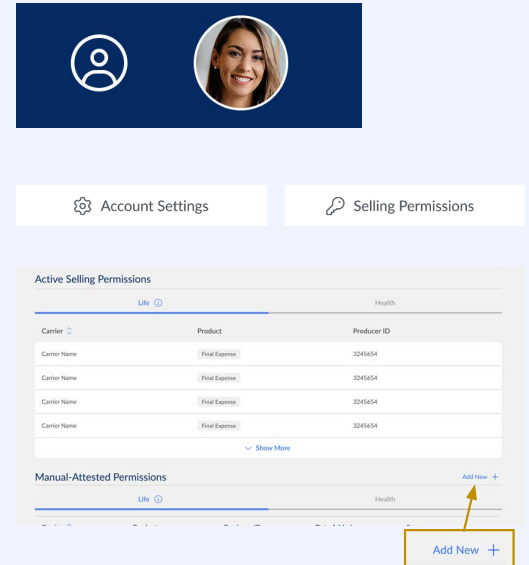


Get started with IntegrityCONNECT in two easy steps! If you need help, click the Live Chat button at the bottom right of your screen.

Step 1: Confirm Your Appointed Carrier List

1. Click your **Profile Icon** in the top-right corner.
2. Click **Account**, then choose **Selling Permissions**. Review the list of carriers and products added to your **Active Selling Permissions**. Is something missing?
3. If yes, click **Add New +** in the **Manual-Attested Permissions** section.
4. Select the **Carrier** and **Product**, type in your **Producer ID**, then click **Save**.
5. Now it will show up in your Manual-Attested Permissions and when you run a quote!



Carrier	Product	Producer ID
Carrier Name	Final Expense	3245654
Carrier Name	Final Expense	3245654
Carrier Name	Final Expense	3245654
Carrier Name	Final Expense	3245654

Manual-Attested Permissions

Carrier: Carrier Name, Product: Chip, Producer ID: 1135669

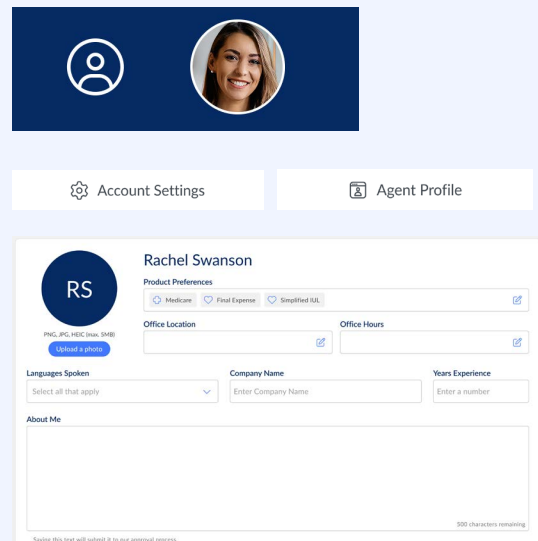
Buttons: Cancel, Save

Step 2: Your Personalized Agent Website

IntegrityCONNECT lets you personalize your Personal Agent Website by adding helpful information!

Personalize your Profile:

1. Click your **Profile Icon** in the top-right corner.
2. Click **Account**, then **Agent Profile**.
3. Click the **Edit Icon** in **Product Preferences** to select **Life** and/or **Health** product(s) — this will determine the brand and products available to you and your clients.
4. Upload a professional photo and fill in your details, such as office location, office hours, languages spoken, company name, years of experience, and about me, then click **Save**.
5. Check the **Submission Guidelines** to make sure your profile is compliant.



Rachel Swanson

Product Preferences: Life, Health, Final Expense, Simplified UL

Office Location: [Text Field]

Office Hours: [Text Field]

Languages Spoken: [Dropdown Menu]

Company Name: [Text Field]

Years Experience: [Text Field]

About Me: [Text Area]

300 characters remaining

Share your Website:

1. Scroll to the **Agent Website Link** section.
2. Click **Copy Link** and paste it into an email, social media, text message or other marketing materials to send it to prospects and clients.

Share your Personal Agent Phone Number:

1. Scroll down to the **Agent Phone Number** section.
2. Copy the phone number and paste it into an email, social media, text message or other marketing materials.
3. This phone number will be displayed on your Personal Agent Website.

Send Business Calls to your Cell Phone:

- Go to **Availability Preferences** on the right side.
- Click **Edit** in the **Forward Calls To** section, type the phone number in that you want to forward your calls to, then click **Save**.

You're all set to start using IntegrityCONNECT!

Agent Website Link

Send your personalized link to clients so they can get quotes and enroll in plans online. Don't worry, you will get the credit for these enrollments.

<https://www.planenroll.com/Rachel-Swanson-1>

Copy Link

Personalized links now use your name. If you have a previous link, don't worry, it still works.

Agent Phone Number

This phone number can be given to clients for them to contact you directly. It will be forwarded to the number found in your Availability Preferences.

888-555-5555

This phone number will appear on your agent page and agent website link.

Availability Preferences

Calls to your Agent Phone Number will be forwarded to the number below.

Forward Calls to:

Edit

435-555-8989

Lead Source



Health

Set Up

Include LeadCENTER Health Leads when "I'm Available."



Life

Configure

Include LeadCENTER Life Leads when "I'm Available."



PlanEnroll Agent Site

Show on PlanEnroll Agent website when "I'm Available."

