

VIEWING REQUIREMENTS FOR INFORCE, DECLINED, CLOSED CASES

(1) FIND THE POLICY BY SEARCHING FOR THE CLIENT OR THE POLICY NUMBER

(A) SEARCH THE CLIENT

(1)-[A] Search the client

Search Contact Search New Select type...

Detailed Search

Policy List - Aaron Smith (Spouse: Jill)

Policy Type Role Stage

Contact Household Pending Cases **Policies** Presale Activity

List | Basic Information | Benefits | Policy Transactions | Letters/Documents |

<input type="checkbox"/>	Holding Type	Contact Name	Advisor	Policy #	Carrier Name
<input type="checkbox"/>	Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaStar L Insurance Con
<input type="checkbox"/>	Life	Smith, Aaron	Keller, Lawrence	AD20282375	ING ReliaStar L Insurance Con

Search Contact Search New Select type...

Detailed Search

Policy List - Aaron Smith (Spouse: Jill)

Policy Type Role Stage

Contact Household Pending Cases **Policies** Presale Activity

List | Basic Information | Benefits | Policy Transactions | Letters/Documents |

<input type="checkbox"/>	Holding Type	Contact Name	Advisor	Policy #	Carrier Name
<input type="checkbox"/>	Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaStar L Insurance Con
<input type="checkbox"/>	Life	Smith, Aaron	Keller, Lawrence	AD20282375	ING ReliaStar L Insurance Con

(1)-[B] Open the policy by clicking here

(A) SEARCH THE POLICY

(1)-[A2] Search the policy

Search Policy Search

Policy List - Aaron Smith (Spouse: Jill)

Policy Type Role Stage

Contacts & Businesses | Household | Pending Cases | **Policies**

List | Basic Information | Benefits | Policy Transactions | Letters/Documents

<input type="checkbox"/>	Holding Type	Contact Name	Advisor	Policy #	Carrier Name
<input type="checkbox"/>	Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaSt Insurance
<input type="checkbox"/>	Life	Smith, Aaron	Keller, Lawrence	AD20282375	ING ReliaSt Insurance

(2) ONCE ON THE POLICY, GO TO THE MENU

SmartOffice by Edix CRM

Home | Settings | Training

Company

Activity Log

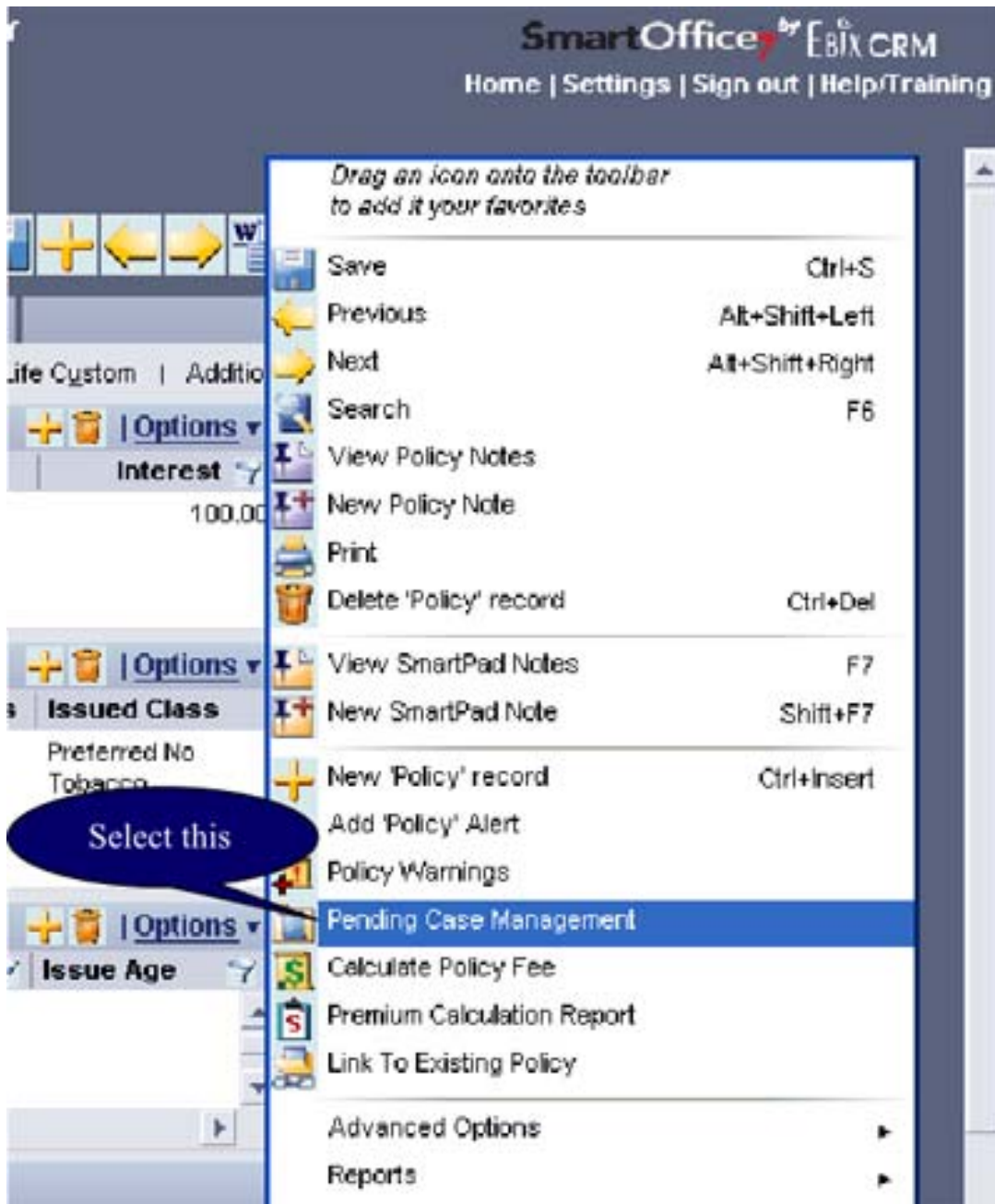
Policy Custom | Life Custom | Additional Info | Carrier Interface

Options

Last Name	Interest
	100.00

Options

(3) ON THE MENU, SELECT "PENDING CASE MANAGEMENT"



(4) YOU CAN NOW VIEW YOUR REQUIREMENTS

(A) CLICK ON THE "REQUIREMENTS" TAB TO VIEW PENDING CASE REQUIREMENTS

The screenshot shows a web application interface for a pending case. At the top, there is a search bar with 'Policy' selected and 'AD20282375' entered, and a 'Search' button. To the right, there is a 'New' button and a 'Select type...' dropdown. Below this, the case title is 'Inforce - AD20282375 - Life - Dr. Aaron Smith - ING TermSmart'. A blue callout bubble points to the 'Requirements' tab in the navigation menu, with the text 'You can now view the requirements tab'. The 'Requirements' tab is selected, and the 'Status and Dates' section is visible. It shows a table with columns for 'Status/Status Date' and 'Inforce'. The table contains the following rows:

Status/Status Date	Inforce
<input checked="" type="checkbox"/> Signed	03/17/2010
<input type="checkbox"/> All Req In	
<input type="checkbox"/> Issued	
<input checked="" type="checkbox"/> Inforce	08/25/2010

Other tabs in the navigation menu include 'List', 'Detail (P)', 'Delivery (Q)', 'Advisor Requests', and 'Riders/Re'. The 'Status and Dates' section also includes a dropdown menu for 'Inforce' and a date field for '08/25/2010'.

(B) CLICK ON THE "DELIVERY" TAB TO VIEW THE DELIVERY REQUIREMENTS

The screenshot shows the same web application interface as above, but with the 'Delivery' tab selected in the navigation menu. A blue callout bubble points to the 'Delivery' tab, with the text 'You can now view the delivery requirements'. The 'Status and Dates' section is visible, showing the same table as in the previous screenshot:

Status/Status Date	Inforce
<input checked="" type="checkbox"/> Signed	03/17/2010
<input type="checkbox"/> All Req In	
<input type="checkbox"/> Issued	
<input checked="" type="checkbox"/> Inforce	08/25/2010

The 'Delivery' tab is selected, and the 'Status and Dates' section is visible. It shows a table with columns for 'Status/Status Date' and 'Inforce'. The table contains the following rows: