



## Q&A Insurance Illustration



### ACCESS THE INSURANCE ILLUSTRATION SOFTWARE

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#### How can I access the new Illustration software (Web version)?

**A:** The best way to access the **Insurance Illustration** software is through the Webi application menu. As you have already logged in using Webi you will not need to log into the **Insurance Illustration** software. This way of doing things ensures an optimal experience and gives you access to all tools.

The new software can also be accessed from an iPad or other tablet through the following URL:\* <https://dsignillustration.desjardins.com>

If you access the software through the URL, you will need to log into Insurance Illustration.

\*You can add the URL to your favourites from the Illustration software's home page. Do not create it from the login page.



#### Where do I get a user ID and password?



**A:** Your user ID and password will be the same ones you use for Webi.



#### I don't have a Webi user ID.



**A:** If you don't remember your Webi user ID and password, you can contact Merchandising Technology:

##### Brokerage Network (SFL, DFSIN, DFSI and MGA)

-  Toll-free:1-800-461-3914
-  Email: [mtsupport@dfs.ca](mailto:mtsupport@dfs.ca)

##### Desjardins Agents Network

You can call technical support at the following number:

-  Toll free : 1 877-639-9119
-  Email: [mtsupport@dfs.ca](mailto:mtsupport@dfs.ca)

If you do not have a Webi user ID, you can get one using the procedure below:

- Go to the Webi.ca\* home page.
  - Click **Log In**



- Complete the sign-up form



## Log In

User ID:

Password:

[Forgot your password?](#)

[Sign Up to Webi](#)

- Your user ID will be emailed to you

## DESKTOP VERSION, SYNCHRONIZATION AND UPDATES (Does not apply to Desjardins Agent Network)



### How can I access the desktop version?

**A:** Follow the procedure which applies to your situation:

#### **Desktop Version (SFL, DFSIN, DSFI and MGA networks)**

First select the “Download” icon in the application menu on Webi. Then select the **Insurance Illustration – Desktop version** option. Follow the instructions for the download and installation (an internet connection is required). Once the installation has finished a shortcut will automatically appear on your computer’s desktop.

If any problems occur, please contact Merchandising Technology at: 1 800 461-3914

#### **Desktop version on a Desjardins Insurance computer**

Fill out a request through Access IT. Once the installation has been complete you may access the desktop version through your computer’s “Start” menu and selecting “Illustration”.



### Can the new Illustration software be used offline?

**A:** Yes. The new Illustration software will be available in a desktop version, which does not require Internet access.



### What is the advantage of desktop version?

**A:** The Desktop version allows you to create an illustrate even if you do not have an Internet access. Do not forget that the desktop version needs to be downloaded and installed before it can be used offline, and you need to log in every 20 days. Before visiting your client:

- Open the desktop version (while connected to the Internet) to see if any updates are required.
- Check if the illustration needs to be synchronized between the Web and desktop versions.



### Will I get a reminder to log in to the desktop version before the 20<sup>th</sup> day?

**A:** Yes. Starting 5 days before, you'll get a notification and a reminder each time you open the desktop version.

The transfer is possible in both directions however, synchronization is accessible only in the desktop version. From the desktop version, you can synchronize the illustrations that you made on the desktop to the Web and send to your desktop, illustrations that has been made on the Web.

Be careful, if you plan to use the desktop version, transfer your illustrations to your desktop before meeting with your client.



### I am using the desktop version and I am not able to synchronize

**A:** When creating an illustration in the desktop version, you must save the illustration and close it before accessing the synchronization window.



### How can I know if there are any updates for the desktop version?

**A:** Upon opening the desktop version a “pop-up” will ask you to do an update, if any are required. You will not be allowed to use the desktop version as long as the update has not been done.

## SAVING AN ILLUSTRATION

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### Can I save an illustration if I have Guest access?

**A:** No. Guest access just allows you to illustrate coverage and see the premiums. It's the ideal mode for a quick quote.



### Can an illustration for the electronic application be saved on a tablet (iPad)?

**A:** Yes, but in order to save the zip file used for the electronic application on the tablet, you must have an active iCloud account. That way it's easy to save the zip file and retrieve it later using the DSign\_P application.



### Will I be able to save a report on my desktop?

**A:** Yes. You need to have the illustration report open and select "Save as". You'll have to select where you want to save it. The method for saving the report may vary from one browser to another.



### I can't find the illustration I just saved as a zip file for the electronic application.

**A:** By default, most browsers automatically save downloaded files in a specific place on the computer. When the zip file for the electronic application is saved, you won't see the Save window that allows you to name your zip file and save it. The zip file will be automatically saved in your Downloads folder and given a default name.

If you want to see the Save window, you need to modify your browser's download options and select **Always ask where to save each file before downloading**.

## GENERAL

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### Will I be able to access the new Illustration software with a tablet?

**A:** Because it's a website, you'll be able to access it in Web mode. For more details, refer to the question: ["How can I access the new Illustration software \(Web version\)?"](#). The Web version can also be used to access the new software from a Mac. However, the desktop version is not available on a Mac or a tablet.



### **Can an illustration I've assigned to my assistant be assigned back to me?**

**A:** Yes. You can assign an illustration to an assistant or another advisor/representative for consultation or modification. When an illustration is assigned to someone else, it disappears from your illustrations saved. In order for you to see it again, that person needs to assign it back to you.



### **How will I be notified when there's a premium change?**

**A:** You'll receive a communication from Desjardins Insurance notifying you of any upcoming changes to premiums or insurance products, along with the effective date of the change.

The new Illustration software will change the premiums automatically on the effective date indicated. Once the premiums have been adjusted in the software, the old premiums can no longer be accessed through the Illustration software.



### **Will the new Illustration software allow me to open a saved illustration and see the old premium?**

**A:** Unlike the old software, the new software won't let you calculate a premium using an old product or a product's old rates. The software always shows the current rates.



### **Will I be able to retrieve an old illustration with the new software?**

**A:** Yes, to save the age but with the new premiums, where applicable. A saved illustration can be retrieved for up to 6 months (the maximum period for saving the age). After 6 months, the illustration is still saved but the creation date will be updated to the current date. The current premium will always be used.