IPIPELINE®

INSURANCE ACCELERATED

iSERVICE USER GUIDE

January 2016

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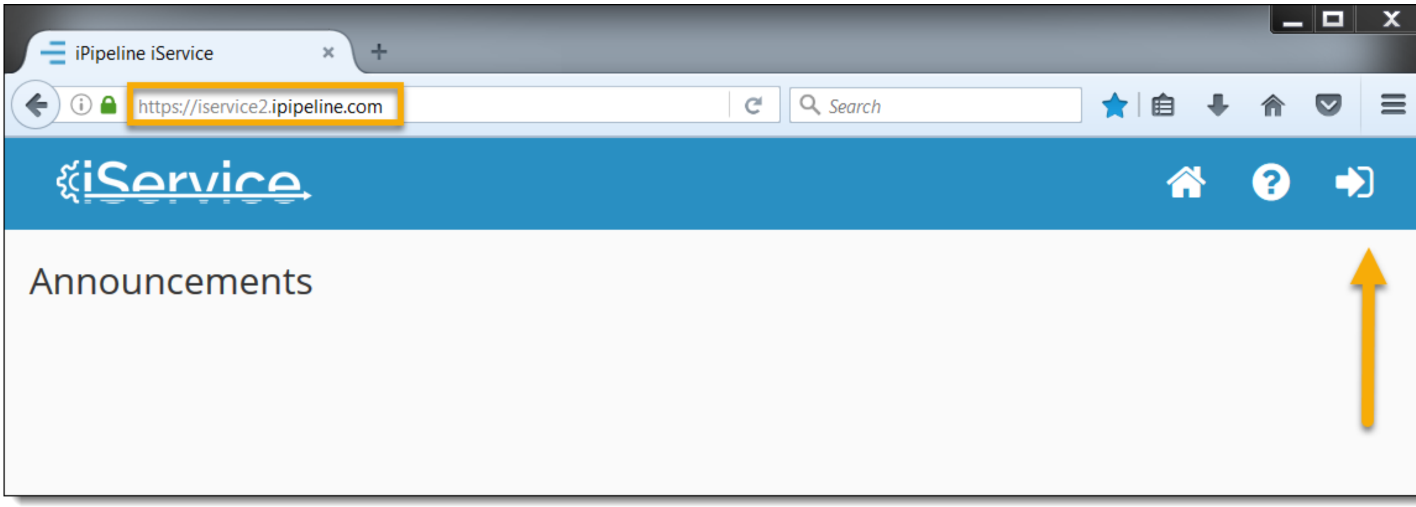
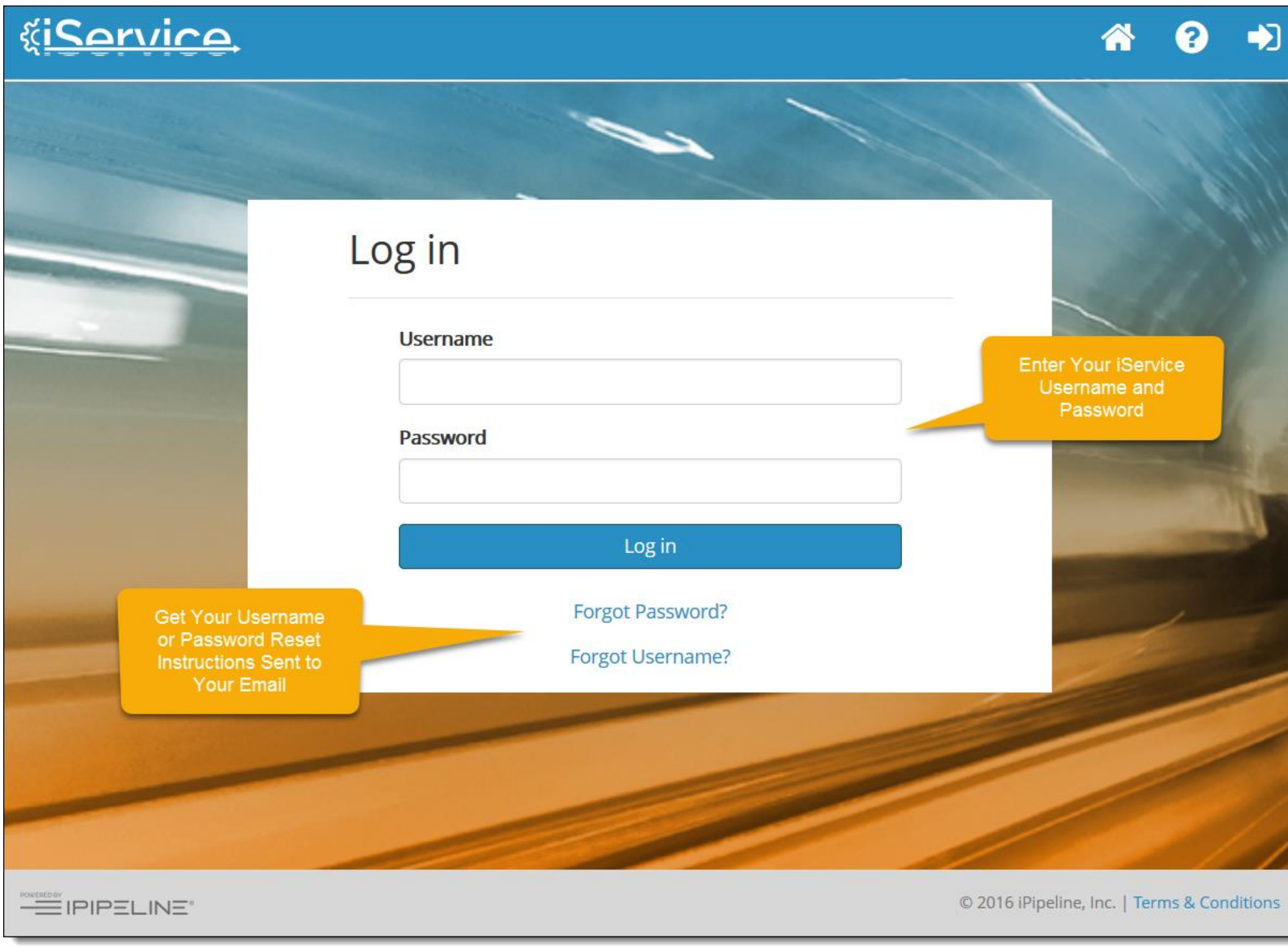
Access iService

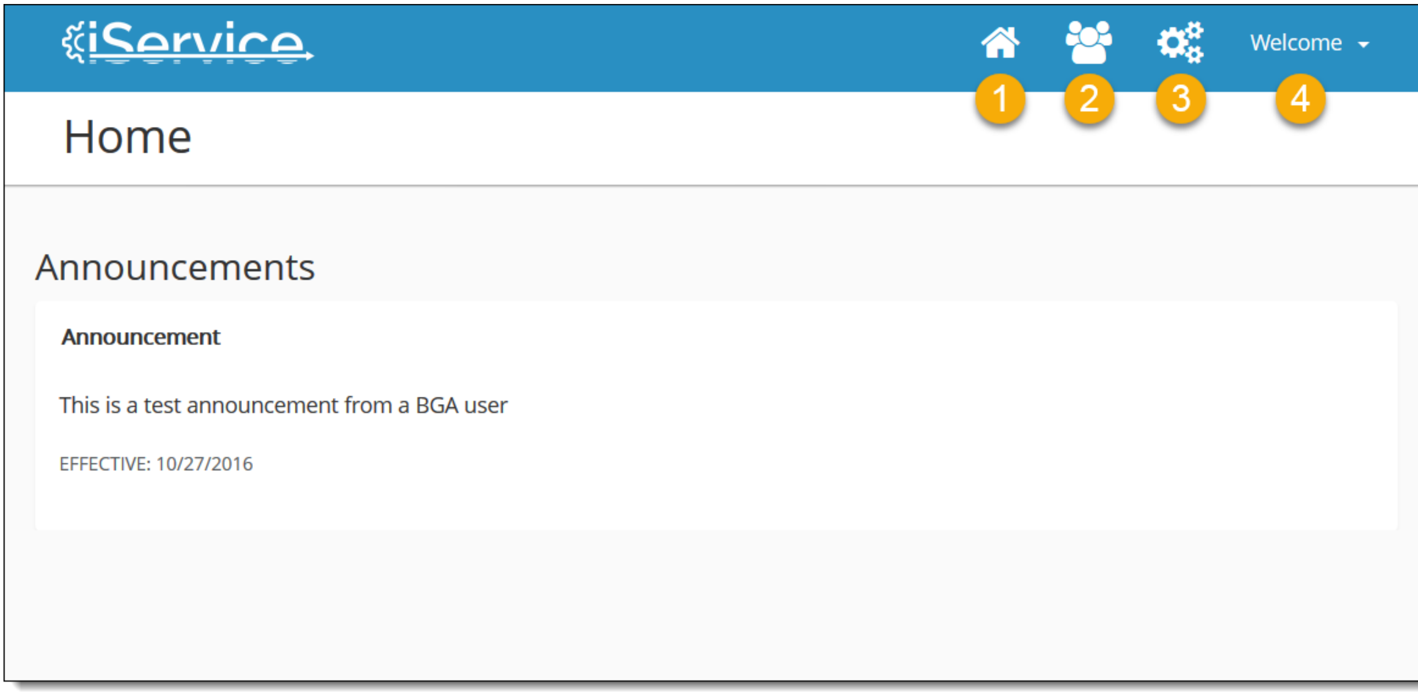
1. Navigate to iservice2.ipipeline.com and click the arrow button in the top right.



2. Log into the site with your iService credentials.



Site Navigation



1 Click the Home icon to return to the **Home** page.

2 Click the User Management icon to complete the following actions:

- Create a new user
- Edit a user's details
- Clone a user
- Disable a user
- Reset a user's password
- Resend verification to a pending user
- Re-enable a disabled user

3 Click the Settings icon to configure the following:

- Annuity Profile
- Forms Profile
- iGO Profile
- Term Rates Profile
- Product Profile

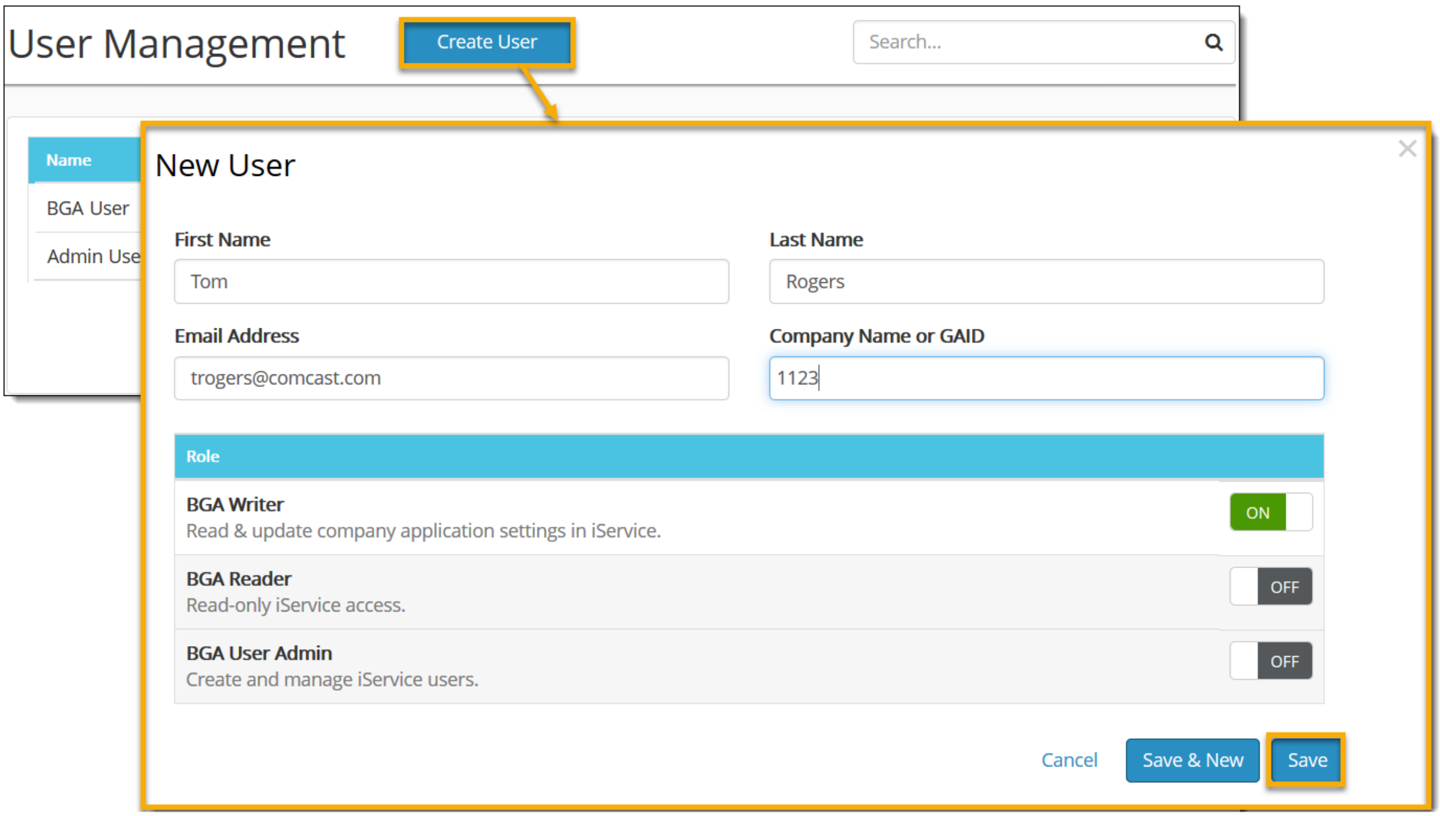
4 Click the Welcome icon to be directed to training resources and iPipeline support.

User Management

You can manage users, and users' settings, by clicking the User Management icon in the top navigation.

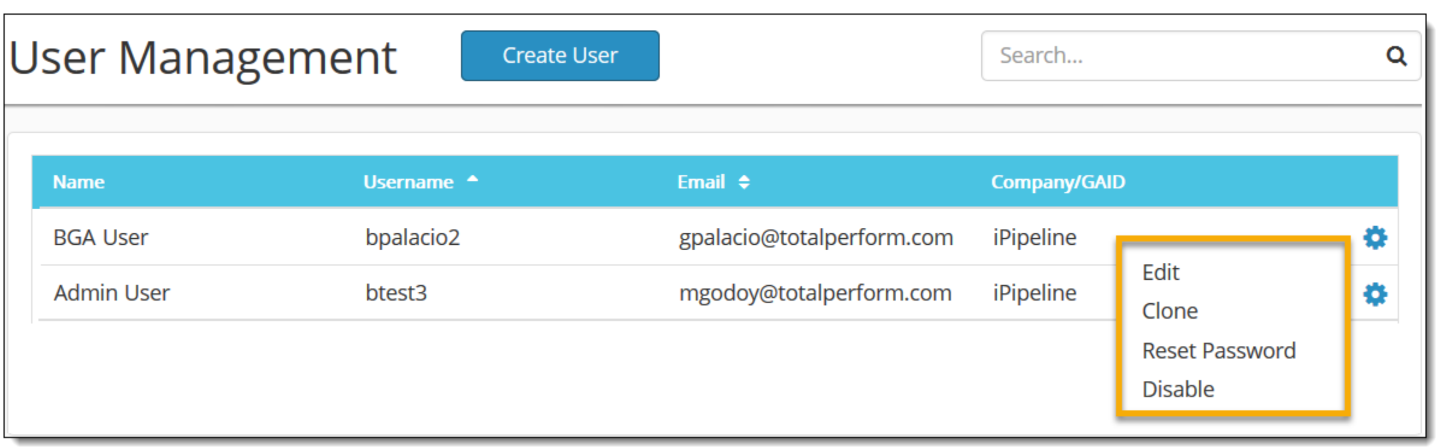
Create a New User

1. Create a new user by clicking **Create User** on the **User Management** page.
2. Fill in all required information, select the user's role(s), and click **Save**.



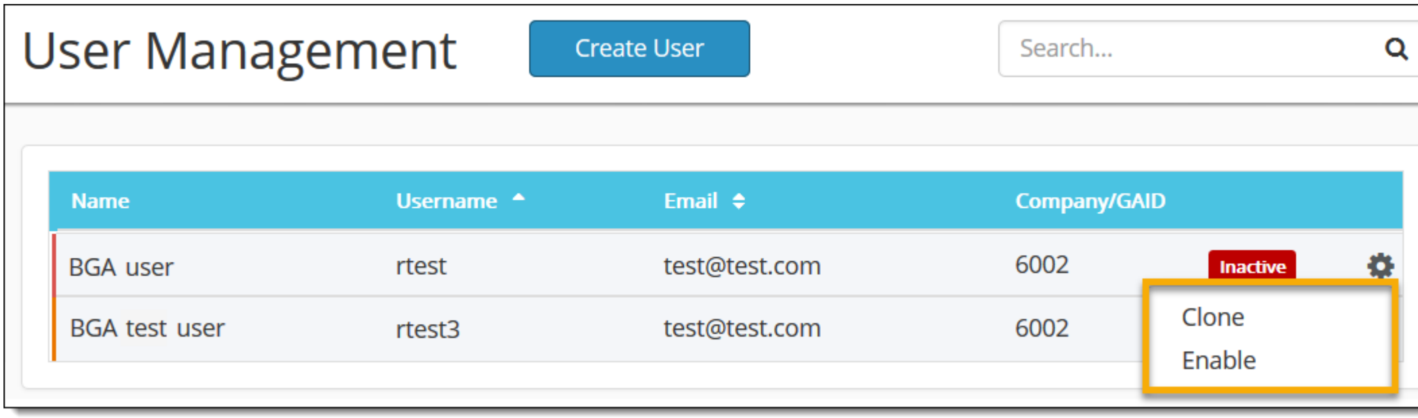
Edit, Clone, Reset Passwords, & Disable Users

1. You can edit, clone, reset a password, or disable a user by clicking the symbol to the right of the user and making the appropriate selection.



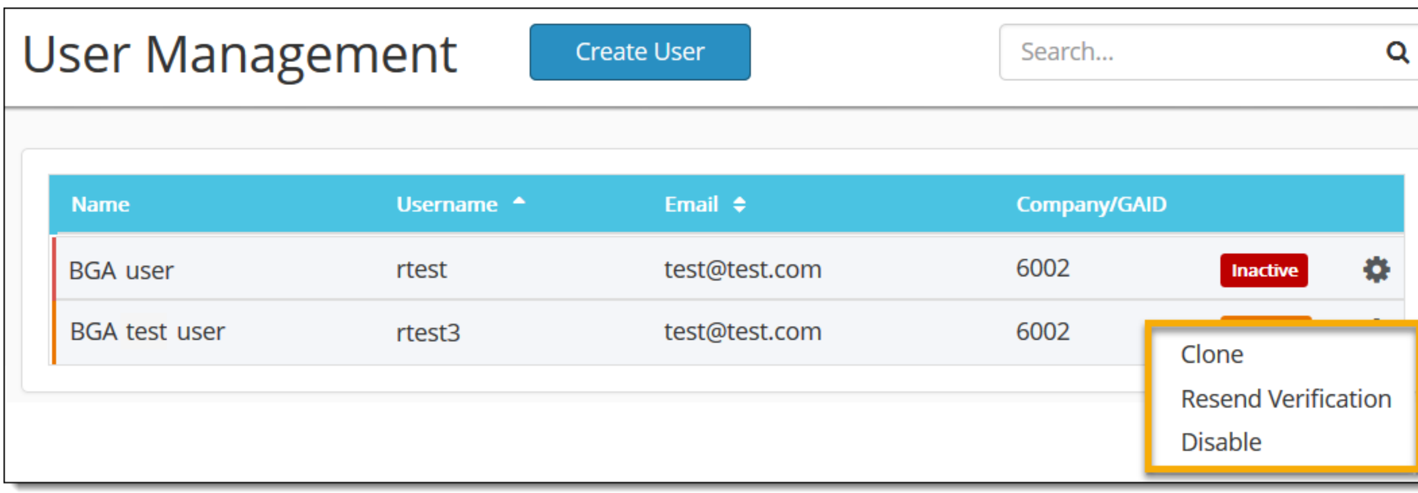
Re-Enable an Inactive User

1. Re-enable an inactive user by clicking the symbol to the right of any inactive user and selecting **Enable**.



Resend Verification to a Pending User

1. Resend verification to a pending user by clicking the symbol to the right of any pending user and selecting **Resend Verification**.

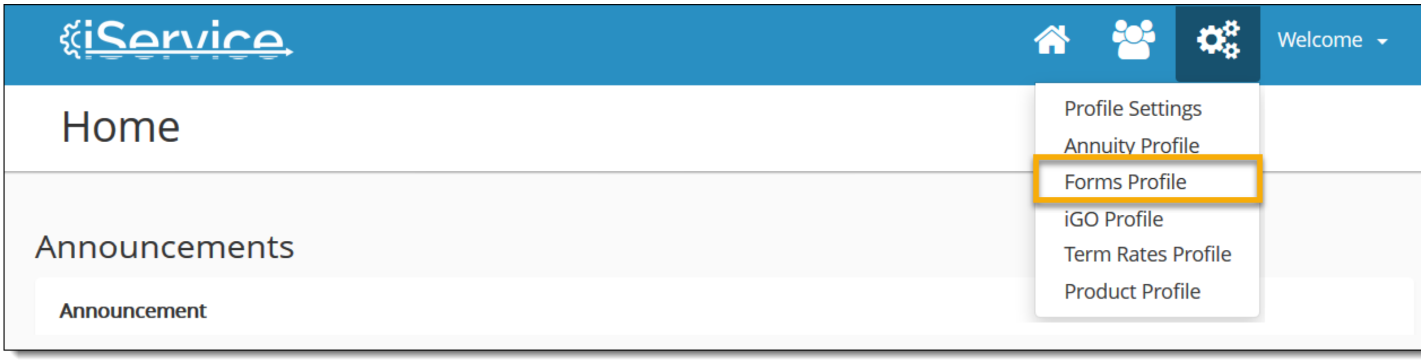


Configure Your Profile

You can select your applications, set locations, and add carriers within **Profile Configuration**.

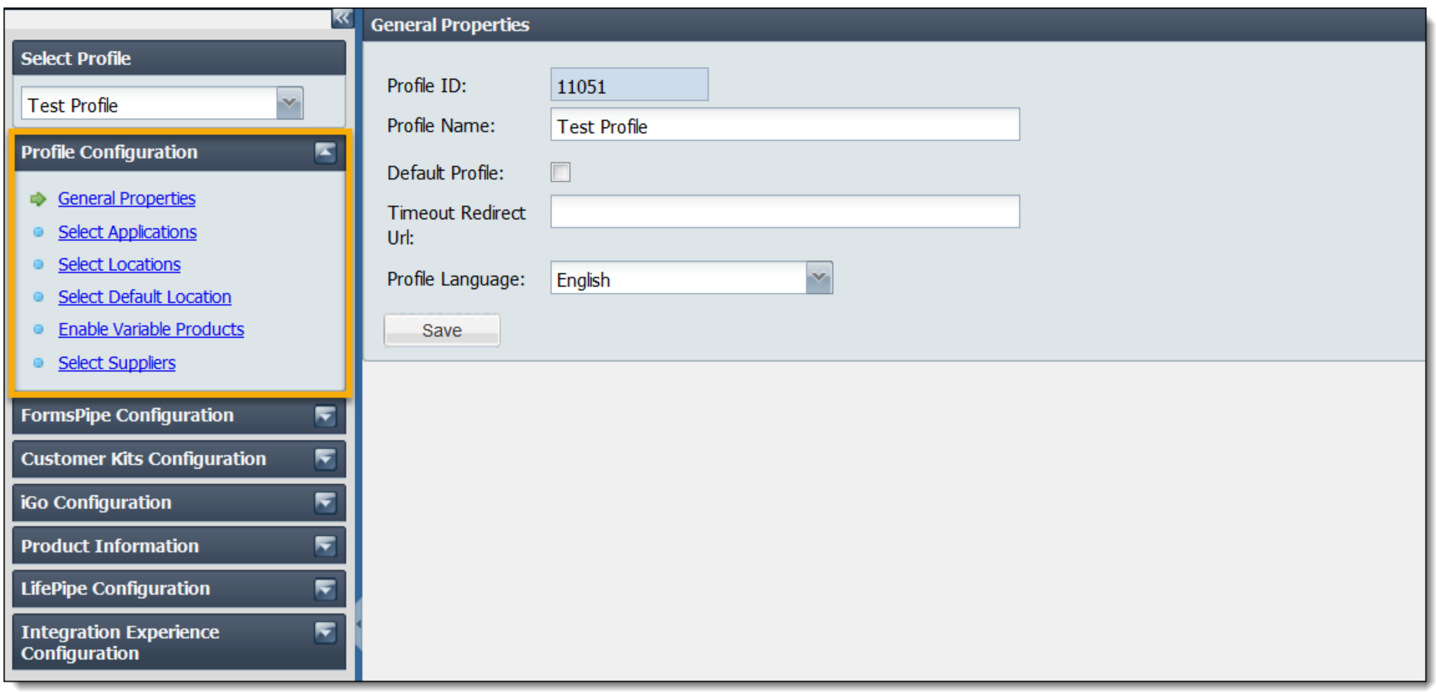
Access Profile Configuration

1. In iService, select **Forms Profile** from the settings drop down on the Home page.



This displays a separate configuration interface.

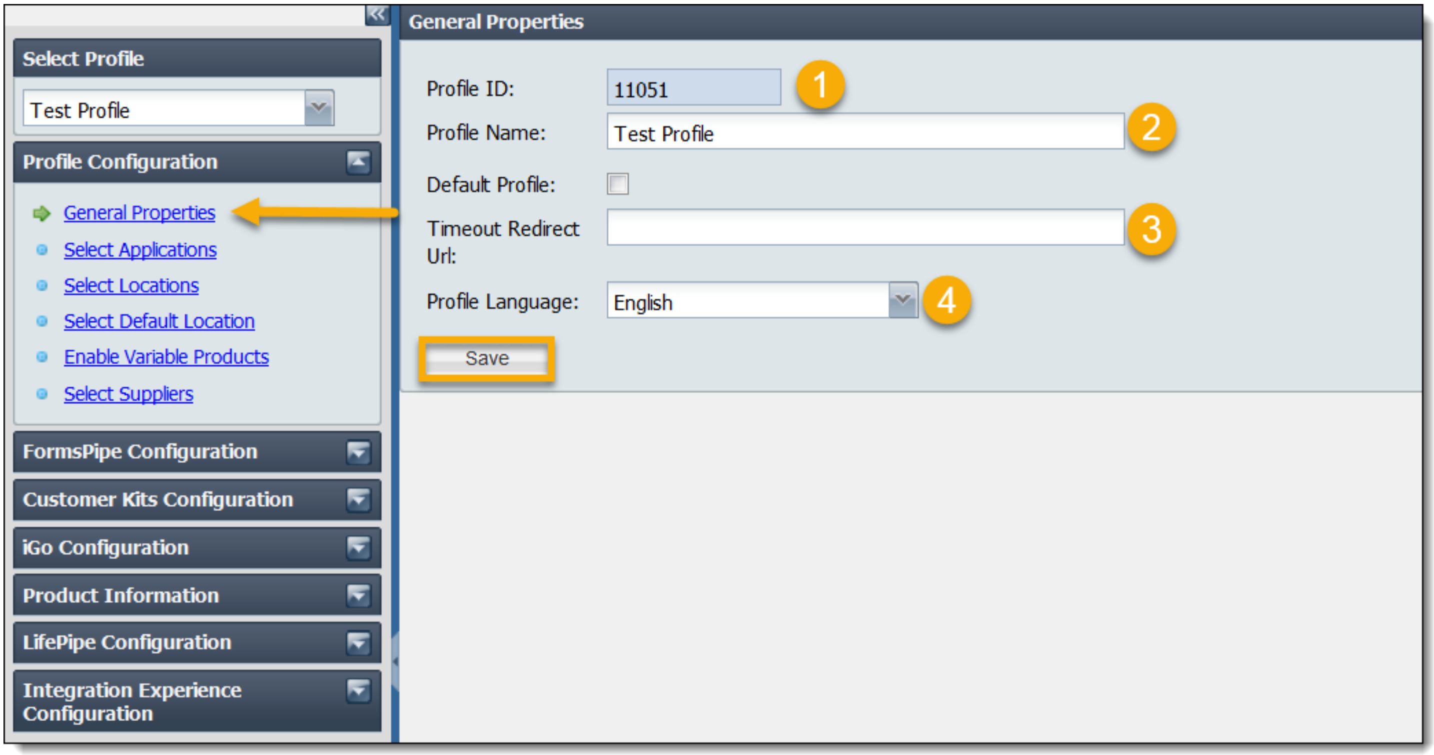
2. Expand **Profile Configuration** from the left menu.



General Properties

From the **General Properties** screen (**Profile Configuration > General Properties**), you can set your profile name, and set a redirect page for when your users timeout.

1. Make modifications to any of the below fields and click **Save**.



1 This field displays your profile ID.

2 Modify your profile name.

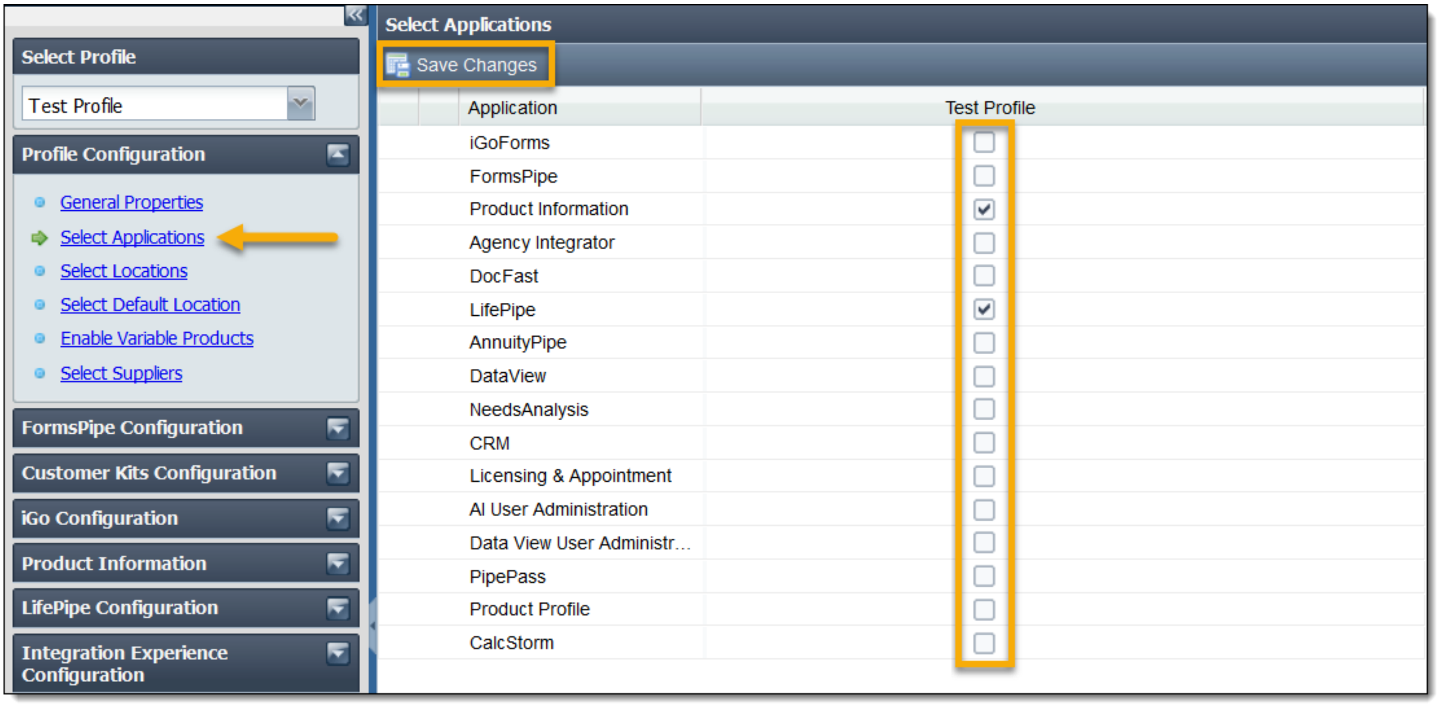
3 Enter the URL of the page you would like users to be redirected to in the case of a session timeout.

4 Select your preferred profile language (Chinese, English, Japanese, Portuguese, Russian, Spanish).

Select Applications

From the **Select Applications** screen (**Profile Configuration > Select Applications**), you can see all the iPipeline tools you are subscribed to.

Caution: Adding or removing an application could cause a disruption if not done properly. Before adding or removing an application, please contact iPipeline support.

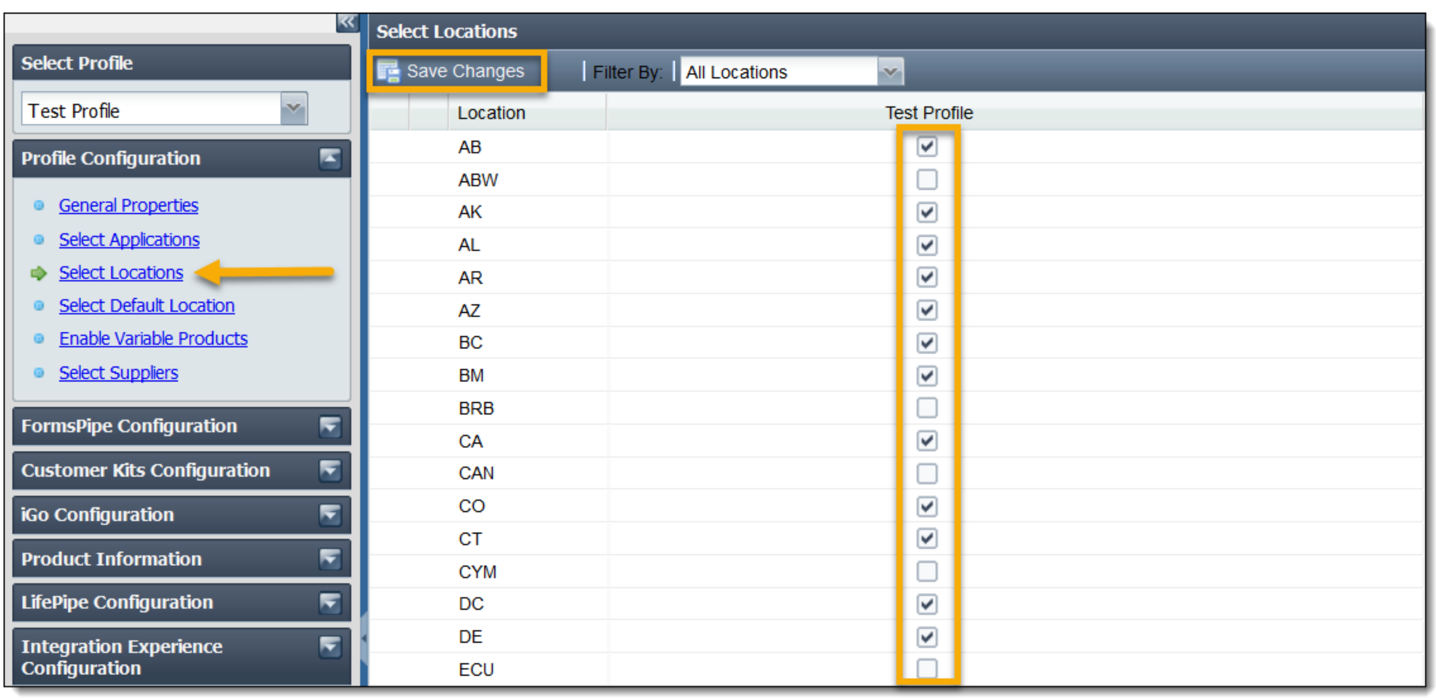


Add Locations

From the **Add Locations** screen (**Profile Configuration > Add Locations**), you can see all locations in which you can do business.

1. Check locations to enable under the agency name (i.e. profile name).
2. Click **Save Changes**.

   Hint: You can set a default location within **Profile Configuration > Select Default Location**.



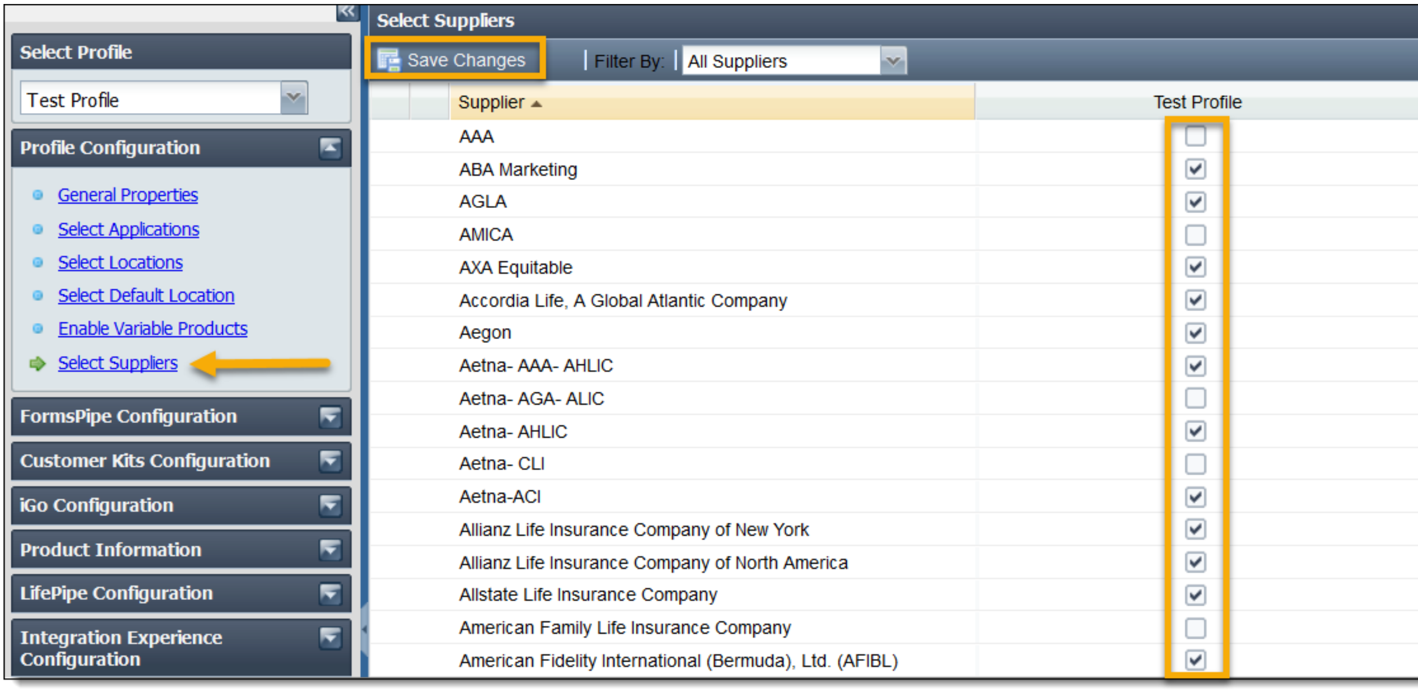
Add Carriers for iGO, Forms, and Product Information

From the **Select Suppliers** screen (**Profile Configuration > Select Suppliers**), you can see a list of carriers on iPipeline's products.

Note: This list displays **ALL** carriers that use iPipeline's products. There may be an instance where you select a Carrier from this list, but it does not display in other configuration sections because you are not subscribed to that Carrier or line of business.

1. Check suppliers to enable under the agency name (i.e. profile name).
2. Click **Save Changes**.

   The selected carriers display as options for all products in which they are available.



Note: You can add or remove carriers from your quote engine by navigating to the **Annuity & Term Rates Profile** page in iService. Refer to Add Products to your Quote Engine for further instruction.

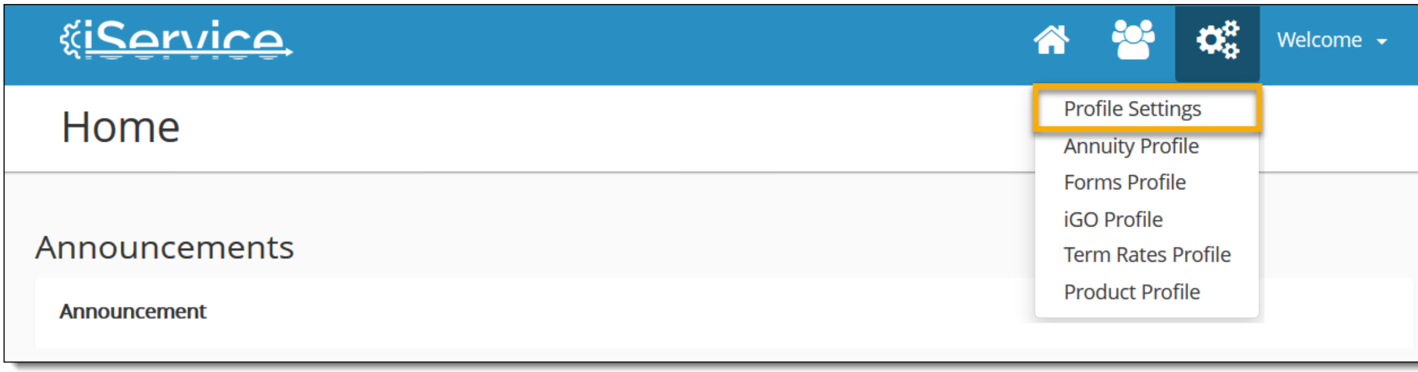
Quote Engine Configuration

You can customize your quote engine by configuring the quote engine interface and adding products to your quote engine.

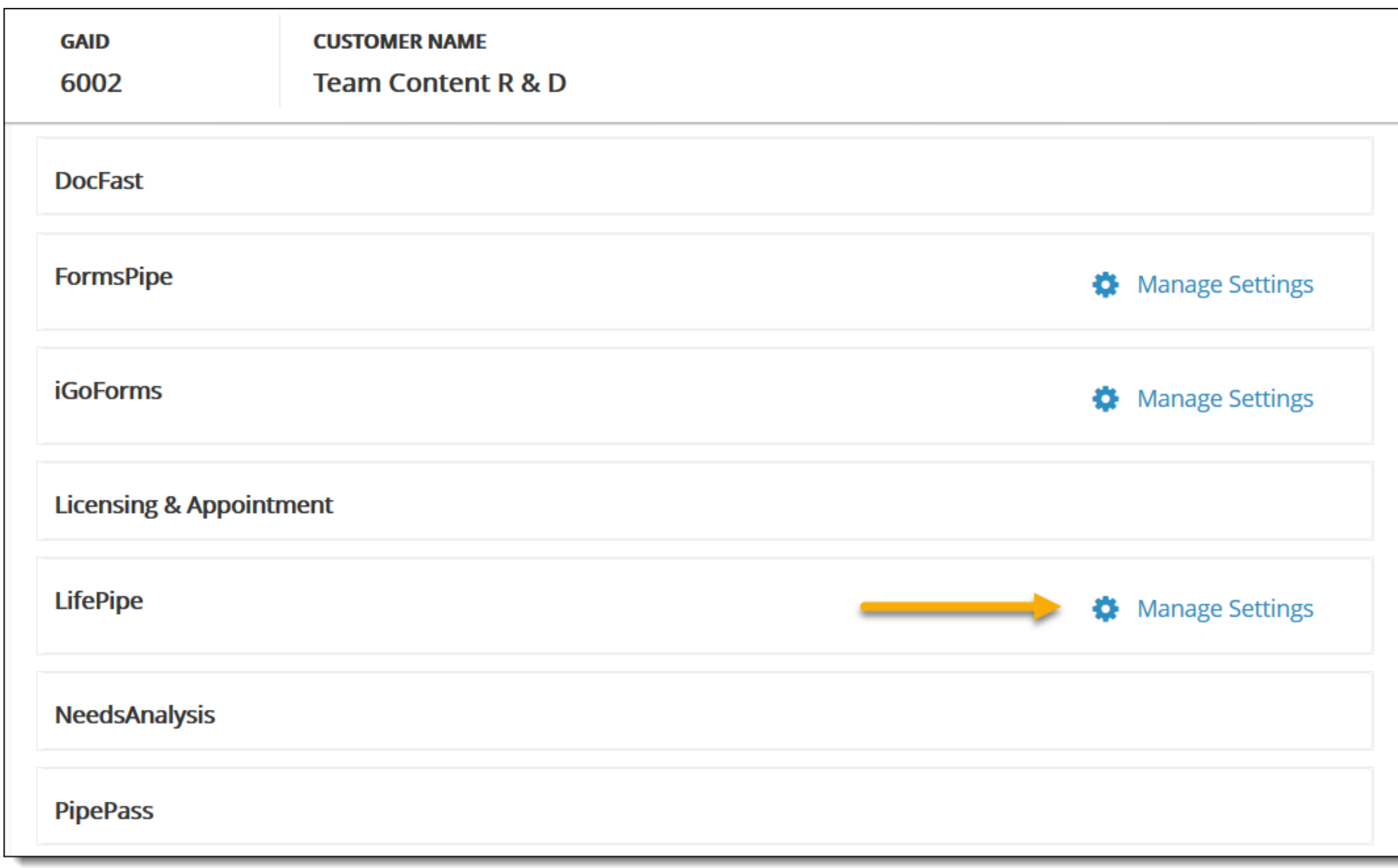
Customize Your Quote Engine Interface

Make customizations to the interface of your quote engine, such as setting defaults, choosing term lengths, configuring required fields, or BCC-ing all emailed quotes from your site.

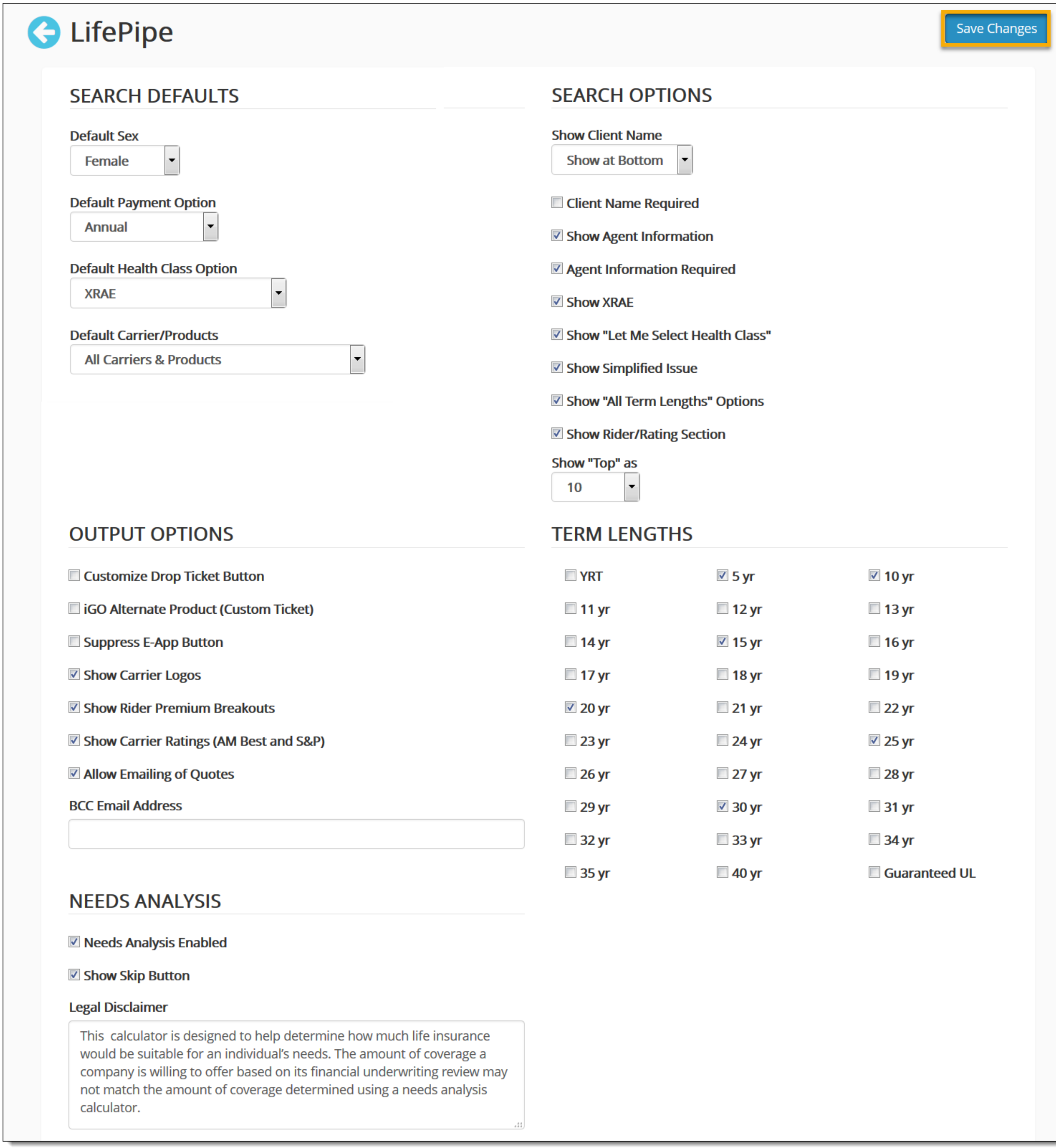
1. Within iService, click **Profile Settings** from the settings drop down on the Home page.



2. Click the **Manage Settings** link on the LifePipe bar in **Profile Settings**.

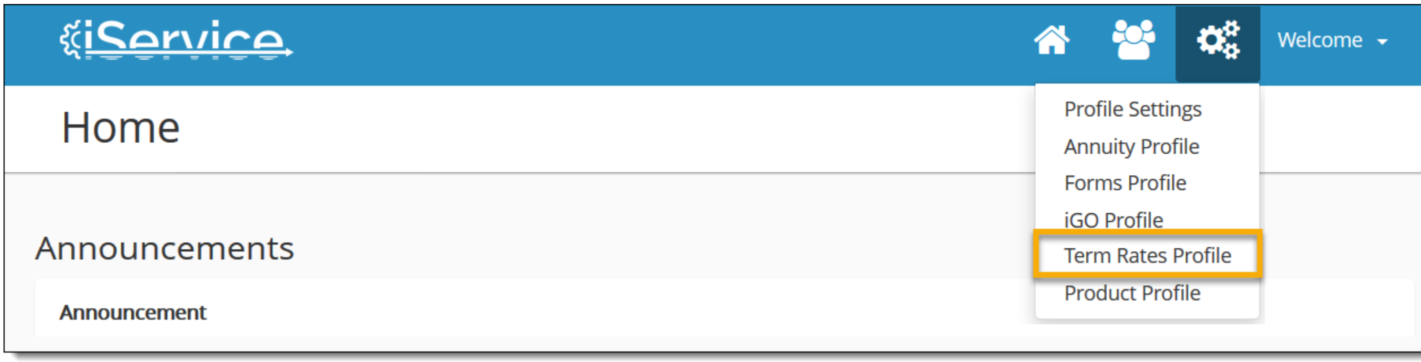


3. Choose all configuration settings for your quote engine, then click **Save Changes**.


LifePipe
Save Changes
SEARCH DEFAULTS
Default Sex
Female
Default Payment Option
Annual
Default Health Class Option
XRAE
Default Carrier/Products
All Carriers & Products
SEARCH OPTIONS
Show Client Name
Show at Bottom
Client Name Required
Show Agent Information
Agent Information Required
Show XRAE
Show "Let Me Select Health Class"
Show Simplified Issue
Show "All Term Lengths" Options
Show Rider/Rating Section
Show "Top" as
10
OUTPUT OPTIONS
Customize Drop Ticket Button
iGO Alternate Product (Custom Ticket)
Suppress E-App Button
Show Carrier Logos
Show Rider Premium Breakouts
Show Carrier Ratings (AM Best and S&P)
Allow Emailing of Quotes
BCC Email Address
TERM LENGTHS
YRT
5 yr
10 yr
11 yr
12 yr
13 yr
14 yr
15 yr
16 yr
17 yr
18 yr
19 yr
20 yr
21 yr
22 yr
23 yr
24 yr
25 yr
26 yr
27 yr
28 yr
29 yr
30 yr
31 yr
32 yr
33 yr
34 yr
35 yr
40 yr
Guaranteed UL
NEEDS ANALYSIS
Needs Analysis Enabled
Show Skip Button
Legal Disclaimer
This calculator is designed to help determine how much life insurance would be suitable for an individual's needs. The amount of coverage a company is willing to offer based on its financial underwriting review may not match the amount of coverage determined using a needs analysis calculator.

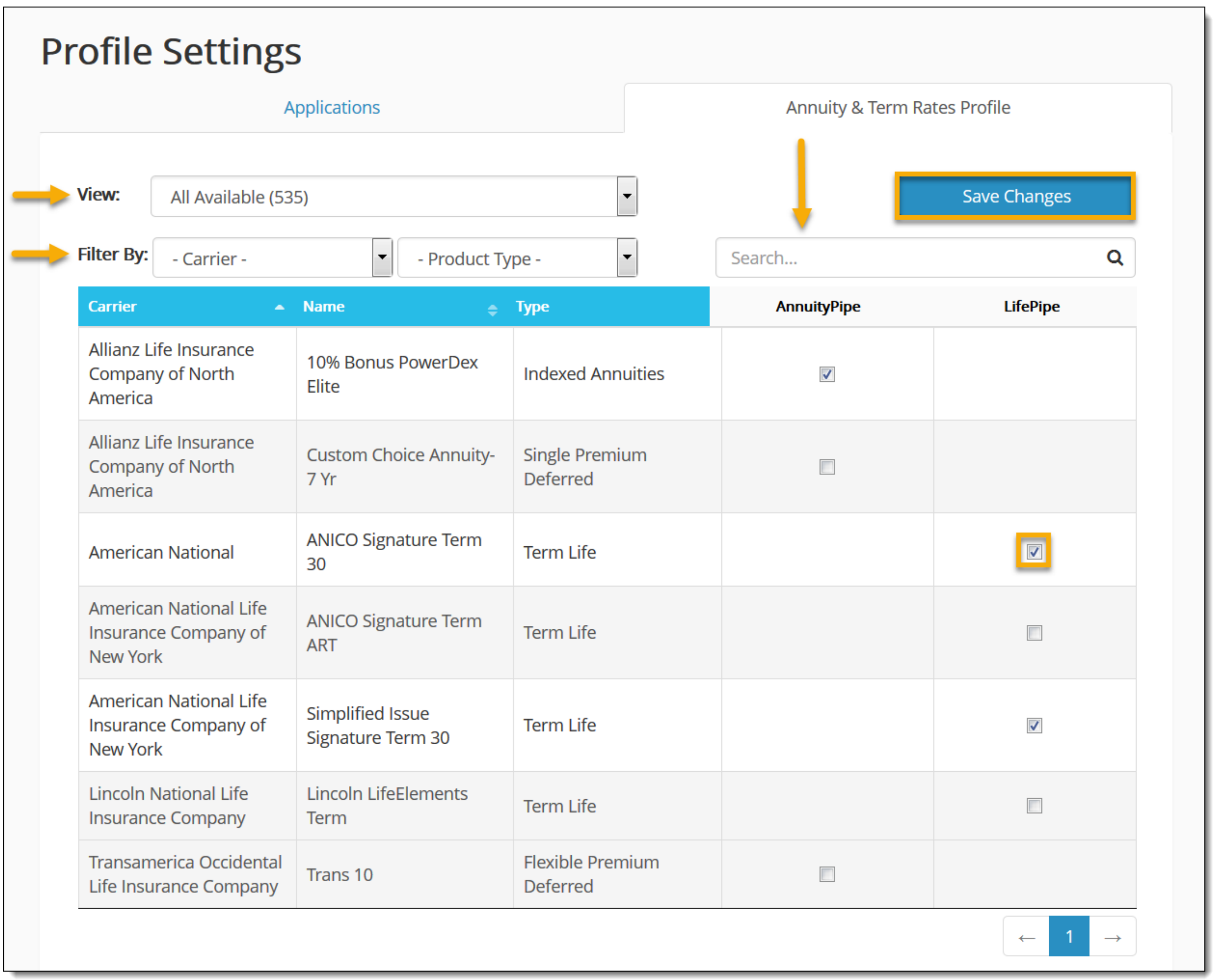
Add Products to Your Quote Engine

1. Select **Term Rates Profile** from the settings drop down to add products to your quote engine.



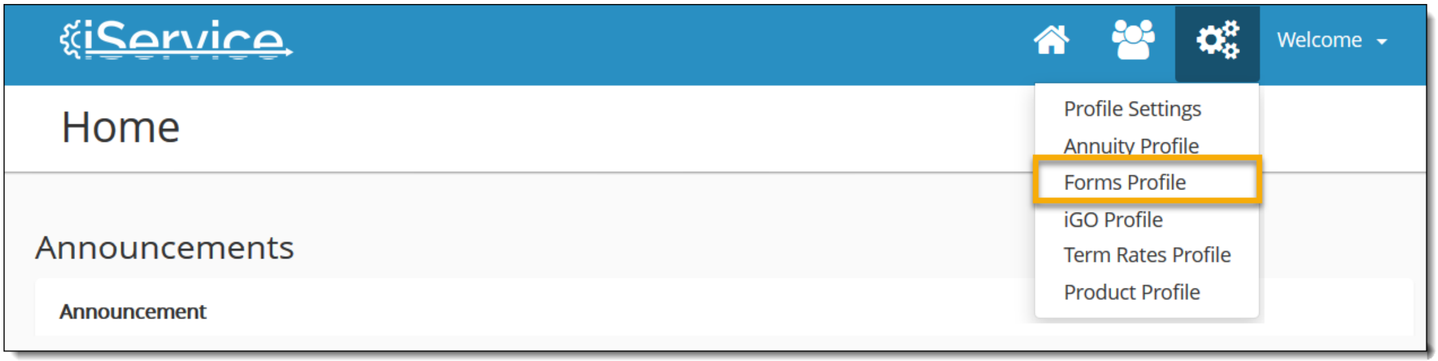
2. Add or remove products from your quoting engines by making selections from the **View** and **Filter By** drop downs or utilize the search bar to modify results. **Note:** *Read-only users are not allowed to filter/search.*
3. Select or un-select the corresponding checkbox under LifePipe or AnnuityPipe to add or remove products.
4. Click **Save Changes**.

   Product changes display immediately on the quote engine when changed in iService.



FormsPipe Configuration

Select **Forms Profile** from the settings drop down to customize search options and add service types and products.



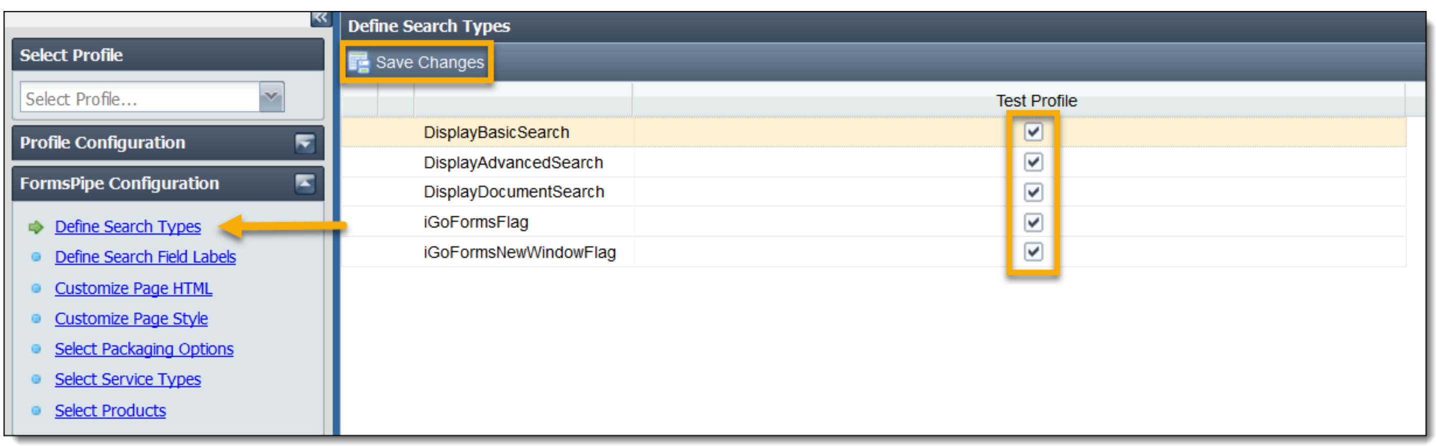
Customize Search Options

You can customize search options for your Forms engine by setting search types (e.g. basic search, advanced search…etc.) and modifying the wording on search fields.

Set Up Search Types

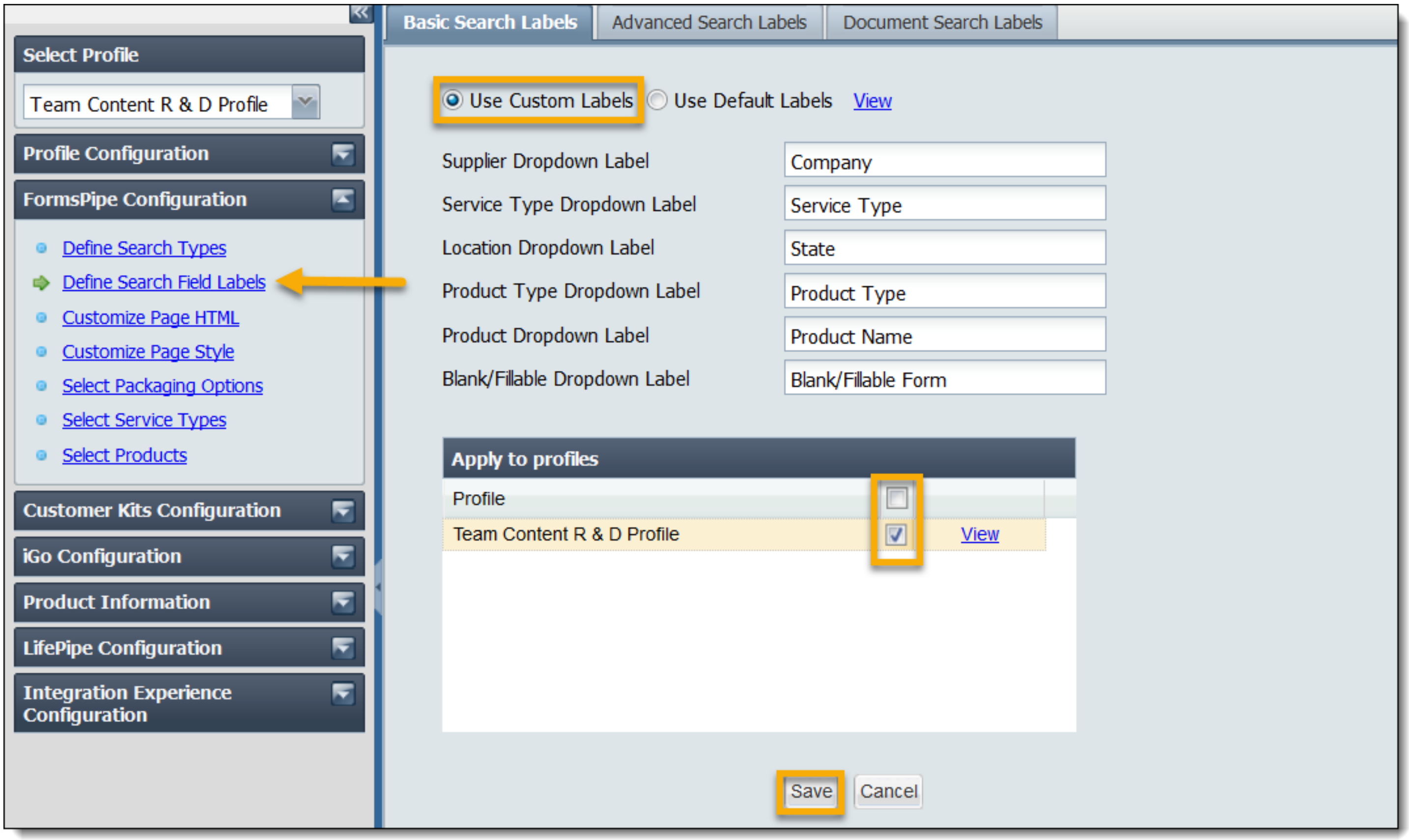
Search Types correspond to the tabs found at the top of the forms tool.

1. Click **Define Search Types** under **FormsPipe Configuration** in the left menu.
2. Check search types to enable under the corresponding agency name
3. Click **Save Changes**.



Change the Wording of Search Fields

1. Click **Define Search Field Types** under **FormsPipe Configuration** in the left menu.
2. Choose each tab at the top to define the corresponding search labels (e.g. Basic Search Labels).
3. Choose **Use Custom Labels** and make applicable changes.
4. Choose which profile(s) to apply the changes to by selecting each checkbox in the **Apply to Profiles** section.
5. Click **Save**.



Customize the Look of your Forms engine

You can customize the look of your Forms engine by:

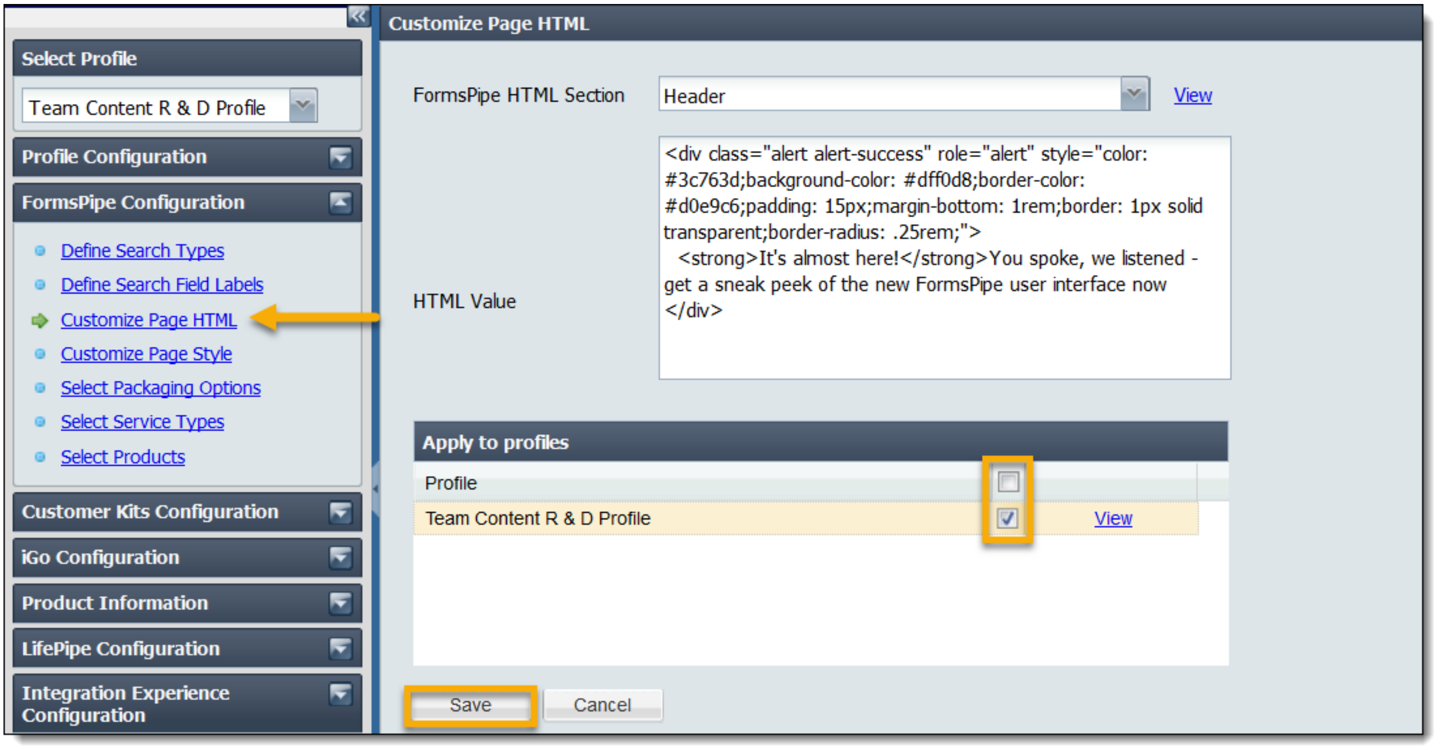
- Adding wording or a logo to your header or footer
- Choosing a different color scheme

Add Wording or a Logo to Your Header or Footer

1. Click **Customize Page HTML** under **FormsPipe Configuration** in the left menu.

   Caution: If you are not familiar with HTML, please contact iPipeline support for assistance.

2. Select a section to customize from the **FormsPipe HTML Section** drop down (Client Text, Header, or Footer).
3. Insert your custom HTML into the **HTML Value** textbox.
4. Choose which profile(s) to apply the changes to by selecting each checkbox in the **Apply to Profiles** section.
5. Click **Save**.

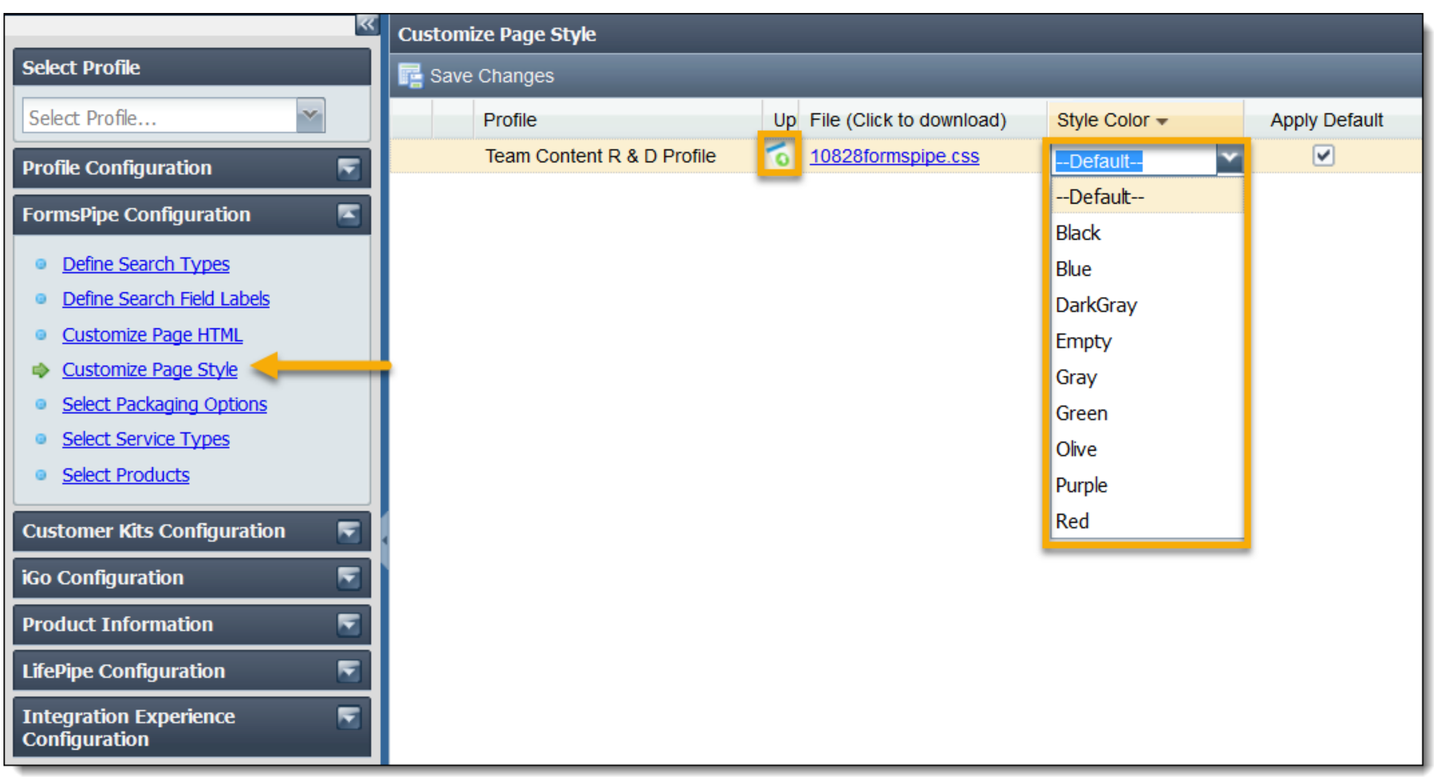


Add a Different Color Scheme

1. Click **Customize Page Style** under **FormsPipe Configuration** in the left menu.
2. Click the drop down in the **Style Color** column and select a color.

   Hint: To update the CSS, click the icon in the **Upload** column, select a CSS file, and click **Save Changes**.

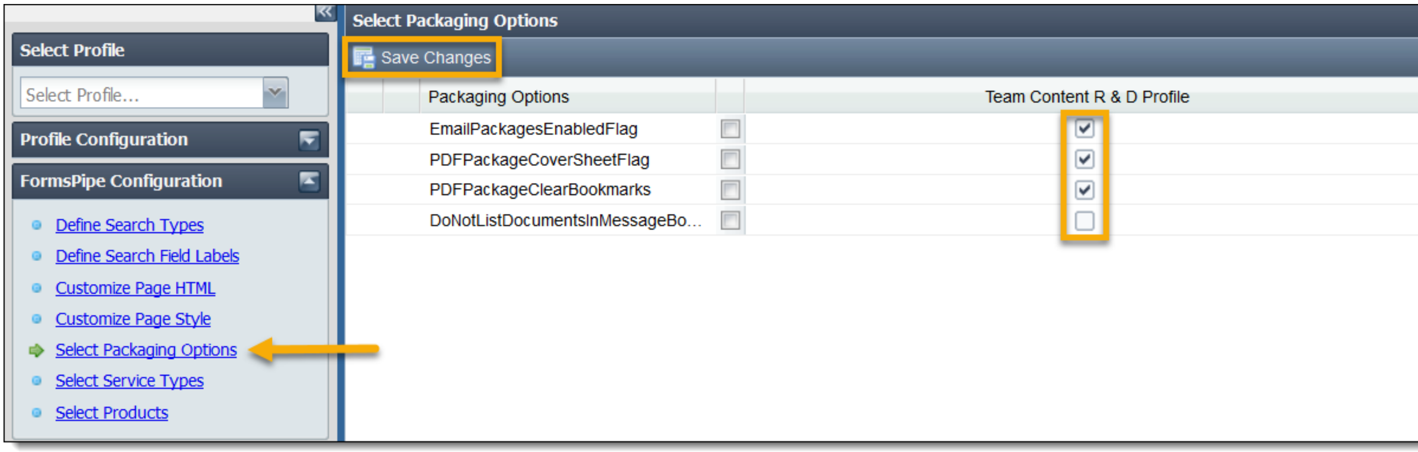
3. Click **Save Changes**.



Add Packaging Options

You can choose to email forms packages from the Forms tool and customize various options.

1. Click **Select Packaging Options** under **FormsPipe Configuration** in the left menu.
2. Enable any of the packaging options by selecting the checkbox under the corresponding agency name:
   - **Email Packages Enabled:** Enable to email forms packages from the Forms tool.
   - **PDF Package Cover Sheet:** Choose to add a generic cover sheet.
   - **PDF Package Clear Bookmarks:** Choose to add clear page bookmarks.
   - **Do Not List Documents In Message:** Choose whether forms should be listed in the email for the recipient.
3. Click **Save Changes**.

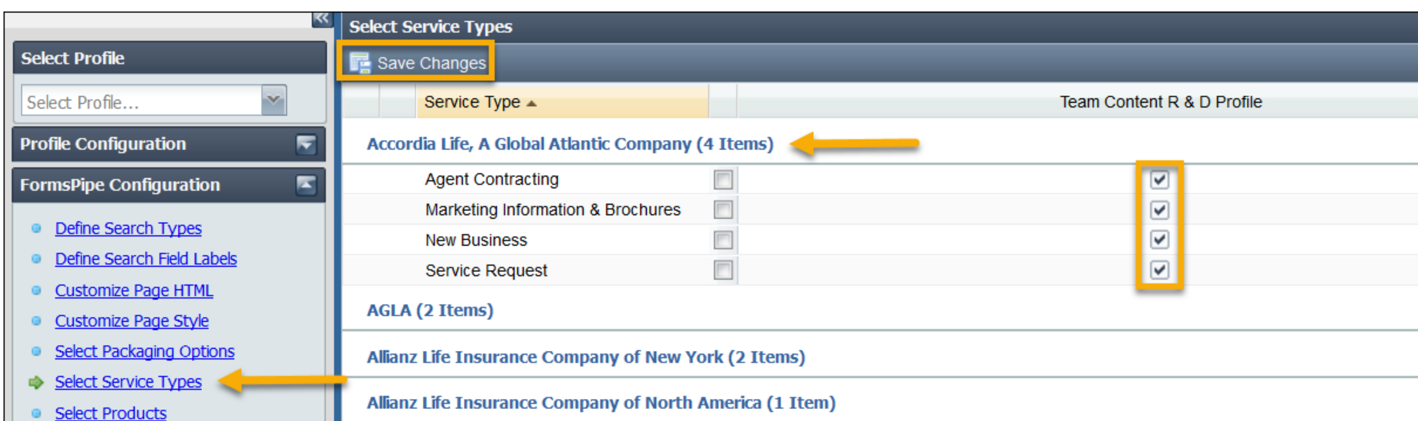


Add Service Types

You can add service types for the available Carriers. Service types should be added before products (i.e. forms).

1. Click **Select Service Types** under **FormsPipe Configuration** in the left menu.
2. Expand an available Carrier and check service types to add under the corresponding agent name.

   Hint: If a specific carrier is not available, it may be that the carrier is not currently available to you, or you may have to first add the supplier.
3. Click **Save Changes**.



Add Forms

After you add service types, you can select the individual products for each carrier.

1. Click **Select Products** under **FormsPipe Configuration** in the left menu.

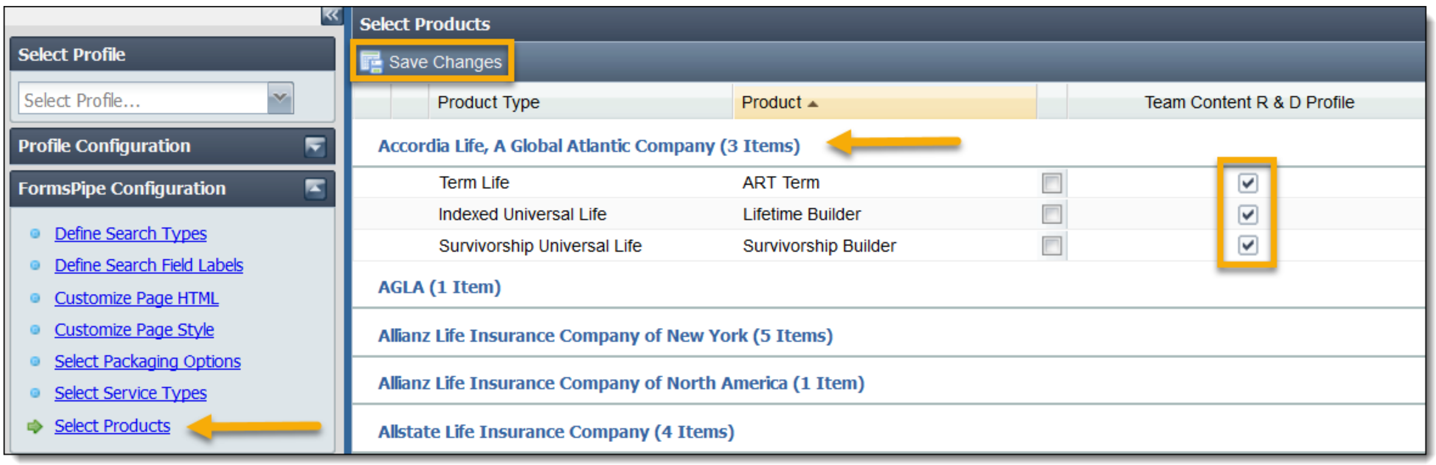
   Hint: If your products are not showing, you may have to first add the corresponding Service Type.

2. Expand a Carrier and check products to add under the agency name.

   Hint: If a specific carrier is not available, it may be that the carrier is not currently available to you, or you may have to first add the supplier.

3. Click **Save Changes**.

   Forms display immediately on the quote engine when changed in iService.



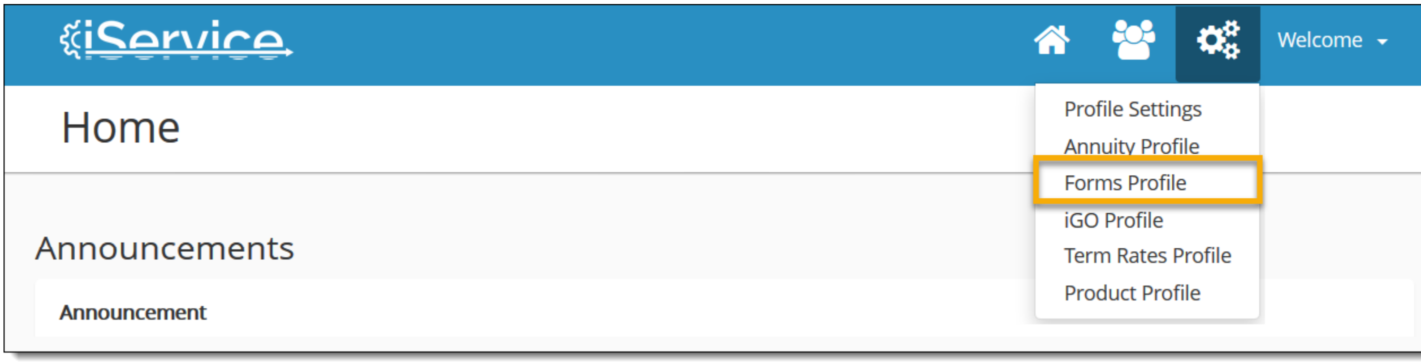
IMPORTANT: If you do not add service types, and just add products, nothing displays in the forms tool.

Add Customer Kits

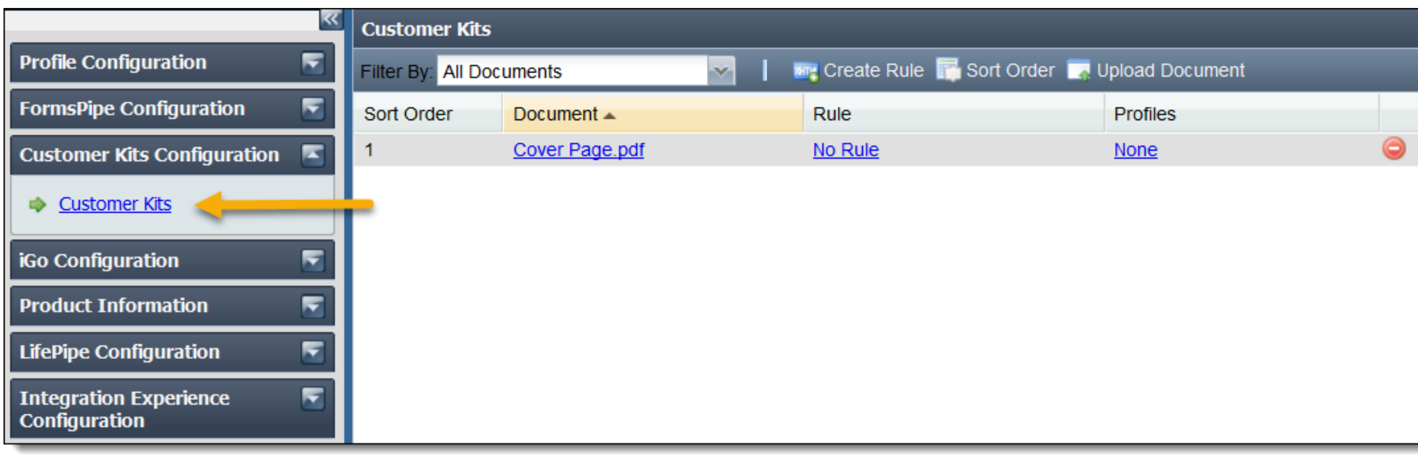
You can add your own personalized forms, such as a cover page, to any forms package by uploading a document in iService. You can additionally create rules to identify which carrier(s) and product packages your form will be bundled with or you can assign the form to your profile.

Access Customer Kits Configuration

1. Select **Forms Profile** from the settings drop down to customize search options and add service types and products.

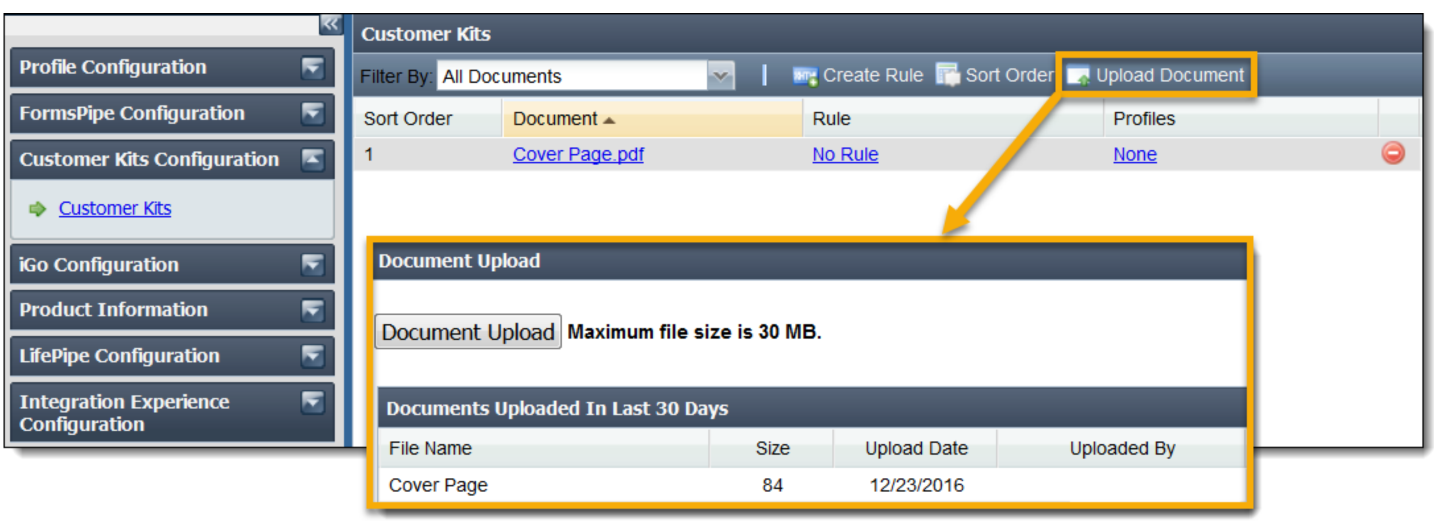


2. Click **Customer Kits** under **Customer Kits Configuration** in the left menu.



Upload a Document

1. Click **Upload Document.**



2. Choose documents to upload from your computer and click **Open**.

   Hint: The document must be a .PDF file.

3. Close the **Document Upload** window.

   Uploaded documents are added in iService.

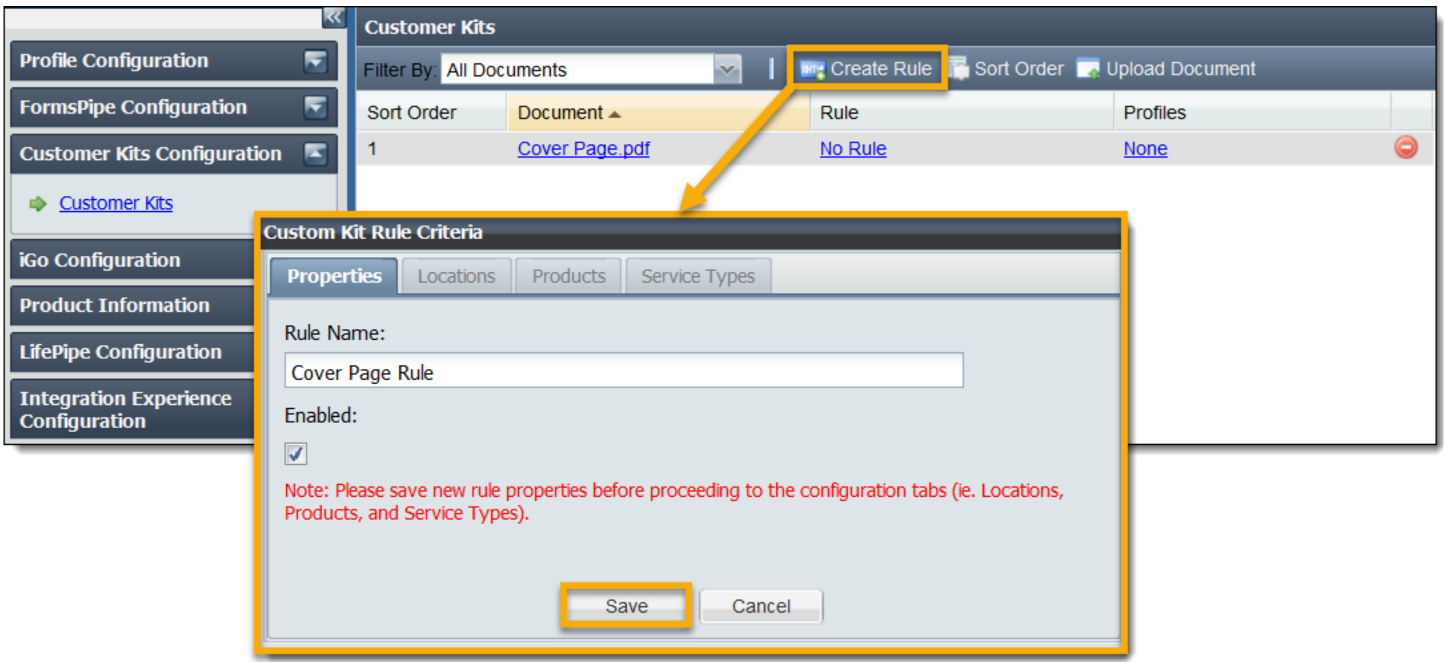
Create a Rule

1. Click **Create a Rule.**

   Hint: If the rule you need has already been created, you can use an existing rule instead.

2. Name the rule, choose to enable it, and click **Save**.

   You must save the rule before you can edit the other three tabs.



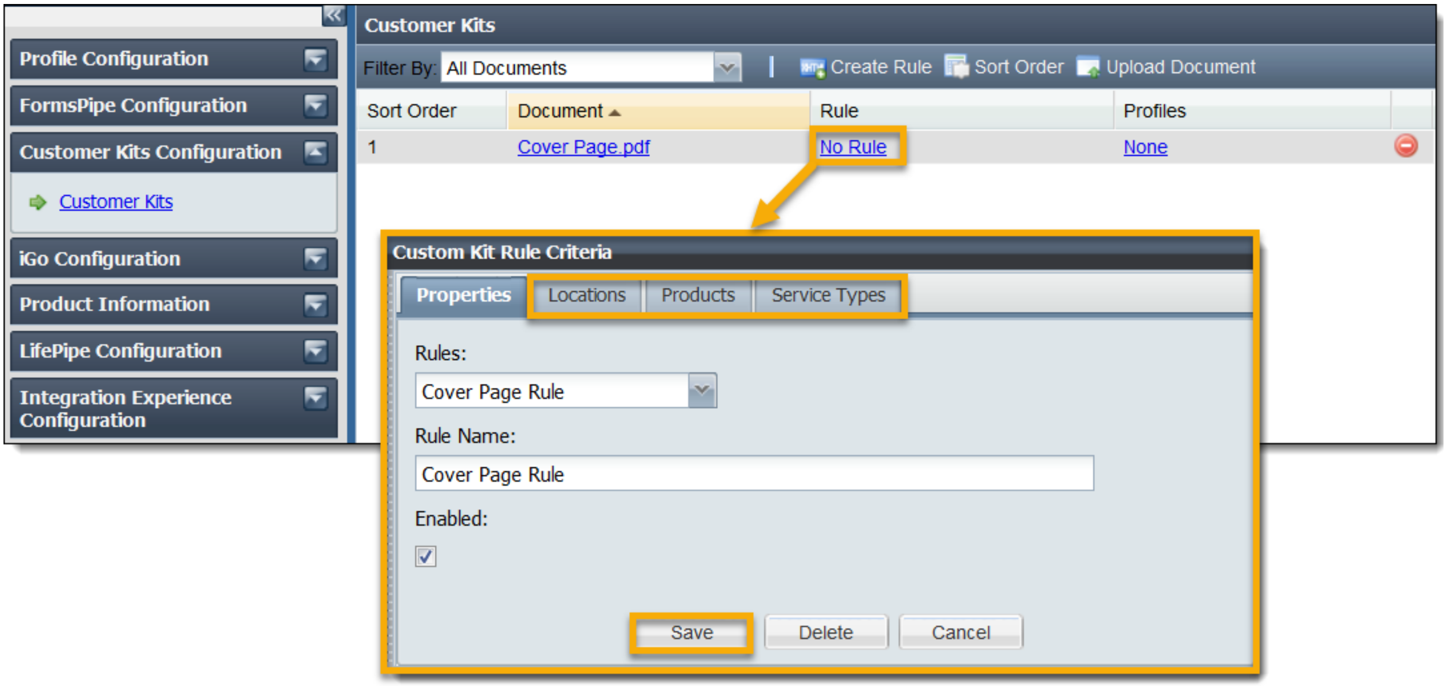
3. To configure a rule, click the **No Rule** hyperlink within the **Rule** column.

4. Select the rule you would like to configure from the **Rules** drop down.

   Hint: You can change the name of the rule by updating the **Rule Name** field within the **Properties** tab and clicking **Save**.

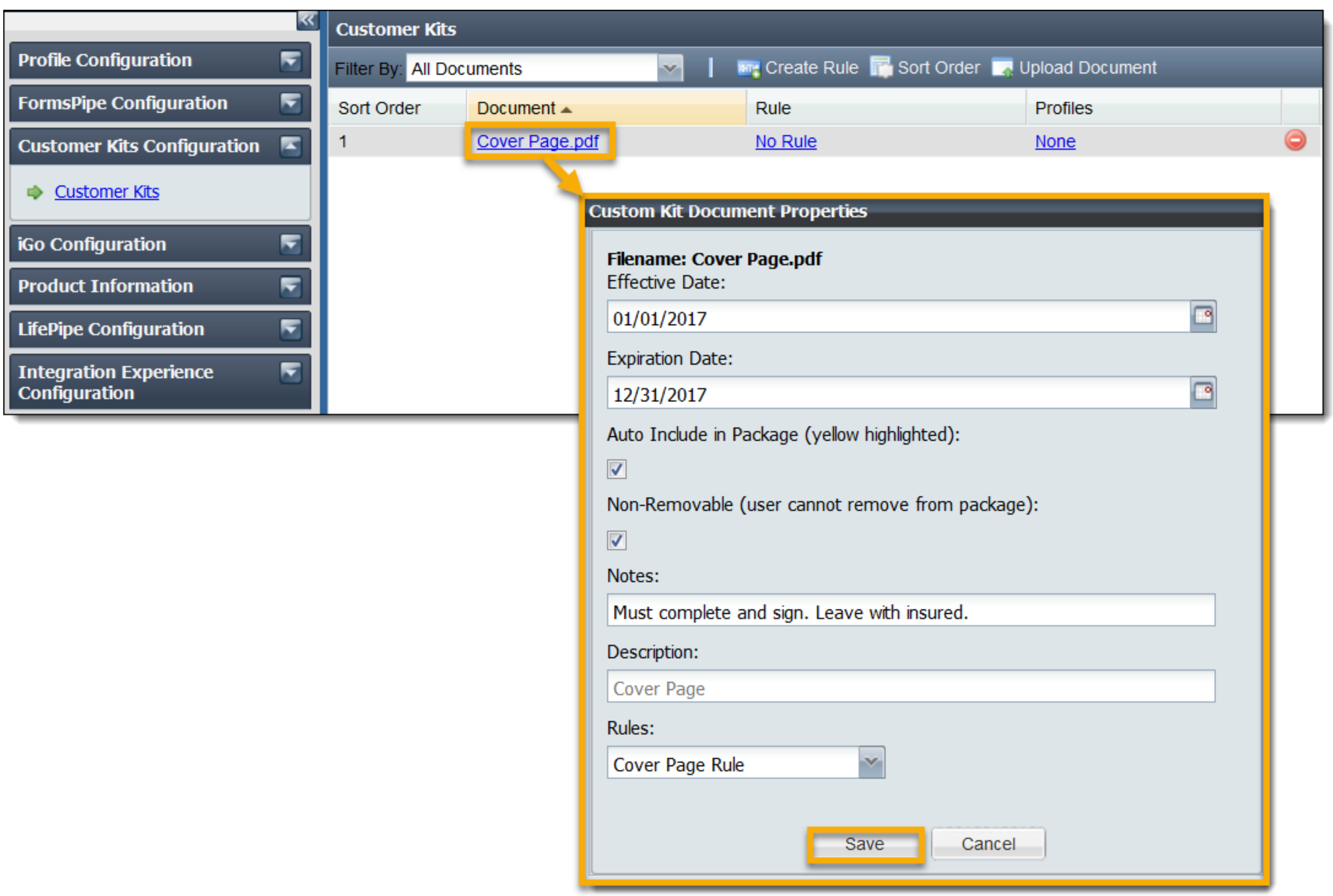
5. Toggle to the **Locations**, **Products**, and **Service Types** tabs to configure each and click **Save**.

   Hint: You can click **Delete** within the **Properties** tab to delete the rule.



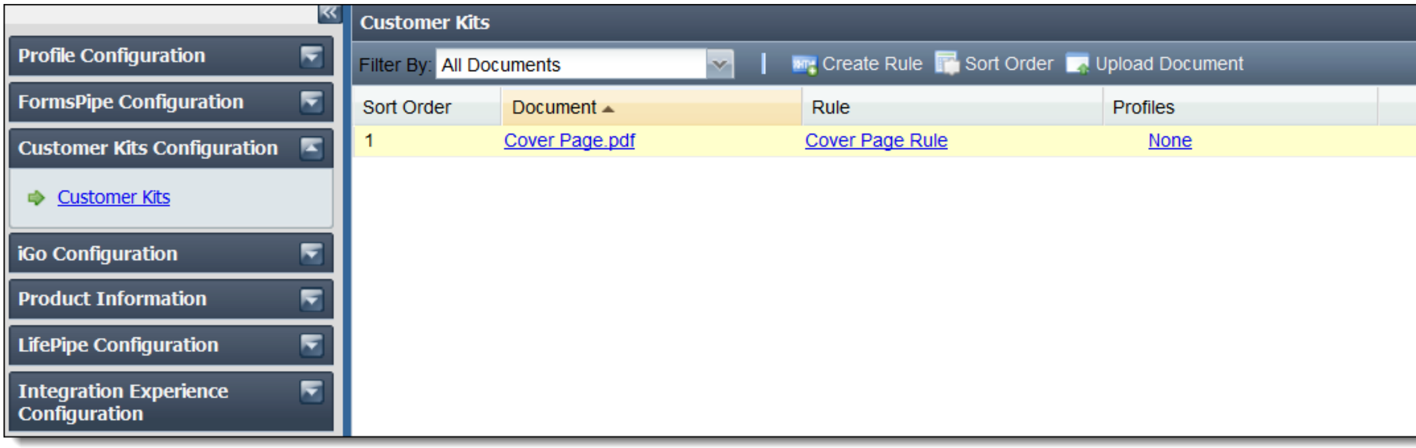
Add a Rule to a Document

1. Click the hyperlink of the document you want to add the rule to.
2. Select an effective date and expiration date to configure when the form should start and stop displaying.



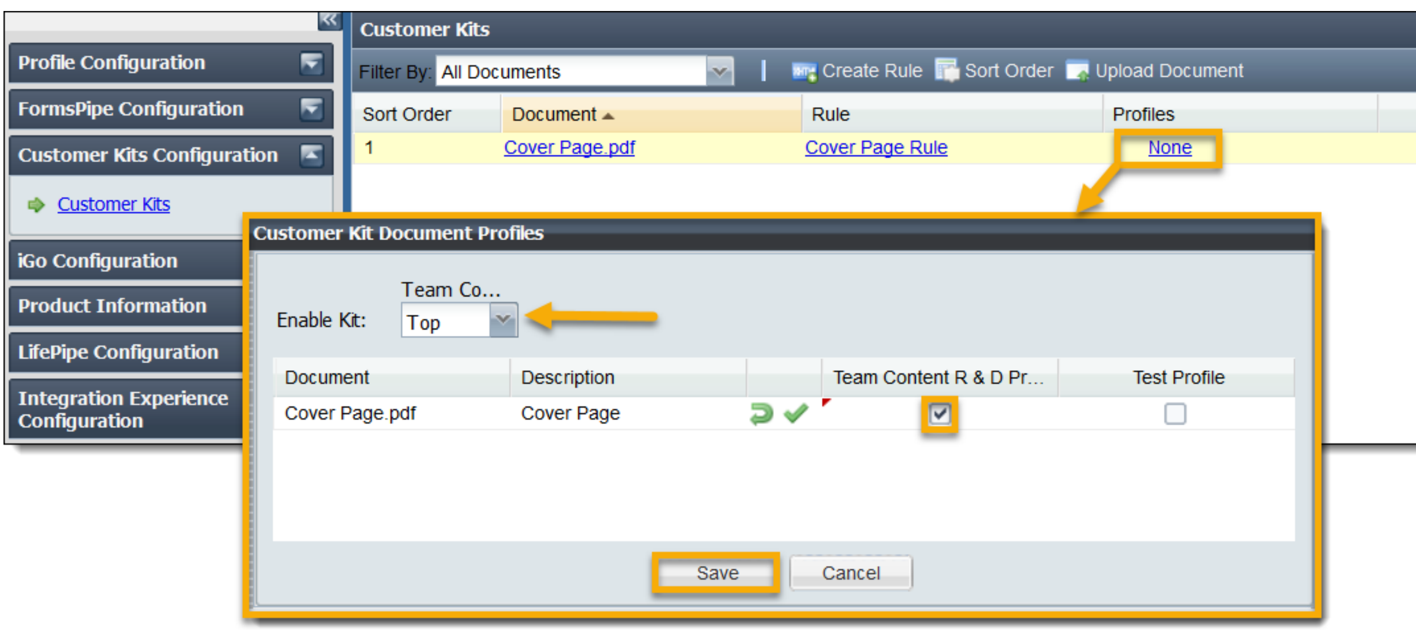
3. Check **Auto Include in Package** if you want the form to display highlighted in yellow.
    a. Check **Non-Removable** if you want the forms permanently attached to the package.
4. Add notes about the rule, such as instructions on how the form should be used, in the **Notes** field (optional).
5. Create a description for the document (optional).
6. Select the rule you would like to apply from the **Rules** drop down.
7. Click **Save**.

Once the document is active, it displays highlighted in yellow.



Add the document to your profile

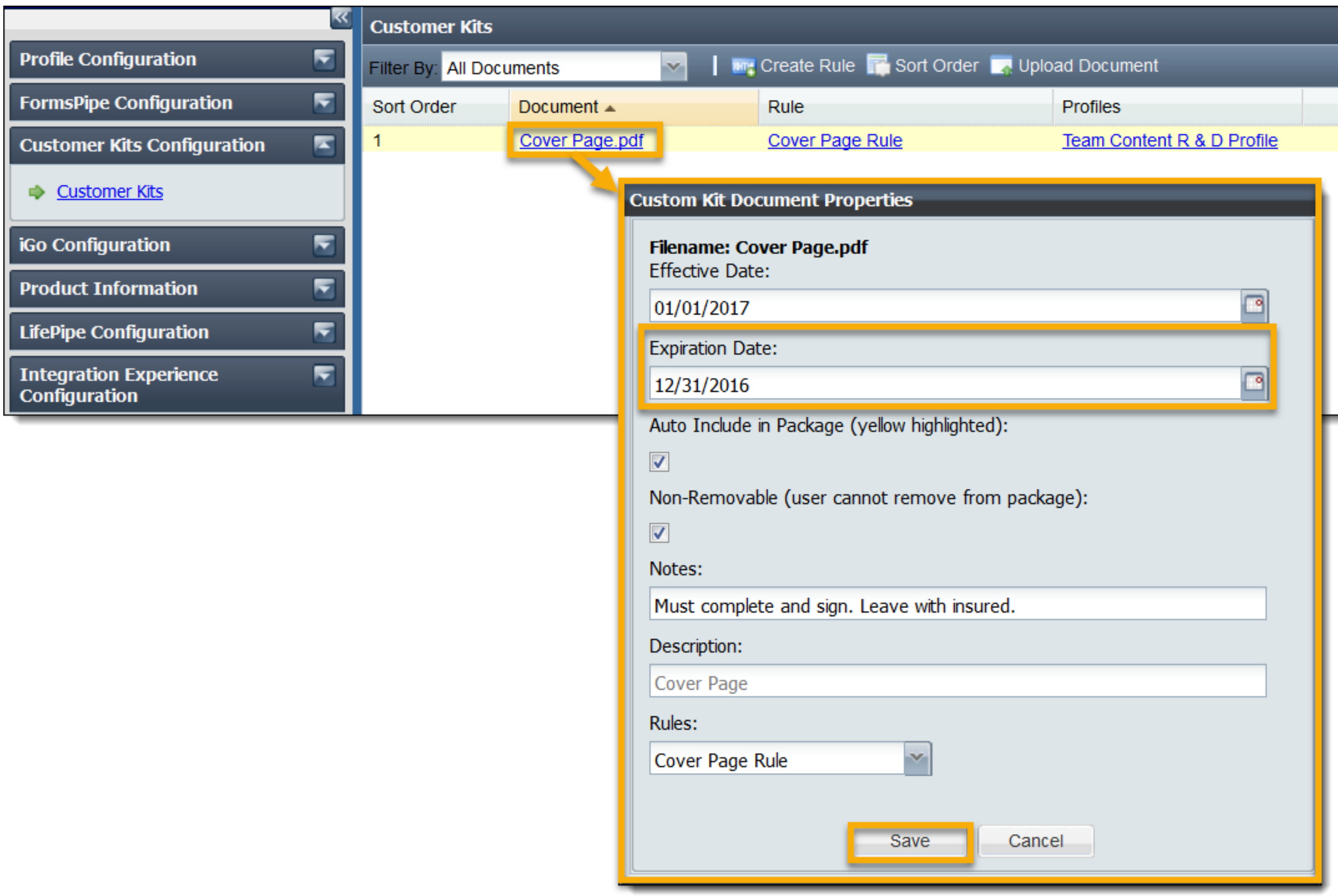
1. Click the **None** hyperlink within the **Profiles** column.
2. Select either **Top** or **Bottom** from the **Enable Kit** drop down to indicate whether your documents display above or below the regular Carrier forms
3. Choose which profile(s) to apply the document to by selecting the profile's checkbox.
4. Click **Save**.



Deactivate or Delete a Document

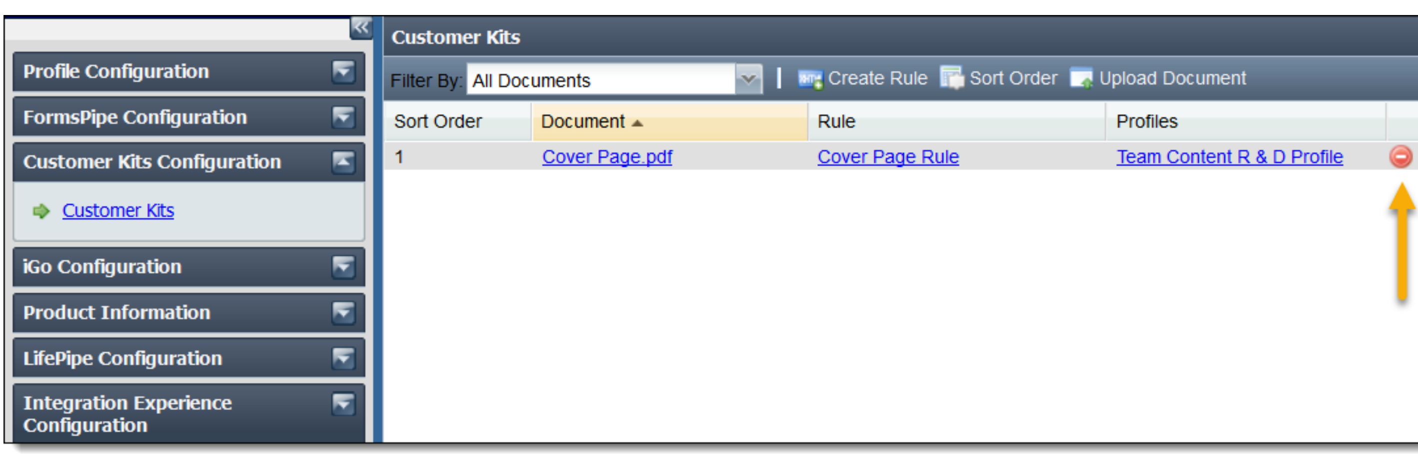
1. Click the hyperlink of the document you would like to deactivate or delete.
2. To deactivate the document, change the expiration date to a day in the past.
3. Click **Save**.

   The document is now inactive. The document displays gray with a red delete button on the right of the screen.



4. To delete a document completely from iService, click the red delete button.

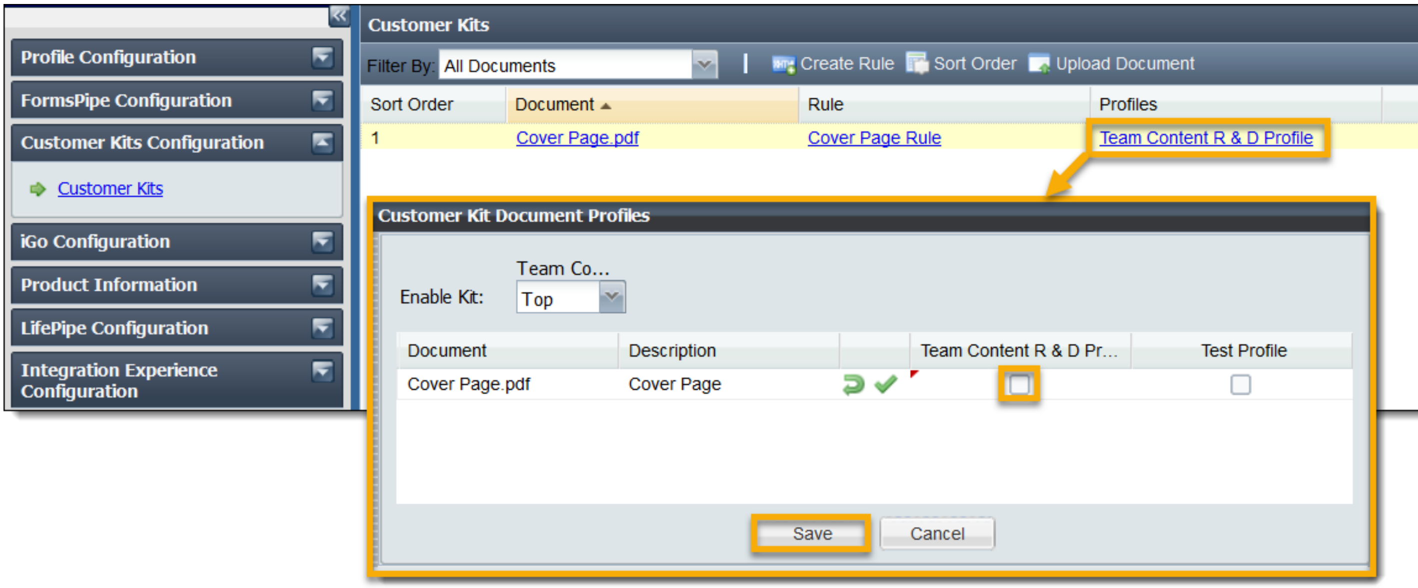
   Hint: Documents must first be deactivated before they can be deleted.



Temporarily Remove a Document

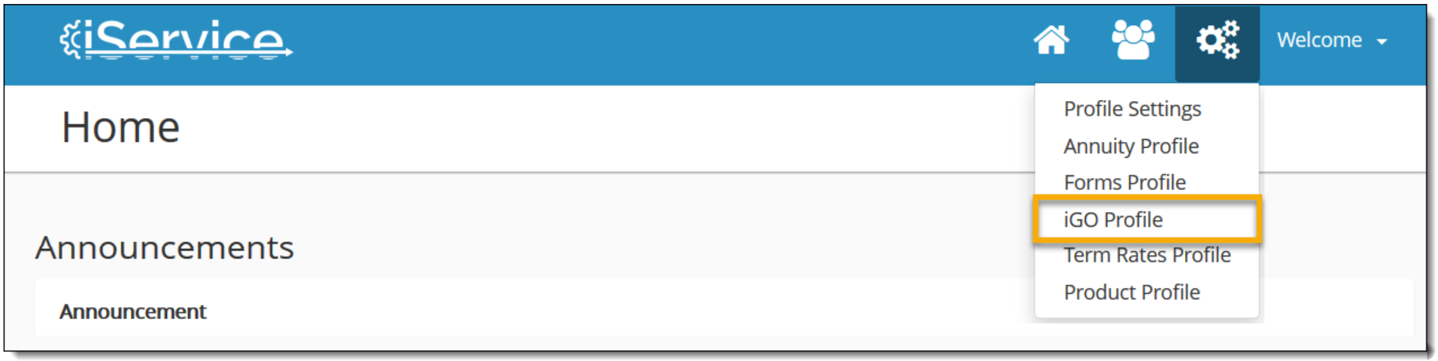
1. To temporarily remove a document in your kit, click the corresponding hyperlink from the Profiles column.
2. Uncheck the box next to the applicable form for that profile.

   The document remains active; however, it does not display.



iGO Configuration

Select **iGO Profile** from the settings drop down to add products to iGO and manage agents' submission approver email.



Add Products to iGO

You can add products to iGO if you are an iGO subscriber.

1. Click **iGO e-APP Products** within **iGO Configuration** from the left menu.

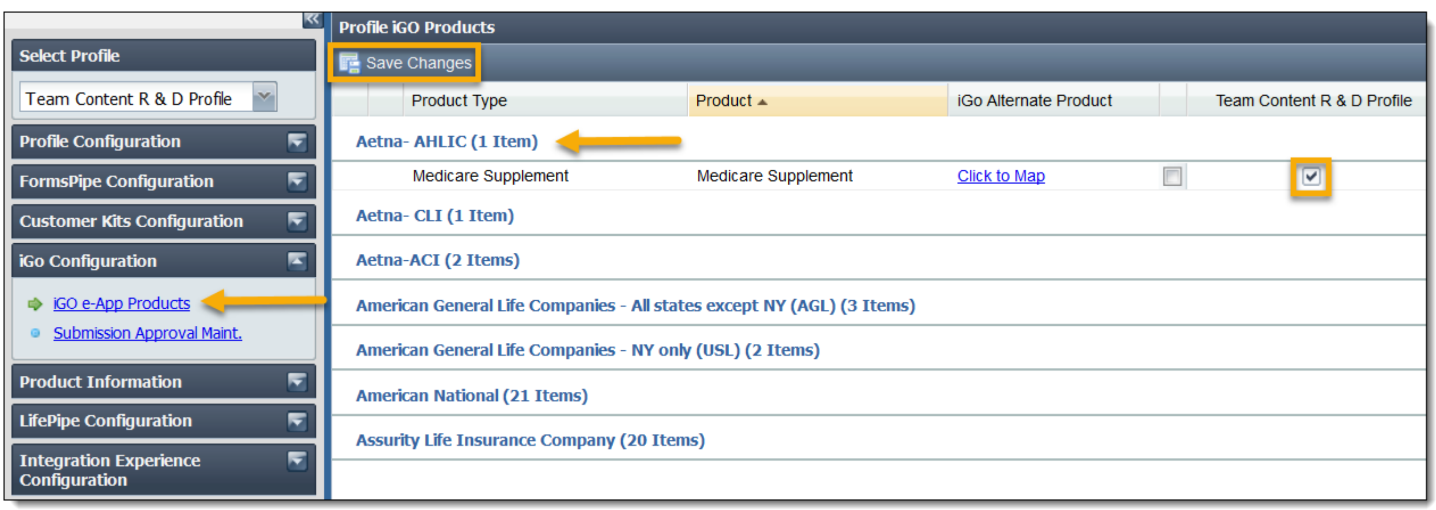
   The carriers that are available in iGO display.

2. Expand an available Carrier and check products to add under the agency name.

   Hint: If a specific carrier is not available, it may be that the carrier is not currently available to you, or you may have to first add the supplier.

3. Click **Save Changes**.

   iGO products should start appearing in iGO within 24 hours of being selected. Forms, Product Information, and Quoting all show immediately when changed in iService.



Update an Agent's Case Manager

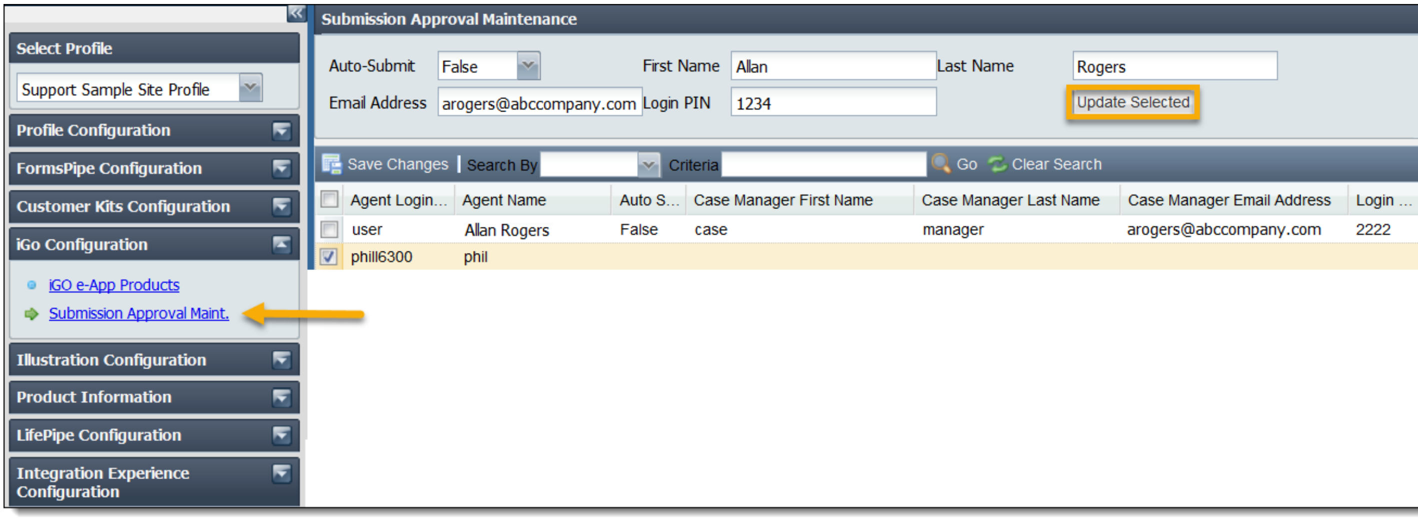
You can control whether certain agents' applications should skip the approval process and go right to the carrier, or whether certain agents' approval emails should go to a specific email address other than the default set.

Note: A blank space indicates that applications are going to the default approver.

1. Click **Submission Approval Maint.** within **iGO Configuration** from the left menu.
2. Complete one of the following to:

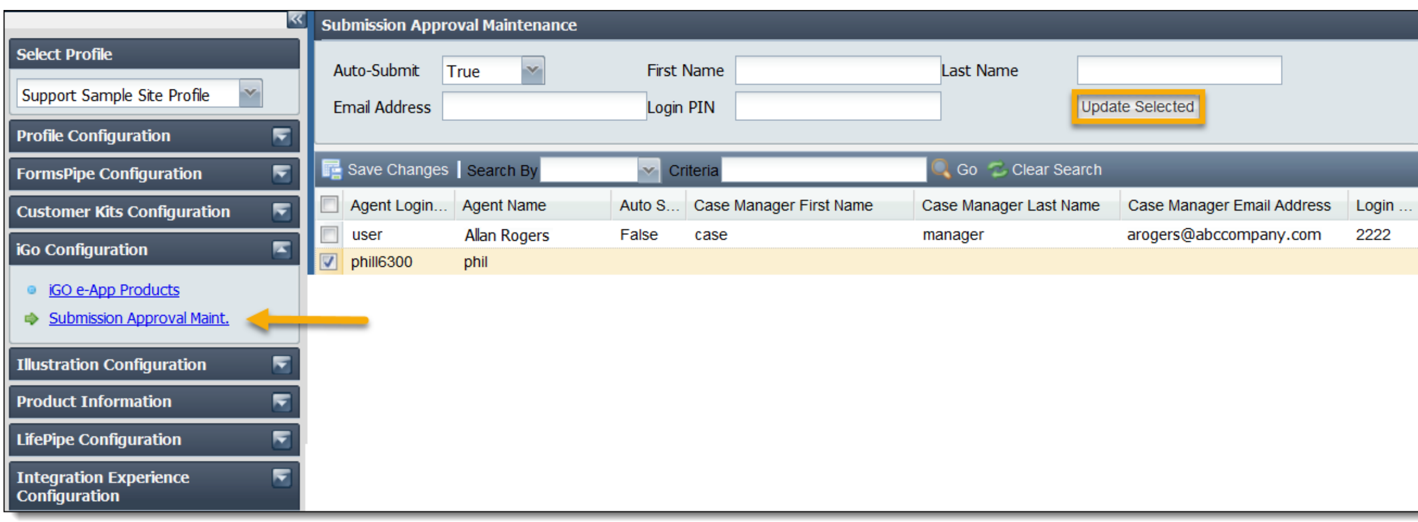
Require Case Manager Approval

a. Mark the box to the left of the Agent Login ID.
b. Choose **False** from the **Auto-Submit** drop down.
c. Assign a case manager using the blank fillable fields at the top of the page.
d. Click **Update Selected**.



Allow Cases to go Directly to a Carrier

a. Mark the box to the left of the Agent Login ID.
b. Choose **True** from the **Auto-Submit** drop down.
c. Click **Update Selected**.



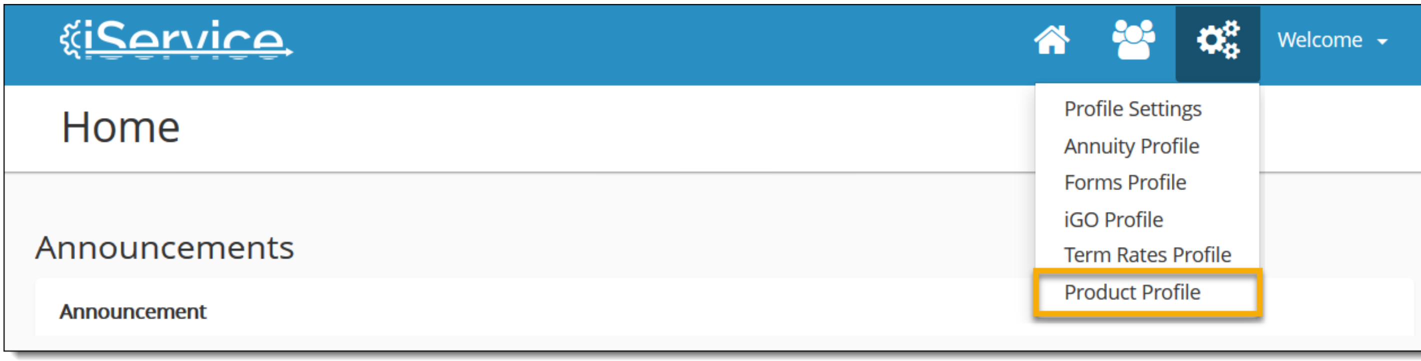
3. When you are done making modifications to applicable agents, click **Save Changes**.

Hint: Application submissions by agents who are not assigned a case manager manually will be sent to the default admin. The default admin was set up at the time your iGO account was activated.

Configure Product Information

Add Product Information

1. Select **Product Profile** from the settings drop down to select products.



2. Click **Select Products** within **Product Information** from the left menu.
3. Expand an available Carrier and check products to add under the agency name.

   Hint: If a specific carrier is not available, it may be that the carrier does not make their product information available on iService, or you may have to first add the supplier.
4. Click **Save Changes**.

   Products display immediately on the quote engine when changed in iService.