



Your central connection.

User guide

## How to use this guide

Use these icons to help you navigate:

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# Table of contents



# suncentral

Your central connection.

## What is Suncentral?

### Everything in one place

Suncentral is the one place to connect with Sun Life for your insurance business.

It officially replaced the Sun Life Advisor and Sun Life Consulting sites on May 1, 2023.

### Simple and intuitive design

To make navigation and search easier, we've completely redesigned the site experience.

Save time and effort with an intuitive layout for the most frequently used tools, information, content and more.

### Designed for you, with you

We built Suncentral with input from users like you through interviews and Voice of Advisor studies.\*

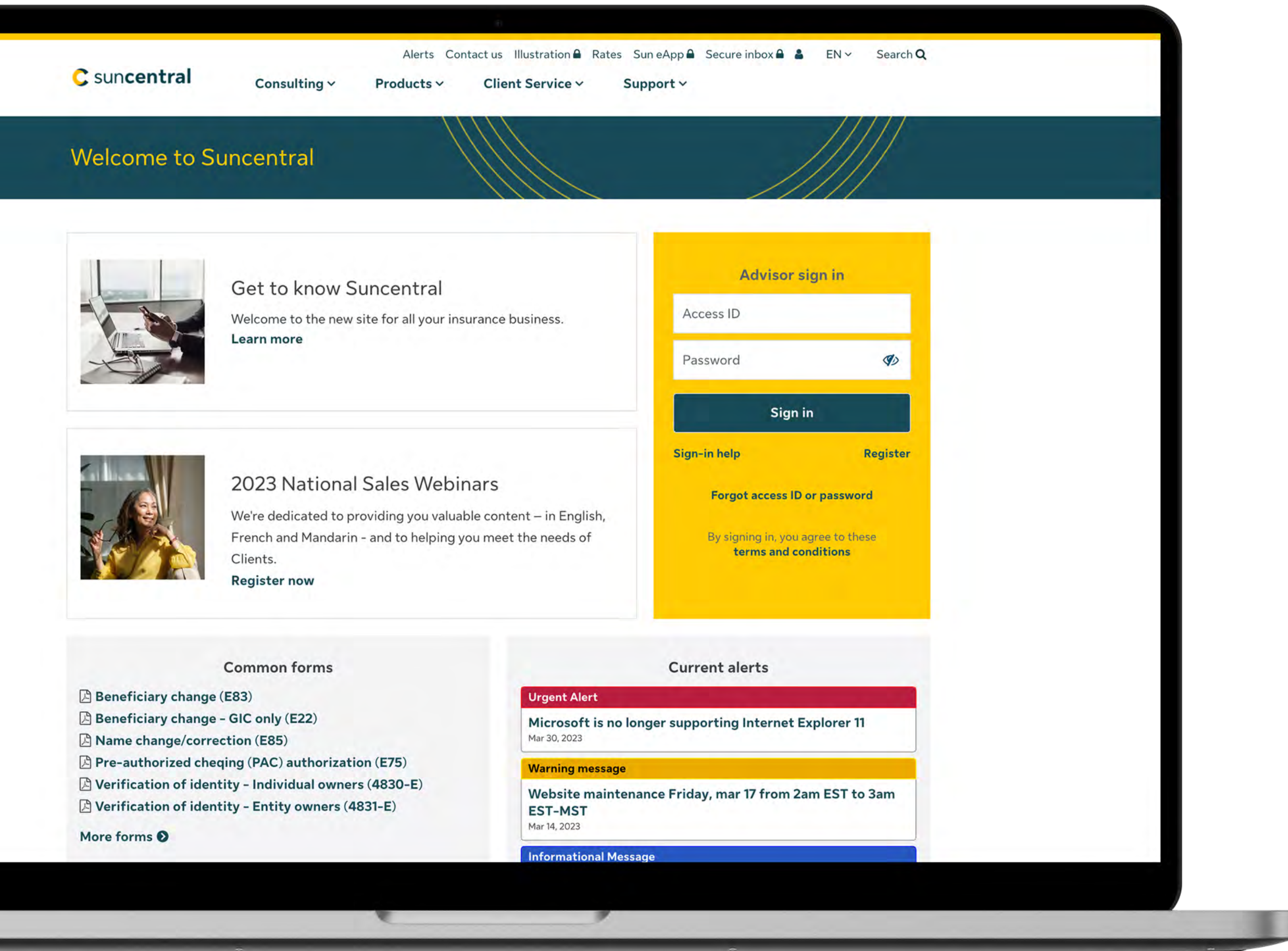
We made careful decisions and tested them with users to ensure the best experience for everyone who chooses to do business with Sun Life.

\*87 participants (including advisors, assistants and back-office staff) through 10 studies.

Watch the Suncentral trailer

Watch time: 1:00 minute

## How does Suncentral work?



## Streamlined homepage

Clean and simple for busy users like you.

### Current alerts

You won't miss important messages with alerts on the homepage.

Easily scan current alerts for urgent issues on products, campaigns, processes, policies, tools and more. Alerts are colour-coded so you know what to focus on first:

- **Red = Urgent**  
i.e., something isn't working
- **Yellow = Warning**  
i.e., we're experiencing intermittent issues
- **Blue = Information**  
i.e., we made a new enhancement

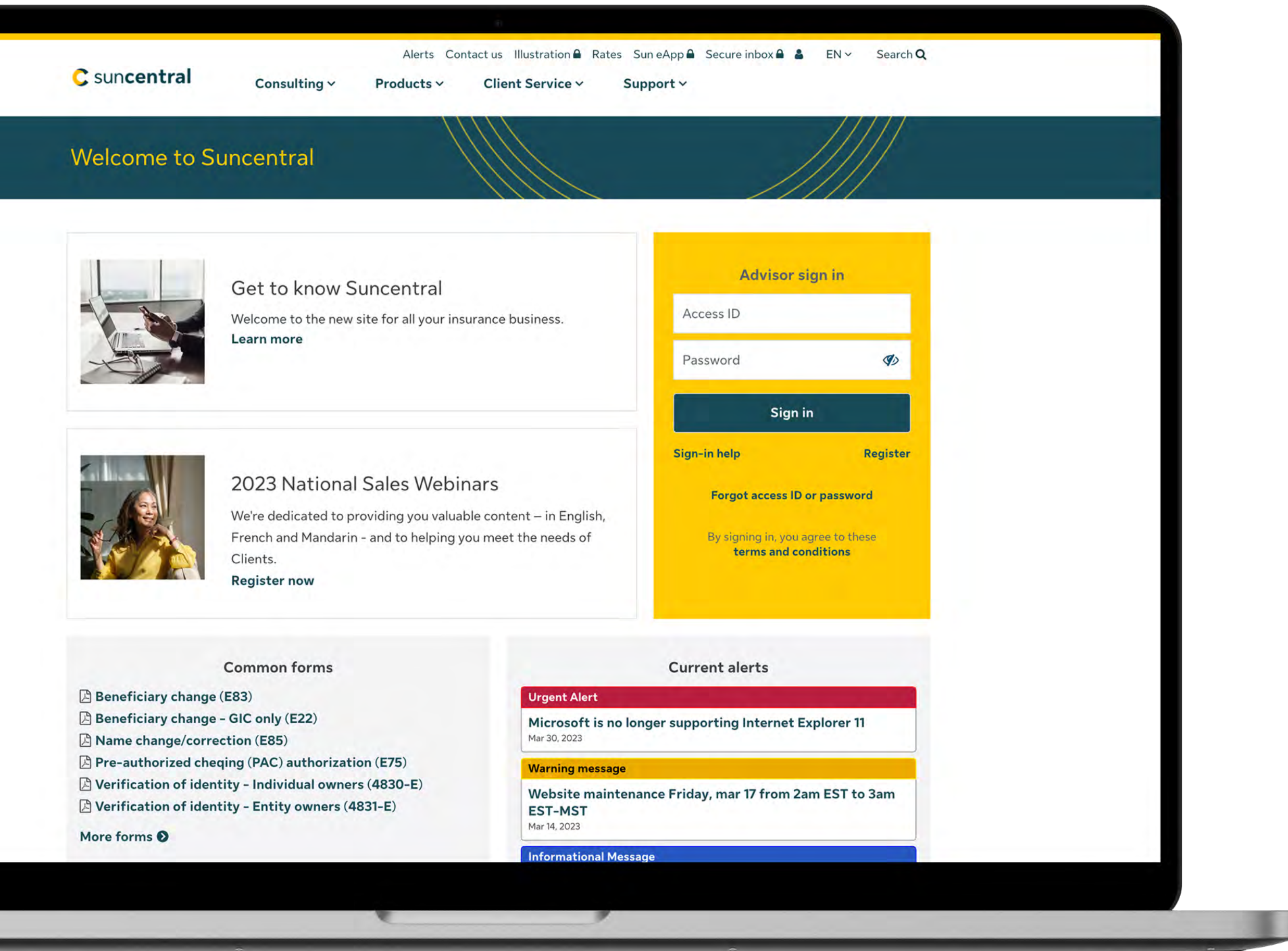
### Common forms

The forms you use most often are on the homepage for fast access.

### News

Find the most recent news articles on the homepage for quick access to keep you in-the-know.

## How does Suncentral work?



Get to know the Suncentral public homepage

Watch: How to use the public homepage

Watch time: 0:31 seconds

# Superior experience when you sign in

## Designed for maximum efficiency.

From your first visit, you'll notice a simple design and layout. The minimalist design and options help you focus on what you need and cuts back on unnecessary scrolling for maximum efficiency.

### Centralized console

When you sign in, your centralized console greets you and displays 7 tabs. This allows you to quickly find all the tools you need and access new business and in-force tasks with fewer clicks.

### Activities & requests

Gives you quick access to your most used tools for new business and in force.

### Alerts

This is where you'll see issues, warnings or updates that may impact your business – grouped based on severity.

### Forms

See all Sun Life forms in one place – designed with advanced features. For example, use the Favourite functionality to keep your most used forms at the top of your list when you're signed in.

### News

The place to find Sun Life articles for up to 90 days.

### Events

Find development opportunities.

### Tools

All the links you need to do business with Sun Life in one convenient location.

### Training

Access CE credits or learn more about Suncentral.

### Watch: How to use the secure homepage

Watchtime: 1:03 minutes



# Everything in one place

## Designed for you, with you.

### Main menu options

The simplified design has 4 main menus.

#### Consulting

To help you build your practice, access Sun Life Consulting content, including:

- Business building
- Marketing yourself
- Advice and stewardship
- Professional insights

#### Products

Find all Sun Life products in one menu:

- Life
- Health
- Investments

This is also where you'll find product Marketing Material.

#### Client Service

Go to Client Service to see all information in one place for:

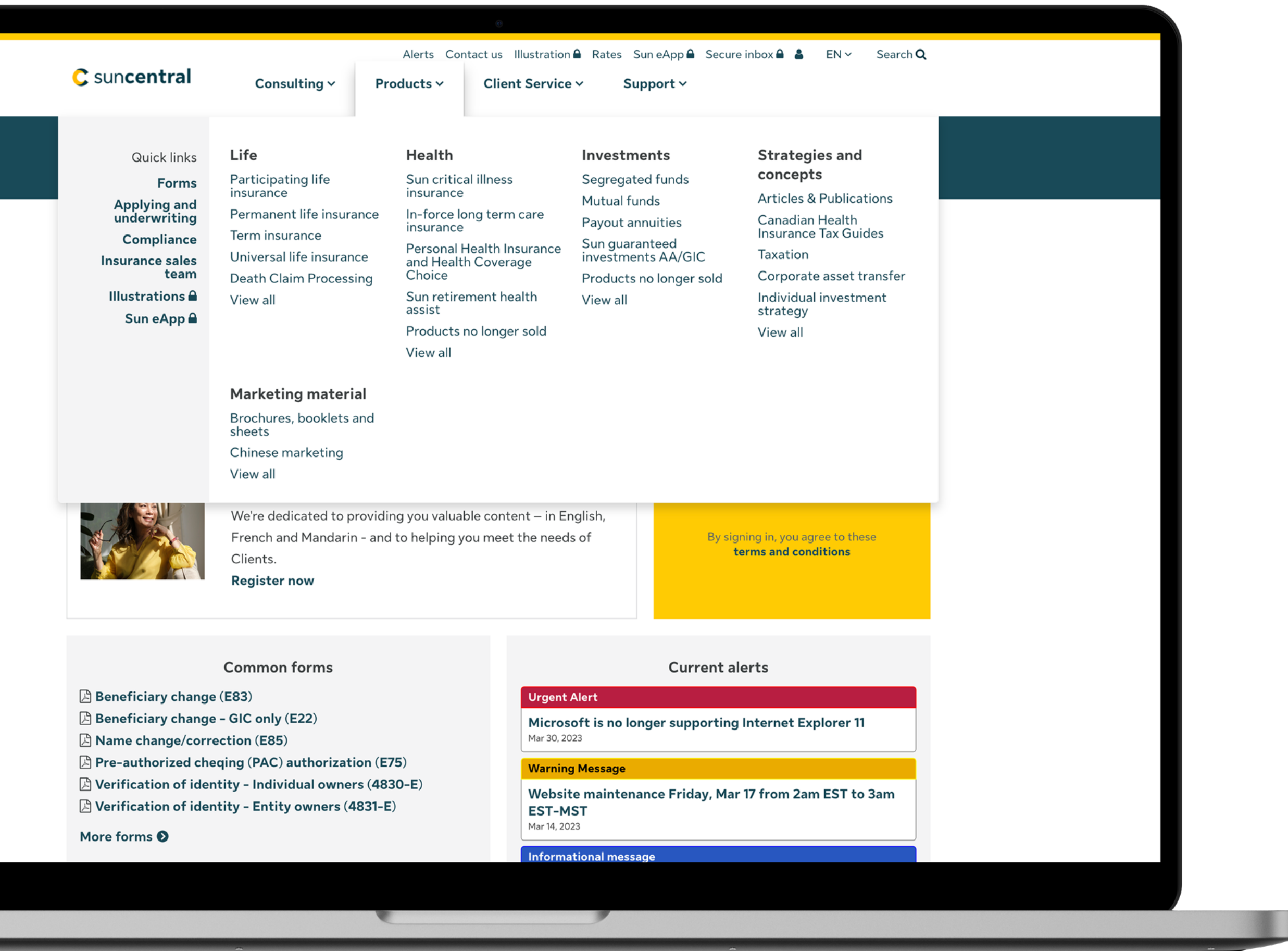
- New business & underwriting
- In-force business
- Client engagement

#### Support

Visit the support page to access everything else you need to strengthen your business with Sun Life, like:

- How we help you grow
- Learning and development
- Contracts and compensation
- Compliance

## How does Suncentral work?



## Quick links

Each menu features quick links.

Use this helpful section to get to common tools and information in fewer clicks, including:

### Forms

- Applying and underwriting
- CE credits
- Contracts and compensation
- Events
- Strategic Partner Program

### Utility menu

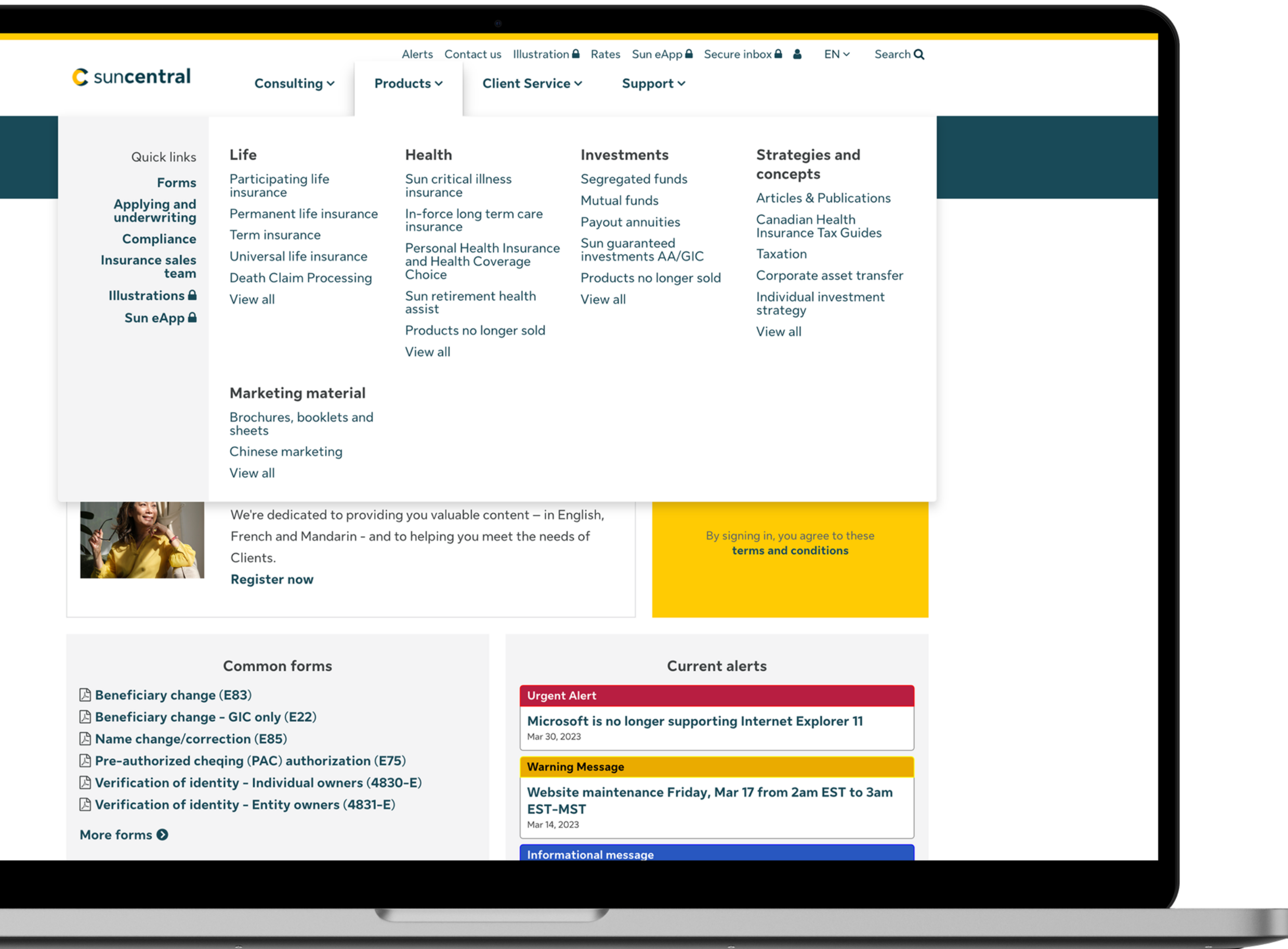
No matter where you are on Suncentral, you can use the utility menu for fast access to key Sun Life tools and resources like:

- Alerts
- Contact us
- Illustration
- Rates
- Sun eApp
- Secure inbox
- Language settings
- Search

### Lock icon

The lock icon means you need to be signed in to access the tool or resource. If you're not signed in, it will prompt you when you click the link.

## How does Suncentral work?

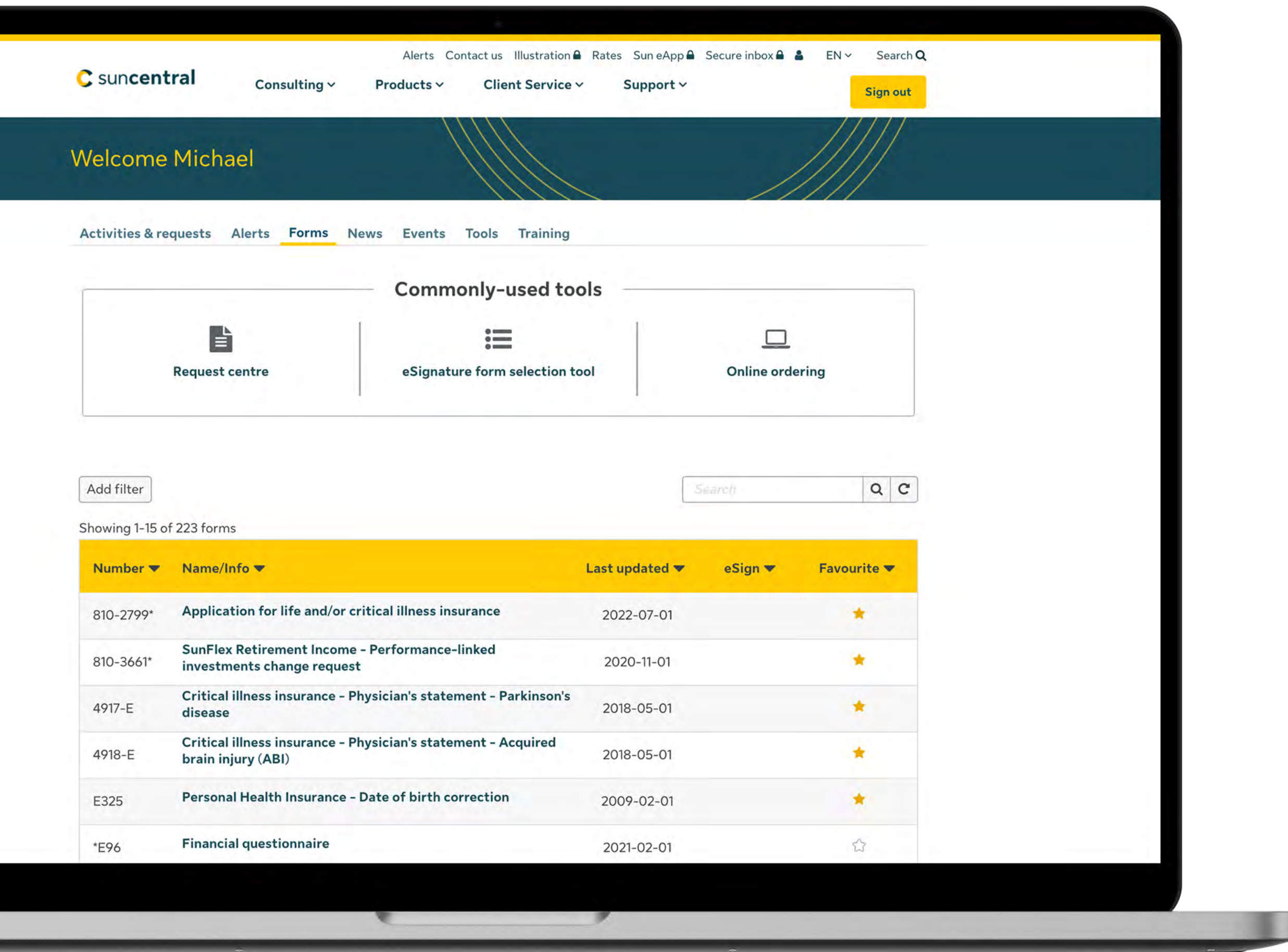


## Get to know the Suncentral navigation

### Watch: How to navigate Suncentral

Watch time: 1:16 minutes

## How does Suncentral work?



## Enhanced forms experience

### With advanced features.

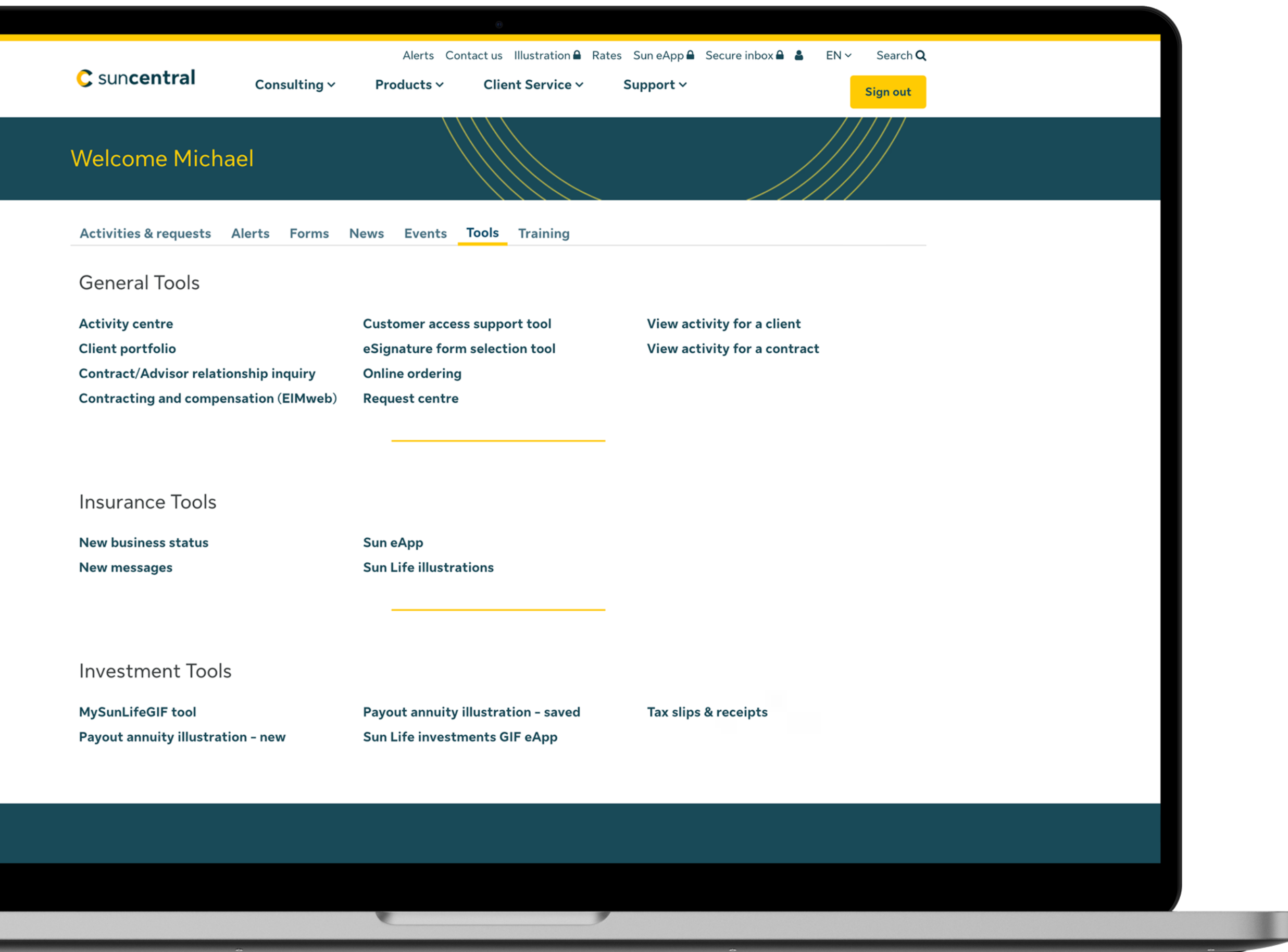
The enhanced filtering options let you:

- Easily search all forms by name or number
- Use the favourites functionality to show your most used forms at the top of your list (when you're signed in)
- Sort quickly by eSign

### Watch: How to use the Forms page

Watch time: 0:25 seconds

## How does Suncentral work?



## Tools to support your business

### Same great tools in a new location

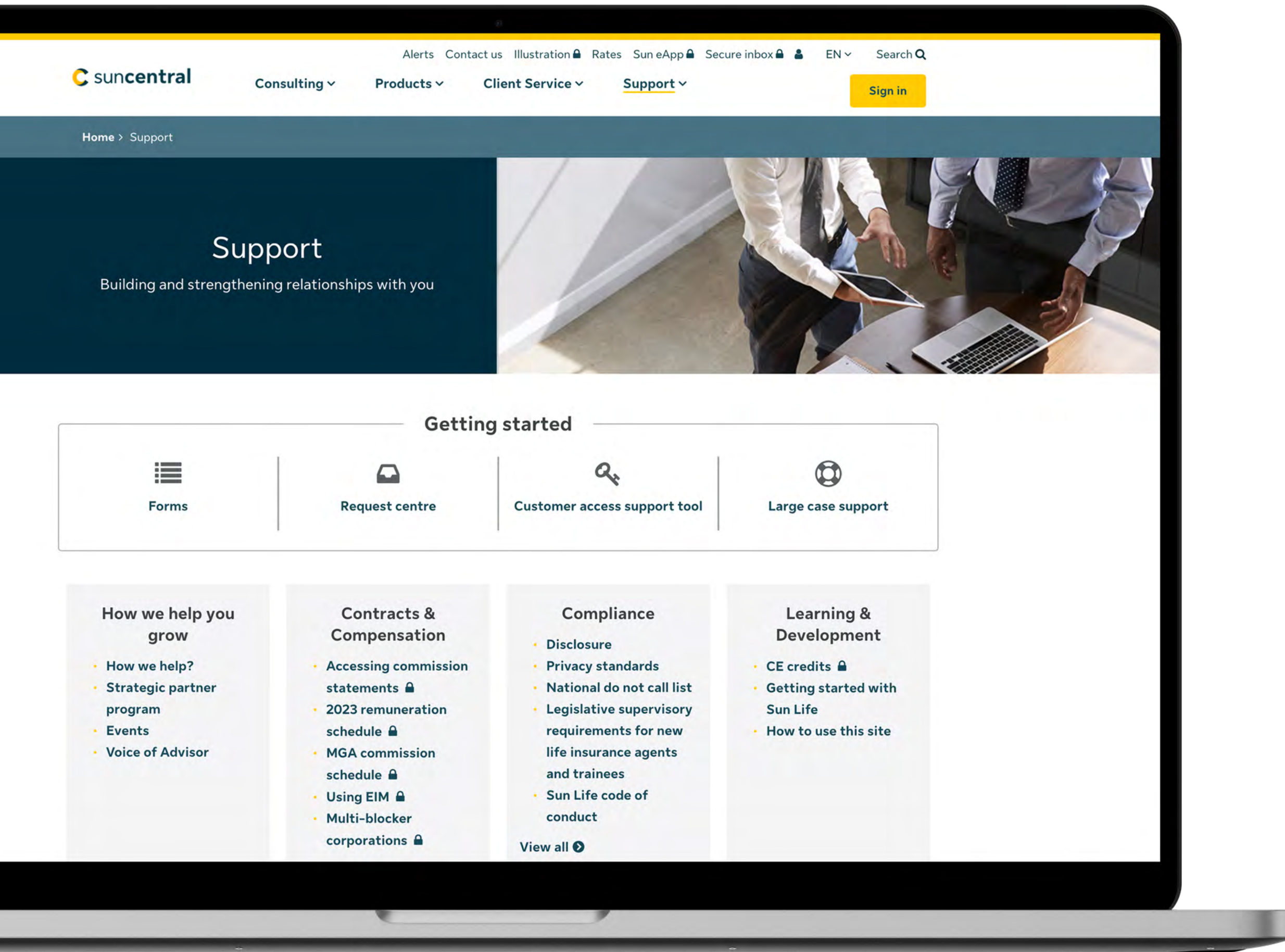
The tools you use—like Sun eApp, Request centre, Illustrations, and others—remain unchanged and function the same as they did on the Advisor site.

You can access Sun Life tools in 3 convenient places:

- **Quick links** on any menu.
- **Utility menu** at the top of any page.
- **Tools tab** when you sign into the secure site.

### Watch: How to find key Sun Life tools

Watch time: 0:17 seconds



## Suncentral assistance

Designed to help you feel at home.

Visit the [How to use the site](#) page for resources to help you get to know Suncentral.

### Watch: How to find Suncentral support

Watch time: 0:16 seconds

Get started

## Get to know Suncentral

The central connection to Sun Life for your insurance business.

We have a few ways for you to get to know Suncentral:

### Check out the site

Visit [suncentral.sunlife.ca](https://suncentral.sunlife.ca) to see the public site for yourself.

### Sign in or register for the best experience

You can [sign in](#) using your Advisor site credentials.

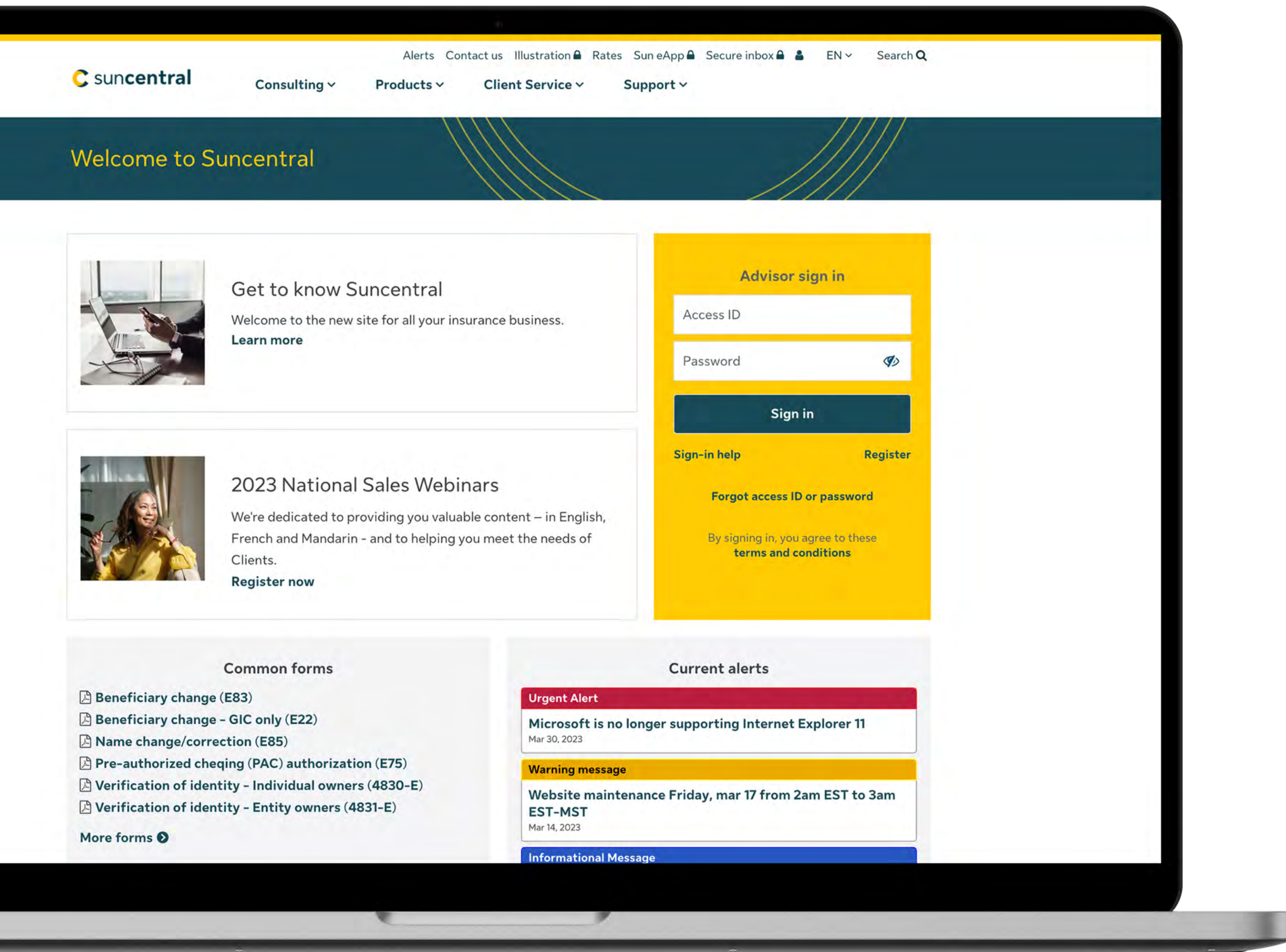
- If you forgot your ID or password, visit the [Forgot Access ID or password](#) page to fix that.
- If you don't have an ID or password, you can [register](#) online.

### Request a follow-up

If you have a non-urgent question about Suncentral or a Sun Life product or application, fill out [this form](#) and someone will be in touch.

### Talk to someone now

For urgent questions about insurance products or plan specific information, including general inquiries about Suncentral navigation, tools and forms call 1-800-800-4786.



We'll continue to evolve Suncentral with your help

The launch is just the beginning.

You can contribute to future upgrades and share feedback to help Sun Life build better products and solutions. Join the Voice of the Advisor Forum (VOA) to have your say.