

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 **Detailed Search** New
Contact

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

☐	Holding Type	Contact Name	Advisor	Policy #	Carrier Name
☐	Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaStar L Insurance Con
☐	Life	Smith, Aaron	Keller, Lawrence	AD20282375	ING ReliaStar L Insurance Con

Search **Detailed Search** New
Contact

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

☐	Holding Type	Contact Name	Advisor	Policy #	Carrier Name
☐	Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaStar L Insurance Con
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(1)-[B] Open the policy by clicking here

(A) SEARCH THE POLICY

(1)-[A2] Search the policy

Search Detailed Search > New

Policy

Policy List - Aaron Smith (Spouse: Jill)

Policy Type Role Stage

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

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

☐ Holding Type	Contact Name	Advisor	Policy #	Carrier Name
☐ Life	Smith, Jill	Keller, Lawrence	AD20281424	ING ReliaSt Insurance
☐ Life	Smith, Aaron	Keller, Lawrence	AD20282375	ING ReliaSt Insurance

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

se Data For: Self SmartOffice by Edix CRM Home | Settings | Training

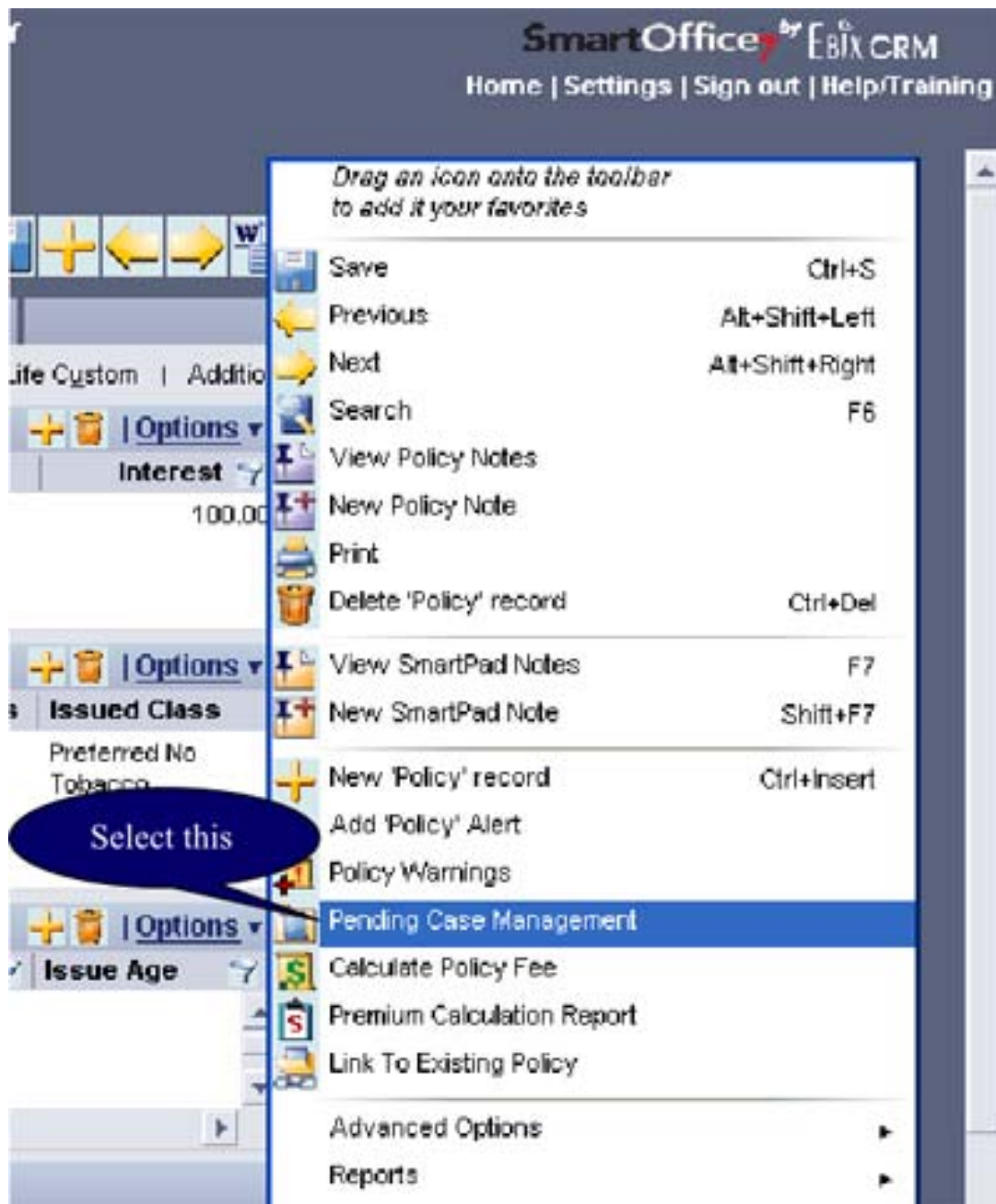
Company

Activity Log

Policy Custom | Life Custom | Additional Info. | Carrier Interface |

Last Name	Interest
	100.00

(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 the Inforce system interface. At the top, there is a search bar with 'Policy' selected and 'AD20282375' entered. A 'Search' button is next to it. To the right, there is a 'New' button and a 'Select type...' dropdown. Below the search bar, the text 'Inforce - AD20282375 - Life - Dr. Aaron Smith - ING TermSmart' is displayed. A blue callout bubble points to the 'Requirements' tab in the navigation bar, 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 'Status/Status Date' and 'Inforce'. The table contains the following data:

Status/Status Date	Inforce
☒ Signed	03/17/2010
☐ All Req In	
☐ Issued	
☒ Inforce	03/25/2010

On the right side of the 'Status and Dates' section, there are checkboxes for 'Submitted', 'Approved', and 'Delivered', all of which are currently unchecked.

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

The screenshot shows the Inforce system interface, similar to the previous one. The 'Delivery' tab is selected in the navigation bar. 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. The 'Delivery' tab is selected, and the 'Status and Dates' section is visible. It shows a table with columns 'Status/Status Date' and 'Inforce'. The table contains the following data:

Status/Status Date	Inforce
☒ Signed	03/17/2010
☐ All Req In	
☐ Issued	
☒ Inforce	03/25/2010

On the right side of the 'Status and Dates' section, there are checkboxes for 'Submitted', 'Approved', and 'Delivered', all of which are currently unchecked.