Get Automatic Credit for Your Sales

Everything you need to know about your shopping URL

Use your agent shopping URL whenever you sell Ameritas individual dental and vision plans to get automatic credit for purchases your clients make. Your shopping URL can be placed on your website, in emails, or included in letters or direct mail pieces.

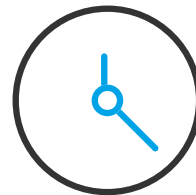## Top 3 reasons to use your shopping URL:

1.
One-click access for clients to quote and purchase insurance

2.
Automatic credit for purchases

3.
Opportunity to sell 24/7, 365

Ameritas Life Insurance Corp.
Ameritas Life Insurance Corp. of New York

Ameritas®
fulfilling life®

Where to find your shopping URL

When you became contracted with Ameritas, you received a welcome email containing your unique Agent ID and shopping URL. If you've lost this information, contact the sales connect team at 888-336-7601, option 2 or salesconnect@ameritas.com and they'll help you out.

You also can find your shopping URL in the producer portal at producerportal.ameritas.com. Once you are logged in to the portal:

1. click the blue Quote button (upper right side of dashboard)

2. click on Quote for Individual Products

3. go to your shopping site by clicking the blue link in the URL column, or copy the shopping URL by selecting the page icon
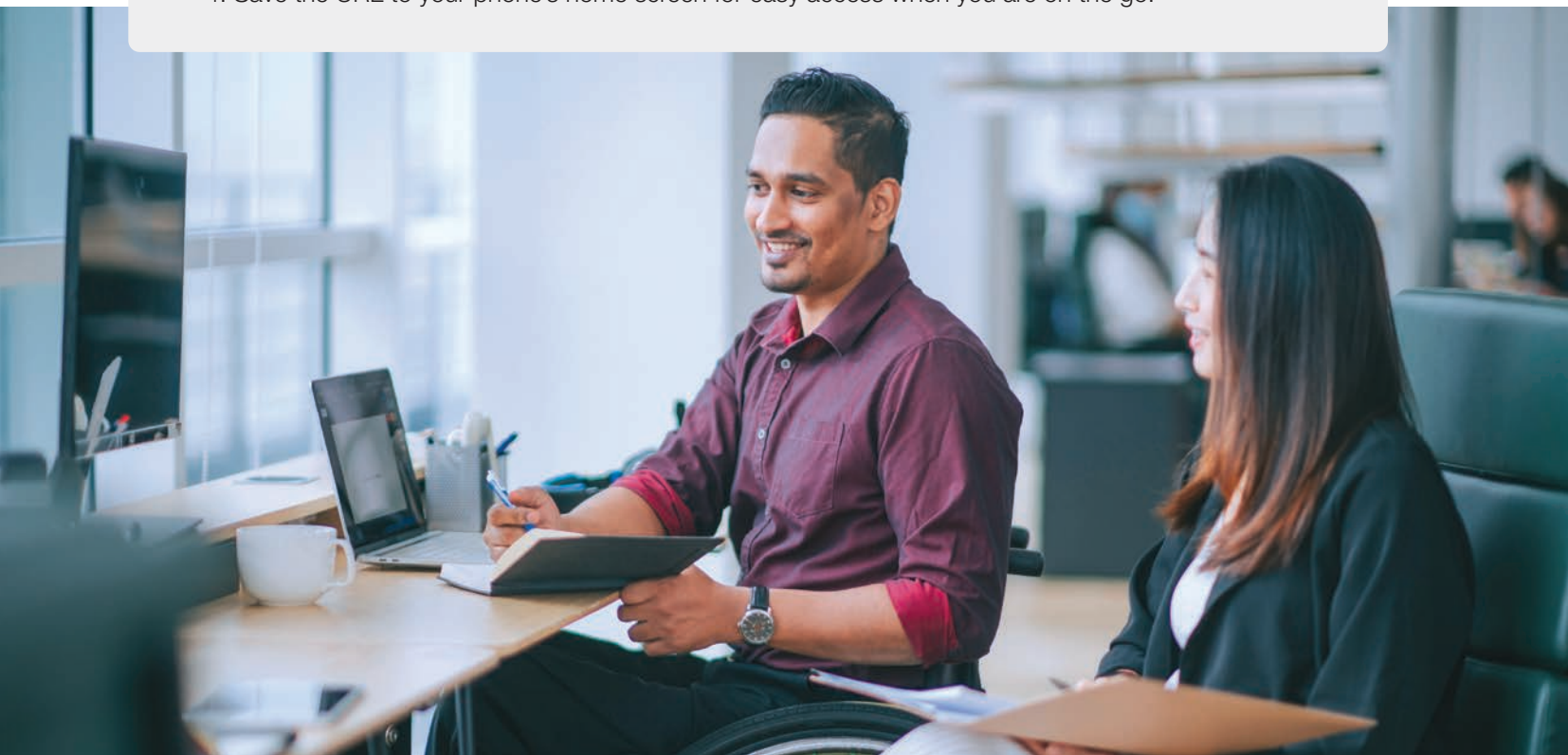

For help with the portal, review this helpful guide. You can also contact agent services at 855-517-5307, option 4, or agentservices@ameritas.com.

Share your shopping URL

There are many ways to share your shopping URL with clients.

1. Bookmark the URL in your web browser for quick access when meeting with a client.

2. Hyperlink the URL in emails, websites, social media, and online marketing materials.

3. Create a QR code and add it to printed materials.

4. Save the URL to your phone's home screen for easy access when you are on the go.

1. Bookmark your shopping URL

How to bookmark a URL

It's easy to bookmark your shopping URL in your web browser so you can quickly access it again. Here are a few ways using some popular web browsers.
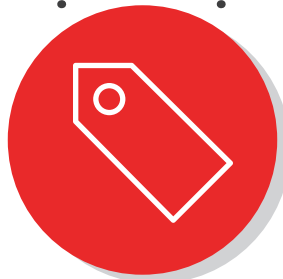
1. Go to your shopping site.

3. Quickly find the page.

You can access your bookmarked pages from the Bookmarks menu, or in the toolbar menu that may be shown by three dots or three lines.

2. Bookmark the page.

Chrome, Firefox, and Microsoft Edge: In the address bar, click the star.

Safari: Click the Share icon in the grey toolbar and select Add Bookmark.

2. Create a hyperlink

How to hyperlink a URL

You can turn text into a link so it automatically opens a webpage. Hyperlinks can be created in most electronic communications.

Often, a URL will automatically turn into a hyperlink in emails and social posts. A full URL with http:// or https:// at the beginning should automatically hyperlink if you insert a space after the URL, or hit Enter or Return on your keyboard.

Sometimes you may want to hyperlink text like "click here" or "shop individual dental and vision plans." To hyperlink text in most applications, simply select the text you want to link, right click, and select Hyperlink.

Tip: Pre-crafted social media posts are available on the agent marketing site. Copy the post text and download the accompanying image to use on your own social media accounts. Add your shopping URL to the text before posting to direct prospective clients to your shopping site.

3. Create and share a QR code

Overview

QR codes are an option if you are printing a brochure and you don't want your client to have to type out the URL to your shopping site. Your client simply takes a photo of your QR code from your brochure and your shopping site pops up on their phone or tablet so they can start shopping right away.

Please note that most people browsing insurance plans, especially seniors, choose to use a device with a larger screen, such as a desktop or laptop. So, shopping on a phone or tablet may not be their preferred device. Please consider your client's preferences when deciding the best way to share your shopping URL with them.

How to create a QR code

You can create a QR code using a QR code generator website, such as qr-code-generator.com. An online search provides many free options.

If you don't have a preferred website, you can create a QR code from a Chrome web browser.

1. Open Chrome and go to your shopping URL.

2. On the right side of the address bar, click Share, then QR Code. These may be displayed as icons.

3. Download the QR code.

How to share a QR code

You can add a QR code to any Ameritas brochure.

Reminder: QR codes do not work when viewed on an electronic device.

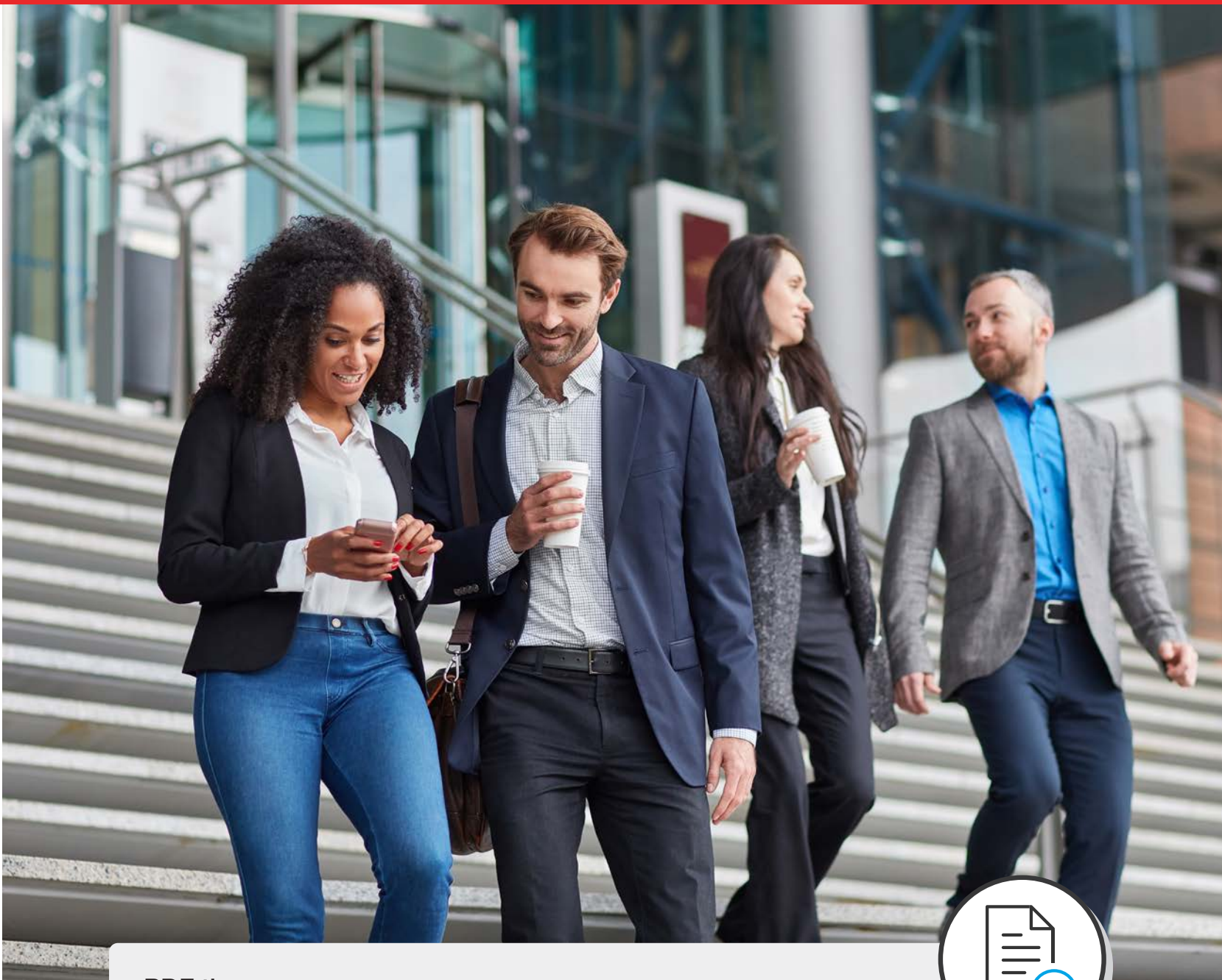**Option 1: Insert your QR code as an image with Adobe Acrobat Pro**

1. In the Tools menu, choose Edit PDF.

2. Choose Add Image from the Edit PDF menu bar.

3. Select your QR code file from your computer.

4. Click on the document to place the image. Move and resize as needed.

5. Close the Edit PDF menu.

6. Print the brochure.

Option 2: Use fillable fields

Ameritas adds fillable fields to most pieces. The most common are text fields, but you may see some image fields for a QR code. Text fillable fields appear as a light blue box on the PDF. Image fillable fields display an icon with mountains inside a box. If you do not enter anything, these fields will not show when printed.

To insert your QR code in an image field:

1. Click the fillable image field.

2. Select your saved QR code file.

3. Print the brochure.

PDF tips

- It may work best to download the document before adding text or images into the fillable fields. Some functionality doesn't work in web browsers.

- The fillable fields will appear when sharing the document electronically, whether there is content added or not. For a cleaner look, print the document as a PDF before sharing with your client. This hides the blue box and image icon and doesn't allow anyone to change the fillable text and/or image you entered.

  – On a PC, open the file in Adobe Acrobat and print as an Adobe PDF.

  – On a Mac, open the file in Preview, then print as a PDF.

- URLs do not automatically hyperlink in fillable text fields. If you enter your shopping URL, your client can copy and paste the URL from the brochure into their web browser without needing to retype the URL. Or, with Adobe Acrobat Pro, you can add a link after printing the document as a PDF. Right click and choose Create Link.

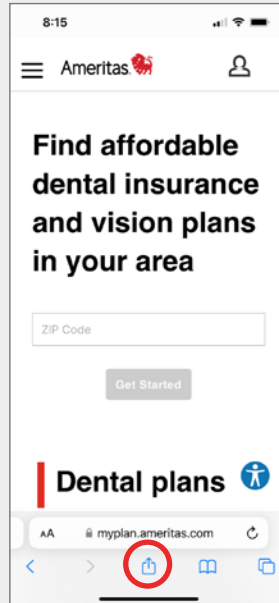## 4. Save your shopping URL to your phone

How to save a URL to your home screen

Selling on-the-go is easier than ever. You can add your shopping URL to the home screen of your mobile device to make selling a breeze. Follow the instructions below to see how you can boost your selling power.
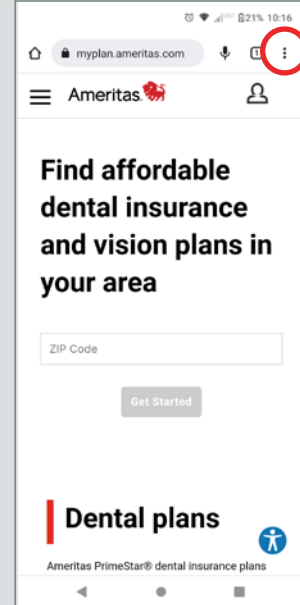
Step 1:
Enter your custom shopping URL into your default web browser. Then, locate the icon circled here.
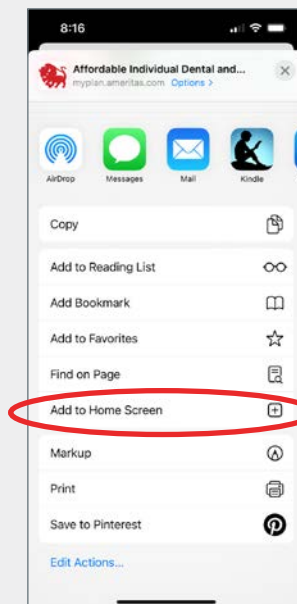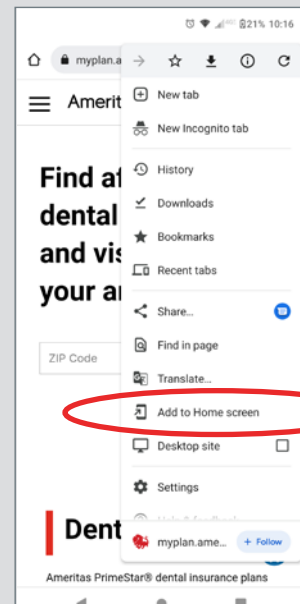
On an iPhone	On an Android device

Step 2:
Select "Add to Home Screen"

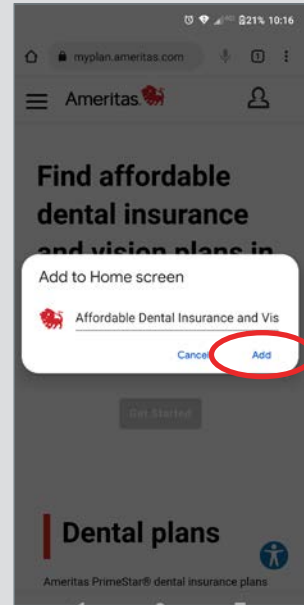| On an iPhone	On an Android device

Step 3:
A new window will appear, allowing you to edit the name of this page. This is how it will appear on your home screen. Click "Add' when finished.
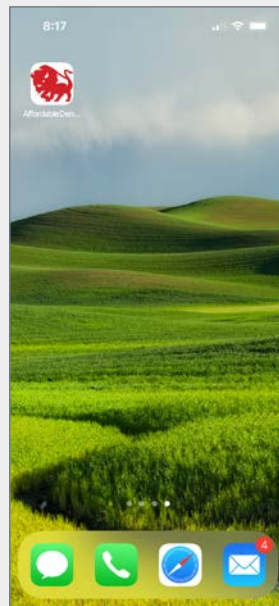
On an iPhone

On an Android device

Step 4:
Once you hit "Add," your shopping URL will appear on the home screen of your device, just like an app would.

On an iPhone

On an Android device

Did you know?

When you share your shopping URL, it brings your client to your shopping home page. You can customize the experience by taking them directly to plans with rates in their ZIP Code. Simply enter their ZIP Code and answer the initial questions, then share the plan information.

You can choose to share the overview dental or vision plan page, or the compare plan page. When sharing plans through your shopping URL, the email to your client will come from your email address.

Step 1: Go to your shopping site, enter the prospect's ZIP Code, and answer the plan coverage questions.

Step 2:

- Click the Share button at the top of the plan list to share all plans available in their area.
- If you want to select specific plans, select the Compare box next to two or more plans you want to share. Click the blue Compare Plans button. Then choose to download or share the comparison.

Step 3: Enter your prospect's email address.

Ameritas is here to help you be successful.

For help with your shopping URL, contact the sales connect team at 888-336-7601 or salesconnect@ameritas.com.

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Ameritas Life Insurance Corp. of New York

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For Producers Only