

New Business Now

Submitted by Josh on July 14, 2014 - 9:33am

Verify and set your preferences



New Business Now ? verify and set your preferences

Please log into the system to review and/or set your notification preferences and advisor settings.

New Business Now has now gone live. During this exciting time, if you have set your notification preferences, please confirm they're accurate. Thank you to those who have already set your preferences under **New Business Now**.

Notification preferences

Setting your notification preferences allows you to receive instant updates on the status of your insurance applications ? just the way you want them. If you have not already done so, please log into the system to set your preferences.

Note: The notification preferences form you may have completed before July 14 was static and independent of **New Business Now**. If you experienced any challenges while signing up, those same issues won't occur when using **New Business Now**.

Here are some helpful tips:

- When signing up for notification preferences, what's most important is you sign into **New Business Now** under your own Canada Life RepNet? ID.
- You won't receive an email confirmation after you submit your preferences; ensure your email and your commission codes are accurate. You can login at any time to confirm or change your information.
- Do you submit business under another advisor's commission code? You're encouraged to enter your commission code first, even if you don't submit business under that code, and then enter any other codes you use to submit business.

Advisor settings

To aid in the speedy entry and processing of your new business applications, take the time now to complete your advisor settings. The default settings are as follows:

- Language ? defaults to the language of the Internet browser used to access **New Business Now**
- Province ? defaults to ?Select? ? user will need to set their appropriate province on first screen of the web application

- Evidence order ? defaults to ?Insurance carrier? **? it?s important to note that Canada Life will order the evidence for you.** If you want to order your own evidence, you must select ?Advisor orders?
- Cross-sell ? defaults to ?No cross sell offer will be presented?
- Advisor commission code ? defaults to blank ? a code needs to be entered (within advisor report screen on web app) in order for app to be submitted

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