

WEB-BASED SALES ILLUSTRATIONS

Q What is the web-based sales illustration system?

- A**
- The web-based sales illustration system is like the existing desktop sales illustration system but can be accessed with any modern web browser. This means it can be used on a mobile device like a cell phone, tablet, or iPad, or with MAC operating systems.

Q Are all the products available on the web-based sales illustration system?

- A**
- At this time, only Equimax® participating whole life is available in the web-based platform. Other products will be added in the future.

Q How do I access the web-based illustration system?

- A**
- You can access the web-based illustration system via EquiNet®, once you login. There is a button in the ribbon called Sales Illustration that now has an option called Web Illustrations.

Q When I log into the web-based illustration system do I need to enter my advisor code?

- A**
- Yes, an advisor code is required to create a new illustration. If you only have one advisor code your code will auto-populate. If you have more than one, start typing the code you want to use and select it from the list that appears.

Q I created a sales illustration, but I don't see a back button to get to back to the dashboard, how do I do that?

- A**
- When the sales illustration opens, it opens in a new web tab, go to the original tab and you will see your dashboard.

Q How long do sales illustrations stay on the dashboard?

- A**
- Sales illustrations will stay on the dashboard for 365 days from the last date modified.

Q Can I start an EZcomplete® application directly from the sales illustration dashboard?

- A**
- At this time the web-based sales illustration system is independent and is not set up to link to EZcomplete. An EZcomplete application will still need to be completed the way it is currently.

Q If I want to use one of the existing sales illustrations on my dashboard for another person, can I do that?

- A**
- You can modify any sales illustration on your dashboard. Any information you currently have on the original illustration will be overwritten with the changes you make.

Q Can I save a web sales illustration?

- A**
- Yes, you will need to enter a file name and then click Save to save an illustration to the dashboard. There is no Save As feature so if you edit a case and change the file name, it will overwrite the existing entry on the dashboard.

Q How can I send a web sales illustration to my client to sign?

- A**
- Once you have completed the sales illustration, click View Report. This will create the PDF in a new tab that you can save and then print or send to the client.

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