



AGENT INSTRUCTIONS

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REGISTRATION

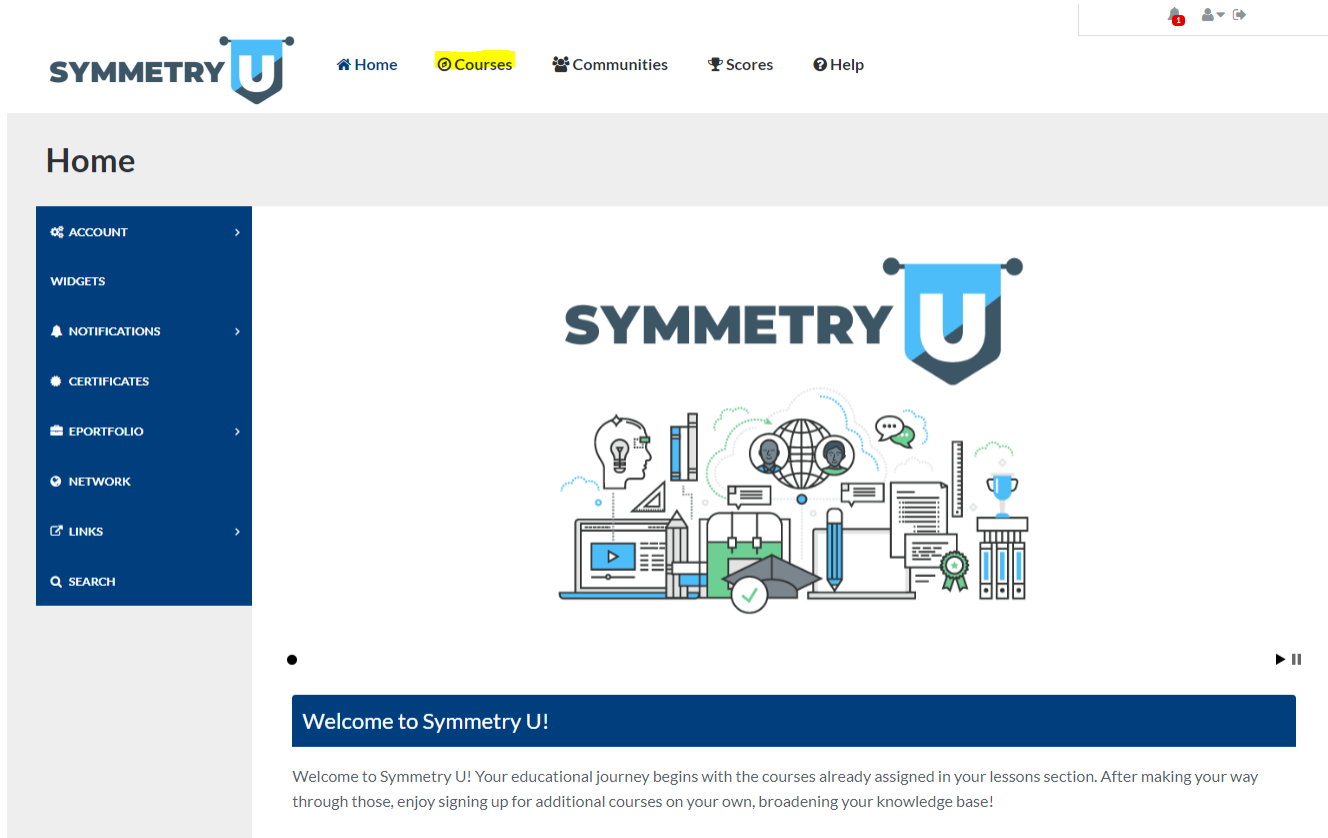
1. Go to <https://e360.sfglife.com/>.
2. Fill out the registration form with your information and click “Register Now!”
 - a. Be sure to select the correct Agency Owner from the drop-down list.
3. Click “Login Here” on the next page, or go to <https://symmetryfinancial.edvance360.com/>, to log in with your username (the e-mail address you registered with) and password.



AGENT INSTRUCTIONS

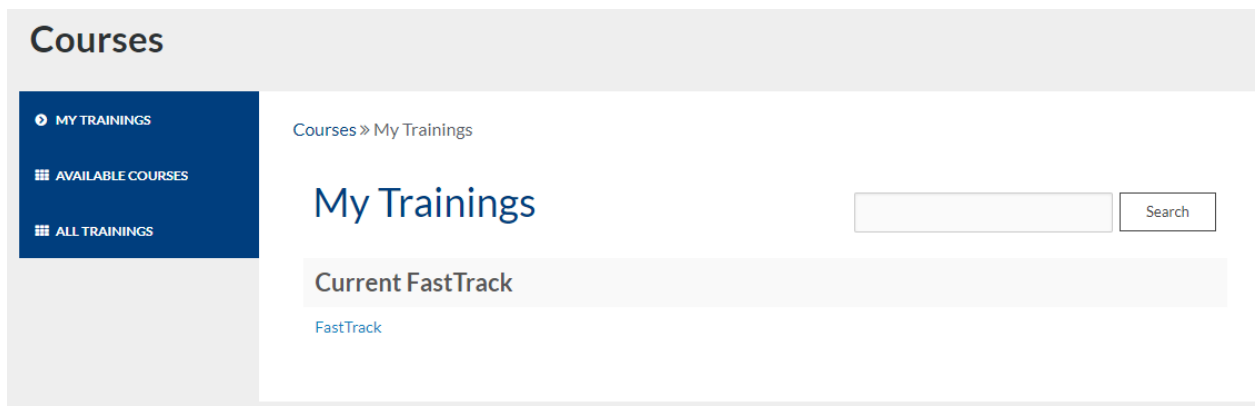
COURSES

1. After logging in, click "Courses" at the top of the screen.



The screenshot shows the Symmetry U home page. At the top, there is a navigation bar with the Symmetry U logo on the left and links for Home, Courses (highlighted in yellow), Communities, Scores, and Help on the right. Below the navigation bar is a "Home" header. On the left side, there is a dark blue sidebar menu with options: ACCOUNT, WIDGETS, NOTIFICATIONS, CERTIFICATES, EPORTFOLIO, NETWORK, LINKS, and SEARCH. The main content area features a large banner with the Symmetry U logo and a colorful illustration of educational icons like a lightbulb, globe, laptop, and books. Below the banner is a dark blue "Welcome to Symmetry U!" message box, followed by a paragraph of text: "Welcome to Symmetry U! Your educational journey begins with the courses already assigned in your lessons section. After making your way through those, enjoy signing up for additional courses on your own, broadening your knowledge base!"

2. Click the course you'd like to start.



The screenshot shows the Symmetry U "Courses" page. The header "Courses" is displayed in a grey bar. On the left, a dark blue sidebar menu has options: MY TRAININGS (selected), AVAILABLE COURSES, and ALL TRAININGS. The main content area shows the breadcrumb "Courses » My Trainings" and the heading "My Trainings". To the right of the heading is a search bar with a "Search" button. Below this, a section titled "Current FastTrack" is visible, with "FastTrack" listed underneath.



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3. Begin the course by clicking on the first lesson (or the last one not completed).

FastTrack

MY COURSE
LESSONS
RESOURCES
DISCUSSION

Courses » Course Lessons
Make This My Default Page

Lessons

Name	Dates	Lesson Progress
Phase 1	--	0% Complete
Phase 2	--	0% Complete
Phase 3	--	0% Complete
Phase 4	--	0% Complete
Phase 5	--	0% Complete
Phase 6	--	0% Complete



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4. Follow the lesson directions and enjoy the course!

After you're finished with the lessons, head over to the discussion board by clicking "Discussion" on the left-hand side of the screen to interact with other Symmetry U students. You can also click "Resources" to view all supplemental course material.

A screenshot of a web interface for a course titled "FastTrack". On the left is a dark blue navigation sidebar with icons and labels for "MY COURSE", "LESSONS", "RESOURCES", and "DISCUSSION" (which is highlighted in green). To the right of the sidebar is a light gray header area with the title "FastTrack" and a button labeled "Make This My Default Page". Below the header is a "Search Filter" section containing three input fields: "Tags/Keywords:" (with an empty text box), "Category:" (with a dropdown menu showing "All"), and "Poster:" (with a dropdown menu showing "All"). A blue "Search" button is positioned below these fields. Underneath the search filter is a "Forums" section with the heading "FastTrack Discussion" and the text "Post your thoughts about the FastTrack course here!". Below this text, it says "Total Posts: 0". At the bottom of the page is a "Posts" section with the text "No Post Found" in red.



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COMMUNITIES

1. After logging in, click “Communities” at the top of the screen.

A screenshot of the Symmetry U user interface. At the top, there is a navigation bar with the Symmetry U logo on the left and links for Home, Courses, Communities (highlighted in yellow), Scores, and Help on the right. Below the navigation bar is a "Home" header. On the left side, there is a dark blue sidebar menu with options: ACCOUNT, WIDGETS, NOTIFICATIONS, CERTIFICATES, EPORTFOLIO, NETWORK, LINKS, and SEARCH. The main content area features a large illustration with the Symmetry U logo and various educational icons like a lightbulb, globe, books, and a laptop. Below the illustration is a dark blue banner that says "Welcome to Symmetry U!". Underneath the banner, there is a paragraph of text: "Welcome to Symmetry U! Your educational journey begins with the courses already assigned in your lessons section. After making your way through those, enjoy signing up for additional courses on your own, broadening your knowledge base!"

2. Click the community you’d like to view.

A screenshot of the Symmetry U "Communities" page. The page has a "Communities" header. Below the header, there is a dark blue sidebar with "MY COMMUNITIES" selected. The main content area shows a breadcrumb trail "Communities » My Communities" and a heading "My Communities". To the right of the heading is a search input field with a "Search" button. Below the heading, there is a list of community categories: "Carriers", "AIG", "Corporate", and "Thrive".



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- Once inside, navigate through the community to access various elements.
 - Wiki** – Contains carrier contact info, guidelines, and specific notes.
 - Resources** – Contains product guides, software, applications, articles, and more.
 - Discussion** – Contains discussion board specific to the community.

A screenshot of the Symmetry U community page for AIG. The page has a dark blue sidebar on the left with navigation options: MY COMMUNITY, WIKI, RESOURCES, DISCUSSION, and COMMUNITY ANNOUNCEMENTS. The main content area is white and features a header "AIG" and a sub-header "Communities > Community Details". Below this, there is a "Messages 1" notification and a "Mark All Read" link. The main heading is "Welcome to AIG's carrier page!" followed by "NOW - NEVER EXPIRES | Mark read". The text below reads: "Welcome to AIG's carrier page through Symmetry U! Here, you'll find carrier specific notes, product information, software downloads, and more!". There are three bullet points: "For important details regarding working with AIG, visit the Wiki page.", "For product information, software downloads, and more, visit the Resources page.", and "Don't forget to share your thoughts and tips on working with AIG in the Discussion group!". On the right side, there is a "About This Community" section with an "AIG" logo and a "Welcome to AIG's carrier page through Symmetry U! Here, you'll find carrier specific notes, product information, software downloads, and more! For important details regarding working with AIG, visit the Wiki page. For product information, software downloads, and more, visit the read more..." link. Below this is an "Administrator" section for "Symmetry Financial Group" with a "Profile" link and a "Send Message" button.



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PROFILE

1. After logging in, you'll have the ability to update your profile, change your password, adjust how your homepage looks (by turning off/on widgets), and create an E-Portfolio.

Home

The screenshot displays the Symmetry U user interface. On the left is a dark blue navigation sidebar with the following items: ACCOUNT (with a dropdown arrow), MY PROFILE, CHANGE PASSWORD, WIDGETS, NOTIFICATIONS, CERTIFICATES, EPORTFOLIO, NETWORK, LINKS, and SEARCH. The main content area features the Symmetry U logo at the top, followed by a large illustration of educational icons including a lightbulb, a globe, a laptop, a graduation cap, and a trophy. Below the illustration is a dark blue banner with the text "Welcome to Symmetry U!". Underneath the banner is a paragraph of text: "Welcome to Symmetry U! Your educational journey begins with the courses already assigned in your lessons section. After making your way through those, enjoy signing up for additional courses on your own, broadening your knowledge base!".

ACCOUNT

- MY PROFILE
- CHANGE PASSWORD

WIDGETS

- NOTIFICATIONS
- CERTIFICATES
- EPORTFOLIO**
- NETWORK
- LINKS
- SEARCH

SYMMETRY U

Welcome to Symmetry U!

Welcome to Symmetry U! Your educational journey begins with the courses already assigned in your lessons section. After making your way through those, enjoy signing up for additional courses on your own, broadening your knowledge base!



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You can also search for other students and add “friends” to your network!

The screenshot shows the Symmetry U home page. At the top left is the Symmetry U logo. To its right is a navigation bar with icons and labels for Home, Courses, Communities, Scores, and Help. Below the navigation bar is a grey header area with the word "Home" on the left. On the far left is a dark blue sidebar menu with white text and icons for ACCOUNT, WIDGETS, NOTIFICATIONS, CERTIFICATES, EPORTFOLIO, NETWORK (highlighted with a green bar), LINKS, and SEARCH. The main content area features a large Symmetry U logo and a colorful illustration of educational icons including a lightbulb, a globe, a laptop, a graduation cap, a trophy, and books. Below the illustration is a dark blue banner with the text "Welcome to Symmetry U!". Underneath the banner is a paragraph of text: "Welcome to Symmetry U! Your educational journey begins with the courses already assigned in your lessons section. After making your way through those, enjoy signing up for additional courses on your own, broadening your knowledge base!".



AGENT INSTRUCTIONS

MEMBER DIRECTORY

NETWORK

Home » Network » Search Contacts

Search Alphabetically

A B C D E F G H I J K L M N O P Q R S T
U V W X Y Z

Members

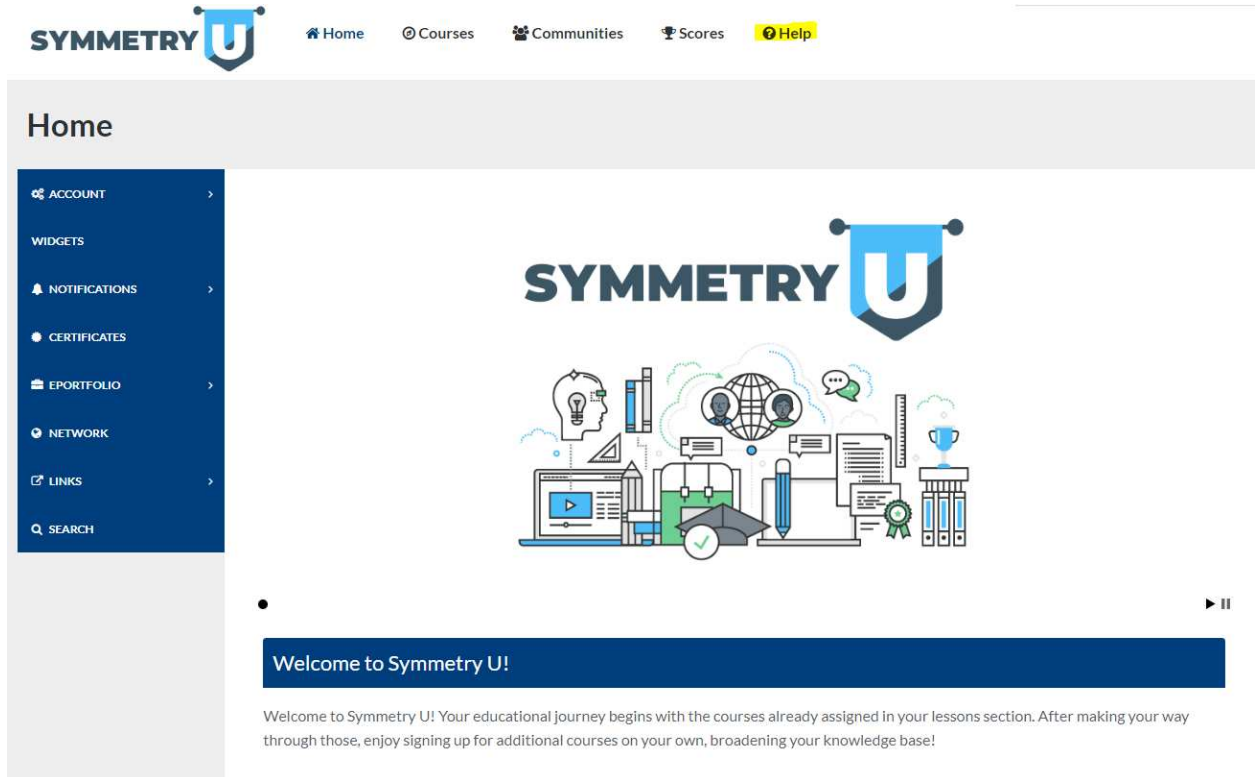
	Name	Member Type	City & State
	Ayres & Cicily Newsom	Agency Owner/Mentor	None
	Corp Staff	Corporate Staff	None
	Doug Zeh	Agency Owner/Mentor	None
	E360 User	Alumni	None
	Jon Edwards	Admin	None
	Justin Buckley	Admin	Swannanoa North Carolina
	Logan Student Test	Agent/Learner	None
	Logan Long	Admin	North Carolina (NC)
	Symmetry Financial Group	Admin	None
	Taco Thursday	Agent/Learner	None
	Test Student	Agent/Learner	None



AGENT INSTRUCTIONS

HELP

1. After logging in, click "Help" at the top of the screen.





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2. Access general tutorials and guides by clicking on the links that appear, or enter in a ticket to the help desk, by clicking on "User Help Desk" on the left-hand side of the screen.

Help & Tutorials

HELP
USER HELP DESK

Help » Help Contents

Help

QuickStart Guides

Please note the Edvance360 tutorials are based on the default system settings. Edvance360 provides the ability to tailor the system to utilize the terminology you prefer. So the tutorials may vary slightly if you have changed the terminology.

For example, if you prefer the term "trainer" versus "faculty" you can make that change. However the tutorials will use the default term "faculty".

Learner/Student

- [Getting Started for Learners](#)
- [How to Login](#)
- [How to Setup Badges](#)
- [How to Use Secure Social Network](#)
- [How to Use the Discussion Course Tool](#)
- [How to Use E360 Navigator - PG 4](#)
- [How to View Certificates](#)
- [How to Blog](#)
- [How to Use Communities](#)
- [How to Setup ePortfolio](#)

Video Tutorials

General Tutorials

- [Blog](#)
- [Calendar](#)
- [Certificates](#)
- [Change Password](#)
- [Communities](#)
- [Course Calendar](#)
- [ePortfolio](#)
- [Home Page Links](#)
- [Logout](#)



AGENT INSTRUCTIONS

When entering a ticket to the help desk, click the green plus sign to start.

Help & Tutorials


HELP
USER HELP DESK

Help » Help Desk

[View Closed Tickets](#)

User Tickets

No User Ticket Found



View the status of current tickets by clicking the link to open it or close the ticket if you feel the issue has been resolved.

SYMMETRY U Home Courses Communities Scores Help


Help & Tutorials

HELP
USER HELP DESK

Help » Help Desk

[View Closed Tickets](#)

User Tickets



Title	Created	Action
test	09/24/2018 11:41 AM	Close



AGENT INSTRUCTIONS

Help & Tutorials

HELP

USER HELP DESK

Help » Help Desk » Ticket Response

Ticket Response

test

Status: Open

Submitted: 09/24/2018 11:41 AM

Attachments:

Responses

09/24/2018 11:42 AM: llong@sfglife.com

Fixed!

Respond

Detail

Attachment 1 No file chosen

Save