

SALES LINK HEADER/NAV.

NEW BUSINESS

OVERVIEW | Policy Watchlist | Agent Watchlist | Downline | E-Track | Policy Assignment | Reports | Search

Current Inventory	Recent Activity (E-Track)		Choose Line of Business	annuity	Date Range			
CONTRACT	PENDING	OPEN REQUIRE.	CONDITION ISSUED	ISSUED PAID	CLOSED DECLINED	?	Detail	
Contract A	4	2	4	4	2		View Detail	
Contract B	6	7	5	3	1		View Detail	
Contract C	8	6	6	3	1		View Detail	
TOTAL	18/XXXXXXXX	17/XXXXXXXX	15/XXXXXXXX	10/XXXXXXXX	4/XXXXXXXX			

TITLE N.B. OVERVIEW
 PROJECT SALES LINK EXT.
 DATE 9-27-13
 CREATOR S. ANKER BRAND

① ANY COLUMNS MISSING?

SALES LINK HEADER/NAV.

NEW BUSINESS > CONTRACT DETAIL

OPEN REQUIRE. |
 BY STATUS |
 BY DIRECT DOWNLINE |
 BY WRITING AGENT |
 MY POLICIES |
 ?

FOR AGENT: JOHN DOE AGENT NUMBER: XXXXXX ??

CONTRACT A: CHOSE LINE OF BUSINESS LIFE DATE RANGE -

OPEN REQUIREMENTS:

Policy	Ins. Name	Premium	Status	Open Req.	Order Date	Rec'd Date	W.A. Name	W.A. #	?	?
Policy 1	XXX	\$XXX	XXX							
Policy 2	XX	\$XXX								
	XX									

NEW BUSINESS -

TITLE View Detail > open Requirements
 PROJECT SalesLink EXT.
 DATE . . .
 CREATOR

"View Detail" -
open Requirements is the default view.

SALES LINK HEADER/NAV.

NEW BUSINESS DETAIL > BY STATUS >

OPEN REQUIRE.
 BY STATUS
 BY DIRECT DOWNLINE
 BY WAITING AGENT
 MY POLICIES
 ?

FOR AGENT: JOHN DOE AGENT NUMBER: XXXXX ??

CONTRACT A: BY STATUS
 Choose Line of Business
 Date Range -

	STATUS	QUANTITY	AMOUNT															
▼	PENDING	6	\$XXX,XXX															
	<table border="1"> <thead> <tr> <th>Policy#</th> <th>Insured Name</th> <th>Date Rec'd</th> <th>Product</th> <th>Face Amount</th> </tr> </thead> <tbody> <tr> <td>123</td> <td>Jane Doe</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="5">NOTES:</td> </tr> </tbody> </table>	Policy#	Insured Name	Date Rec'd	Product	Face Amount	123	Jane Doe				NOTES:						
Policy#	Insured Name	Date Rec'd	Product	Face Amount														
123	Jane Doe																	
NOTES:																		
	<table border="1"> <thead> <tr> <th>Policy#</th> <th>Insured Name</th> <th>Date Rec'd</th> <th>Product</th> <th>Face Amount</th> </tr> </thead> <tbody> <tr> <td>456</td> <td>Bob Smith</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="5">NOTES:</td> </tr> </tbody> </table>	Policy#	Insured Name	Date Rec'd	Product	Face Amount	456	Bob Smith				NOTES:						
Policy#	Insured Name	Date Rec'd	Product	Face Amount														
456	Bob Smith																	
NOTES:																		
▶	Conditionally Issued	4	\$XXXXXX															
▶	Issued	10	\$XX XXXX															

NEW BIZ. DETAIL -

TITLE BY STATUS

PROJECT

DATE

CREATOR

SALES LINK HEADER/NAV.

NEW BUSINESS DETAIL > BY DIRECT DOWNLINE

OPEN REQUIRE- BY STATUS BY DIRECT DOWNLINE BY WRITING AGENT MY POLICIES ?

FOR AGENT: JOHN DOE AGENT NUMBER: XXXXXX ?

CONTRACT A: BY DIRECT DOWNLINE Choose Line of Business [dropdown] Date Range [calendar] [calendar]

AGENT	QUANTITY	AMOUNT				
▼ BILL SMITH	3	\$XXX,XXX				
▼ Policy#	Insured Name	Writing Ag. Name	STATUS	Product		
2791	XXX	XXX	XX	XXX		
NOTES: XXXX						
▶ POLICY 2						
▶ POLICY 3						
▶ BEN MILLER	5	\$XXX,XXX				
▶ ANN JONES	2	\$XXX,XXX				

NEW BIZ. DETAIL >
BY DIRECT DOWNLINE

TITLE
PROJECT
DATE
CREATOR

SALES LINK HEADER/NAU

NEW BUSINESS DETAIL > BY WRITING AGENT

OPEN REQUIRE.	BY STATUS	BY DIRECT DOWNLINE	BY WRITING AGENT	MY POLICIES	?
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FDR AGENT: JANE DOE AGENT NUMBER: XXXXX ?

CONTRACT A: BY WRITING AGENT Choose Line of Business Life Date Range -

WRITING AGENT	AGENT #	QUANTITY	AMOUNT	?			
▼ JOE JONES	XXXXX	2	\$XXXXXX	?			
Policy #	Insured Name	Status	Order Date	Rec'd date	Issued State	?	?
XXX	XXXX	XXX	X-XX	X-XX	XX	XX	XX
NOTES							
XXX	XXXX	XXX	V-XX	X-XX	XX	XX	XX
NOTES:							
▶ JANET SMITH	XXXXX	5	\$XXXXXX	?			
▶ DON ADAMS	XXXXX	4	\$XXXXXX	?			

NEW BUSINESS > DETAILS > BY WRITING AGENT

PROJECT

DATE

CREATOR

SALES LINK HEADER/NAV.

NEW BUSINESS DETAIL > MY POLICIES

OPEN REQUIRE.	BY STATUS	BY DIRECT DOWNLINE	BY WRITING AGENT	MY POLICIES	?
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FOR AGENT: TIM MILLER AGENT NUMBER: XXXX ?

MY POLICIES

Choose Line of Business

Life ▼

Date Range

☰ - ☰

Insured Name	Policy#	Status	Product	Face Amount	?	?
▶ Penny Policyholder	XXX	XX	XXXX	\$XXXXX	XX	XX
▼ Paul Policyholder	XXX	XX	XXXX	\$XXXXX	XX	XX
	Order Date	Reed Date	Cash with App	Issued State	Req. Description	
	XX-XX	X-XX	\$XXXXX	XX	XX	XX
NOTES						
▶ Peter Policyholder	XXX	XX	XXX	\$XXXX	XX	XX

NEW BUSINESS > DETAILS >

TITLE MY POLICIES

PROJECT

DATE

CREATOR

SALES LINK HEADER/NAV

NEW BUSINESS > POLICY WATCHLIST

overview	Policy Watchlist	Agent Watchlist	Downline	E-Track	P.N.A.	Reports	Search
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POLICY WATCH LIST

CONTRACT NUMBER	TOTAL PREMIUM	DETAILS
▶ CONTRACT A	2 / \$ XXX,XXX	<u>View</u>
▼ CONTRACT B	1 / \$ XXX,XXX	<u>View</u>

POLICY NUMBER	Writing Agent Name	Insured Name	STATUS	+ Add	- Delete
▶ POLICY 1 XXX	XX XXX	XX XXX	XXX	+	-
▼ POLICY 2 XXV	XX XXX	XX XXX	XXX	+	-
open Ref.	Plan Type	Annual Premium	Face Amount	Last Update	Last Update Item
▶ POLICY 3	XX XXX	XX XXX	XXX	+	-

NEW BUSINESS >
TITLE POLICY WATCHLIST

PROJECT

DATE

CREATOR

SALES LINK HEADER/NAV.

NEW BUSINESS > AGENT WATCHLIST

Overview	Policy Watchlist	Agent Watchlist	Downline	E-Track	PNA	Reports	Search
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AGENT WATCHLIST

▶ CONTRACT A

▶ CONTRACT B

▼ CONTRACT C

Agent Name	Ag. #.	View Summary	View Policies	Pending	Cond. Issued	Iss/Paid	Ann. Prem.	Life Prem.	Delete
John J.	XXX	<u>XXXV</u>	<u>XXXX</u>	X	X	X	<u>5</u>	<u>7</u>	<input type="checkbox"/>

UPDATE

▶ CONTRACT D

NEW BUSINESS >
AGENT WATCHLIST

TITLE

PROJECT

DATE

CREATOR

SALESLINK HEADER/NAV.

NEW BUSINESS > POLICY DETAIL

OVERVIEW	POLICY WATCH.	AGENT WATCH.	DOORLINE	E-TRACK	PNA	REPORTS	SEARCH
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? AGENT INFO: ? AGENT NUMBER: ?

POLICY: L123456

PENDING: IN-UNDERWRITE-APP-STATUS

LAST UPDATED: 10-4-2013

INSURED NAME: XXX	W.A. NAME: John Jones	W.A. NUMBER: XXX
?	?	?

REQUIREMENTS	NOTES	LOSSX TRANSFER	DATES & PLAN	AGENT SPLITS	?
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NOTES:

DATE	COMMENTS
09-04-2013	XXV XXV XXV
08-16-2013	XXXX XX XXX

NEW BUSINESS:
 TITLE POLICY DETAIL
 PROJECT (NOTES)

PROJECT

DATE

CREATOR

SALES LINK HEADER/NAU.

NEW BUSINESS > E-TRACK

Overview	Policy Watch.	Agent Watch.	Downline	E-Track	P.N.A.	Reports	Search
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EVENT SUMMARY (PAST 7 DAYS)

	Policy Events	Commission Events	
CONTRACT A	<u>5</u>	<u>10</u>	View Details/History
CONTRACT B	<u>6</u>	<u>4</u>	View Details/History
CONTRACT C	<u>5</u>	<u>5</u>	View Details/History

NEW BUSINESS >

TITLE E-TRACK SUMMARY

PROJECT

DATE

CREATOR

Objectives Noted:

- Events in past 7 days
- Events by policy
- All policy events (or date range)
- All commission events (or date range)

SALES LINK HEADER/NAV.

E-TRACK DETAILS > CONTRACT A

Overview | Policy Watch. | Agent Watch. | Downline | **E-Track** | P.N.A. | Reports | Search

FOR AGENT: JOHN DOE AGENT NUMBER: XXXXX ?

CONTRACT A DETAILS

Policy Events (PAST 7 DAYS) | Policy Event History | Commission Events History

Policy #	Insured Last Name	Product	W.A. Name	W.A. #	Event Type	Event Detail	Event Date
XXXX	XXXX	XXX	XX	XV	XX	XXXX XXXX	X-XX
XXX	XXX	XXX	XX				

► Policy 3

NEW BUSINESS > ETRACK
 TITLE CONTRACT DETAILS/
 PROJECT HISTORY
 DATE

CREATOR
 -policy events "tab" will
 show events for past 7 days.

SALES LINK HEADER/NAV.

NEW BUSINESS > E-TRACK
POLICY EVENT HISTORY

TITLE
PROJECT
DATE
CREATOR

E-TRACK > POLICY EVENT HISTORY

Overview	Policy Watch.	Agent Watch.	Downline	E-Track	P.N.A.	Reports	Search
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CONTRACT A

AGENT NAME: John Doe AGENT #: XXXXX ?

POLICY EVENT HISTORY SEARCH DATE RANGE -

Policy Events	Policy Event History	Commission Events History
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Policy #	Insured Last Name	Product	W.A. #	W.A. Name	Event Type	Event Detail	Event Date
LXXX	SMITH	XXX	XXX	DOE	XXX	XXX XX XXXXX XX XXXX XX	XX-XX
LXXX	JONES	XXX	XXX	DOE	XXX	XXXX XX XXX XXXXX XX XXX	XX-XX

SALESLINK HEADER/NAV

E-TRACK DETAILS > CONTRACT A

Overview	Policy Watch.	Agent Watch.	Downline	E-Track	P. N.A.	Reports	Search
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CONTRACT A

AGENT NAME: XXX AGENT #: XXX ?

COMMISSION EVENTS HISTORY

SEARCH DATE RANGE -

POLICY EVENTS | Policy Event History | Commission Events History

AGENT ID	EVENT TYPE	NEW VALUE	EVENT DATE
0000XXXX	XXXXX	\$XXXX.XX	XX-XX-XX
0000XXXX	XX XXX	\$ XXX.XX	XX-XX-XXXX
0000XXXX	XXXX XXV	\$ XXXX.XX	XX-XX-XXXX

TITLE
PROJECT
DATE
CREATOR