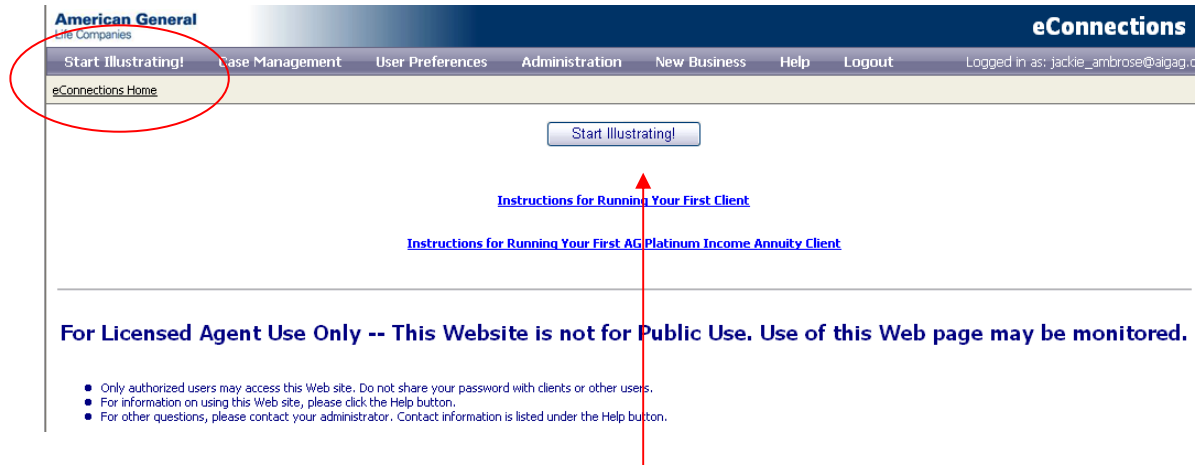
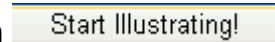


# eConnections *Getting Started* Guide

Welcome Screen: After signing in you will come to this Screen:  
Click on Case Management from the menu bar.



Later, when you have client files, the Start Illustrating button will automatically take you to the Data Entry page.



At the Case Management view, you have the following choices to select from:

**Manage Clients** – Create and edit individual clients, select multiple clients for print or exporting, or import clients into a case file.

**Manage Case Files** - Create, edit names, and delete case files

**Manage Agents** – Create, edit, and delete agents. You can also associate a client to another agent when editing a client. **This feature is specially helpful for back-office administrators or internal wholesalers.**

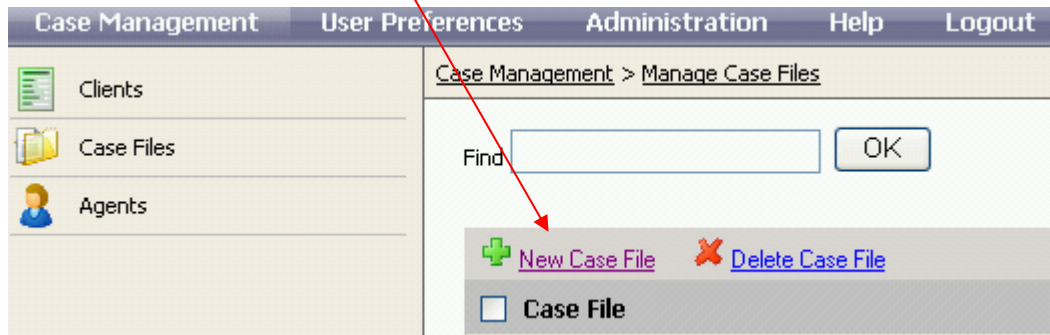
## Manage Case Files

Here you will create and edit case file names.

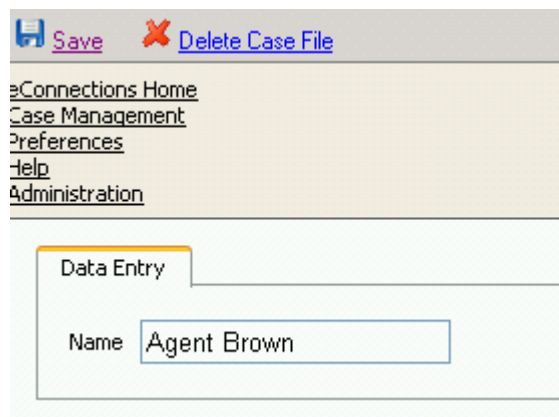
Click on Manage Case Files



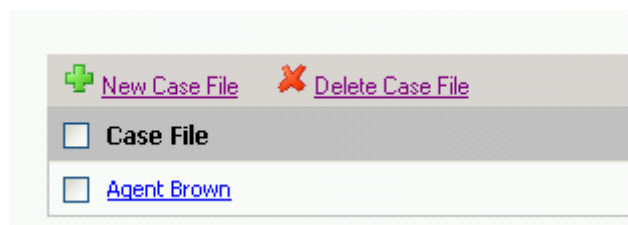
Click on New Case File



Type in a case name and click on Save.



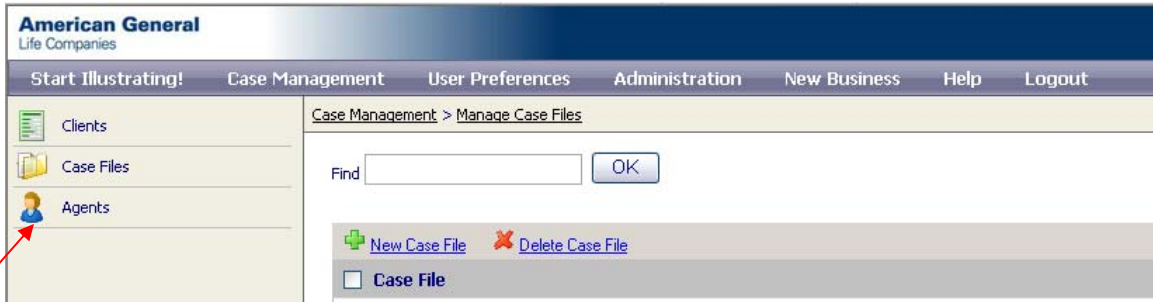
Once new case file names are created and saved, they will be listed under Case File.



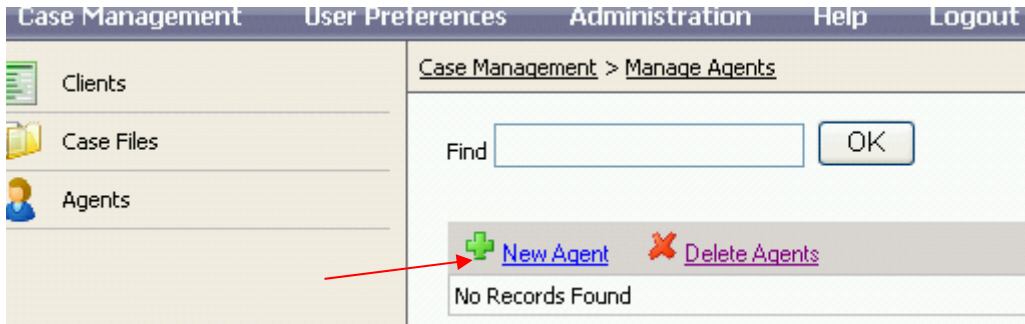
# Manage Agents

Here is where you will add, edit, and delete agent information.

Click on the Agents icon on the left side of the screen.



Then Click on the New Agent Button.



Fill in Required Information, which is designated with Red asterisks\* to the right of the boxes, and fill in the other necessary information for your task.

You can also designate the default agent from this page.

Remember, YOU MUST CLICK THE SAVE BUTTON. This information does not save automatically!

[eConnections Home](#)  
[Case Management](#)  
[Preferences](#)  
[Help](#)  
[Administration](#)

---

Data Entry

Last Name  \*

First Name  \*

Middle Initial

Agency

Address

City

State  ▼

Zip

Voice  (ex. 123-456-7890 x123)

Mobile  (ex. 123-456-7890)

Email

Fax  (ex. 123-456-7890)

Set as Default Agent?

\* Indicates a required field.

You will then return to the previous screen, and your agent name will appear in the table.

Case Management > Manage Agents

Find

<input type="checkbox"/> Name	Agency
<input type="checkbox"/> Munster Herman	House on Haunted Hill

Just like Case File names, as agent information is saved, it will be listed under Last Name.

## Manage Clients

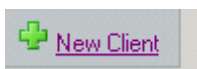
From this page, you can add a new client, delete existing clients, and move clients from one case file to another. You can also copy clients, export, import, and print selected clients. To perform any of the functions, you will click the check box located next to the clients name and then click on function you want to perform.

Case Management > Manage Clients

Find

Move to:

To create a new client, click on New Client.



At the Manage Client page, select an existing or enter in a new case file for this client. Click the Add button to continue.

Case Management > Manage Clients

Please select an existing or enter in a new case file for this client.

Case Files:

New Case File:

You are now directed to the client input page.  
This is where all client data will be entered and saved for your eConnections program. From this page, you can also view or print a quote.

Case Management > Manage Clients > Edit SPIA Client

Data Entry Quick View Reports Validation Messages (1)

**Client Information**

Client Description: Default case with older age

Client: Valued Client

Age Nearest Birthday / DOB: Age 80

Sex: Male

Impaired Risk Rating: N/A

Joint Client?

**Policy Information**

Quote Type: Enter Single Premium

Dollar Amount: 100000

Payment Mode: Monthly

First Payment: Start in one modal period

On the left had side of the page, the agent name should appear. You can select a different agent by clicking on the down arrow next to the agent's name. You will also select the state and product. In order for changes to apply, you must click the Apply button.

**Product Selection**

Product Line: Annuities: Immediate

Product: Single Premium Imme

State: Florida

Agent: Herman Munster

Apply

You must click apply for changes to take effect.

On the left hand side of the page we offer product information, Quick Jump – jump to another client, select another product, state, or agent as well as Sales Tools which links to helpful information.

Remember, when using any of the functions on the left hand side of the page remember, you must click on the APPLY button in order for it to take effect.

Product Selection

Product Line: Annuities: Immediate

Product: AG Platinum Income

State: Arkansas

Agent: Herman Munster

**Apply**

You must click apply for changes to take effect.

Product Information

**AG Platinum Income**

Once the aggregate total premium for annuitant or joint annuitant (i.e., existing contracts plus new contracts) is over \$1 million, home office approval is required. Ages 0-90 in most cases, some exceptions may apply. Minimum...

Case Management > Manage Clients > Edit SPIA Client

For assistance, please contact us at (888) 438-6933, option 2.

Data Entry | Quick View | Reports | Errors / Messages (0)

**Client Information**

Client Description: New Case

Valued Client


Age Nearest Birthday / DOB: Age 65

Sex: Male

Age Rate Up: N/A

Issue State: Arkansas

**Save**

Once all the information has been entered, click Save  located at the top of the page. Once you save your client, you will receive a message in red: Your Case has been saved successfully.

Validation Messages (1)

Your case has been successfully saved.

Here are some things you may see when entering information:  
Checking boxes will reveal additional information which needs to be filled in.  
Here is an example:

Bill is married to Sue and is a joint client to her. Click joint client:

**eConnections**  
Preferences Administration Help Logout Logged in as: cameron\_hall@aigag.com  
Save Delete Client Quick View Reports New Client  
Case Management > Manage Clients > Edit SPIA Client

Data Entry Quick View Reports Validation Messages (1)

**Client Information**

Client Description: Williams Family Annuity

Client: Bill Williams

Age Nearest Birthday / DOB: Age 65

Sex: Male

Impaired Risk Rating: N/A

Joint Client?

**Policy Information**

Quote Type: Enter Single Premium

Dollar Amount: 100000

Payment Mode: Monthly

First Payment: Start in one modal period

Start Date: 8/6/2006

Deposit Date: 7/6/2006

Local intranet

Additional Information should appear for Sue:

Internet Explorer  
Search Favorites Media  
Management/EditClientCase\_SPIA.aspx Go Links  
**eConnections**  
Preferences Administration Help Logout Logged in as: cameron\_hall@aigag.com  
Save Delete Client Quick View Reports New Client  
Case Management > Manage Clients > Edit SPIA Client

Data Entry Quick View Reports Validation Messages (1)

**Client Information**

Client Description: Williams Family Annuity

Client: Bill Williams

Age Nearest Birthday / DOB: Age 65

Sex: Male

Impaired Risk Rating: N/A

Joint Client?

**Annuitant Two**

Annuitant Two: Joint Valued Client

Age: 65

Sex: Female

Impaired Risk Rating: N/A

**Joint Information**

You can show/hide options by clicking the arrows: this helps especially in the quick jump portion of the program located on the left part of the screen.

**American General** Life Companies **eConnections**


Start Illustrating! Case Management User Preferences Administration New Business Help Logout Logged in as: jackie\_ambrose@agag.com

Save Delete Client New Client Copy

Case Management > Manage Clients > Edit SPIA Client

For assistance, please contact us at (888) 438-6933, option 2.

Data Entry Quick View Reports Errors / Messages (0)

**Client Information** 

Client Description: New Case

Client: Valued Client

Age Nearest Birthday / DOB: Age 65


Sex: Male


Age Rate Up: N/A

(PRIOR HOME OFFICE APPROVAL REQUIRED, which must be submitted with the application. Click to learn more about [Medical Underwriting](#) that's needed to attain an Age Rate Up.)

Issue State: Arkansas

Joint Client?

**Joint Information** 

**Policy Information** 

Type: Enter Single Premium


Dollar Amount: 100000

Mode: Monthly

First Payment: Start in one modal period

Start Date: 04/30/2009

Deposit Date: 03/31/2009 default is 7 days from today

**Policy Options** 

Multiquote

**Product Selection**

Product Line: Annuities: Immediate


Product: AG Platinum Income

State: Arkansas

Agent: Herman Munster

Apply

You must click apply for changes to take effect

**Quick Jump** 

SPIA Rates

**Client Description**

- 1 M65TX AG Platinum Income
- 2 F65TX AG Platinum Income
- 3 M65NY AG Platinum Income
- 4 F65NY AG Platinum Income
- 5 M65TX CPI AG Platinum Income
- 6 F65TX CPI AG Platinum Income
- 7 M65NY CPI AG Platinum Income
- 8 F65NY CPI AG Platinum Income

**Product Information**

**AG Platinum Income**

**American General** Life Companies **eConnections**


Start Illustrating! Case Management User Preferences Administration New Business Help Logout Logged in as: jackie\_ambrose@agag.com

Save Delete Client New Client Copy

Case Management > Manage Clients > Edit SPIA Client

For assistance, please contact us at (888) 438-6933, option 2.

Data Entry Quick View Reports Errors / Messages (0)

**Client Information** 

Client Description: New Case

Client: Valued Client

Age Nearest Birthday / DOB: Age 65


Sex: Male

Age Rate Up: N/A

(PRIOR HOME OFFICE APPROVAL REQUIRED, which must be submitted with the application. Click to learn more about [Medical Underwriting](#) that's needed to attain an Age Rate Up.)

Issue State: Arkansas

Joint Client?

**Joint Information** 

**Product Selection**

Product Line: Annuities: Immediate

Product: AG Platinum Income

State: Arkansas

Agent: Herman Munster

Apply

You must click apply for changes to take effect

**Quick Jump**

SPIA Rates

**Product Information**

**Sales Tools**

- [Just because retired](#)
- [Stretch your assets](#)
- [A certain outcome](#)
- [Your replacement ratio](#)

**AG Platinum Income**

## Using the Tabs:

How to use quick view, access reports, check validation messages, etc.

The screenshot shows the 'Edit SPIA Client' form. At the top, there is a navigation bar with 'Case Management', 'User Preferences', 'Administration', 'Help', and 'Logout'. Below this is a toolbar with 'Save', 'Delete Client', 'Quick View', 'Reports', and 'New Client'. The main content area has a breadcrumb trail: 'Case Management > Manage Clients > Edit SPIA Client'. A red box highlights the tabs: 'Data Entry', 'Quick View', 'Reports', and 'Validation Messages (1)'. The 'Quick View' tab is selected. The form is divided into 'Client Information' and 'Policy Information' sections. The 'Client Information' section includes fields for Client Description, Client name, Age, Sex, Impaired Risk Rating, and Joint Client? The 'Policy Information' section includes fields for Quote Type, Dollar Amount, Payment Mode, First Payment, Start Date, and Deposit Date.

**Quick view tab** allows you to see a payout option with the benefit: You can select more than one option by holding the shift key and selecting desired payout options in the Policy Options section of the Data entry. This is a picture of two policy options selected.

The screenshot shows the 'Quick View' tab selected. It displays a table with the following data:

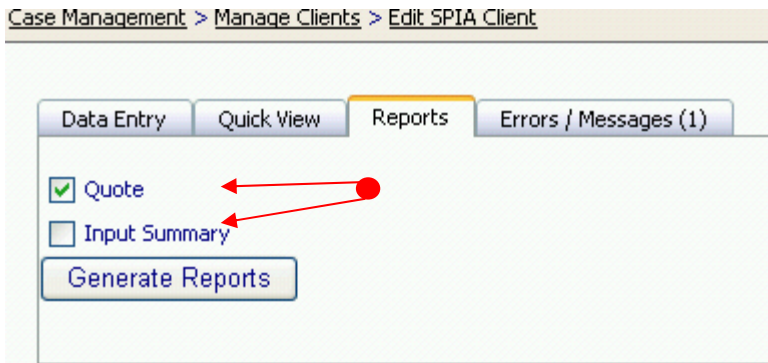
Payout Option	Premium Amount	Modal Benefit
Lifetime Income	\$100,000.00	\$645.63
Lifetime Income with 10 Yr Period Certain	\$100,000.00	\$620.83

**Validation Messages (Errors/Messages) tab** allows you to see any vital information in your client's case. Example:

The screenshot shows the 'Validation Messages (1)' tab selected. It displays a warning message:

Before you give a quote to a client, please verify you have the most current rates.

**Reports Tab** allows you to either create an input summary or make a quote. Select one of the options to view the Adobe file with the given information.



Click **Generate Reports** and a quote will run.

The screenshot shows a Microsoft Internet Explorer browser window displaying a PDF document. The browser's address bar shows the URL [http://www.aigag.com/.../editClient.asp?clientid=...&tab=Reports](#). The PDF document is titled "Valued Client Quote" and contains the following information:

**PLATINUM INCOME ANNUITY  
SINGLE PREMIUM IMMEDIATE FIXED ANNUITY QUOTE  
(CONTRACT FORM #01016)**

American General Life Insurance Company  
Attn: SPIA Operations 2-D1  
P.O. Box 3018 Houston, TX 77253-3018

Quote Date: June 30, 2006  
Deposit Date: July 7, 2006  
Quote Expiration Date: July 7, 2006

Presented by:  
Agent: a a  
Email:  
Phone:  
Fax:

**PROPOSED ANNUITANT(S):** Valued Client  
SEX: Male  
AGE: 65  
DATE OF BIRTH: Not Given  
STATE OF OWNERSHIP: Florida  
(CONTRACT STATE):  
PAYMENT START DATE: August 7, 2006  
SOURCE OF FUNDS: Nonqualified  
COST BASIS: \$100,000.00

PAYOUT OPTION	PREMIUM AMOUNT	MONTHLY BENEFIT	EXCLUSION RATIO
LIFETIME INCOME	\$100,000.00	\$687.30	60.6%

**Payout Option Description(s):**  
Valued Client, the annuitant, will receive a monthly benefit payment of \$687.30 per month beginning August 7, 2006 for the annuitant's lifetime.

Below the PDF, there are several dropdown menus and an "Apply" button:

- Product Line: Annuities: Immediate
- Product: Single Premium Imme
- State: Florida
- Agent: a a
- Apply

A red message at the bottom states: "You must click apply for changes to take". The browser's status bar shows "Done" and "Local intranet".

What happens when you save a client under the wrong case file name?

- You can move the client to a new case file or existing case file.
- Go to Manage Clients.
- Select the client you wish to move to another case file by checking the box to the left of his/her client description.
- Click on the Drop down menu that says Move To: select desired case file and click move. You should see the case file change in the right column of the information.

The screenshot shows the American General eConnect interface. The top navigation bar includes 'Start Illustrating!', 'Case Management', 'User Preferences', 'Administration', 'New Business', 'Help', and 'Logout'. The user is logged in as 'jackie\_ambrose@agsg'. The left sidebar has 'Clients', 'Case Files', and 'Agents' options. The main content area is titled 'Case Management > Manage Clients'. It features a search bar with 'Find' and 'OK' buttons, and a 'View by Case File' dropdown menu currently set to 'first'. Below this are several action buttons: 'New Client', 'Delete Client', 'Move to: third', 'Move', 'Copy', 'Export Selected', and 'Import Clients'. A table displays client information with columns for 'Client Description', 'Client Name', 'Product Name', and 'Case File'. Two rows are visible: one for 'checking calc' (Mickey Mouse, Inheritance Life, first) and one for 'New Case' (Valued Client, AG Platinum Income, first). Both rows have a checked checkbox in the first column.

<input type="checkbox"/>	Client Description	Client Name	Product Name	Case File
<input checked="" type="checkbox"/>	checking calc	Mickey Mouse	Inheritance Life	first
<input checked="" type="checkbox"/>	New Case	Valued Client	AG Platinum Income	first

This screenshot is similar to the previous one but shows the 'View by Case File' dropdown menu set to 'third'. The table now displays two rows: 'checking calc' (Mickey Mouse, Inheritance Life, third) and 'New Case' (Valued Client, AG Platinum Income, third). A red rectangular box highlights the 'Case File' column of the table.

<input type="checkbox"/>	Client Description	Client Name	Product Name	Case File
<input type="checkbox"/>	checking calc	Mickey Mouse	Inheritance Life	third
<input type="checkbox"/>	New Case	Valued Client	AG Platinum Income	third

When you have a long list of clients, it will help to alphabetize the clients by client description, sort by client name, sort by product (this applies to those who have access to more than one product.), and sorting by case file name. Do this by clicking on these links. Example:

The screenshot shows the 'Manage Clients' interface. At the top, there is a navigation bar with 'Case Management', 'User Preferences', 'Administration', 'Help', and 'Logout'. The user is logged in as 'cameron\_hall@aigag.com'. On the left, there is a sidebar with 'Clients', 'Case Files', and 'Agents'. The main area has a search bar with 'Find Joe' and buttons for 'OK' and 'View All'. Below the search bar, there are action buttons: 'New Client', 'Delete Client', 'Move to: June Cases', 'Move', 'Copy', 'Export Selected', 'Import Clients', and 'Print Selected'. A table lists clients with columns for 'Client Description', 'Client Name', 'Product Name', and 'Case File'. Red arrows point from a central point above the table to the 'Client Description', 'Client Name', 'Product Name', and 'Case File' column headers.

<a href="#">Client Description</a>	<a href="#">Client Name</a>	<a href="#">Product Name</a>	<a href="#">Case File</a>
<input type="checkbox"/> <a href="#">Barnes, Joe SPIA</a>	Valued Client	Single Premium Immediate Annuity	July Cases
<input type="checkbox"/> <a href="#">Smith, Joe Client Info</a>	Valued Client	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">44 Single Male Quarterly</a>	Joe Smith	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">46 Single Male Semi-Annual Modal Qual. Req.</a>	Joe Millionaire	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">50 Single Male Annual w/ 30d Start</a>	Joe Williams	Single Premium Immediate Annuity	June Cases

You can also use the find tool by typing the name of the client.

The screenshot shows the 'Manage Clients' interface. At the top, there is a navigation bar with 'Case Management', 'User Preferences', 'Administration', 'Help', and 'Logout'. The user is logged in as 'cameron\_hall@aigag.com'. On the left, there is a sidebar with 'Clients', 'Case Files', and 'Agents'. The main area has a search bar with 'Find Joe' and buttons for 'OK' and 'View All'. Below the search bar, there are action buttons: 'New Client', 'Delete Client', 'Move to: June Cases', 'Move', 'Copy', 'Export Selected', 'Import Clients', and 'Print Selected'. A table lists clients with columns for 'Client Description', 'Client Name', 'Product Name', and 'Case File'. A red box highlights the search bar and its buttons.

<a href="#">Client Description</a>	<a href="#">Client Name</a>	<a href="#">Product Name</a>	<a href="#">Case File</a>
<input type="checkbox"/> <a href="#">Barnes, Joe SPIA</a>	Valued Client	Single Premium Immediate Annuity	July Cases
<input type="checkbox"/> <a href="#">Smith, Joe Client Info</a>	Valued Client	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">44 Single Male Quarterly</a>	Joe Smith	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">46 Single Male Semi-Annual Modal Qual. Req.</a>	Joe Millionaire	Single Premium Immediate Annuity	June Cases
<input type="checkbox"/> <a href="#">50 Single Male Annual w/ 30d Start</a>	Joe Williams	Single Premium Immediate Annuity	June Cases

# Export/Import Clients

Here you can select multiple clients for exporting to import or export into a case file.

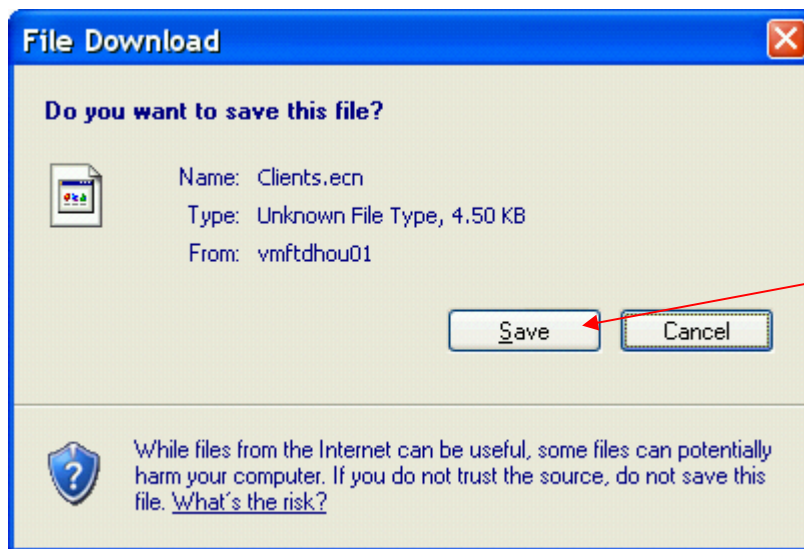
Export clients: from the Manage Clients page, click on the check box next to the client name and click the Export Selected icon.



The screenshot shows a web interface for managing clients. At the top, there are several action buttons: 'New Client' (with a green plus icon), 'Delete Client' (with a red X icon), 'Move to: Joe Blow' (with a dropdown arrow), 'Move', 'Copy', 'Export Selected' (with a red circle around it), and 'Import Clients' (with a green plus icon). Below these buttons is a table with three columns: 'Client Description', 'Client Name', and 'Product Name'. Two rows are visible, both with checked checkboxes in the first column. A red arrow points to the first checkbox.

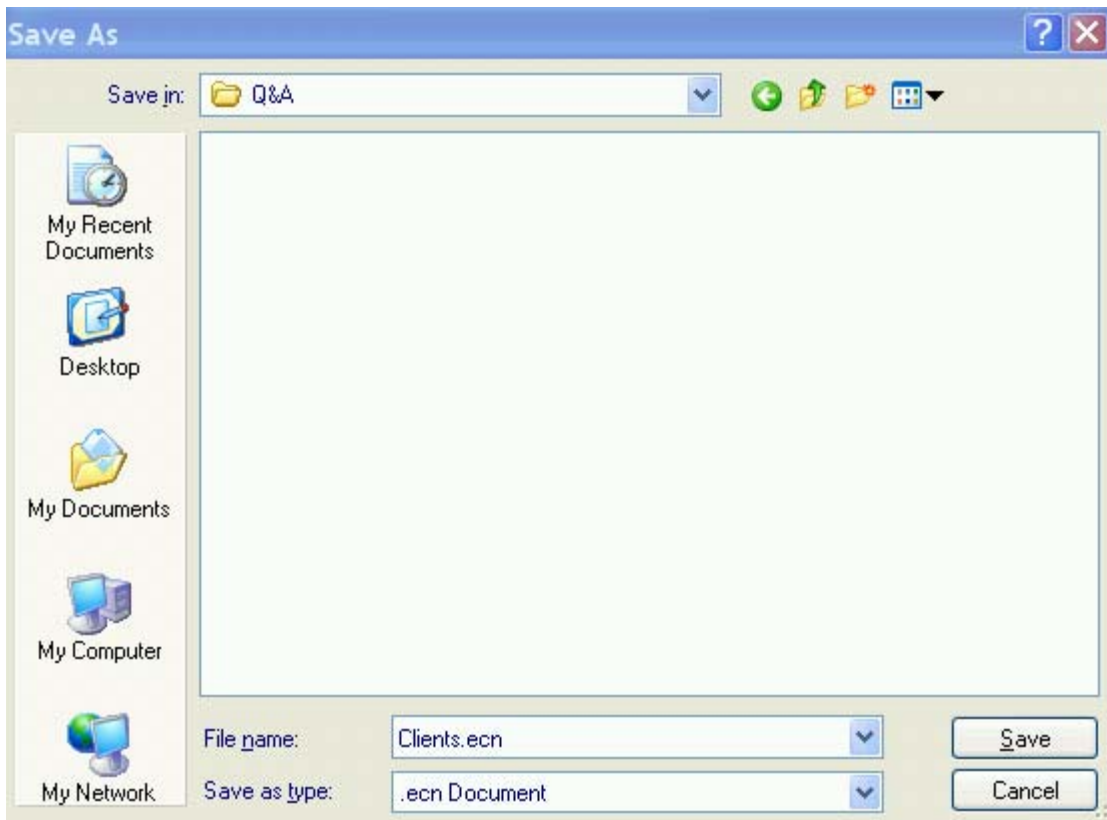
<input type="checkbox"/>	<u>Client Description</u>	<u>Client Name</u>	<u>Product Name</u>
<input checked="" type="checkbox"/>	Default case	Herman Munster	AIG Inheritance Life
<input checked="" type="checkbox"/>	Default case with older age	Valued Client	Single Premium Immediate Annuity

At the File Download box, click on the Save button



The screenshot shows a 'File Download' dialog box with a blue title bar and a close button. The main text asks 'Do you want to save this file?'. To the left is a document icon. To the right, the file details are listed: 'Name: Clients.ecn', 'Type: Unknown File Type, 4.50 KB', and 'From: vmftdhou01'. At the bottom, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button. Below the buttons is a warning section with a shield icon containing a question mark and the text: 'While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not save this file. [What's the risk?](#)'


At the Save As box, select where to save the client to by clicking on the down arrow in the Save in input box, Next type in a name in the File name input box. Then click the Save button.



Once saved, you will receive a message that the download completed.



Click the Close button.

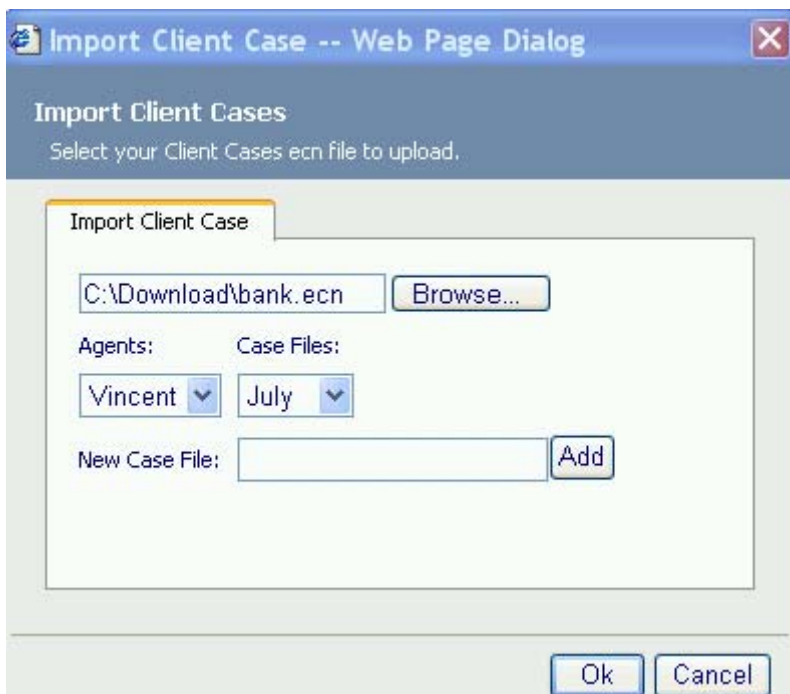
To Import client(s): from the Manage Clients page, click on the check box next to the client name and click the Import Clients icon. 

From the Import Client Case popup box, click the Browse button and navigate to the path where the case that you want to import is. (ex: c:\download\three.ecn)

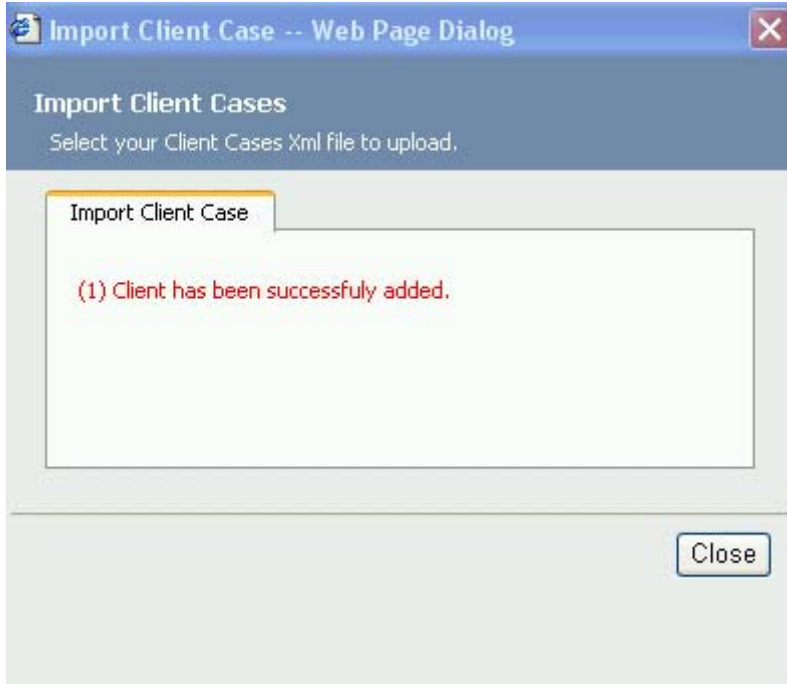
Note: At this time you are unable to upload/download between desktop and eConnections.

Select the agent and case file you want to associate the client file with. If this is a new case, type in the new case name in the New Case File import box and click the Add button. The new case will now show in the Case Files input box.

When complete, click the Ok button.



You will then receive a confirmation that you client(s) have been added successfully. Click the Close button to exit.



Your imported case is now listed with the other saved cases.

<input type="checkbox"/> <a href="#">Default case with younger age</a>	Valued Client	Single Premium Immediate Annuity	Simpson
--	---------------	----------------------------------	---------