Step 1: Access the Mutual of Omaha Website by clicking the link below:

https://www.mutualofomaha.com/

This page will appear:



Step 2: Navigate to the bottom of page and click on "Sales Professional Access" link:

Д Митиа	्र Omaha Products v Employers v Search 10	Planning & Advice V Our S	Story V nave all A	вент сонтаст топ 🖉	Q Search	Support	(1) Sign In
	Get a quot Select	te V Co	Select	Apply now	× .		
		Talk to us, we're list	ening: <u>800-646-8882</u>				
		Back	to top A				
© 2020 Mutual	Careers Sales Professional Access (2 <u>Other S</u>	ites ¥				fyı	■ in

Step 3 : Enter Producer Credentials

Usernan	ne or email address	
Passwor	d	
Show	/ Password	
	Sign in	
	Forgot your password?	

Step 4 : Click on reports

🐌 Митиак#Отана					
Sales Professional Access	Products	Sales & Marketing	Reports	Training & Compliance	Search (
→ Have you seen our improved Cor Visit the <u>Compensation Information p</u> Important information about the steps we'r <u>Important Coronavirus Information</u> <u>Mutual of Omaha's Financial Strength</u>	npensation FAQ age under the Rep e taking regardi	l? orts tab now! ing coronavirus (COVID	-19)		
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Step 5: Navigate to the bottom of page and click on "Select to View Compensation":

Sales Professional Access Products Sales	& Marketing Reports	Training & Compliance	Search \mathbb{Q}
Persistency - By Hierarchy	Invalid date		
Placement - By Hierarchy	Invalid date		
Producer Portal Link			
Mutual Income Solutions Con Select to View Compensation	npensation		
Have a sales or marketing question, need technology	nical assistance, or have a	n idea you want to share? <u>Contact Suppo</u>	ħ
upport Directory Technical Support Site Feedback			

Step 6 : Click on the three horizontal lines to the left of the Mutual of Omaha Logo

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Step 8 : Click on Commissions Sub-module under 'Compensation'

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🕐 My Dashboard 🗸 🗸			
& Compensation			
Commissions			

Step 9 :

a. Click on 'Saved Views' drop down arrow

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	Commissions ×						
3	Saved Views Advance	Balance from P.					Advanced Search V
							U E
	Producer Name	Producer Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance
	Hannard I avai Tact	RRANGR	NIPolio/2004	00/01/2010	na/52/2010	\$108.00	00.363

b. Choose from '<u>Advance Balance from policy</u>/<u>Commission Detail</u>/<u>Downline Advance Balance from agent</u>/<u>Downline Advance Balance from policy</u>/<u>Downline Commission details</u>/<u>Last 6 months</u> <u>statement</u>' smartVUE under saved view drop-down.

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	Commissions	5 ×						
	Saved Views	Advance Balance from P V Select					Advanced Search	< 1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.
	Producer Nam	Commission Detail	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Ad	vance
	Heaped Leve	Downline Advance Balance from Downline Advance Balance from Downline Commission Details	DIPolicy2004	09/01/2019	09/23/2019	\$108.00		\$36.00
		Last 6 Months Statement						

<u>VUE Producer Portal – Accessing and Navigating (DI Product)</u> Additional Information

Advance Balance from policy smartVue

By using this smartVUE producer will be able to view advance balance left on policy

- Click on the VIEW MORE button
 - Note: View More functionality is available in all smartVue's with the exception of Advance Balance from Policy

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	Commissions ×								
٢	Saved Views Advance Balance	te from P V					Adv	anced Search	~
	Producer Name	Producer Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)		XLS
	Comp Test MGA 2	BB0082	DIPolicy2004	09/01/2019	09/23/2019	\$168.00	\$42.00	VIEW	IORE

Advance Balance is shown

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	Commissions X									
<u>&</u>	Saved Views Advance Balance fr	om P 🗸						Âđ	anced Search	~
									U	<u>(i)</u>
	Producer Name	Producer Code	Policy #	Policy Effective Date		Advance Date	Original Advance(5)	Amount Applied To Advance(5)		
	Comp Test MGA 2	880082	DIPolicy2004	09/01/2019		09/23/2019	\$168.00	\$42.00	VIEW	LESS
	Advance Balance(S) -126	 Product Disability Income 	2	Product Item Disability Base Coverage - D90	11	Product Item Type Base Coverage	÷.			

Commission Details smartVue

Here user should be able to view the total commission Agent earned per policy, here user can use 'Advanced Search' to filter out the commission/Advance/Garnishment/Override earned by Insured

Click on Advance Search.

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Commissions	⁵ ×						
Saved Views	Commission Detail V						Advanced Search V
Policy #	Channel	Role	Statement Date	Insured Name	Carrier	State	O H
1030_03	Brokerage	Master General A	09/28/2019	Insured 3	Mutual of Omaha Ins	AK	
1030_03	Brokerage	Master General A	09/28/2019	Insured 3	Mutual of Omaha Ins	AK	
1030_03	Brokerage	Master General A	09/28/2019	Insured 3	Mutual of Omaha Ins	AK	
1030_03	Brokerage	Master General A	09/28/2019	Insured 3	Mutual of Omaha Ins	AK	

Search Query is visible

МитиаL#О	тана						н	i, Comp Test MGA 2
Commissions		_						
Commission Type	Insured Name	-						Advanced Search A
	~						Clear	Search
Policy #	Channel	Role	Statement Date	insured Name	Carrier	State		9 U
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK		
1030_03	Brokerage	Master General Agency	09/28/2019	insured 3	Mutual of Omaha Insuran	AK		
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK		
1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK		

Commission Details SmartVue - continued

- 1. Click on Commission Type down arrow
- 2. Select Commission from dropdown menu
- 3. Input Insured Name
- 4. Click Search

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× 🖸	Commissions ×							
恣	SEARCH QUERY							Advanced Search 🖍
	Commission Type	Insured Name						
	Commission	DI Policy2004	3				c	icar Search 4
	Adjustment	Î.						0 B
	Advance F Bonus	Channel	Role	Statement Date	Insured Name	Carrier	State	
	Camilhant	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK	
	OverRide	• Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK	
	1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK	
	1030_03	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Omaha Insuran	AK	

Query results is shown

Commissions ×								
SEARCH QUERY								Advanced Search 🔨
Commission Type	Insured Name							
Commission	V Di policy2004						Clear	Search
								a (
Policy #	Channel	Role	Statement Date	Insured Name	Carrier	State		
DIPolicy2004	Brokerage	Master General Agency	09/23/2019	DI Policy2004	Mutual of Omaha Insuran	NE		

Downline Advance Balance from agent smartVue

By using this smartVUE, Agent can see his Downline(s) Advance Balance. By using Advanced Search, user can search by specific Producer by using his Name/Code/NPN.

- 1. Click on Down line Advance Balance from Agent saved views
- 2. Click on Advance Search

	Commissions	тиаL#Omaha ×						Hi, Col	np rest MGA 2	10
<u>ه</u>	Saved Views	Advance Balance from P. Select	🗸					→ 0	Advanced Search	> @
	Producer Nam	Eduardot Estance from Folioy Commission Detail	r Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)		
		Downline Advance Balance for Downline Advance Balance fro	o Downline Advance Balar	nce from Agent						
		Downline Commission Details Last 6 Months Statement								

- 3. Input Producer Code
- 4. Click Search

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\odot	Commissions ×							
&	SEARCH QUERY							Advanced Search 🔨
	Producer Name	Producer Code	3 NPN					> 4
		880098					Clear	Search
								U 🖻
	Producer Name		Producer Code	Reporting Authority Code	Original Advance	Amount Applied To Advance	Advance Balance NPN	

> Downline Advance Balance from agent Query results is shown

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2	Commissions ×							
2	SEARCH QUERY							Advanced Search ∧
	Producer Name	Producer Code	NPN					
		880098					Clear	Search
								- S
	Producer Name	Pro	oducer Code	Reporting Authority Code	Original Advance	Amount Applied To Advance	Advance Balance NPN	
	Heaped Level Test	1	380098	BB0082	\$108.00	\$36.00	(\$72.00)	

<u>VUE Producer Portal – Accessing and Navigating (DI Product)</u> <u>Downline Advance Balance from policy SmartVue</u>

Here Agent can see his Downlines Advance Balance by Policy. By using Advance Search user can enter the Policy/Producer details to see specific Policy details of his downline.

- 1. Click on 'Down line Advance Balance from Policy' saved views
- 2. Click on Advance Search

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Commissions	×							
Saved Views	Downline Advance Bala 🗸						2	Advanced Search
	Select Advance Balance from Policy							U
Producer Nam	Commission Detail	rc1	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)	
	Downline Advance Balance from	-						
	Discourse Advances Halance Stress. 1							
	Downline Commission Details	Downline Advance Sala	ance from Policy					

- 3. Input Producer Name
- 4. Click Search

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	Commissions ×						
گ	SEARCH QUERY					Advanced Search	
	Producer Name	Producer Code	Policy Numb	er			
	Heapled Level Test	3				Clear Search	
						<u></u>	
	Producer Name	Producer Code	Policy #	Policy Effective Date Advance Date	Original Advance(5)	Amount Applied To Advance(\$)	I.

> Downline Advance from Policy Query Results is Shown

Show a		тана					Hi, Com	p Test MGA 2
	Commissions X							
۵.	SEARCH QUERY							Advanced Search 🔨
	Producer Name	Producer Code	Policy Number					
	Heaped Level Test						Clear	Search
								0
	Producer Name	Producer Code	Policy #	Policy Effective Date	Advance Date	Original Advance(\$)	Amount Applied To Advance(\$)	
	Heaped Level Test	BB0098	DIPolicy2004	09/01/2019	09/23/2019	\$108.00	\$36.00	

Downline Commission details smartVUE

In this smartVUE, agent can view his downline commission details. By using Advance search, user can filter to view the specific producer details.

- 1. Click on 'Downline Commission Details' saved views
- 2. Click on Advance Search

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	Commission	s x							~
٨	Saved Views	Downline Commission	~						Advanced Search V
		Select Advance Balance from Policy		/					0 B
	Policy #	Commission Detail	sme	Producer Code	Channel	Role	Statement Date	Insured Name	
	1030_03	Downline Advance Balance from . Downline Advance Balance from .	EA2	B80082	Brokerage	Master General Agency	09/28/2019	Insured 3	
	1030_03	Director Communic Ortalia	1 2 Co	mp Test MGA 2	Brokerage	Master General Agency	09/28/2019	Insured 3	VIEW MORE

- 3. Input Policy # or other Search criteria
- 4. Enter To Date (optional)
- 5. Click Search

Commissions ×											
SEARCH QUERY											Advance
Commission Type	Insured Name	Producer Name	1	Producer Code	Polic	* 3	Carrier		From Date		
	~				Dipol	cy2004				62	
To Date	4										6
94/01/2020	6								6	er	Search
Delive #	Producer Name	Producer Code	Channel		Role	Statement Da	te	Insured Name			

> Downline Commission details Query Results is Shown

Commissions x										1	
SEARCH QUERY											Advanced Search
Commission Type	Insured Name	Producer Name		Producer Code	Policy#		Carrier		From Date		
	~				Dipolicy2004			~		G	
To Date											
94/01/2020	G								Clear		Search
											δE
Policy #	Producer Name	Producer Code	Channel		Role	Statement Date		Insured Name			
DIPulicy2014	Comp Test MGA 2	850082	Brokerae		Maister General Assercy	09/23/2019		Dr Policy2004			

Last 6 months statements smartVUE

In this smartVUE, agent view a VUE generated statement

- 1. Click on 'Last 6 Months Statement saved views
- 2. Click on Statement Date hyperlink
- 3. Click on commission statement to open

≡	O M	птиаг¢Отана					Hi, Comp Test MGA 2
\odot	commissions	×					
\$	Saved Views	Advance Balance from P ~ Select Advance Balance from Policy					Advanced Search 🗸
	Producer Nan	Commission Detail Downline Advance Balance from Downline Advance Balance from Downline Commission Details Last & Months Statement	er Code Polic	y # Policy Effective Date A	dvance Date Original Advan	ce(\$) Amount Applied	S42.00
	commission	Литиа∟∕⁄Отана ™×					Hi, Comp Test MGA 2
٢	Saved View	s Last 6 Months Statement	~				Advanced Search 🗸
	Payee Nam	ie -	Statement Date	Opening Balance (\$)	Closing Balance (\$)	Amount (\$)	Туре
	Comp Tes	st MGA 2	05/22/2020	0	-5199.98	0	Commission
	Comp Te:	st MGA 2	12/31/2019	2 0	1561.1	1561.1	Commission
	≡ 🕥 2 Comm	МитиаL#Отана					Hi, Comp Test MGA 2
	Saved Vi	ews Last 6 Months Statemen	t ~				Advanced Search 🗸
	Payee N	lame	4 Statement Date	Opening Balance (\$)	Closing Balance	(S) Amount (S)	Туре
	3 Comp	Test MGA 2	12/31/2019	0	1561.1	1561.1	Commission
5	Commission Sta	itepdf					Show all

Last 6 months statements smartVUE -continued

PDF Statement

Murual #Omaka Commission Statement Summary From 09/29/2019 To 12/31/2019								
Broker Information			Commissions Contact Info					
Comp Test MGA 2 ID : PC-880082 4517 longhom st Cass, AZ 45425			3300 MUTUAL OF OMAHA PLZ OMAHA, NE 68175					
	Commission Summary Inform	nation						
	Opening Balance	\$0.00						
	Miscellaneous							
	Commissions	\$0.00						
	Overrides	\$1,561.10						
	Other	\$0.00						
	Bonus	\$0.00						
	Nonmonetary Bonus	\$0.00						
	Subtotal \$1,561.10							
	Current Amount Paid \$1,561.10							
	Current Amount Held	\$0.00						
	Closing Balance	\$1,561.10						
	Payment Mode	Check						
	Pending Commissions	\$0.00						
	L							
REASON DESCRIPTION : ADJ = Adjustment; ADVOFF ADJ = Advance Writeoff Adjustment; REN FEE = Appointment Renewal Fee; COMM = Commissions; DEB ADJ = Debit Balance Adjustment; DED = Deduction; FEE = Fee; GARN = Garnishment; INT = Interest Charge, NET ADJ = Netted Adjustment; OVR = Overnide; PMT = Payment Applied; PEND = Pending commission missing information; PT = Plan Transfer; REFUND = Refund ADVANCE REASON DESCRIPTION : APP ADY = Applied to Advance; NEW ADV = New Advance; NO ACT = No Activity; REC TRM = Reconciled Advance due to policy term; REC + = Reconciled Advance plus commissions due; REC - = Reconciled Advance with								

Note:By using Advance Search over the smartVUE, user can search for payee statements with specific statement date

Special Feature- Download details in Excel Format:

Saved Views SmartVues allow the producer download details in Excel or CSV format

> Float mouse pointer over the xls icon and select Excel from dropdown

=	Murual@	́Отана						Hi, Comp Test MGA 2
	Commissions X							
\$	Saved Views Downlin	e Commission 🗸						Advanced Search 🗸
	Policy #	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name	⊡ csv
	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	Excel
	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	
	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	VEN HOLE

Special Feature- Download details in Excel Format: - continued

Click No



- Statement is downloaded in PDF format
 - Click on commission statement to open

	>	Отитиаця Отана							Hi, Comp Test MGA 2	ß
~		Commissions	s ×							
	Ś	Saved Views	Downline Commission 🗸						Advanced Search \lor	
									Č III	
		Policy #	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name		
		1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3		
÷		1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3		
	Cont	racts_CommXl	SX A						Show al)

> Excel spreadsheet opens.

		🖶 5-0-%	-	CommissionDe	tailVUE85Portal_66_20200401	195242013.X McMa	anus, Gloria 🛛 🗹	i —		
1	File Home I	nsert Draw Page La	yout Formulas	Data Review	View Add-ins Help	Micro Focus ALM Uplo	ad Add-in ACR	ОВАТ 🖓 ТеІ	ll me 🖻	
Pa	Segoe iste v v B J			= ≫ - ĕÞ	General ▼ \$ ▼ % * ₩ \$ ∞ % * ₩ \$ ∞ % * ₩	nditional Formatting + 'mat as Table + II Styles +	Helete ▼ E Delete ▼ E Format ▼	$\sum_{\mathbf{v}} \cdot \frac{\mathbf{A}_{\mathbf{v}}}{\mathbf{Z}^{\mathbf{v}}} \cdot$ $\bigvee_{\mathbf{v}} \cdot \mathbf{P} \cdot$ $\bigvee_{\mathbf{v}} \cdot$		
Cli	pboard 🕞	Font	Fai Al	ignment	🖫 Number 🖫	Styles	Cells	Editing	^	
A	1 *	$\times \checkmark f_x$	Policy #						~	
	А	В	С	D	E	F	G		H 🔺	
1	Policy #	Producer Name	Producer Code	Channel	Role	Statement Date	Insured Name		Carrier	
2	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of On	naha Insurai	
3	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of On	naha Insurai	
4	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of Om	naha Insurai	
5	1030_03	Comp Test MGA 2	BB0082	Brokerage	Master General Agency	09/28/2019	Insured 3	Mutual of On	naha Insurai	
6	1030_05	Heaped Level Test	BB0098	Brokerage	General Agent	09/28/2019	Insured 5	Mutual of On	naha Insurai	
	Sheet 1 ⊕									
Rea	ady				S Displ	ay Settings 🔛	E H		+ 100%	

Page **13** of **13**