

## **Run a Quote and save as PDF**

After you have successfully logged on to eConnections, you will get a screen with the menu bar shown below. You will have access to Case Management, User Preferences, Help and Logout.



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**For Licensed Agent Use Only -- This Website is not for Public Use. Use of this Web page may be monitored.**

- ⌘ Only authorized users may access this Web site. Do not share your password with clients or other users.
- ⌘ For information on using this Web site, please click the Help button.
- ⌘ For other questions, please contact your administrator. Contact information is listed under the Help button.

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**Case Management** – this is where you will create your case files, client files and create quotes. If you have multiple agents in your office, you can manage your agents from here. Remember that what you create under this user id will only be available under this id. You will not have access to these files under a different user id.

**User Preferences** – In this section you will set up your personal profile information and be able to change your password.

**Help** – This is your on-line help tool

**Logout** – Click on this when you have completed running your quotes. It is always recommended that you log out in lieu of just closing your internet browser for security purposes.

**Logged in as:** This is the user id that you are logged in as.

## **How to Run a Quote and save as PDF (without setting Up a Case File and Client File)**

If time does not permit for you to set up a case file and client file, you can still quickly run an quote. You can save the quote as a PDF. (If you want to utilize any eConnections features which will let you save quotes within eConnections, you must set up a case and client file first.)

When you log back in you will see the button “Start Illustrating” on the first page. When you click on it, you will go instantly to the quote page to run your quote. You will need to select the product line, Product, State and Agent on the left of the screen.

The Data Entry screen will look very familiar if you have used our previous quote tool.

Product Selection

Product Line Select Product Line

Product Select Product

State Alabama

Agent

Apply

You must click apply for changes to take effect.

Just as in the old site, you will need to select the product line, product, the state and agent. Click on the down arrow in the blue box and make your selections from the drop down lists.

You must always click the “Apply” button for the changes to take effect and be locked in.

You are now ready to complete the information to run a quote for your client.

Data Entry | Quick View | Reports | Errors / Messages (1)

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.)

Joint Client?

**Client Description:** This will be the name of the case file.

**Client:** This is your client's name

**Age Nearest Birthday:** The default is the age. If you click on the down arrow you can select DOB and enter your client's date of birth. Be patient as the screen updates.

**Sex:** From the drop down list select either Male or Female.

**Age Rate Up:** If your client was medically underwritten and you have an age rate up letter from Home Office, enter the information here.

**Joint Client?:** If this is a joint application, click in the box. Be patient as the screen updates.

## Joint Annuitant Example

Data Entry | Quick View | Reports | Errors / Messages (1)

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**Client Information** ↑

Client Description	New Case	
	Annuitant One	Annuitant Two
Client	Valued Client	Joint Valued Client
Age Nearest Birthday / DOB	Age <input type="checkbox"/> 65	Age <input type="checkbox"/> 65
Sex	Male <input type="checkbox"/>	Female <input type="checkbox"/>
Age Rate Up	N/A <input type="checkbox"/>	N/A <input type="checkbox"/>

(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.)

Joint Client?

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**Joint Information** ↑

Relationship to Primary Annuitant	Spouse <input type="checkbox"/>
Reduce Payment	<div style="border: 1px solid black; padding: 2px;">           No reduction ever            On Primary Annuitant's Death            On Either Annuitant's Death         </div> <input type="checkbox"/>

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**Policy Information** ↑

Type	Enter Single Premium <input type="checkbox"/>
Dollar Amount	100000
Mode	Monthly <input type="checkbox"/>
First Payment	Start in one modal period <input type="checkbox"/>
Start Date	<input type="text" value="2/23/2007"/>
Deposit Date	<input type="text" value="1 / 23/ 2007"/>

Once the screen has updated, it will look like this. You will need to enter the information for the Joint Client.

Relationship to Primary Annuitant: Select either Spouse or Non-Spouse  
 Reduced Payment: Select from the drop down list.

In the Policy Information you will need to select:  
**Type:** What are you solving from or for? Either Single Premium or Modal Income Payment Amount.  
**Dollar Amount:** Enter the amount either the Single Premium or Model Income payment Amount, whichever you selected above.  
**Payment Mode:** Select how frequently the client will receive income payments.  
**Start Date:** Enter the date the client wants to receive their first income payment (check/EFT). It can be anywhere from 30 days to one year from the date of deposit.  
**Deposit Date:** The system will automatically enter 7 days from the date you are creating the quote.

**Policy Options** 

Multiquote

Payout Options **Lifetime Income**  
 Lifetime Income with Certain Period  
 Installment Refund  
 Certain Period  
 Cash Refund

Certain Period (5 to 50) **N/A**

Annual Payment Adjustment **None**  
 Consumer Price Index (CPI-U)  
 1% increase  
 2% increase  
 3% increase  
 4% increase  
 5% increase

In the Policy Options, select the type of payout that the client wants:  
**Payout Options:** Click on either Lifetime Income or Lifetime Income with Certain Period. When you select Certain Period, the screen will change to allow you to select the number of years in the drop down box.  
**Annual Payment Adjustment:** You can select the Consumer Price Index (automatic adjustment based on change in the CPI); or select an automatic percentage increase ranging from 1% to 5% that will be compounded annually.

**SPIA Miscellaneous Options** 

Qualified Trustee to Trustee Transfer

Nonqualified 1035 Exchange

Cost Basis

Is quote requested by Financial Institution?

Under the SPIA Misc Options, you will need to indicate where the funds are coming from.

Qualified Trustee to Trustee Transfer: This is the dollar amount coming from qualified monies.

Nonqualified 1035 Exchange: Here you will enter the Cost Basis of the funds.

If the quote is requested by a Financial Institution, and/or you want to include "not insured by FDIC" on the quote print out, click on the box.

Once you have entered all of the information, if all you need to know is premium amount and modal benefit, click on Quick View and it will give you that information:

[Case Management](#) > [Manage Clients](#) > [Edit SPIA Client](#)

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[Data Entry](#) | [Quick View](#) | [Reports](#) | [Errors / Messages \(1\)](#)

Payout Option	Premium Amount	Modal Benefit
Lifetime Income	\$100,000.00	\$432.64

If you need a print out of the quote, click on the tab at the top that says “Report” and select “Quote”. Click on “Generate Reports” and a quote will be created. Be patient as the system updates.



[Data Entry](#) | [Quick View](#) | [Reports](#) | [Errors / Messages \(0\)](#)



Quote  
 Input Summary

After you have either clicked on Quick View or Reports, you will need to check for error messages.

**Errors/Messages:** If your quote cannot be run based upon the data entered, an error message will explain what you need to modify.

[Data Entry](#) | [Quick View](#) | [Reports](#) | [Errors / Messages \(2\)](#)

 Single Premium entered was less than Minimum allowed.  
 The start date was either less than 27 days from the deposit date or a year over the deposit date and has been adjusted.

-  If you see this symbol you will need to fix the error.
-  If you see this symbol, the system will fix it.

You have now successfully run a quote. If you have already created a client file and case file for this quote, you can click “Save”. Else, you can save the quote in its PDF format to your desktop. To learn how to utilize all the features of eConnections continue reading.