

## CLIENT MANAGER MULTI-CLIENT QUOTING TRAINING GUIDE



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## General Overview

### Features

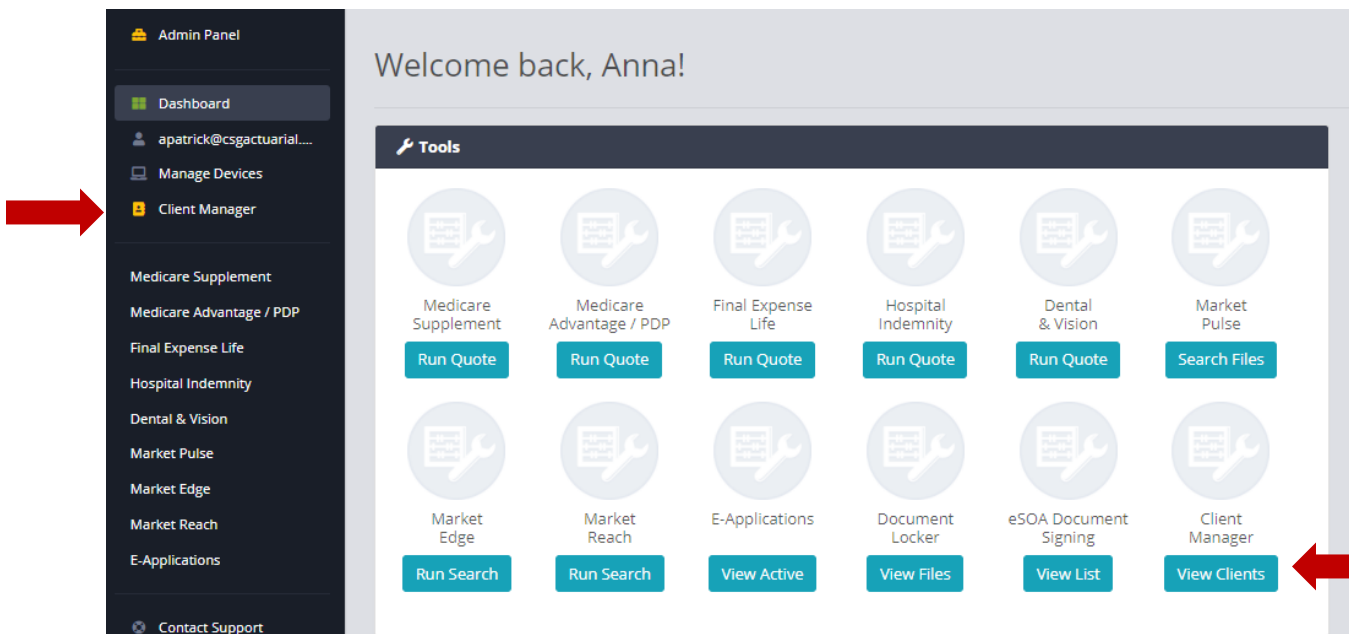
Spend time on what matters most: your customers! Client Manager partners with the MarketAdvisor agent quoting and enrollment tool. Go from a client profile to quoting and electronic application submission all in one system. Easily store client information and create manageable segments based on key demographics. Run new quote options for each segment with the click of a button.

- **Create & Upload Lists**
  - Store name, address, date of birth, contact information and current plan details.
  - Quickly generate a quote and save quote history.
- **Create Client Segments**
  - Use easy filtering process to create targeted client lists by a number of demographics and current plan details.
- **Quote Multiple Clients**
  - After selecting a client group, the system will determine their lowest premium options from your selected group of carriers. Compare clients' current premium to new quote results. Export and save.

### Access

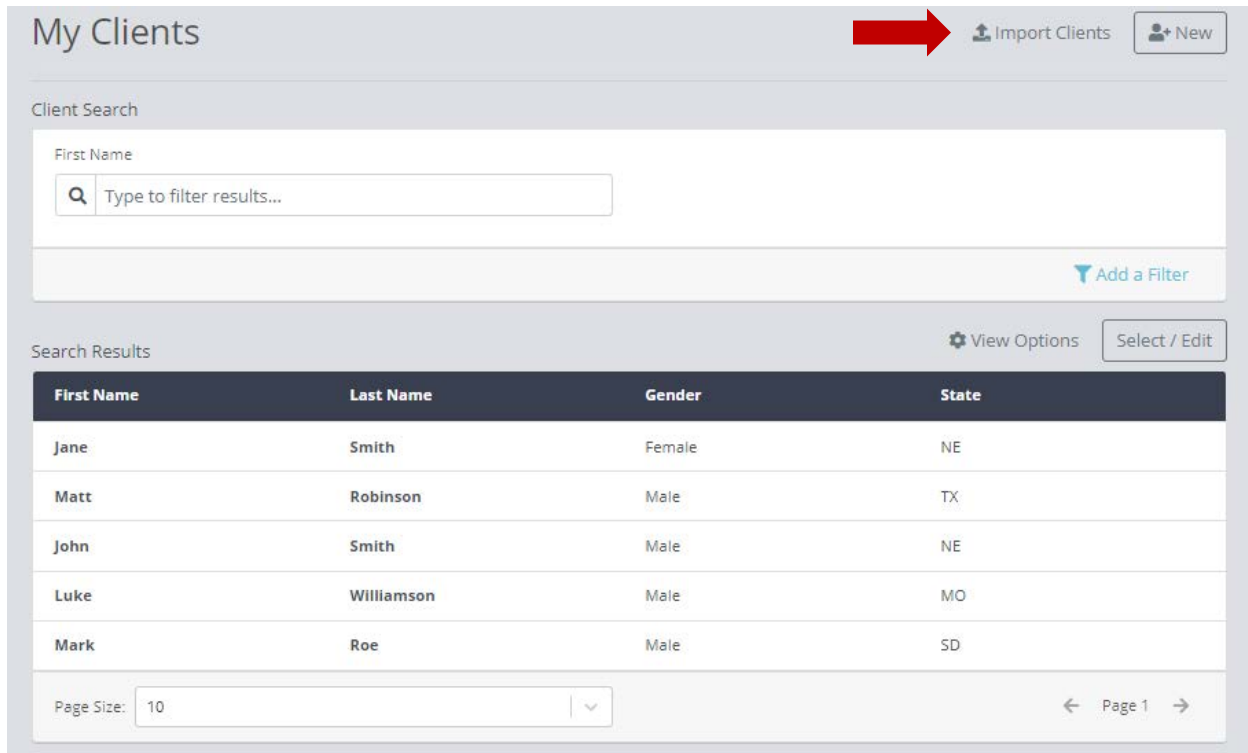
There are two ways to access Client Manager from the Dashboard Screen.

1. Click on **Client Manager** on the far left side bar.
2. Click on **Client Manger – View Clients** under the **Tools** section.



## Import Client Lists

1. Click on **Import Clients** in upper right corner.



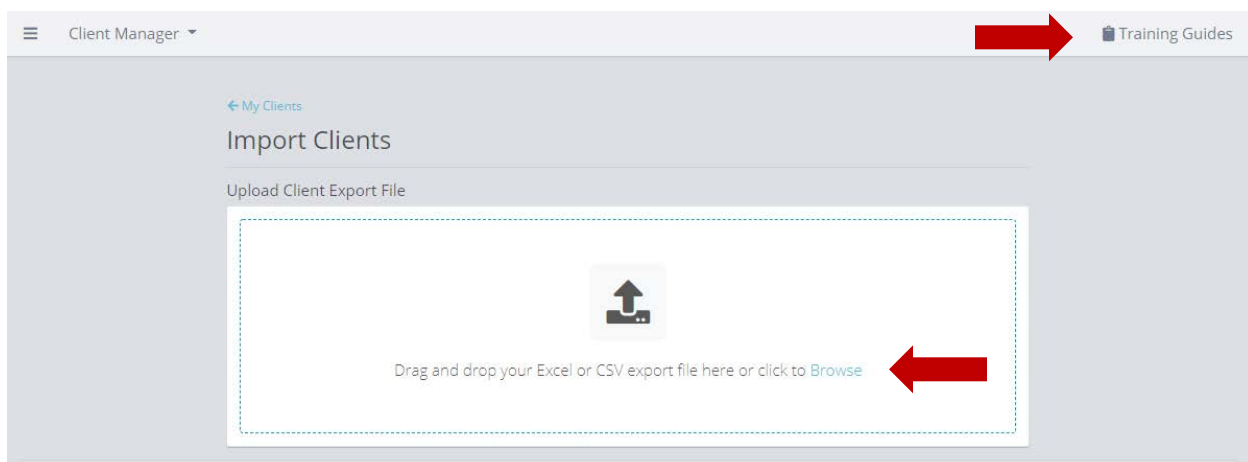
The screenshot shows the 'My Clients' interface. At the top right, there is a red arrow pointing to the 'Import Clients' button. Below the header is a 'Client Search' section with a search box and an 'Add a Filter' button. The 'Search Results' section contains a table with the following data:

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
Matt	Robinson	Male	TX
John	Smith	Male	NE
Luke	Williamson	Male	MO
Mark	Roe	Male	SD

At the bottom of the table, there is a 'Page Size' dropdown set to 10 and a 'Page 1' indicator with navigation arrows.

2. **Import an Excel or CSV file.**

- a. A client import example is located in the **Training Guides**. View this document for **proper column headers and data formatting requirements**.



The screenshot shows the 'Import Clients' page. At the top right, there is a red arrow pointing to the 'Training Guides' button. Below the header is a 'My Clients' breadcrumb and the 'Import Clients' title. The main content area is titled 'Upload Client Export File' and contains a dashed box with an upload icon and the text 'Drag and drop your Excel or CSV export file here or click to [Browse](#)'. A red arrow points to the 'Browse' link.

3. The system will automatically attempt to map the uploaded file column headers to the Client Properties. There may be some unmapped headers.
  - a. Drag the unmapped headers to the Client Properties.
  - b. Click Map Headers & Upload once all headers are mapped.
  - c. If the uploaded file has column headers that are not Client Properties, leave them in unmapped headers. They will not import.

### Map Data Headers

Unmapped headers found in: **Test Upload File.csv**

firstname

lastname

birthdate

In order to ensure data integrity, please map the mismatched client data's column-header names from the imported file to the Client Manager platform's client property names.

Drag the above **Column Headers** that were found in the imported file, onto the appropriate **client properties** listed below.

Address Line 1

Address Line 2

Date of Birth

Household Discount

Email Address  
Imported name: email

First Name

Gender

Last Name

Phone  
Imported name: phone

State

Tobacco Use

Zip Code

Medicare Supplement Plan

Medicare Supplement Premium

Medicare Supplement Company

↶ Reset
Cancel
Map Headers & Upload

4. A confirmation message will appear on the Client Manager screen.

Uploading Clients from File

Your client import is uploading. It may take a few moments for your clients to display. Check back soon.

## My Clients

Import Clients New

Client Search

First Name

Add a Filter

Search Results
View Options
Select / Edit

First Name	Last Name	Gender	State
Robert	Smith	Male	
William	Penn	Male	Texas
Jane	Smith	Female	Texas
John	Smith	Male	Missouri



## Add New Client

1. Click on **New** button in upper right corner.

The screenshot shows the 'My Clients' dashboard. At the top right, there are two buttons: 'Import Clients' and 'New'. A red arrow points to the 'New' button. Below the buttons is a 'Client Search' section with a search bar containing the text 'Type to filter results...'. To the right of the search bar is an 'Add a Filter' button. Below the search bar is a 'Search Results' section with a table of clients. The table has columns for 'First Name', 'Last Name', 'Gender', and 'State'. The table contains five rows of client data. At the bottom of the search results, there is a 'Page Size' dropdown set to '10' and a 'Page 1' indicator with left and right arrows.

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
Matt	Robinson	Male	TX
John	Smith	Male	NE
Luke	Williamson	Male	MO
Mark	Roe	Male	SD

2. Enter **Basic Information** for Client and click **Save**.
  - a. A client profile must have **Gender, Tobacco Use, Date of Birth and Zip Code** fields complete in order to run quotes from the client profile and multi-client quoting.

The screenshot shows the 'Create a New Client' form. The form is titled 'New Client' and has a 'Basic Information' section. The form fields are as follows:

- First Name: William
- Last Name: Penn
- Middle Name: J
- Title: (empty)
- Gender: Male
- Tobacco Use: No
- Date Of Birth: 08/01/1955
- Social Security Number: 777-88-9999
- Phone Number: 888-555-7777
- Email Address: Willian.penn@email.com
- Address Line 1: 123 W. Rd
- Address Line 2: (empty)
- State: Texas
- Zip Code: 75201

At the bottom left of the form, there is a blue 'Save' button, which is highlighted with a red arrow.



In a client profile, an agent can:

- b. Include **Household Discount**
- c. Enter **Current Products**
- d. Run a **New Quote**
- e. View **Quote History**

← My Clients

## Edit Client

New Quote Show Current Products

Basic Information

William Penn

First Name Last Name Middle Name Title

William Penn J

Gender Tobacco Use Date Of Birth Social Security Number

Male No 08/01/1955 777-88-9999

Phone Number Email Address

888-555-7777 Willian.penn@email.com

Address Line 1 Address Line 2 State Zip Code

123 W. Rd Texas 75201

Save

Household

Apply 'Household Discount (HHD)' to rates

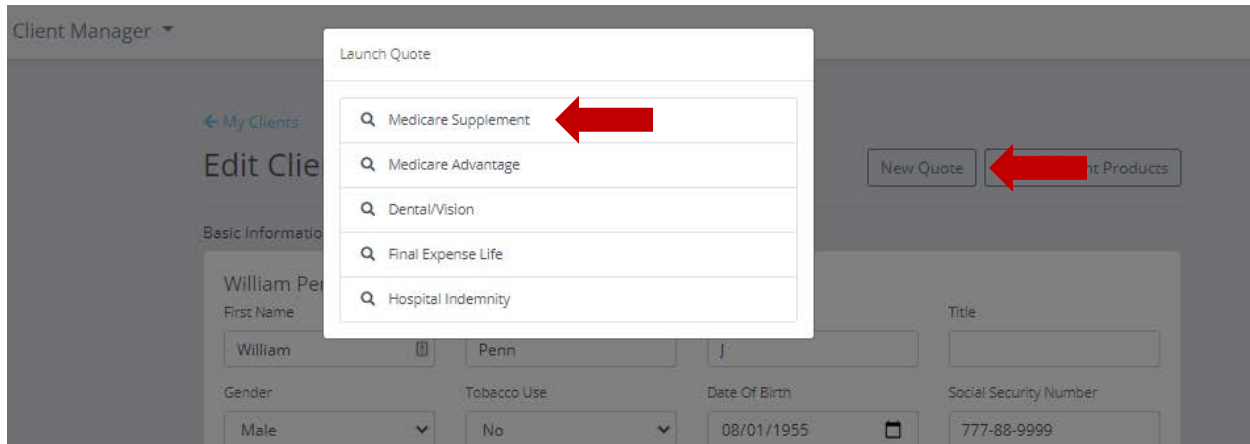
Quote History

Quoted Date	Quote Type	Run Quote
10/1/2020	Medicare Supplement	Run Quote

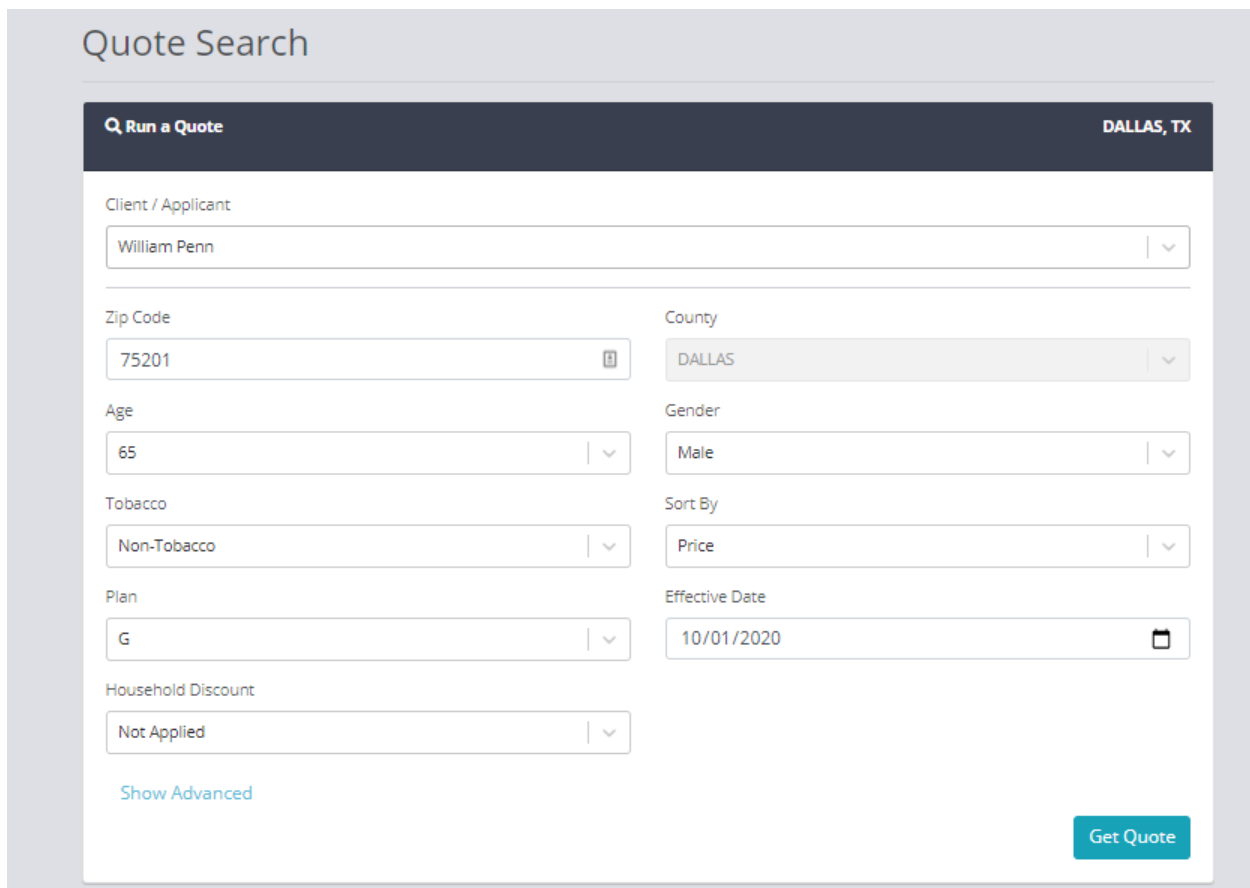
Page Size: 10 Page 1



3. To run a new quote from client profile, click on New Quote and select the product.
  - a. A client profile must have **Gender, Tobacco Use, Date of Birth and Zip Code** fields complete in order to run quotes from the client profile.

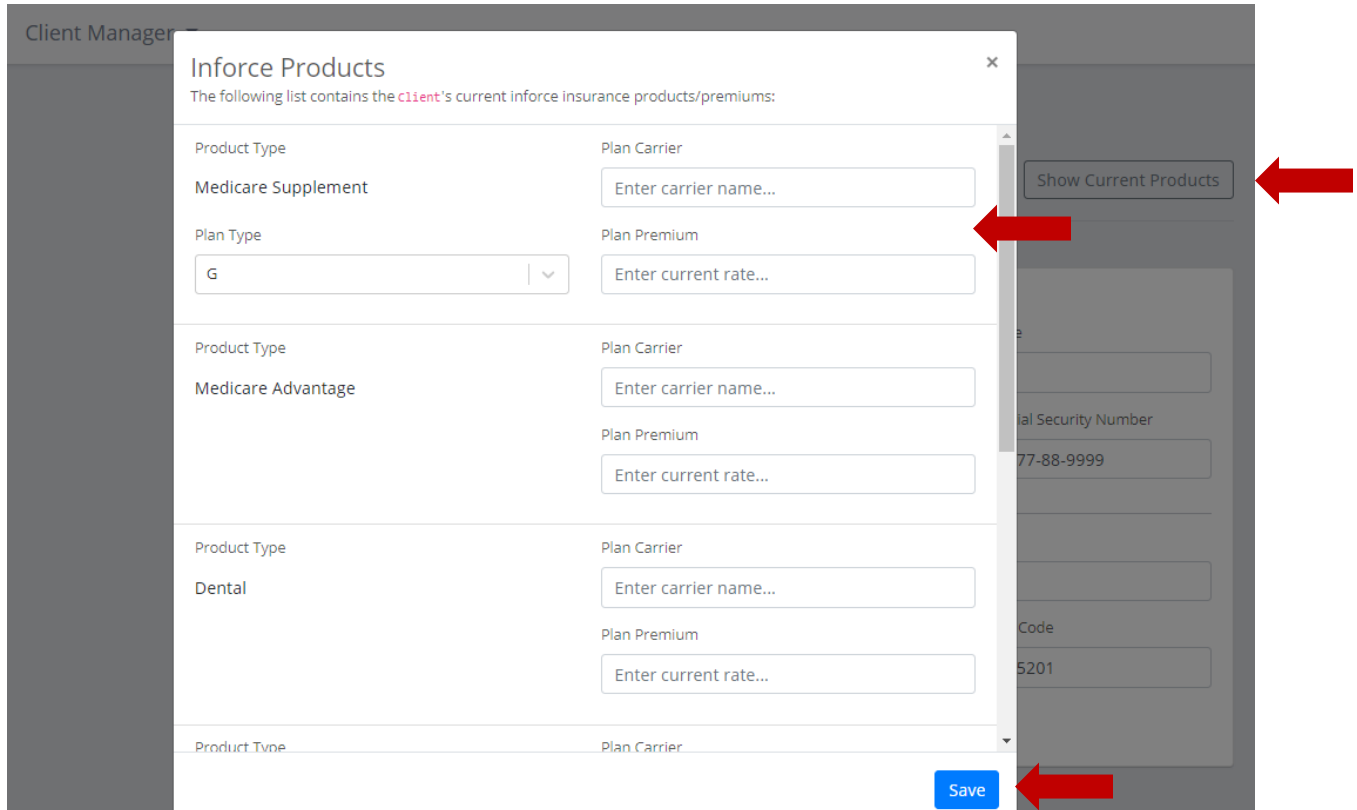


4. The **client's information will populate in the quote search**. The agent can adjust any of the fields, such as Plan Type or Effective Date. Click **Get Quote** to start search.





5. Include client's current in-force policies by selecting **Show Current Products** on client profile. Enter **Plan Type, Carrier Name and Plan Premium**. Click **Save**.



**Inforce Products**

The following list contains the client's current inforce insurance products/premiums:

Product Type	Plan Carrier	Plan Premium
Medicare Supplement	<input type="text" value="Enter carrier name..."/>	<input type="text" value="Enter current rate..."/>
Medicare Advantage	<input type="text" value="Enter carrier name..."/>	<input type="text" value="Enter current rate..."/>
Dental	<input type="text" value="Enter carrier name..."/>	<input type="text" value="Enter current rate..."/>

**Show Current Products**

**Save**



## CREATE LIST SEGMENTS

### Overview of Client Search & Search Results

1. Search for a client by typing their name into the **Client Search**
2. **Add a Filter** to create a segment list
3. Customize fields shown in search results by clicking on **View Options**
4. Adjust **number of clients shown** on search results
5. Go to **next page** to view more clients

### My Clients

Import Clients
 New

---

Client Search

First Name

Choose a Filter:

Select...
v
x

Add a Filter

---

Search Results

View Options
 Select / Edit

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
Matt	Robinson	Male	TX
John	Smith	Male	NE
Luke	Williamson	Male	MO
Mark	Roe	Male	SD

Page Size:

v

← Page 1 →



## Add a Filter to Create Segmented Lists.

1. Click **Add a Filter**

Client Search

First Name

Choose a Filter:

[Add a Filter](#)

Search Results View Options Select / Edit

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
Matt	Robinson	Male	TX

2. **Select a Filter** from the drop-down menu.

Client Search

First Name

Choose a Filter:

Age

Zip 3

Zip 5

State

Gender

Tobacco

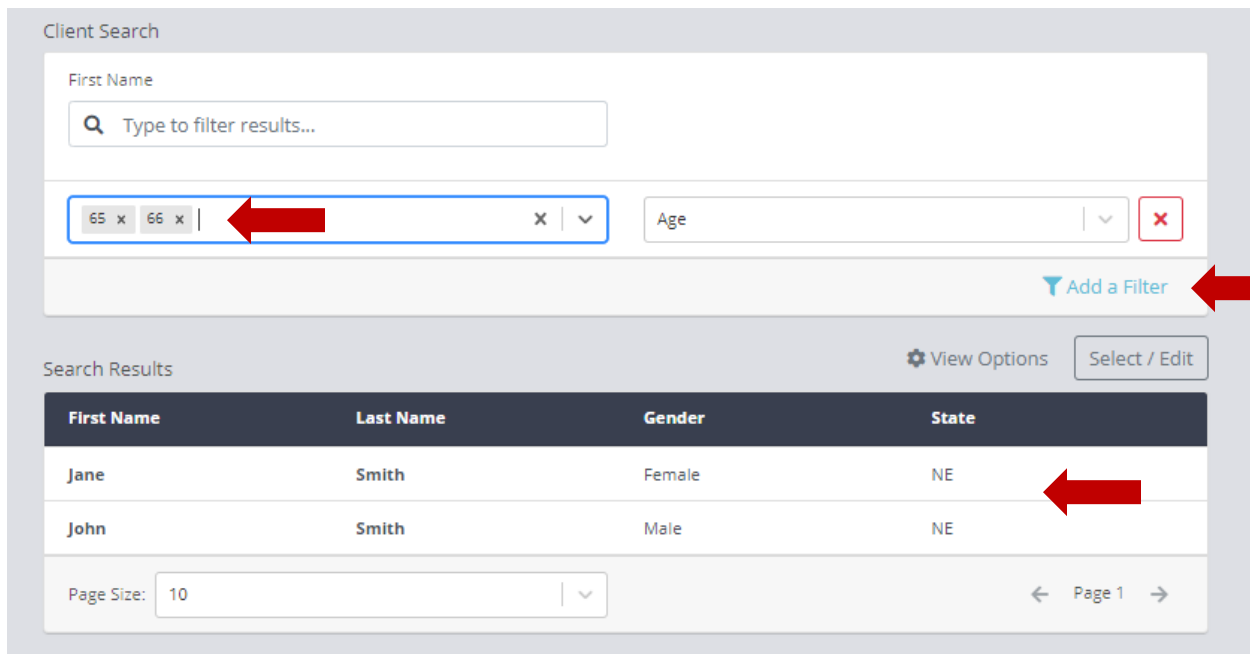
Med Supp Plan

Med Supp Carrier

Search Results View Options Select / Edit

First Name	Last Name	Gender	State
Jane	Smith		
Matt	Robinson		
John	Smith		
Luke	Williamson	Male	MO
Mark	Roe	Male	SD

3. A sub-filter will populate. Select filter categories.
4. Multiple filters and filter categories can be added.
5. Clients that meet those filter requirements will appear in Search Results.



The screenshot displays the 'Client Search' interface. At the top, there is a search bar labeled 'First Name' with the placeholder text 'Type to filter results...'. Below the search bar, there are two filter categories: 'Age' and 'State'. The 'Age' filter is currently set to '65 x 66 x', and the 'State' filter is set to 'Age'. A red arrow points to the 'Add a Filter' button. Below the filters, there is a 'Search Results' section with a table. The table has four columns: 'First Name', 'Last Name', 'Gender', and 'State'. The results show two entries: 'Jane Smith' (Female, NE) and 'John Smith' (Male, NE). A red arrow points to the 'NE' value in the 'State' column. At the bottom of the search results, there is a 'Page Size' dropdown set to '10' and a 'Page 1' indicator.

Client Search

First Name  
Type to filter results...

65 x 66 x | Age

Add a Filter

Search Results View Options Select / Edit

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
John	Smith	Male	NE

Page Size: 10 Page 1



## Multi-Client Quoting

A client profile must have **Gender, Tobacco Use, Date of Birth and Zip Code** fields complete in order for results to appear for the client.

1. Click on **Select/Edit**.

Client Search

First Name

[Add a Filter](#)

Search Results [View Options](#) **Select / Edit**

First Name	Last Name	Gender	State
Jane	Smith	Female	NE
Matt	Robinson	Male	TX

2. **Select Clients** to run quotes for.
3. Click **Bulk Quote**.

Client Search

First Name

[Add a Filter](#)

Search Results [View Options](#) [Cancel](#)

First Name	Last Name	Gender	State
<input type="checkbox"/> <i>Select All...</i>			
<input checked="" type="checkbox"/> Jane	Smith	Female	NE
<input checked="" type="checkbox"/> Matt	Robinson	Male	TX
<input checked="" type="checkbox"/> John	Smith	Male	NE
<input type="checkbox"/> Luke	Williamson	Male	MO
<input type="checkbox"/> Mark	Roe	Male	SD

Page Size: 10 [←](#) Page 1 [→](#)

[Export CSV](#) [Delete](#) **Bulk Quote**



4. Update the desired **Effective Date** and the date to calculate the **Ages** of the selected Clients for the quote results.
5. **Choose a plan type** to search for, or search the clients' current plans.
6. **Choose companies** to show in the quote results.
  - a. The tool will show the **lowest three premiums** of the selected Companies.
  - b. **My Companies** button will default to your selected My Companies from the Medicare Supplement Settings.
  - c. Make sure the proper companies are selected and available in the states the selected clients are located in. If companies are selected and not available in the client's state, no results will appear.
7. Click **Get Quotes**.

**Bulk Quote** [X]

**Quote Parameters**  
Update the desired **Effective Date** and the date to calculate the **Ages** of the selected Clients for the quote results.

Effective Date: 10/05/2020      Age (Calculate as of...): 10/05/2020

**Select a Plan**  
Choose a plan type to search for, or search the clients' current plans.

G [v]

**Select Companies**  
Choose companies to show in the quote results.

Search... [v]      My Companies

Remember these selected companies

**Get Quotes**

**My Clients**

Client Search: First Name [Type to filter]

Search Results:

First Name	State
<input type="checkbox"/> Select All...	
<input checked="" type="checkbox"/> Jane	NE
<input checked="" type="checkbox"/> Matt	TX
<input checked="" type="checkbox"/> John	NE
<input type="checkbox"/> Luke	MO
<input type="checkbox"/> Mark	SD



1. The multi-client bulk quote will show **client demographics** and **inforce rate** entered in their client profile.
2. Adjust the **Select Companies** or **Plan Type**.
3. Click **View All Results** to compare all company plans and premiums.
  - a. Bulk Search will only show top three lowest premium plans.
4. **Export Results** in upper right corner.

If no results are generating, confirm the client profile is complete with required quoting parameters (gender, tobacco status, date of birth, and zip code) and confirm the companies selected are available in the client's state.

[← My Clients](#)

## Quote Results (Bulk Search) Export Results

Select Companies  
Choose companies to show in the quote results.

15 Selected x | v My Companies

**John Smith** Male, Age 66, Non-tobacco, 68124 (NE)  
HHD Not Applied

**In-force Rate: \$180.00** G | v

\$112.21/mo	Continental Life Ins Co Brentwood	Plan: G
\$118.83/mo	Acme Corporation	Plan: G
\$118.83/mo	United World Life Ins Co	Plan: G

[View All Results →](#)

**Jane Smith** Female, Age 65, Non-tobacco, 68124 (NE)  
HHD Applied  
Current Carrier: Aetna Health

**In-force Rate: \$150.00** G | v