



INSURANCE

CHEAT SHEET

EVO INSURANCE ON THE WEB

Streamlining Insurance

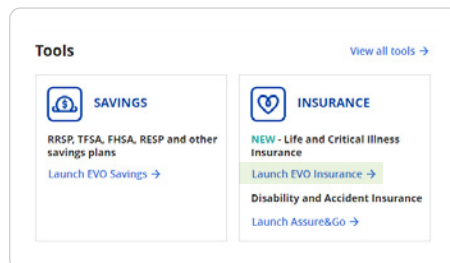


First login experience

1. Launch the new version from the Advisor Centre

In the **Tools** section of the home page, click on the **Launch EVO Insurance** link.

If the Advisor Centre is unavailable and you've saved the link to the web version in your favourites, you can use it to access the platform. If that doesn't work, contact our support team at 1-888-610-5101 or at interface@ia.ca.



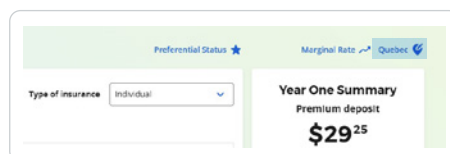
2. Once you're logged in, use the virtual guide

to help you as you explore the new platform.

3. Select the same parameters (default values) as the ones used in the downloadable version (province, commission rates, default advisor information, etc.).

4. To change the province in a sales application, click the geolocation icon located at the top right of your screen.

To set a default province, go to the **Illustrations Configuration** section in the **Settings** menu.



Good news! When you submit a sales application in the web version of EVO Insurance, you will be redirected to the home page, where you can track the status of your application. You no longer have to wait for the transmission to be completed before performing other actions on the platform.

EVO
Experience driven

Refer to the Need Help page
in the Advisor Centre as needed.

Watch our [three demo videos](#): create an illustration, complete an electronic application and submit with an electronic signature.

5. Be sure to finalize your sales applications in the downloadable version when you get the chance.

In a few weeks, you won't be able to submit applications in this version. However, applications that were created in the downloadable version will remain available for consultation for a period of one year.

INVESTED IN YOU.

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