

SWISS LIFE NETWORK PLATFORM
FOR YOUR INFORMATION AND OUR COLLABORATION

Allocation of responsibilities for multinational companies and business cases

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 at employeebenefits@swisslife.com.

Manager Role

As a *Standard user*, you can:

- access the contracts which are assigned to you in the <Portfolio> or in the <Opportunities> sections.
- see the respective local contracts and opportunities on the company profile of a multinational company.

If you want to see further details, you need to contact the dedicated assigned person.

As a *Manager user*, you can:

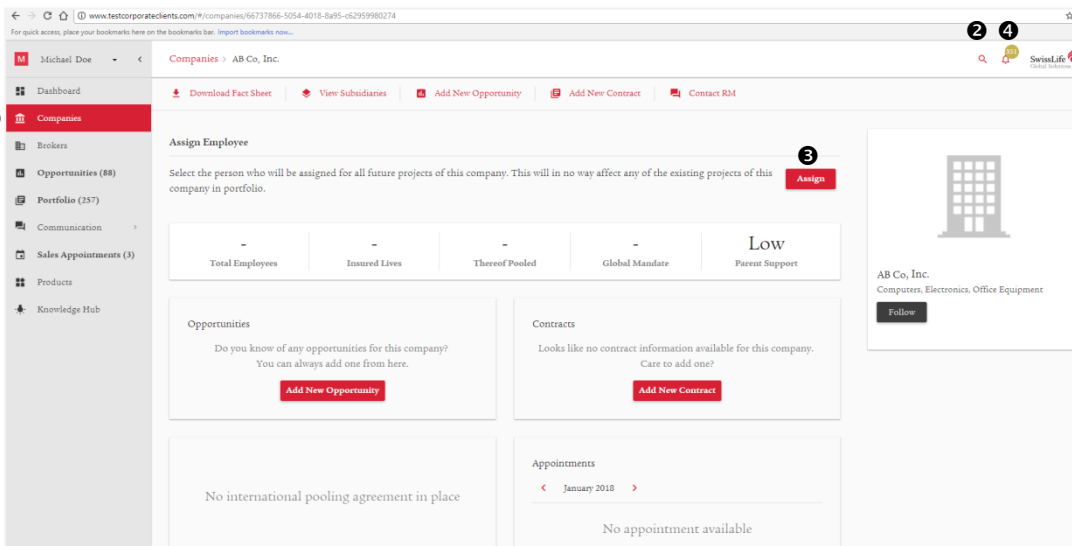
- see and access the full range of local contracts opportunities as well as contracts of all companies of the respective Network Partner.
- allocate either multinational companies overall or specific local contracts to members of your team dealing with cases in the context of the cooperation with Swiss Life Network.

This role is only granted to one person at each Network Partner.

Please contact employeebenefits@swisslife.com if you are not sure whether you are allocated as a manager or if you want to allocate someone else.

Allocating multinational companies to an employee of your team

In the <Companies> tab **1**, click on the respective multinational company - or alternatively search for it via the <Search> tool **2** - then click on the <Assign> button **3** and select the team member you want to allocate to this headquarters. He/she will be informed via email about this assignment.



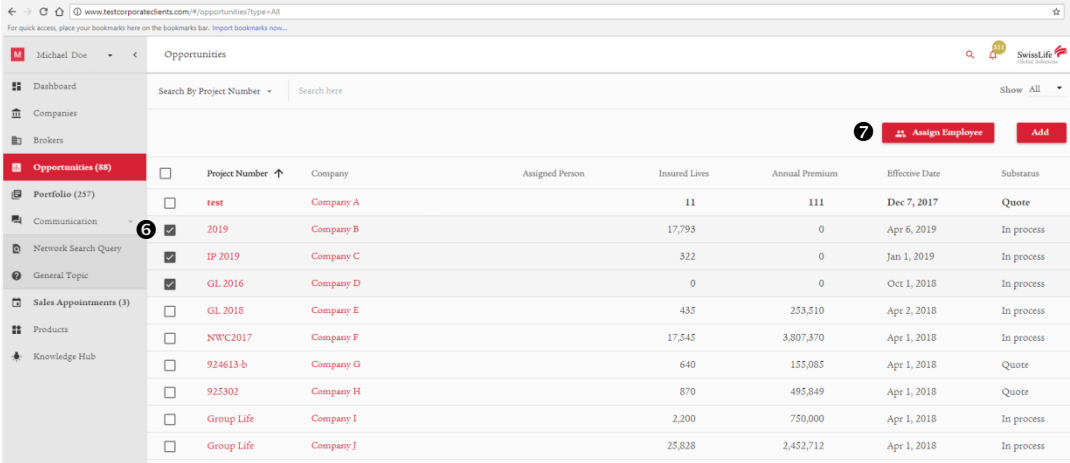
The screenshot displays the EB-Life web application interface. The browser address bar shows the URL: www.testcorporateclients.com/#/companies/66737866-5054-4018-4a85-c62959980274. The user is logged in as Michael Doe. The main navigation menu on the left includes: Dashboard, Companies (selected), Brokers, Opportunities (88), Portfolio (257), Communication, Sales Appointments (3), Products, and Knowledge Hub. The 'Companies' section is active, showing a list of companies with columns for Total Employees, Insured Lives, Thereof Pooled, Global Mandate, and Parent Support. The 'Assign Employee' form is visible, with a red 'Assign' button. Below the form, there are sections for 'Opportunities' (with an 'Add New Opportunity' button), 'Contracts' (with an 'Add New Contract' button), and 'Appointments' (showing 'No appointment available'). A search icon (2) and a filter icon (4) are visible in the top right corner. A building icon represents the company profile for AB Co, Inc. (Computers, Electronics, Office Equipment) with a 'Follow' button.

New opportunities, quotes and contracts related to this headquarters will now be automatically allocated to this person, who will also always be notified about any new or modified local projects for this specific multinational company via the <Notifications> center **4**.

Note that all previously registered opportunities and contracts remain with the previously assigned person. In order to allocate these existing opportunities and contracts to the new assigned person as well, please refer to the following paragraph.

Allocating specific local contracts or opportunities to an employee of your team

In the <Opportunities> and <Portfolio> tabs **5**, you can assign a single or multiple existing projects and opportunities to persons within your team. Tick the boxes **6** in front of the respective projects, then click on the <Assign Employee> button **7** and select the team member you want to allocate to these projects. He/she will be informed via email about this assignment.



Project Number	Company	Assigned Person	Insured Lives	Annual Premium	Effective Date	Substatus
<input type="checkbox"/> test	Company A		11	111	Dec 7, 2017	Quote
<input checked="" type="checkbox"/> 2019	Company B		17,793	0	Apr 6, 2019	In process
<input checked="" type="checkbox"/> IP 2019	Company C		322	0	Jan 1, 2019	In process
<input checked="" type="checkbox"/> GL 2016	Company D		0	0	Oct 1, 2018	In process
<input type="checkbox"/> GL 2018	Company E		435	253,510	Apr 2, 2018	In process
<input type="checkbox"/> NWC2017	Company F		17,545	3,807,370	Apr 1, 2018	In process
<input type="checkbox"/> 924613-b	Company G		640	155,085	Apr 1, 2018	Quote
<input type="checkbox"/> 925302	Company H		870	495,849	Apr 1, 2018	Quote
<input type="checkbox"/> Group Life	Company I		2,200	750,000	Apr 1, 2018	In process
<input type="checkbox"/> Group Life	Company J		25,828	2,452,712	Apr 1, 2018	In process

The newly assigned person will also always be notified about any new or modified local projects for this specific multinational company via the <Notifications> center.

Support

If you have questions or need further assistance, please contact us at employeebenefits@swisslife.com.

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.