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LOGIN
This screen gives you the choice:
• Starting a new case (Start New Case) or
• Going to your list of cases already open (View My cases)

Depending on how a user accesses this tool, there is information that is stored within the system. Every user has a “profile” that contains information about them. Agents will want to make sure this data is accurate as it is reflected in the illustrations output. To update this information, click on the underlined name above the big buttons.
A new screen will be open and allow the agent to complete the information that will be used later in the illustrations output. Once updated, click OK and the information will be saved for that particular login.

Agent of Record
The agent of record allows you to complete an illustration on behalf of someone (another agent). To change the agent on a case, the user clicks on the underlined name.

This opens a blank information screen which allows the user to enter agent’s information.
Basic Screen Set-up
The tabs along the top of the main panel are the keys to identifying and launching different modules in your system. Your customized system may not contain all of the tabs (modules) shown in this example, or it may include others.

Main Panel
The Main Panel contains the information gathering fields, menus, and windows for the client input.
Case Information Tab

Enter data in the Case Information tab once, and it carries through to all areas of the application.

Select a State and Product Type, and then click the Find Available Products button. A list of single user products appears as shown below. The SELECT button indicates which of the system’s modules are available to use with that product.
**Needs Analysis**  
This tool provides a structured, yet flexible, approach to needs-based selling. It shows your clients a clear picture of their current situation and helps you draft a blueprint of what is needed—before you sell the solution. By working with clients and using their own numbers, you gain credibility by solving a problem rather than selling a solution.

**Quotes/Illustrations**  
The Quotes/Illustrations tab helps you design and illustrate life insurance product solutions. This module (called Illustrations from here on) accurately facilitates the “what if” modeling necessary for today’s flexible products. With all your products accessible and the ease of saving multiple scenarios, you can compare products and approaches until you find an effective solution. Illustrations also includes several advanced ‘solves’ to quickly respond to areas of high concern to a client, such as the length of income stream or the lowest premium. The version you are using is tailored to your company’s products and specifications.
Advanced Sales

This is an ideal tool to assist you in constructing and presenting illustrations for advanced markets. After you’ve met with the client and identified his or her needs, the Advanced Sales module will help you design the solution. **Note:** Advanced Sales is not available for some product types (e.g., Term). If you have a Product Type selected on the Illustrations tab that is not available in Advanced Sales, the Advanced Sales tab will not be visible.
**Application**
This takes you directly to iGO and all information that was entered on the Case information tab will be transferred into the application.

**Left Side Navigation**
The Leftside navigation gives you a list of choices for information gathering.
- Needs Analysis: Select Concept (Education Funding, for example)
- Quotes/Illustrations: Concept, State, Product Type, and Product (Illustration e.g., Term, and TermMaster 25)
- Advanced Sales: Select Concept
Rightside Navigation
The rightside navigation gives you a list of the outputs available.

- Needs Analysis: Reports, Introduction, Fact Finder, Overview and Marketing
- Quotes/Illustrations: Save, Illustration, Test Print and Calc Results
- Advanced Sales: Reports, Overview, Presentations, and Marketing

Other Features

Case Actions
The following case actions are available depending on the...

Share: To share a case with another user (agent), click the case's checkbox (or checkboxes to trigger sharing for more than one case) in the Select column. Then select Share Case from the Case Actions drop-down menu. A list of all the system's users appears.
**Unshare:** To undo the sharing of a case with another user (agent), click the case’s checkbox in the Select column. Then select Unshare Case from the Case Actions drop-down menu. A users list appears. This is a list only of the other users who share that case.

**Transfer:** To transfer a case to another user (agent), click the case’s checkbox (or checkboxes to transfer more than one case) in the Select column. Then select Transfer Case from the Case Actions drop-down menu. A list of all the system’s users appears.

**Delete:** To delete a case, click the checkbox (or checkboxes to delete more than one case at the same time) in the Select column. Then select Delete on the Case Actions drop-down menu. A confirmation will ask you “Are you sure you want to delete this?” Click OK to complete the deletion or Cancel to prevent the deletion. Note: The system is designed to purge cases that have no activity after 120 days automatically.

**Navigation Cues**
There are several navigation cues throughout the application to help the agent as they use the system.
PDF outputs
By clicking on the Illustrations tab – a PDF will be generated for printing.
For more information, please go to training.ipipeline.com