 2019
Project 2	Company 2	0	0	Apr 1, 2018
Project 3	Company 3	35,000	0	Jan 1, 2018
Project 4	Company 4	0	0	Jan 1, 2018
Project 5	Company 5	2,310	0	Jan 1, 2018
Project 6	Company 6	122	9,472	Nov 14, 2017
Project 7	Company 7	4	0	Oct 1, 2017
Project 8	Company 8	0	0	May 1, 2017
Project 9	Company 9	170	0	Apr 1, 2017
Project 10	Company 10	0	0	Jan 1, 2017

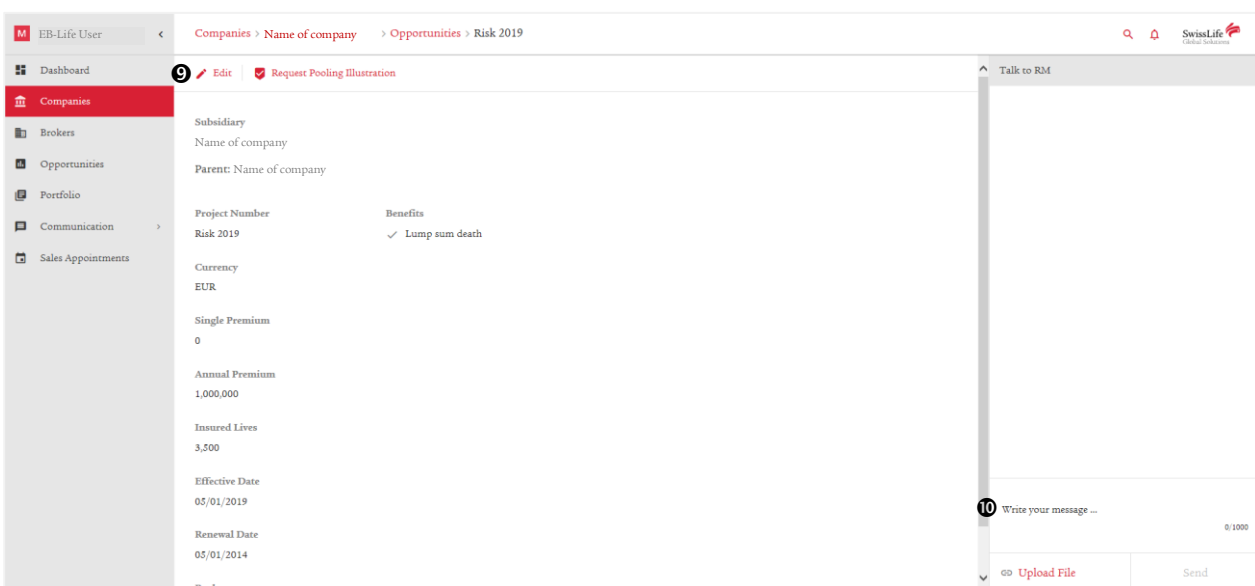
6 Click on a <Project Number> to see the details of a specific project. It then allows you to start instantly communicating, following-up and exchanging information with the Relationship Manager at Swiss Life Network in a convenient and structured way (see hereunder).

Activities in Swiss Life Network

- 7 The section <Total Network Analytics> shows the overall production of all Network Partners within Swiss Life Network since the last two years.
- 8 The drop-down-menu on the right allows selecting the best performers of the year from Multinational Companies, Network Partners and Brokers. Click on the respective names to view more details and relevant information.

Communication and updates

Communication and updates about specific projects can be done two ways:



9 Click on <Edit> to start communicating with the dedicated Relationship Manager at Swiss Life Network or to modify the information of a current opportunity, quote or contract. Once all mandatory fields are complete and a message is entered, the <Update> button is active and you can submit the information to Swiss Life Network.

In this way, you can easily submit information such as updates of contract number, number of lives insured, etc. but also inform us if a quote has been issued within the framework of an existing opportunity.

- ⑩ Use the <Write your message...> section to give an update, inform Swiss Life Network whether a quote was successfully concluded (or lost) or ask for support. Click on <Upload File> to add an attachment and on <Send> to submit your message to the respective Relationship Manager at Swiss Life Network.

In both ways, all such communication with the respective Relationship Manager at Swiss Life Network is always accessible on the left side of the respective project for your further reference.

Important notice

Privacy and confidentiality of all your data is guaranteed. All of your information submitted via *EB-Life* cannot be viewed by any other Network Partner than you. Any of your local contracts, quotations and opportunities and its related information can only be seen by you.