

Customizing Your Defaults

Equitable Life Sales Illustration

Customizing your defaults

- Do you usually sell 20 YRT but the illustration defaults to 10 YRT?
- Do you sell PAC but the illustration defaults to Annual?
- Is your average face amount closer to \$200,000 than the \$100,000 default the illustration used?

If the answer to any of these questions is yes, and you're tired of constantly changing this information when you run an illustration, the solution is easy! Customize your illustration defaults. Just following these simple steps:

1. Change the information you want to customize.
2. Click on the Advisor Tools tab and select Save case as default.
3. Repeat for each product you sell.

The screenshot shows the 'Equitable Life Of Canada - R&C - NONAME' software interface. The 'Advisor Tools' tab is selected, and the 'Save case as default' option is highlighted. The 'Coverage 1' section is expanded, showing the following settings:

- Coverage Type: Single Life
- Number of Lives: 1
- Premium Mode: Monthly PAC
- Plan Type: 20 YRCT
- Face Amount: Specified \$ 200,000
- Client Name: Life_1
- Sex: Male
- DOB (dd/mm/yyyy): / /
- Age: 35
- Life Classification: Non-Smoker
- Rating: []

At the bottom of the interface, there are tabs for Scenario 1, (scenario 2), (scenario 3), (scenario 4), and (scenario 5).