

SWISS LIFE NETWORK PLATFORM  
FOR YOUR INFORMATION AND OUR COLLABORATION

## Registering and following up on opportunities (quotes)

### Login to EB-Life

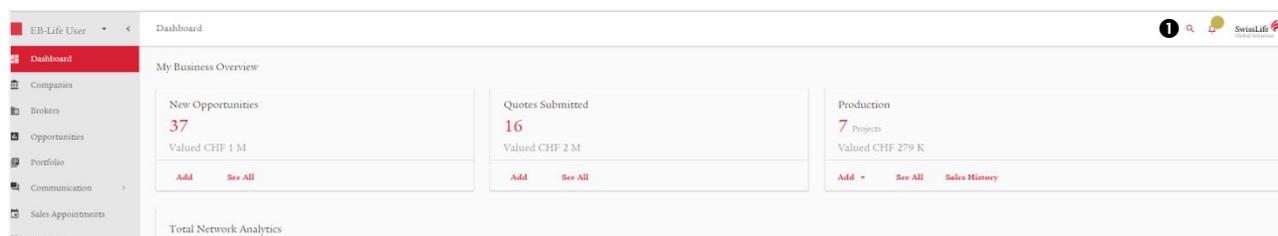
Connect on <https://www.swisslifecorporateclients.com> (Google Chrome recommended) and login with your Email, your Password and the Activation Code sent by sms.

- ➔ 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](mailto:employeebenefits@swisslife.com).

### Finding multinational company

In order to register a new opportunity (quote) for a multinational company existing in your local market, please search for the respective multinational company.

- 1 On the Dashboard page, press the <Search> button on the top right corner. Enter the name of a multinational company in the search field and press <Enter>.

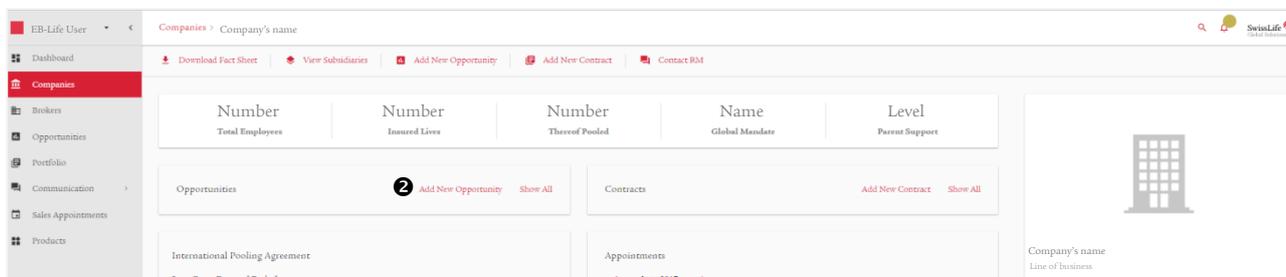


The screenshot shows the 'Dashboard' page for an 'EB-Life User'. The main content area is titled 'My Business Overview' and contains three summary cards: 'New Opportunities' (37, Valued CHF 1 M), 'Quotes Submitted' (16, Valued CHF 2 M), and 'Production' (7 Projects, Valued CHF 279 K). Each card has 'Add' and 'See All' buttons. Below these is a section for 'Total Network Analytics'. The left sidebar contains navigation options: Dashboard, Companies, Brokers, Opportunities, Portfolio, Communication, Sales Appointments, and Products. The top right corner has a search icon, a notification bell, and the SwissLife logo.

Choose the company name out of the suggestions and you will end on the profile of the corresponding multinational company where you can see among other information at a glance all the existing contracts in force as well as already registered opportunity (quotes).

### Registering a new opportunity (quote)

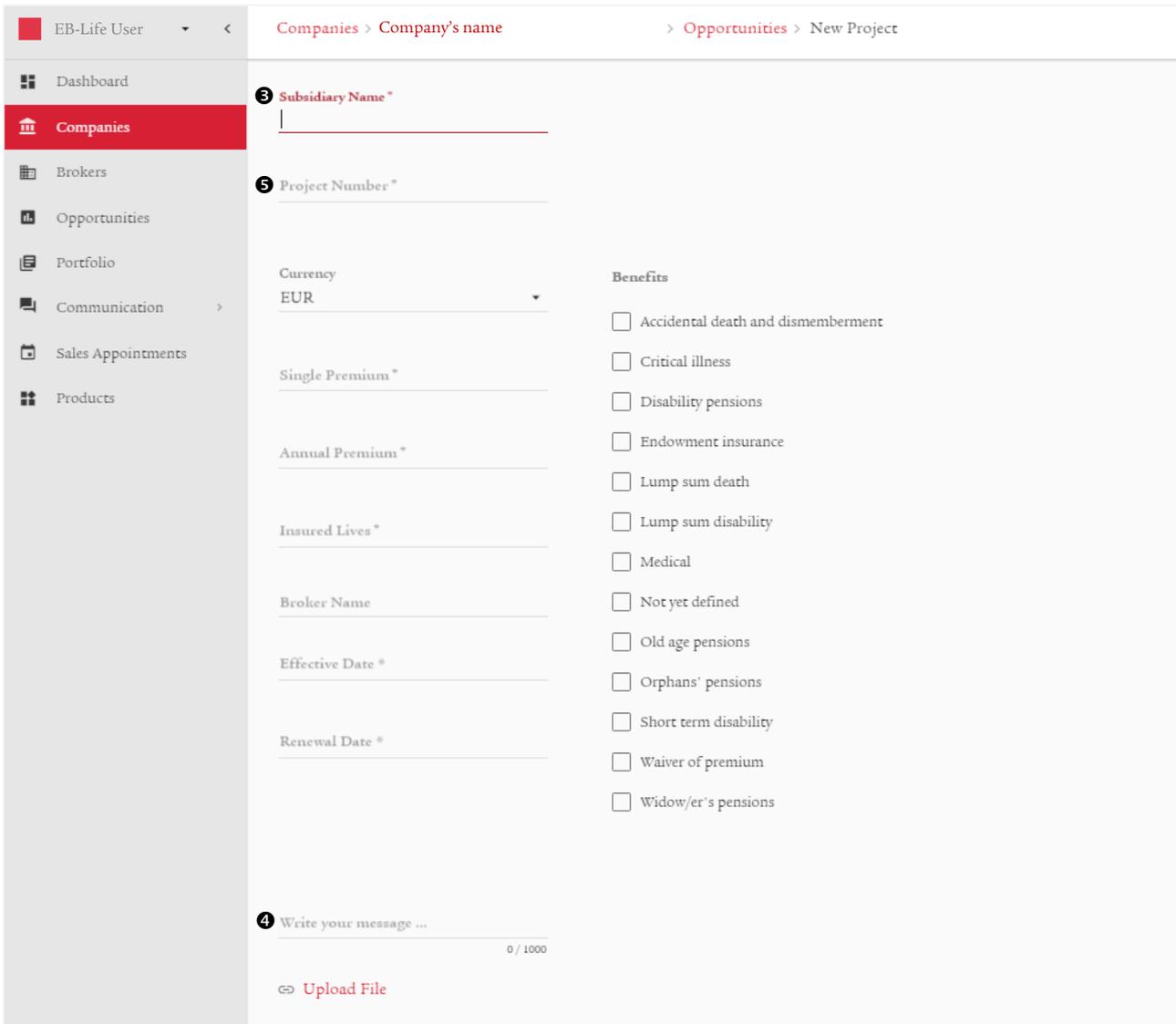
- 2 Click on <Add New Opportunity> to register a new opportunity.



The screenshot shows the 'Companies' profile page for a specific company. The top navigation bar includes 'Download Fact Sheet', 'View Subsidiaries', 'Add New Opportunity', 'Add New Contract', and 'Contact RM'. The main content area is divided into several sections: 'Number' (Total Employees, Insured Lives, Thereof Pooled), 'Name' (Global Mandate), and 'Level' (Parent Support). Below these are sections for 'Opportunities' (with an 'Add New Opportunity' button and 'Show All' link), 'Contracts' (with an 'Add New Contract' button and 'Show All' link), and 'Appointments' (with a date selector for June 2017). The bottom right corner shows the company name and line of business. The left sidebar is identical to the dashboard screenshot.

In the form, please fill information in all the mandatory fields.

- ③ In the <Subsidiary Name> field, select an entry from the dropdown-list. If you don't find the subsidiary name in this list, please select any subsidiary from the dropdown-list and then specify the correct subsidiary name in the <Write your message> section at the bottom of the screen ④.
- ⑤ In the <Project Number> field, please describe the benefit, i.e. life or medical. This field is not mandatory.



For the rest of the fields kindly note that all the information **is mandatory** and at least one benefit must be flagged from the options. If you don't know the exact numbers or information, please provide a rough estimation or assumption.

For the <Broker Name> field, please select one from the dropdown-list or leave it blank.

Please feel free to add any additional information in the message section which might be of added value (e.g. quotation already issued).

### Submitting the request to Swiss Life

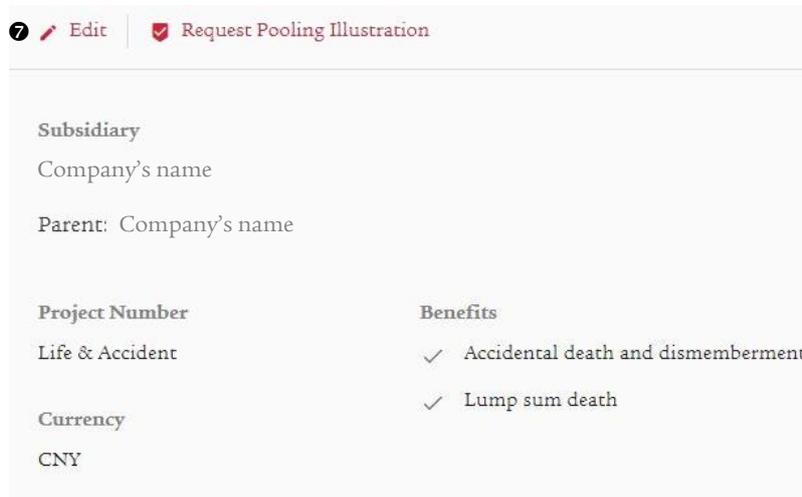
- 6 Click on <Create> to submit the opportunity (quote) to Swiss Life.

Please note that the <Create> button only becomes active after all mandatory fields have been populated and a message has been registered in the message-box.

### Following up on existing opportunities and quotes

To let Swiss Life know or to ask about developments of an already registered opportunity or quote, search for the respective multinational company as described above. Instead of registering a new opportunity, please click on the respective existing one in the <Opportunities> section of the multinational company's profile.

- 7 Click on the <Edit> button, do any necessary adjustments and enter a message. Swiss Life will be notified after clicking the <Update> button.



The screenshot shows a form titled "Request Pooling Illustration" with an "Edit" button. The form contains the following fields:

- Subsidiary**
  - Company's name
  - Parent: Company's name
- Project Number**
  - Life & Accident
- Currency**
  - CNY
- Benefits**
  - Accidental death and dismemberment
  - Lump sum death

### 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.