

## Getting started – Quick tips

New Business Now allows you to do business your way – anywhere, anytime – with tailored preferences. Whether you use web, paper or tele-applications, you receive timely email status updates on your tablet, mobile phone or computer. You choose who receives communications, when they're delivered (daily, weekly – or both) and how medical evidence is ordered. It's a better way to do new business.

### Access New Business Now insurance application

#### When the system is live:

1. Sign in to Canada Life *RepNet*™
2. From the left navigation panel select the link to **New Business Now insurance application** under **Online services**.

New Business Now insurance application will open in English or French based on the language of your *RepNet* session.

### Set preferences

Setting preferences helps you take advantage of the key benefits of New Business Now whether you use web or paper applications.

#### To set preferences when New Business Now is live:

1. Go to the New Business Now insurance application **Home** page and select **Preferences**.
2. Choose **Advisor settings** for language, medical evidence and cross-sell.
3. Then choose **Notifications** to select when and to whom email updates are sent.

#### Tips

- Incomplete information will be indicated by a red box and red text. This mandatory information must be completed to continue.

#### Advisor settings

- For cross-sell offer(s) select **Yes** if you wish to view these for clients (instant decision cases only). If **No** is selected or if no selection is made, cross-sell offer(s) won't be shown for all web apps.
- Add as many advisors as required for splitting commissions. For case-by-case commission splitting, delegates should be indicated within each application.

#### Notifications

- You can choose multiple email addresses for weekly and/or daily status updates. Indicate the email address of the preferred individual(s) to whom you want updates sent (advisor or a delegate), then add other email addresses as needed.
- The **insurance application summary** generated by web app can only be sent to one email address. Select the appropriate box to assign the email entered as your preferred address. If the application has multiple policies a separate summary will be sent for each policy.

## Search for pending applications

Use the search function for saved web apps or for all applications submitted to underwriting.

1. Choose **Search Application** from the New Business Now **Home** page.
2. Select from the two search choices: **Applications not submitted** (web apps only) and **Submitted pending applications**.
3. Use the drop down menu to search by one of the five search criteria or select **ALL** to view all pending applications. Then select **Go**.
4. To access a web app PDF for a pending application, select **Submitted pending applications**. Select the **Full app** PDF file and save it to a secure location. The PDF will be removed from web app when the policy(ies) are placed. A PDF is not available for paper applications.

## For more information\*

### Courses available:

- Getting started – New Business Now insurance application
- Web application - New Business Now
- Paper application - New Business Now
- Processing new insurance - New Business Now

### Resources:

- Guide to processing new individual insurance business (46-9355)
- Questions and answers

\* CL-NBN.com

With New Business Now, leverage leading-edge technology and enhanced communications to get information on insurance applications and respond to requirements faster. New Business Now. It's a better way to do new business.