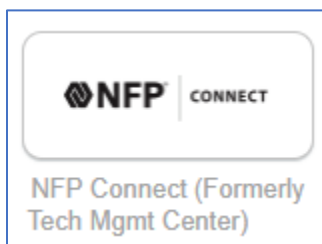
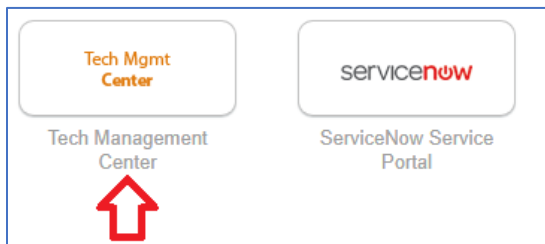
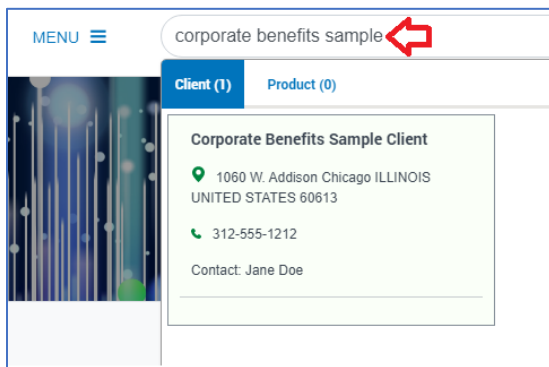


Open Enrollment Landing Page Setup Instructions

- 1) Click on the Tech Management Center Okta tile (soon to be re-branded as NFP Connect. New NFP Connect Okta tile image displayed below) from your Okta home page (<https://nfp.okta.com/>):



- 2) Search for the client you use to create an Open Enrollment Landing page in the global Tech Management Center search box:

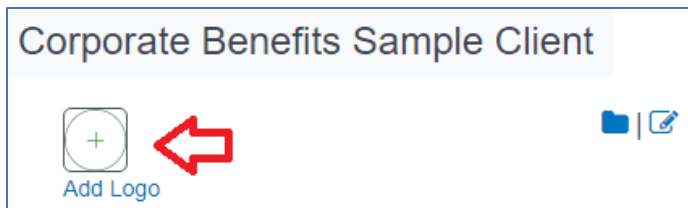


- 3) Add a client logo

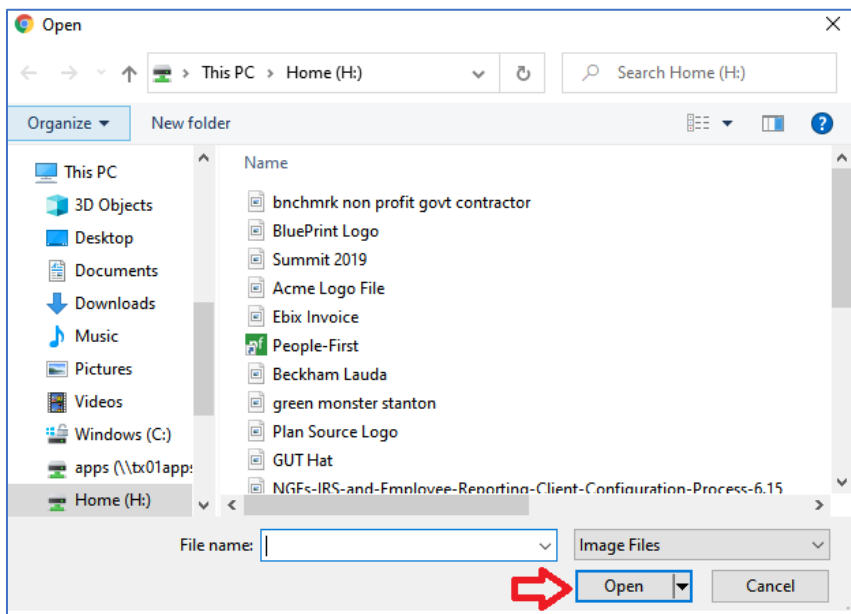
If client logo is not already aligned to the client record, you can do so with the following steps (**Note: the size of a client's logo image file is constrained to a max height of 60 pixels and a max width of 120 pixels**):

- (a) Click on the Add Logo icon found below the client name

Open Enrollment Landing Page Setup Instructions



(b) Choose the location from where to import the logo image file and click Open



4) Toggle the Employee Services radio button to on (color will change from grey to blue):

Open Enrollment Landing Page Setup Instructions

Corporate Benefits Sample Client

[Change](#) | [Remove](#)

Client Details

Address
1060 W. Addison
Chicago,
IL
60613

Phone
W: 312-555-1212

Website
--


NAICS
711211

SIC Code
--

Non-Profit
No

Government Contractor
No

Services

Employee Services 

BCP Checklist

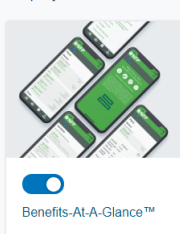
Once Employee Services radio button is toggled to on, a new tab, Employee Services, will appear:

Corporate Benefits Sample Client

[Change](#) | [Remove](#)

Calendar Plans Compliance Checklist **Employee Services** Member Data Client Reports Landing Page

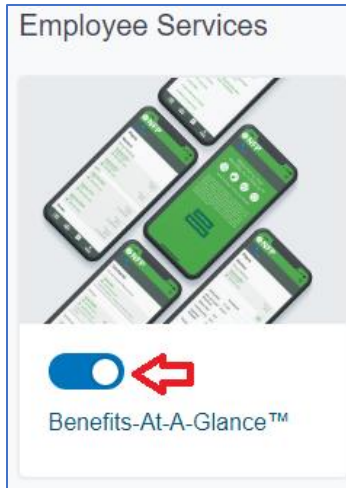
Employee Services



Benefits-At-A-Glance™

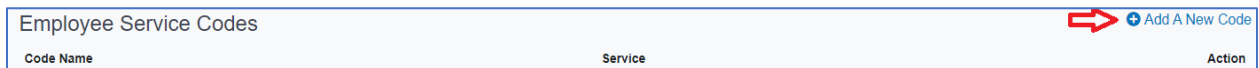
5) Toggle the Benefits-At-A-Glance radio button to on (color will change from grey to blue):

Open Enrollment Landing Page Setup Instructions

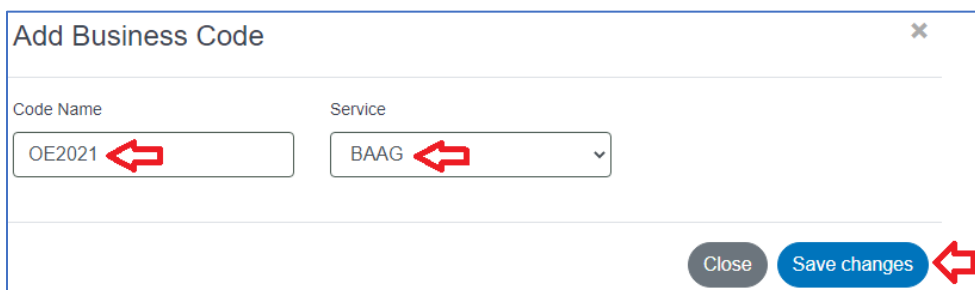


- 6) Define all of the available Employee Service Codes for the client. Employee Service Codes represent distinct divisions or classes of benefits offered to a group of employees (e.g. union vs. non-union, salaried vs. hourly, New York employees vs. Chicago employees, etc.). **The advisor is responsible for determining the number of employee services codes required and their corresponding naming convention for each client group.** Ultimately, each employee service code value will correspond to its own Open Enrollment Landing Page.

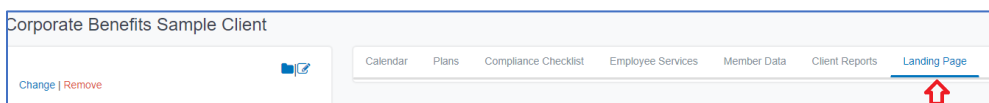
(a) Click on the Add a New Code icon:



(b) Enter the Code Name in the Add Business Code screen, select 'BAAG' from the Service drop down menu, and click on the Save changes button:

The image shows a form titled 'Add Business Code'. It has two input fields: 'Code Name' and 'Service'. The 'Code Name' field contains the text 'OE2021' with a red arrow pointing to it. The 'Service' field is a dropdown menu with 'BAAG' selected and a red arrow pointing to it. At the bottom right of the form, there are two buttons: 'Close' and 'Save changes', with a red arrow pointing to the 'Save changes' button.

- 7) Click on the Landing Page:



Open Enrollment Landing Page Setup Instructions

8) Align the Employee Service/business code created in step 5 (b) to the Open Enrollment Landing page:

- (a) Enter the name for the Landing Page
- (b) Select the appropriate Employee Code from the drop down menu
- (c) Select 'NFP Default' from the Import from Template drop down menu
- (d) Click on the Save changes button

Note: for the creation of the first Open Enrollment Landing Page, you will need to select 'NFP Default' from the Import from Template drop down menu. You will have ability in later stages to create your own template to re-use for the creation of additional Open Enrollment Landing Pages.

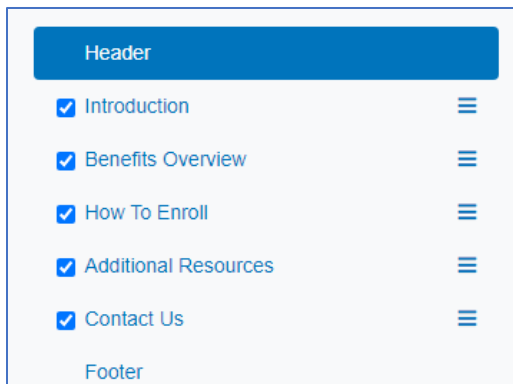
The screenshot shows a form titled "Add New Landing Page" with a close button (X) in the top right corner. The form contains three input fields: "Landing Page Name" with the text "Sample Client 2021 OE Page", "Employee Code" with the value "OE2021", and "Import from Template" with the value "NFP Default". Each of these three fields has a red arrow pointing to it from the right. At the bottom right of the form, there are two buttons: a grey "Close" button and a blue "Save changes" button. A red arrow points to the "Save changes" button from below.

9) Adding Open Enrollment Landing Page Content

In this step, an advisor can add the content that will be displayed on the Open Enrollment Landing Page specific to a given client and a specific set of employees based upon their Employee Service/Business Code. The left-hand navigation displays the various sections to be displayed on the Open Enrollment Landing Page (based upon selecting 'NFP Default' in step 7):

- (a) Header
- (b) Introduction
- (c) Benefits Overview
- (d) How to Enroll
- (e) Additional Resources
- (f) Contact Us
- (g) Footer

Open Enrollment Landing Page Setup Instructions

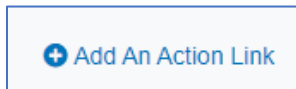


10) Adding/Editing Header Section Content:

- (a) **Name of Client** – name of the client will automatically default
- (b) **Show Logo** – if this box is checked, the client logo will appear on the Open Enrollment Landing Page
- (c) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
- (d) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
- (e) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
- (f) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported
- (g) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
 - (i) *External Actions Links* – is any external website hyperlink or URL address
 - (ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

- (a) Click on the Add an Action Link icon:



- (b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

Open Enrollment Landing Page Setup Instructions

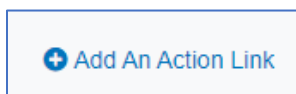
The screenshot shows a dialog box titled "Add Action Link". It has a close button in the top right corner. There are two input fields: "Action Link Name" and "Uri". The "Uri" field contains "https://". Below these is a "Type" dropdown menu with options: "Select", "External", and "Webinar Registration". The "Select" option is currently selected. At the bottom right are "Cancel" and "Save" buttons. Red arrows point to the "Action Link Name" field, the "Uri" field, the "Type" dropdown, and the "Save" button.

11) Adding/Editing Introduction Section Content:

- (a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
- (b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
- (c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
- (d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
- (e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
- (f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
 - (i) *External Actions Links* – is any external website hyperlink or URL address
 - (ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

- (a) Click on the Add an Action Link icon:



- (b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

Open Enrollment Landing Page Setup Instructions

Add Action Link

Action Link Name

Uri

Type

Select

Select

External

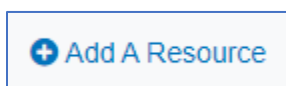
Webinar Registration

Cancel Save

(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

Add New Resource

Resource Name

Type

Link

Description

Priority

None

None

1

Choose an Image

No Image

Benefits

BENEFITS

Cancel Save

(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot

Open Enrollment Landing Page Setup Instructions

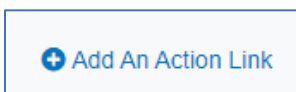
be imported.

12) Adding/Editing Benefits Overview Section Content:

- (a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
- (b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
- (c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
- (d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
- (e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
- (f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
 - (i) *External Actions Links* – is any external website hyperlink or URL address
 - (ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

- (a) Click on the Add an Action Link icon:



- (b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

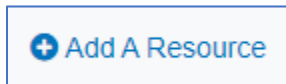
A dialog box titled "Add Action Link" with a close button (X) in the top right corner. It contains two text input fields: "Action Link Name" and "Url". The "Action Link Name" field is empty, and the "Url" field contains "https://". Below these fields is a "Type" dropdown menu with a downward arrow. The dropdown menu is open, showing three options: "Select", "External", and "Webinar Registration". The "Select" option is highlighted in blue. At the bottom right of the dialog box are two buttons: "Cancel" and "Save". Red arrows point to the "Action Link Name" field, the "Url" field, the "Type" dropdown menu, and the "Save" button.

Open Enrollment Landing Page Setup Instructions

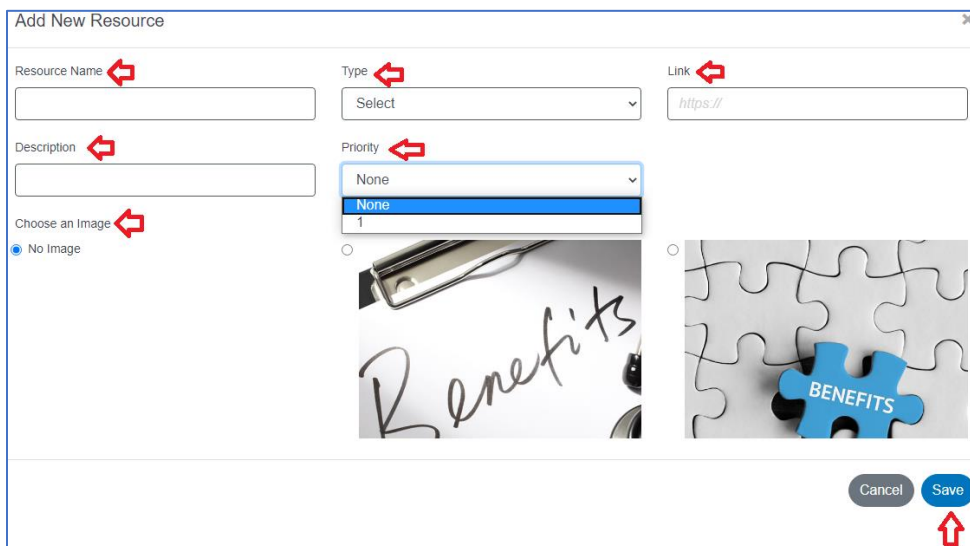
(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

A screenshot of a web form titled "Add New Resource". The form has several fields: "Resource Name" (text input), "Type" (dropdown menu with "Select" selected), "Link" (text input with "https://" pre-filled), "Description" (text input), "Priority" (dropdown menu with "None" selected), and "Choose an Image" (radio buttons for "No Image", "Benefits" (handwritten), and "Benefits" (puzzle piece)). At the bottom right are "Cancel" and "Save" buttons, with a red arrow pointing to the "Save" button.

(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

13) Adding/Editing How to Enroll Section Content:

(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page

(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page

(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page

Open Enrollment Landing Page Setup Instructions

(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page

(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.

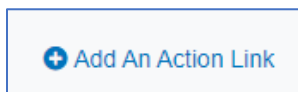
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:

(i) *External Actions Links* – is any external website hyperlink or URL address

(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

(a) Click on the Add an Action Link icon:



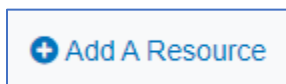
(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

A dialog box titled "Add Action Link" with a close button (X) in the top right corner. It contains two text input fields: "Action Link Name" and "Uri". The "Uri" field has "https://" pre-filled. Below these is a "Type" dropdown menu with a blue arrow pointing to it; the dropdown is open, showing "Select" (highlighted), "External", and "Webinar Registration". At the bottom right are "Cancel" and "Save" buttons, with a red arrow pointing to the "Save" button.

(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing Page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description,

Open Enrollment Landing Page Setup Instructions

Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is a drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

The screenshot shows a form titled "Add New Resource" with the following fields and options:

- Resource Name:** A text input field with a red arrow pointing to it.
- Type:** A dropdown menu with "Select" as the current value and a red arrow pointing to it.
- Link:** A text input field containing "https://" and a red arrow pointing to it.
- Description:** A text input field with a red arrow pointing to it.
- Priority:** A dropdown menu with "None" selected and "1" as an option below it. A red arrow points to the dropdown.
- Choose an Image:** A section with a radio button selected for "No Image" and a red arrow pointing to it. Below are two image thumbnails: one showing the word "Benefits" in cursive, and another showing a puzzle piece with the word "BENEFITS" on it.
- Buttons:** "Cancel" and "Save" buttons at the bottom right. A red arrow points to the "Save" button.

(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

14) Adding/Editing Additional Resources Section Content:

(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page

(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page

(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page

(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page

(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.

(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:

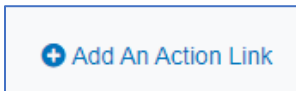
(i) *External Actions Links* – is any external website hyperlink or URL address

(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

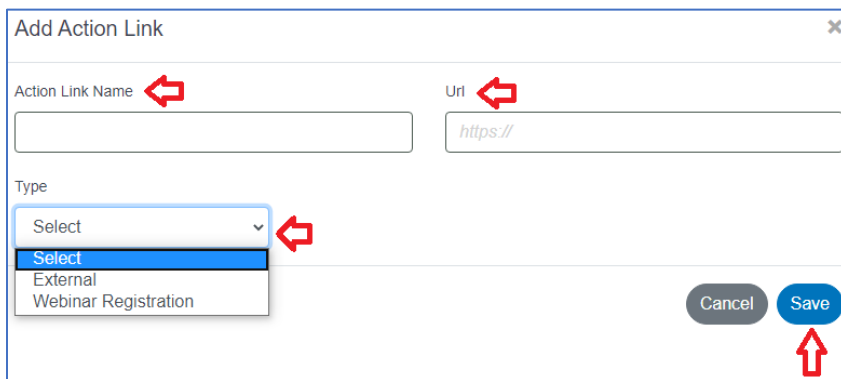
Open Enrollment Landing Page Setup Instructions

To Add An Action Link:

(a) Click on the Add an Action Link icon:



(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

A dialog box titled "Add Action Link" with a close button (X) in the top right corner. It contains two text input fields: "Action Link Name" and "Url". The "Url" field contains "https://". Below these fields is a "Type" dropdown menu with a blue highlight on the "Select" option. The dropdown menu lists "Select", "External", and "Webinar Registration". At the bottom right of the dialog are "Cancel" and "Save" buttons. Red arrows point to the "Action Link Name" field, the "Url" field, the "Type" dropdown menu, and the "Save" button.

(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

Open Enrollment Landing Page Setup Instructions

The screenshot shows a form titled "Add New Resource" with the following fields and options:

- Resource Name:** A text input field.
- Type:** A dropdown menu with "Select" as the current value.
- Link:** A text input field with "https://" as a placeholder.
- Description:** A text input field.
- Priority:** A dropdown menu with "None" selected, and "1" as an alternative option.
- Choose an Image:** A radio button selection between "No Image" and two image thumbnails. The first image shows a clipboard with "Benefits" written on it. The second image shows a puzzle piece with "BENEFITS" written on it.

At the bottom right, there are "Cancel" and "Save" buttons, with a red upward-pointing arrow below the "Save" button.

(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

15) Adding/Editing Contact Us Section Content:

(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page

(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page

(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page

(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page

(e) **Client Contacts** – for those offices on the latest version of Salesforce, client contacts contained within Salesforce will automatically appear in this section. If you choose to have the client contact and their contact info appear on the Open Enrollment Landing Page, simply check the box(es) of which information you would like displayed: name, email address, and/or phone number.

The screenshot shows a section titled "Client Contacts" with a dropdown menu. The dropdown is open, showing a checked box next to "Jane Doe". Below the dropdown, there are three checked checkboxes for "312-555-5959" and "jdoe@acmecorp.com".

(f) **Additional Contacts** – for those contacts not listed in Salesforce, you can click on the Add A Contact icon to add an additional contact. However, if a client contact is not in Salesforce and should it be, you should enter the client contact information in Salesforce since Salesforce is the system of

Open Enrollment Landing Page Setup Instructions

record for this type of information. An automated job runs every few hours to “synch” client and contact record information between Salesforce and the Tech Management Center (soon to be re-branded NFP Connect).

(g) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.

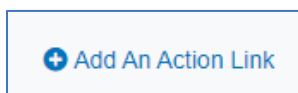
(h) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:

(i) *External Actions Links* – is any external website hyperlink or URL address

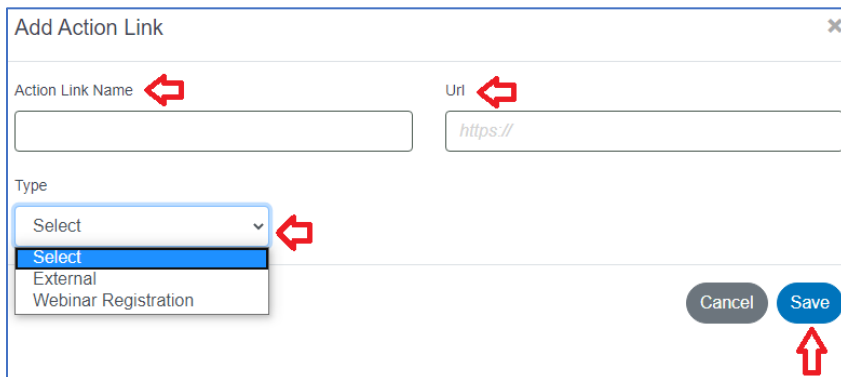
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

(a) Click on the Add an Action Link icon:



(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

A dialog box titled "Add Action Link" with a close button in the top right corner. It contains two input fields: "Action Link Name" and "Uri". The "Uri" field contains the text "https://". Below these fields is a "Type" dropdown menu with a downward arrow, showing a list of options: "Select", "External", and "Webinar Registration". The "Select" option is currently selected. At the bottom right of the dialog are two buttons: "Cancel" and "Save". Red arrows point to the "Action Link Name" field, the "Uri" field, the "Type" dropdown menu, and the "Save" button.

(i) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



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(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

The screenshot shows a web form titled "Add New Resource". It contains several input fields and controls:

- Resource Name:** A text input field with a red arrow pointing to it.
- Type:** A dropdown menu with "Select" as the current value and a red arrow pointing to it.
- Link:** A text input field containing "https://" and a red arrow pointing to it.
- Description:** A text input field with a red arrow pointing to it.
- Priority:** A dropdown menu with "None" selected, and a red arrow pointing to it. The dropdown is open, showing "None", "None", and "1".
- Choose an Image:** A section with a radio button selected for "No Image" and a red arrow pointing to it. Below it are two image thumbnails: one showing a clipboard with "Benefits" written on it, and another showing puzzle pieces with one blue piece labeled "BENEFITS".
- Buttons:** "Cancel" and "Save" buttons at the bottom right, with a red arrow pointing to the "Save" button.

(j) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

16) Adding/Editing Footer Section Content:

(a) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported

(b) **Select Theme** – advisors will have the ability to modify with some specificity the theme color based upon the Red Blue Green Alpha (RGBA) or HEX color system. The RGBA color system is the three-channel RGB color model supplemented with a fourth alpha channel. Alpha indicates how opaque each pixel is and allows an image to be combined over others using alpha compositing, with transparent areas and anti-aliasing of the edges of opaque regions. A color HEX code is a hexadecimal way to represent a color in RGB format by combining three values – the amounts of red, green and blue in a particular shade of color.

To Select A Theme Color:

(i) Click anywhere in the Theme Color test box

(ii) Modify the color scheme by either sliding radio bar from left to right, entering specific red, green, blue, and alpha numeric values, dragging the radio button from right to left to change the alpha percentage value, or clicking on the up/down arrows next to the A (alpha field) to convert the color

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scheme to HEX .



17) Adding/Editing New Section Content:

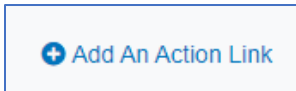
This set of features allows advisors to create a customized section of content to be displayed on the Open Enrollment Landing page.

- (a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
- (b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
- (c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
- (d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
- (e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
- (f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
 - (i) *External Actions Links* – is any external website hyperlink or URL address
 - (ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

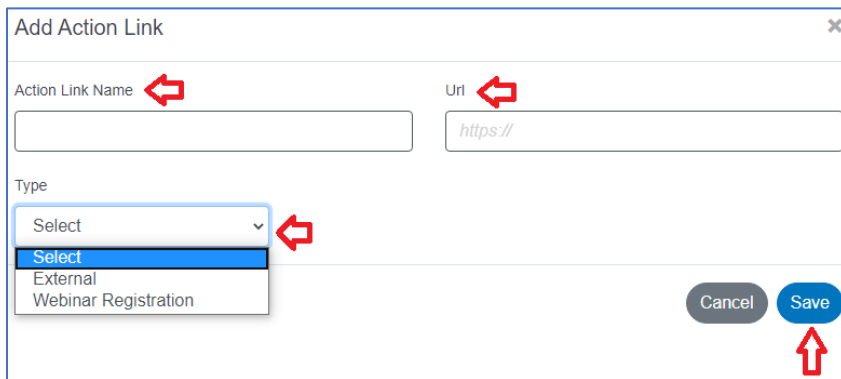
To Add An Action Link:

- (a) Click on the Add an Action Link icon:

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(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

A dialog box titled "Add Action Link" with a close button (X) in the top right corner. It contains two text input fields: "Action Link Name" and "Url". The "Url" field contains "https://". Below these fields is a "Type" dropdown menu with a downward arrow, showing a list of options: "Select", "External", and "Webinar Registration". The "Select" option is highlighted. At the bottom right of the dialog are two buttons: "Cancel" and "Save". Red arrows point to the "Action Link Name" field, the "Url" field, the "Type" dropdown menu, and the "Save" button.

(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

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The screenshot shows a dialog box titled "Add New Resource". It contains the following fields and options:

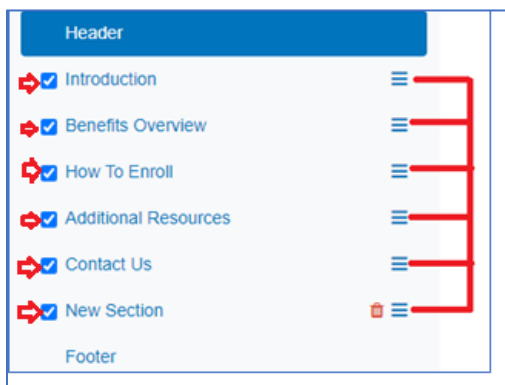
- Resource Name:** A text input field.
- Type:** A dropdown menu with "Select" as the current value.
- Link:** A text input field containing "https://".
- Description:** A text input field.
- Priority:** A dropdown menu with "None" selected, and a list showing "None" and "1".
- Choose an Image:** Radio buttons for "No Image" (selected), and two image thumbnails. The first thumbnail shows the word "Benefits" written in cursive. The second thumbnail shows a puzzle piece with the word "BENEFITS" on it.
- Buttons:** "Cancel" and "Save" buttons. A red arrow points to the "Save" button.

(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

18) Changing the Sequence of How Sections Are Displayed on the Open Enrollment Landing Page

Advisors have the ability to change the sequence of how sections and their corresponding content are displayed on the Open Enrollment page:

- (a) Left click on the three horizontal bars icon next to a given section heading name from the left-hand navigation
- (b) Drag and drop that section heading name in the order or sequence (from top to bottom) as you desire



Note: Advisors can determine which content section to display on the Open Enrollment Landing Page by either checking or unchecking the checkbox to the left of each content section heading

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Leveraging Templates

In order to create efficiencies for creating additional Open Enrollment Landing Pages with a specific content format, advisors can create and save templates. For NFP offices on Salesforce, templates can be accessed and re-used within the same region (e.g. West, Central, Mid-Atlantic, Northeast, etc.). Sample client records for NFP offices on Salesforce have been created within NFP Connect for advisors to create demo or sample Open Enrollment Landing Pages and/or share templates within a given region:

Central: <https://techmanagementcenter.nfp.com/client/details/801189>

Northeast: <https://techmanagementcenter.nfp.com/client/details/801191>

Mid-Atlantic: <https://techmanagementcenter.nfp.com/client/details/801193>

Southeast: <https://techmanagementcenter.nfp.com/client/details/801194>

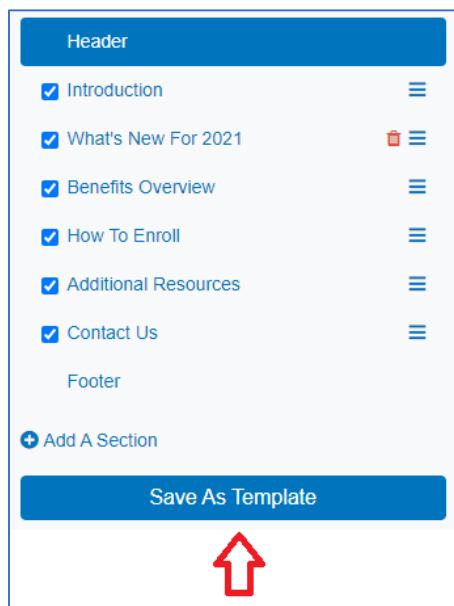
West: <https://techmanagementcenter.nfp.com/client/details/801197>

For Benefits Partners firms or those NFP offices not on Salesforce, templates be accessed and re-used within the same office.

Create & Save a Template:

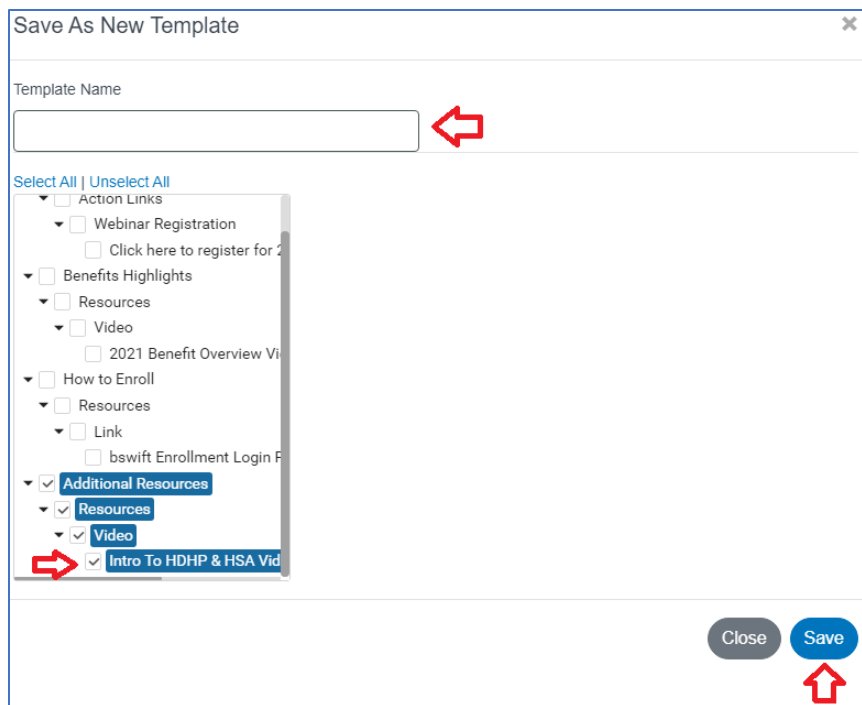
(a) Ensure all content has been entered for the initial Open Enrollment Landing Page (section names, descriptions, including section heading sequencing, etc.)

(b) Click on the Save As Template button:



(c) Enter a Template Name and select which resource(s) (e.g. documents, links, images, etc.) that you like to be copied and saved along with the template in the Save As New Template screen and then select the Save button:

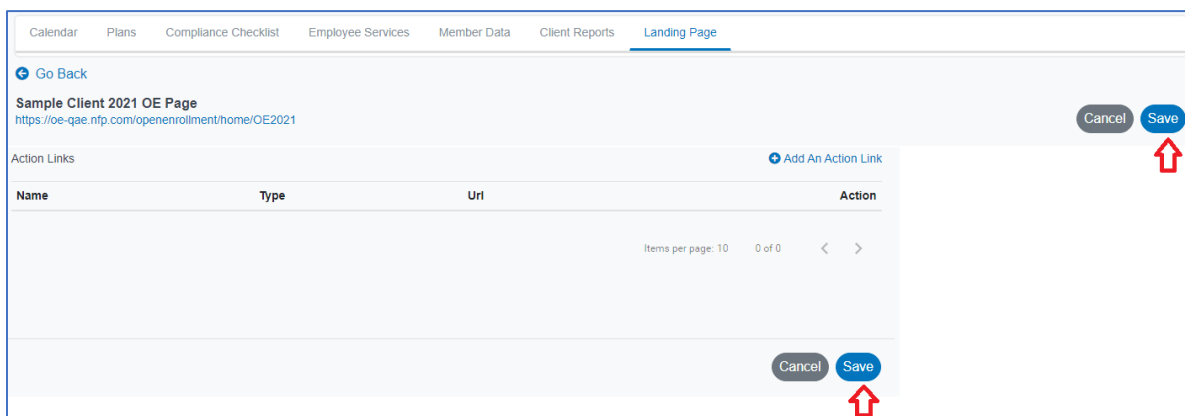
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(d) Once a template is saved, it can be re-used to create a new Open Enrollment Landing Page (refer back to step 8 where the option is given to the user to import a previously created template)

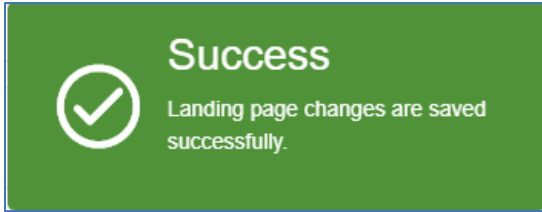
19) Saving the Open Enrollment Landing Page

(a) Click on the Open Enrollment Landing Page Save button found either in the upper right or lower right screen within the Landing Page tab:



(b) After saving the Open Enrollment Landing Page, you'll receive a notification:

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Note: there is no “sandbox” or test environment where Open Enrollment Landing Pages can be viewed or tested. Once the Open Enrollment Landing Page is saved, the client’s Open Enrollment Landing Page website/URL is “live.” Anyone with access to the Open Enrollment Landing Page website/URL can view the content and any subsequent changes or updates made to the Open Enrollment Landing Page.

20) Locating Open Enrollment Landing Page Website Address/URL

Once step 8 is completed, a unique Open Enrollment Landing Page website address/URL is automated created. The Open Enrollment Landing Page website address/URL is not customizable at this time. All Open Enrollment Landing Page websites/URLs will contain the Employee/Business Code created in step 8.

The Open Enrollment Landing Page website address/URL is found just above the left-hand navigation of the various content sections in the Landing Page tab:

