

Hi Agent,

We may have met previously as this is my automated message. If we have not met, let me introduce myself. I am Michelle your local dedicated tech for NYL South Florida who is here to guide you through what you need to do to get NYL technology set up on all your devices and become compliant with NYL requirements.

Please schedule a time for getting all your initial technology needs addressed in our South Florida new agents group technology class .

It is approximately 1 ½ hours depending on how quickly attendees can keep up. It is held 3 days a week in-person and simultaneously broadcast in Zoom. It would be best if you could attend one of the in-person sessions. **You must sign up via the link for the date you want to attend because if I am out of the office and you did not sign up, I have no way to notify you.** Use the link below to schedule a time.

****Please note the recent time change of Wednesday's meeting in the event you were told the old information it will be at 10:45 AM****

Day	Time and location (Links take you to floor plan to locate the room)	Link to schedule below
Tuesday	Miami 12:15 conference room 3	https://calendly.com/mleeman/ptas
Wednesday	Palm Beach 10:45 conference room 4	
Friday	Sunrise 10:00 conference room 2	

Prerequisites that must be completed before the class:

1. If you have not registered **PingID and HYPR** please call help desk to complete **before the class** otherwise you may not be able to finish the class agenda. Register first time login PingID and HYPR: 888.569.5433 option 1 (excluding national holidays). *Note: you must have HYPR configured on your phone to set up the mobile apps. (you can complete all together using the yellow highlighted link below)
2. If you have not registered **Intune**, please select a time here to complete **before the class** otherwise you may not be able to finish the class agenda. Register Intune: <https://outlook.office.com/book/IntuneAppointments@newyorklife.onmicrosoft.com/?ismsaljsauthenabed>

- **Bring all your devices and charging cables to class.**
- **Please do not be late to the class as it progresses and if you miss the first part you will not be able to complete the last part.**
- **Besides my assistance, there is also available a New York Life Technical Support help desk: 888.569.5433 (24/7, excluding holidays).**
For SalesCentral, choose option 5 for the digital desk. For eapp support choose option 4. For most other things, option 1.
- **Prerequisites for Class:**
 - **First time portal logon completed with PingID and HYPR activated:** Visit to start setup with your temporary password. Your portal ID will not include the @ft.newyorklife.com <https://www.today.newyorklife.com/agencyportal>

For questions and assistance with this process agents and agent staff should contact the Agent Help Desk at 1-888-569-5433, option #1.

You can also request an appointment through Calendly for assistance setting up PingID and HYPR mobile

apps: <https://outlook.office.com/book/NewAgentOnboarding@NewYorkLife.onmicrosoft.com/?ismsaljsauthenabled>

- **Sales Central, promote a consumer to a prospect** so we can access a Relationship record in Sales Central for Revver setup. If you have none, make a test case consumer record and promote it to a prospect so they will appear in your relationships database. Demo/How to video to promote consumer to prospect/relationship: https://nylview.mediaspace.kaltura.com/media/1_rerotm2b

- **Know your Apple/ Google ID and password so that if the app store needs your password to download the apps you will be successful.**
- **For the class, please have the following with you:**
 - **All your technology devices, phones, tablets, computers**
 - **All your charging cables for devices**
 - **Your portal ID and passwordless method configured (HYPR App)**

Please provide me the following info ASAP so I can have your signature ready for the class. If it is not ready in time, we can complete in a follow up 1 on 1 meeting. Reply to this message and fill in the 2nd column.

Personalized photos for signatures are only available after trigger and photo uploaded to agent profile page.

For your email signature, please reply and provide the information below. Please let me know if you are securities registered (Series 6,7, etc.)

- Please Provide the following fields that are not filled in.
- If it does not apply to you, leave it blank.
- Do not alter the field names.
- Enter the information in proper case and spelling as it will be automatically merged with the template exactly how it is written.
- URL Means website address. Pay attention 1 does not want the https:// while the others must include https:// in the URL.

Field	Data  (Fill in your information in this column)	Instructions
Full Name:		
Agent Title:	Financial Professional	This must not change
Company:	New York Life Insurance Company	This must not change
CA or AR License Line:		Leave blank if this does not pertain to you . ONLY for California or Arkansas, otherwise

		leave blank. If you are licensed for life insurance in the state of California or Arkansas please include the state issued license# and state.
Mailing Address:		
Cell Phone:		(formatted to how you want it to appear)
Hearsay Number:		Leave blank if this does not pertain to you. (formatted to how you want it to appear)
Hearsay Number NoSpaces:		Leave blank if this does not pertain to you. No formatting or spaces so the URL link for your page can be created
Email:		@ft.newyorklife.com
Languages Line:		Leave blank if this does not pertain to you. Include any languages you speak in the language and in the format I speak "language". Include any accent marks. Example: Eu falo Português. Hablo Español.
Website URL:	southflorida.nyloffices.com	This must not change. Do <u>Not</u> Include https://
Facebook URL:	https://www.facebook.com/newyorklife	This must not change. Do Include https:// .
LinkedIn URL:	https://www.linkedin.com/company/newyorklife	This must not change. Do Include https:// .
Instagram URL:	https://www.instagram.com/newyorklife	This must not change. Do Include https:// .
Photo URL:	https://www.docvino.com/michelle/logo/nylBldgCircle.jpg	This must not change.

		Do Include https://). <u>Personalized photos for signatures are only available after trigger and photo uploaded to agent profile page:</u>
Calendar URL:		This is your Calendly URL. Calendly Link: how to find it :
Disclosure:	If you do not wish to receive email communications from New York Life, please reply to this email, using the words "Opt out" in the subject line. Please copy email_optout@newyorklife.com .	This must not change.

Here is what we will go over for this class:

	Description	Link to page
1.	Check your computer for compatibility	Is your computer compatible?
2.	Intune Company Portal is required on all devices accessing NYL	Intune Company Portal
3.	Full Disk Encryption is required on all computers accessing NYL	Full Disk Encryption - FDE
4.	To access NYL agentlife wifi in the GO you will need to generate a password for your use.	agentlife/agentlife 5G Wi-Fi Register/generate passphrase How to connect: agentlife/agentlife 5G Wi-Fi Connect-Windows agentlife/agentlife 5G Wi-Fi connect - Mac agentlife/agentlife 5G Wi-Fi connect - iOS (iphone) agentlife/agentlife 5G Wi-Fi Connect - Android Remove lifenet: lifenet WIFI Remove - Windows lifenet WIFI Remove - Mac lifenet WIFI Remove - iOS lifenet WIFI Remove - Android

5.	Subscribe to Revver, Calendly and Zoom	Subscribe App Central-Web
6.	Sales Central data on your mobile.	Salesforce Mobile App
7.	Get NYL email on your mobile device	Outlook Mobile App
8.	We will discuss your signature needs but it will not be completed during the class.	Email signature Outlook Web App (OWA) Outlook Mobile (iPhone/Android) Sales Central Marketing Central
9.	Sales Strengthening Role Play Ai	Dialogue – Roleplaying AI
10.	ChatGPT enterprise	Chat GPT Enterprise
11.	How to reserve a conference Room	Book Conference Rooms Sunrise Miami Palm Beach Gardens
12.	Report a suspicious email	Email Report Phishing
13.	A general security philosophy to protect NYL and you personally	General Security
14.	Check here before traveling outside of the United States. If you are going to a blocked country, do not bring devices with NYL apps/access on them.	Travel Advisory – High Risk Countries
15.	How to securely share files with customers/prospects	NPI/PII Handling
16.	Zoom Enterprise license	Configure Zoom SSO NYLIFE Zoom send invite Outlook Web/Desktop Zoom Send Invite Sales Central

17.	Calendly Configuration: Connect Zoom Connect NYL Outlook Calendar Configure Calendar availability windows Configure events for referred location offerings.	Calendly Configure
18.	Revver (Paperless filing)	Revver: Sales Central Promote consumer to Prospect Configure Revver
19.	What is needed for social media and how to schedule setup.	Social Media
20.	SalesCentral Verify Email	https://nylic.lightning.force.com/lightning/settings/personal/AdvancedUserDetails/home
21.	How to access NYL Today/Info Central and which browsers to use	Correct Portal URL to bookmark

Please save my and the help desk's information into your mobile contact list.

Local Dedicated Tech

Michelle Leeman

Make a 1-on-1 appointment: <https://calendly.com/mleeman/agent>
mleeman@newyorklife.com

954 866 9066

<https://support.nyl.com> (by appt only)

Best way to reach me is email.

NYL TEC Support Helpdesk

888 569 5433

M - F 8 AM to midnight for most things but it is open 24/7 for basic things

<https://support.nyl.com>

You will receive separately an invite to my [A28-SouthFlorida Agents OneNote notebook](#). It has the entire agenda for the class under the Table of Contents: PTAS section. If you can't access it, reply and let

me know so I can share it with you.

	A28-SouthFloridaAgents ▾	
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