CLIENT MANAGER
MULTI-CLIENT QUOTING
TRAINING GUIDE

TABLE OF CONTENTS

General Overview

Features

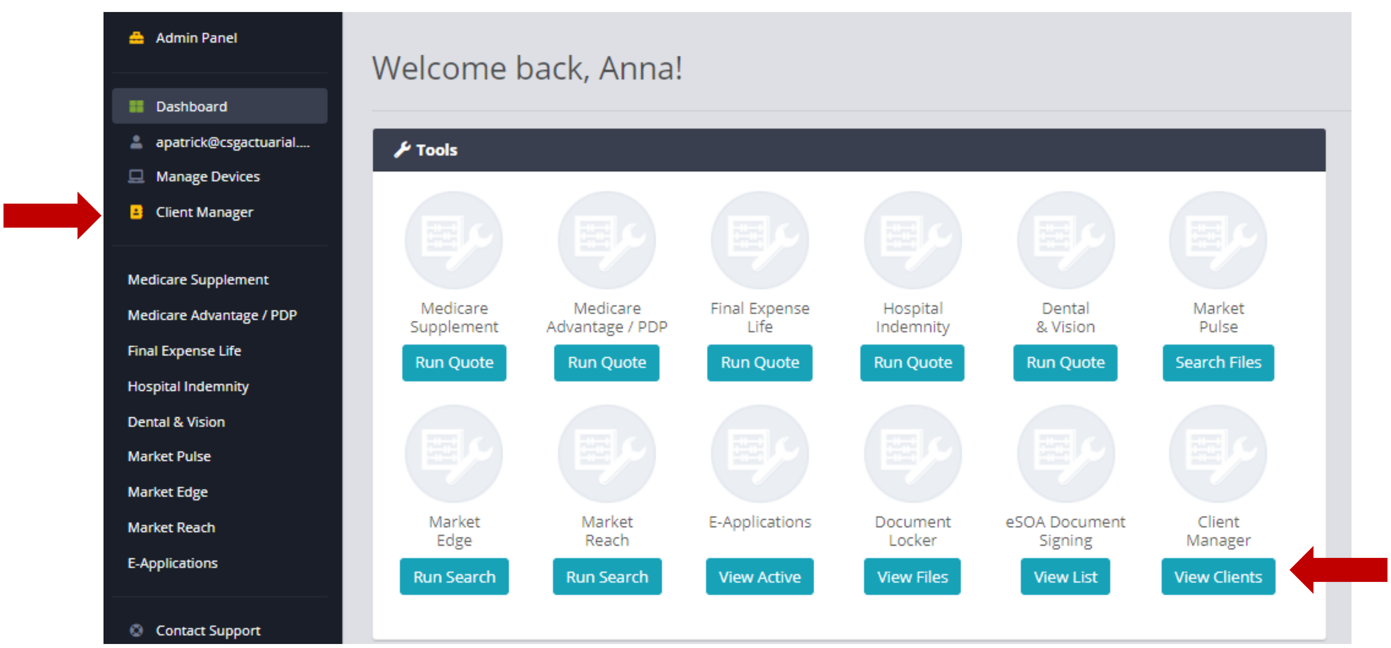
Spend time on what matters most: your customers! Client Manager partners with the MarketAdvisor agent quoting and enrollment tool. Go from a client profile to quoting and electronic application submission all in one system. Easily store client information and create manageable segments based on key demographics.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

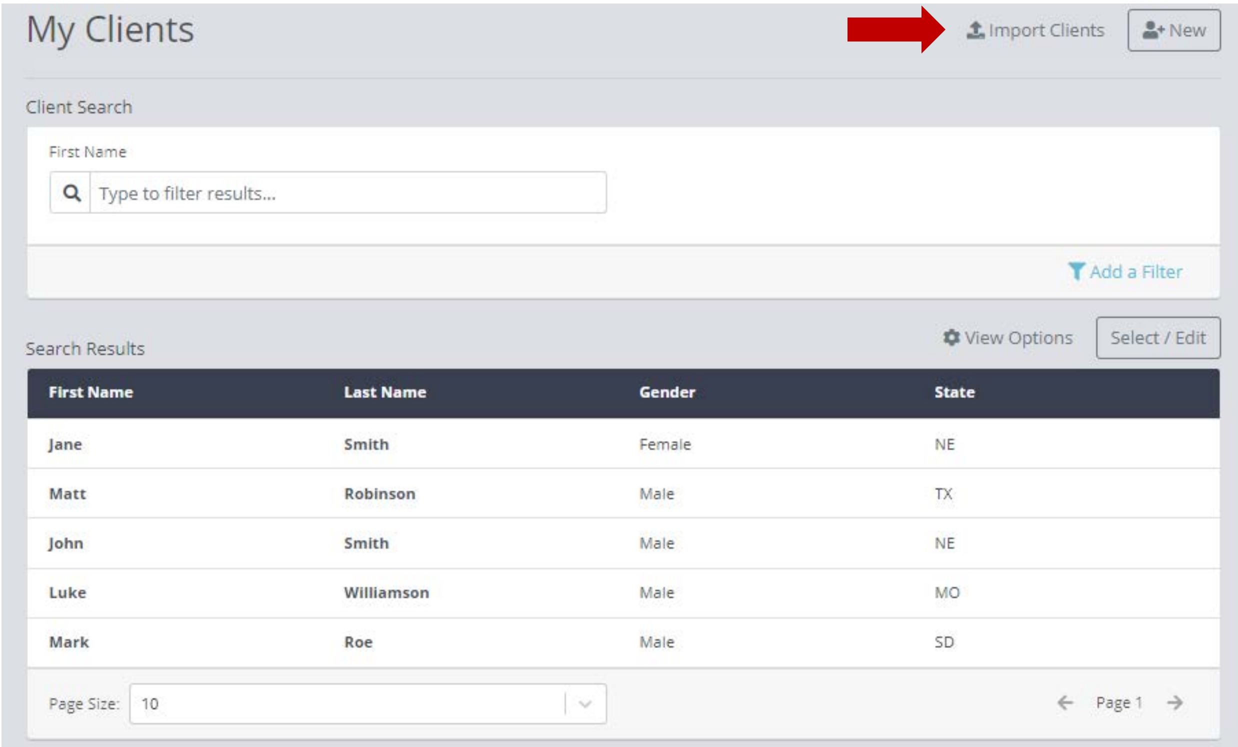
There are two ways to access Client Manager from the Dashboard Screen.

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

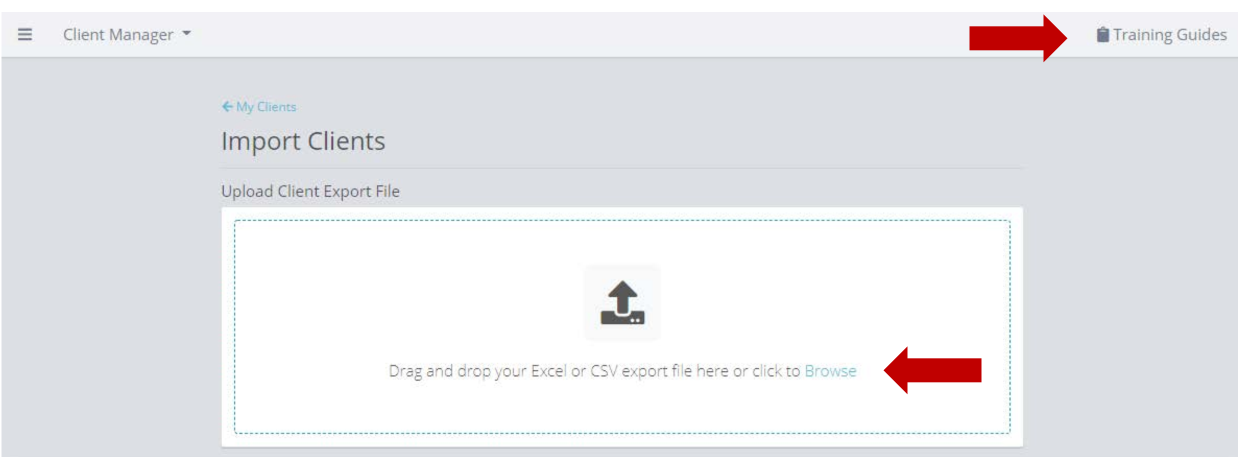


Import Client Lists

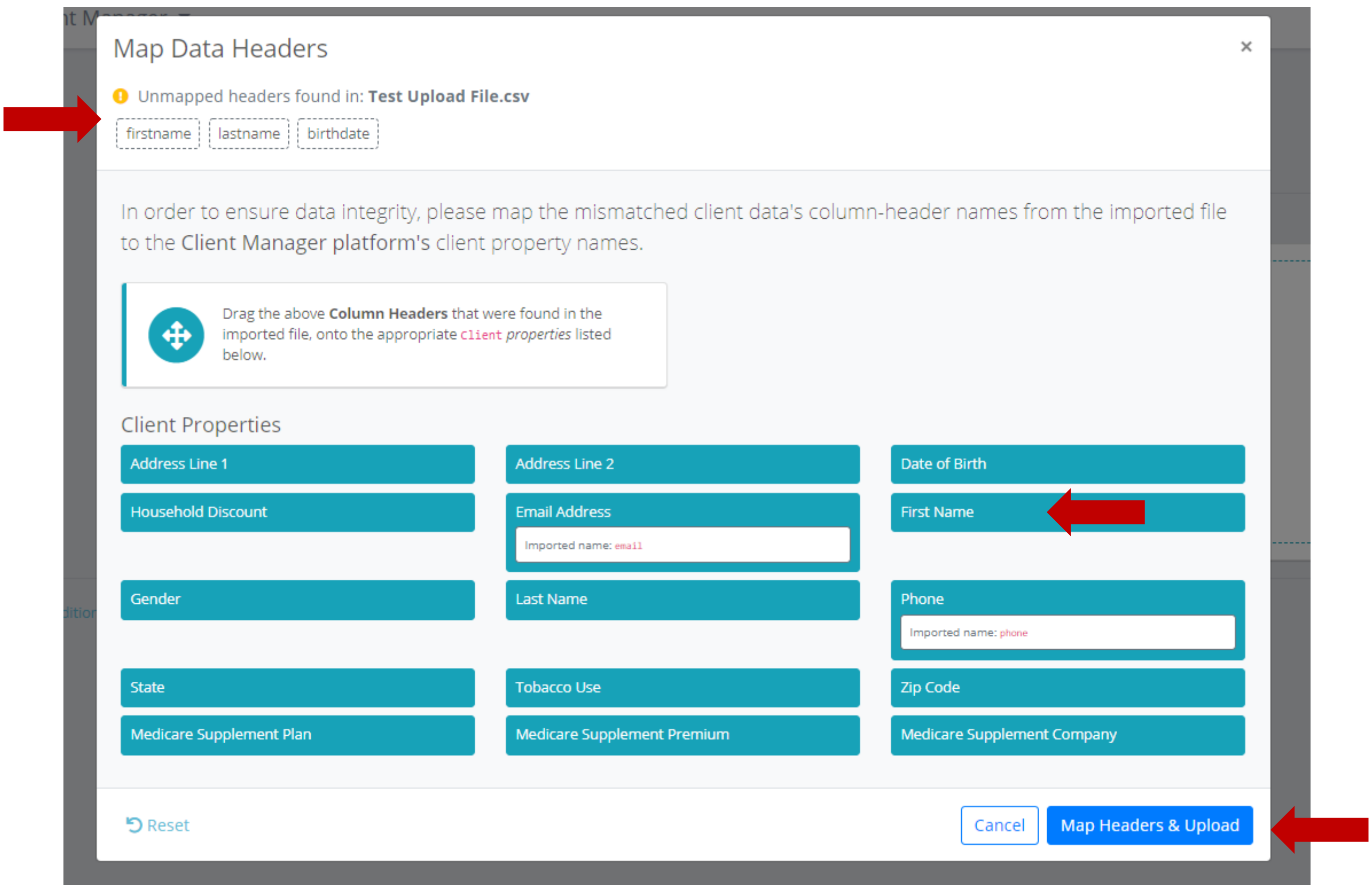
1. Click on **Import Clients** in upper right corner.



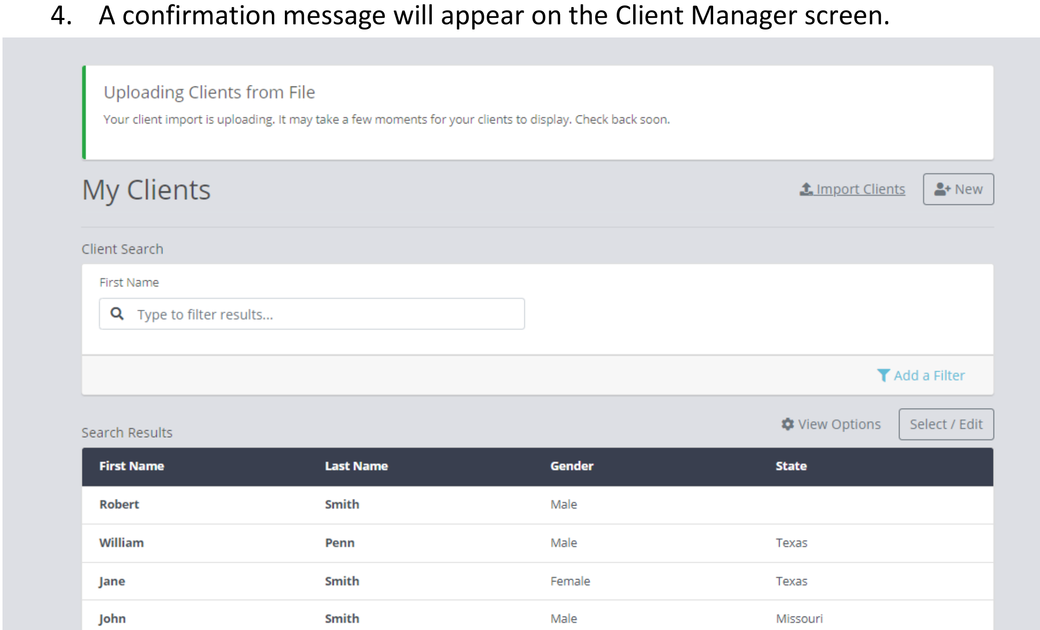
2. **Import an Excel or CSV file.**
    a. A client import example is located in the **Training Guides.** View this document for **proper column headers** and **data formatting requirements.**



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.

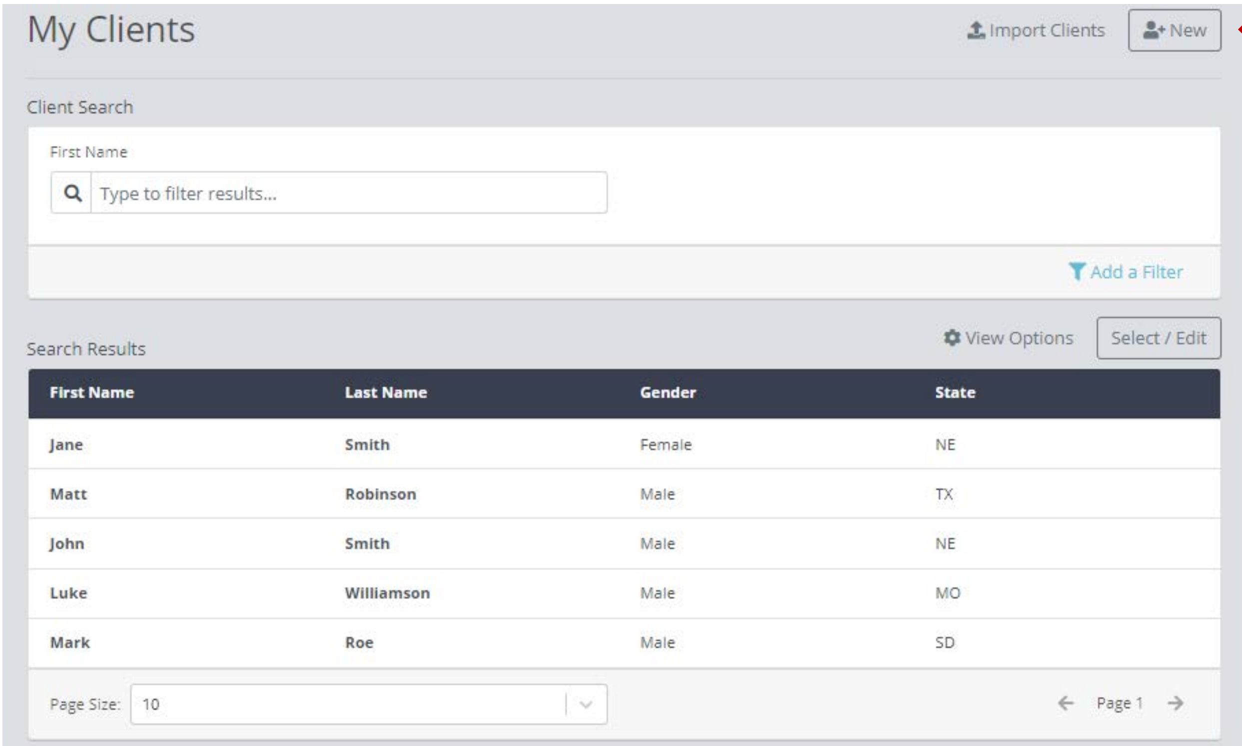


4. A confirmation message will appear on the Client Manager screen.

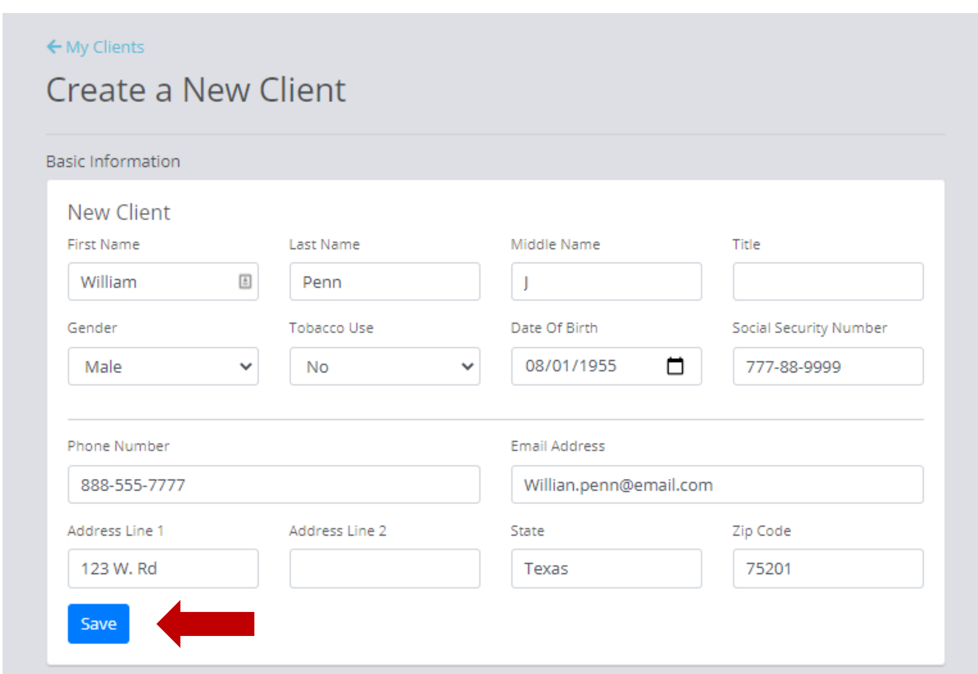


Add New Client

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

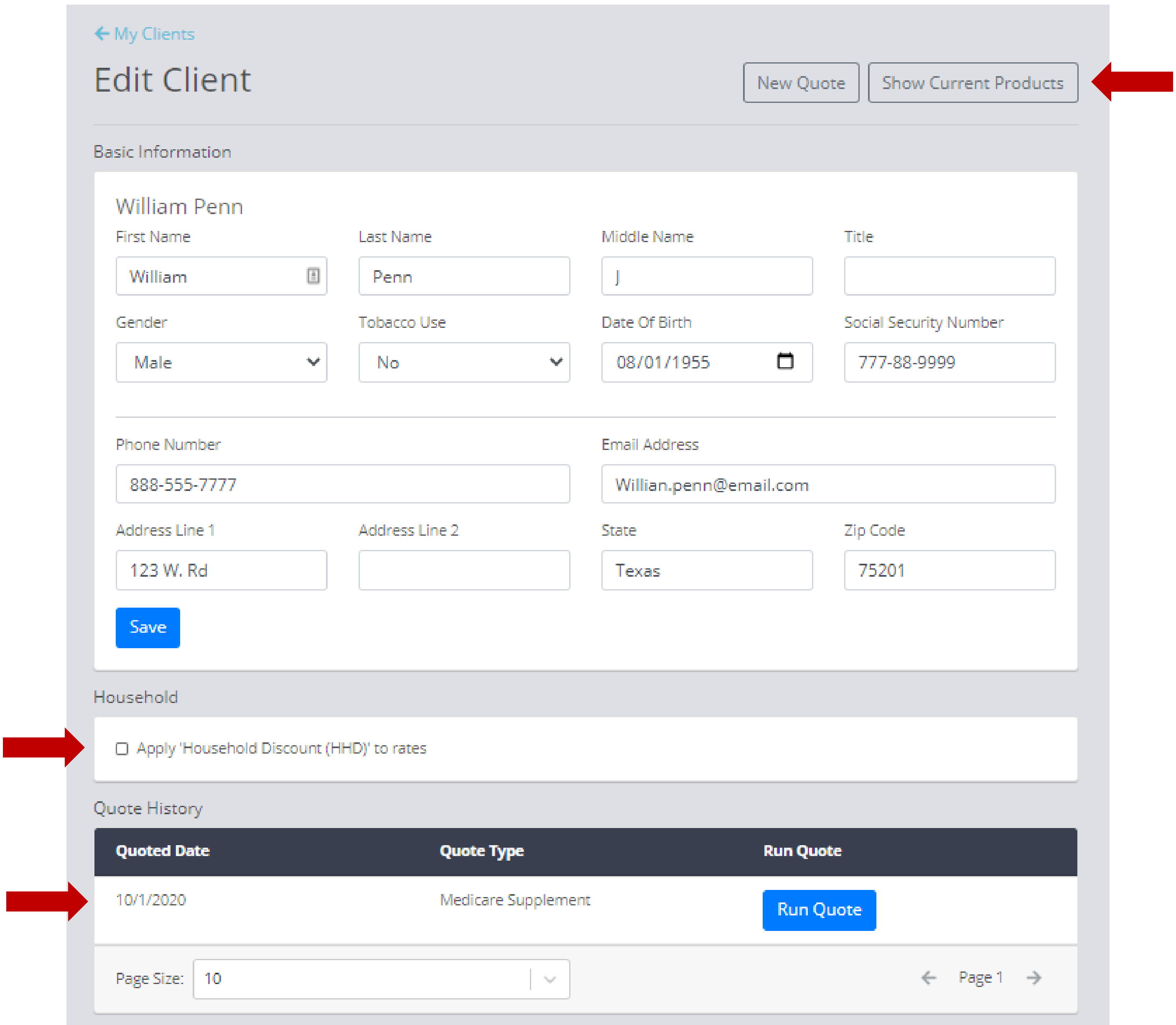


2. Enter **Basic Information** for Client and click **Save.**
    a. A client profile must have **Gender, Tobacco Use, Date of Birth and Zip Code** fields complete in order to run quotes from the client profile and multi-client quoting.

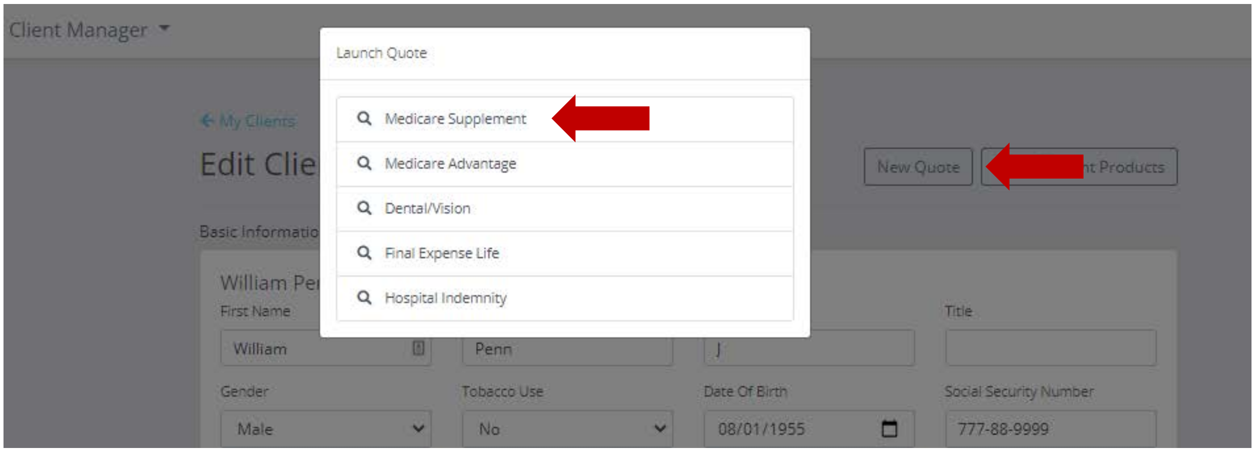


In a client profile, an agent can:

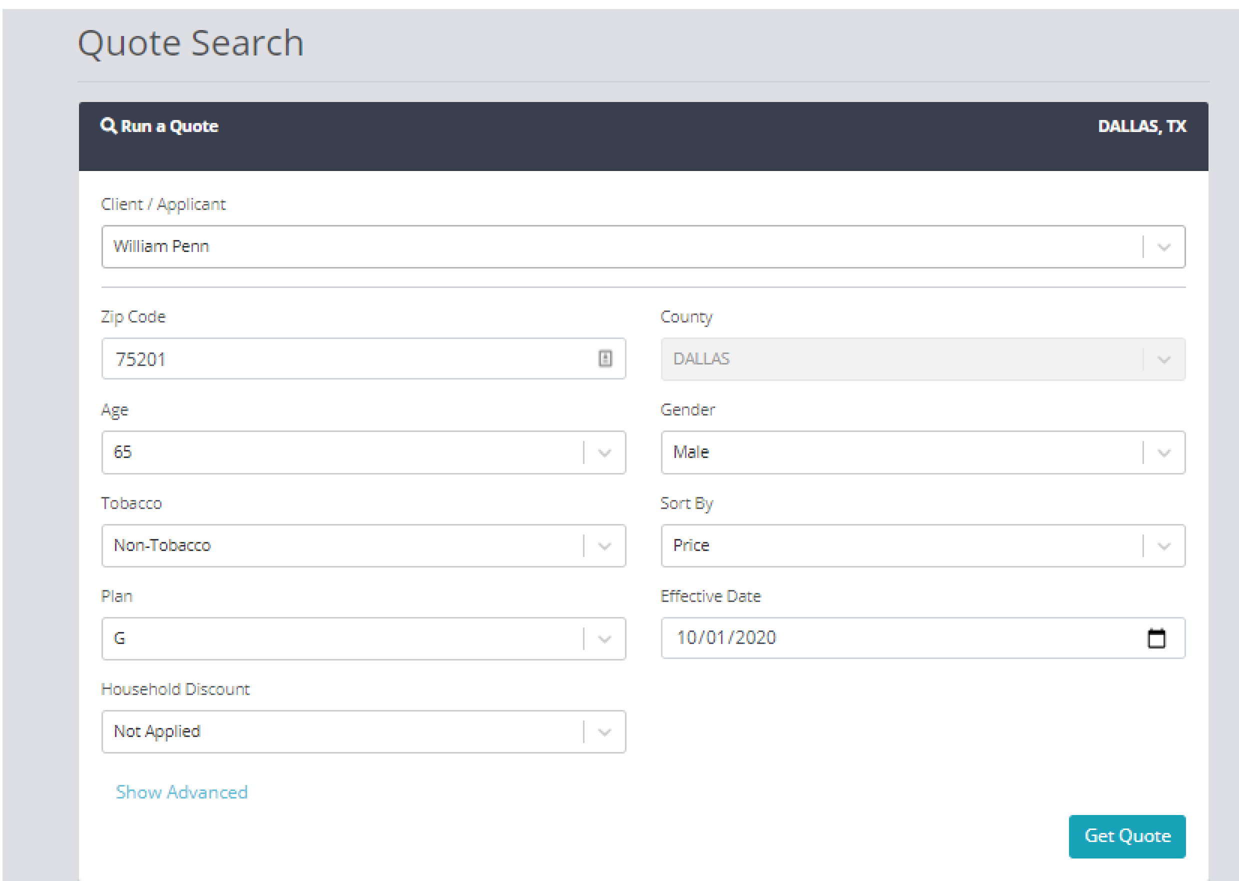
b. Include **Household Discount**
c. Enter **Current Products**
d. Run a **New Quote**
e. View **Quote History**



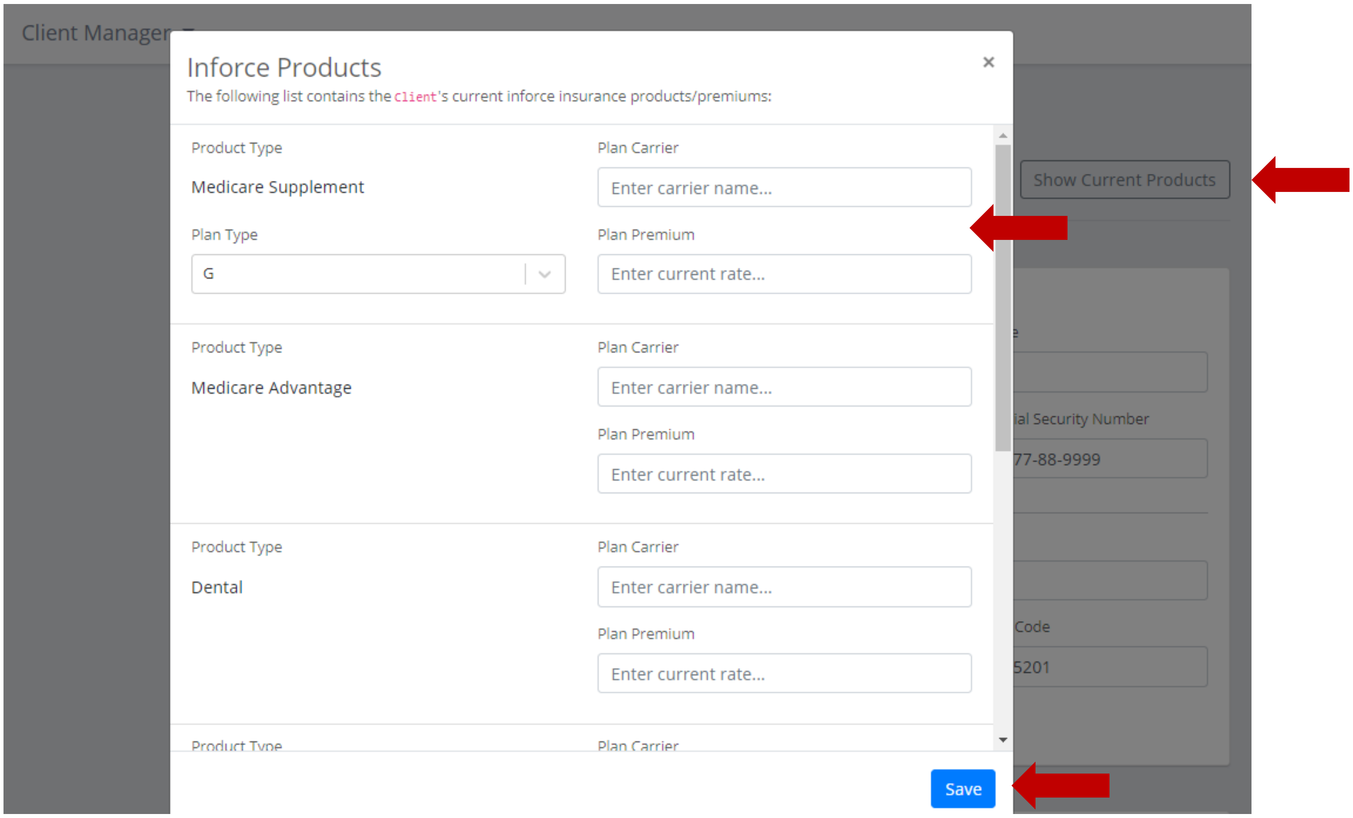
3. To run a new quote from client profile, click on New Quote and select the product.
    a. A client profile must have **Gender, Tobacco Use, Date of Birth and Zip Code** fields complete in order to run quotes from the client profile.



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.



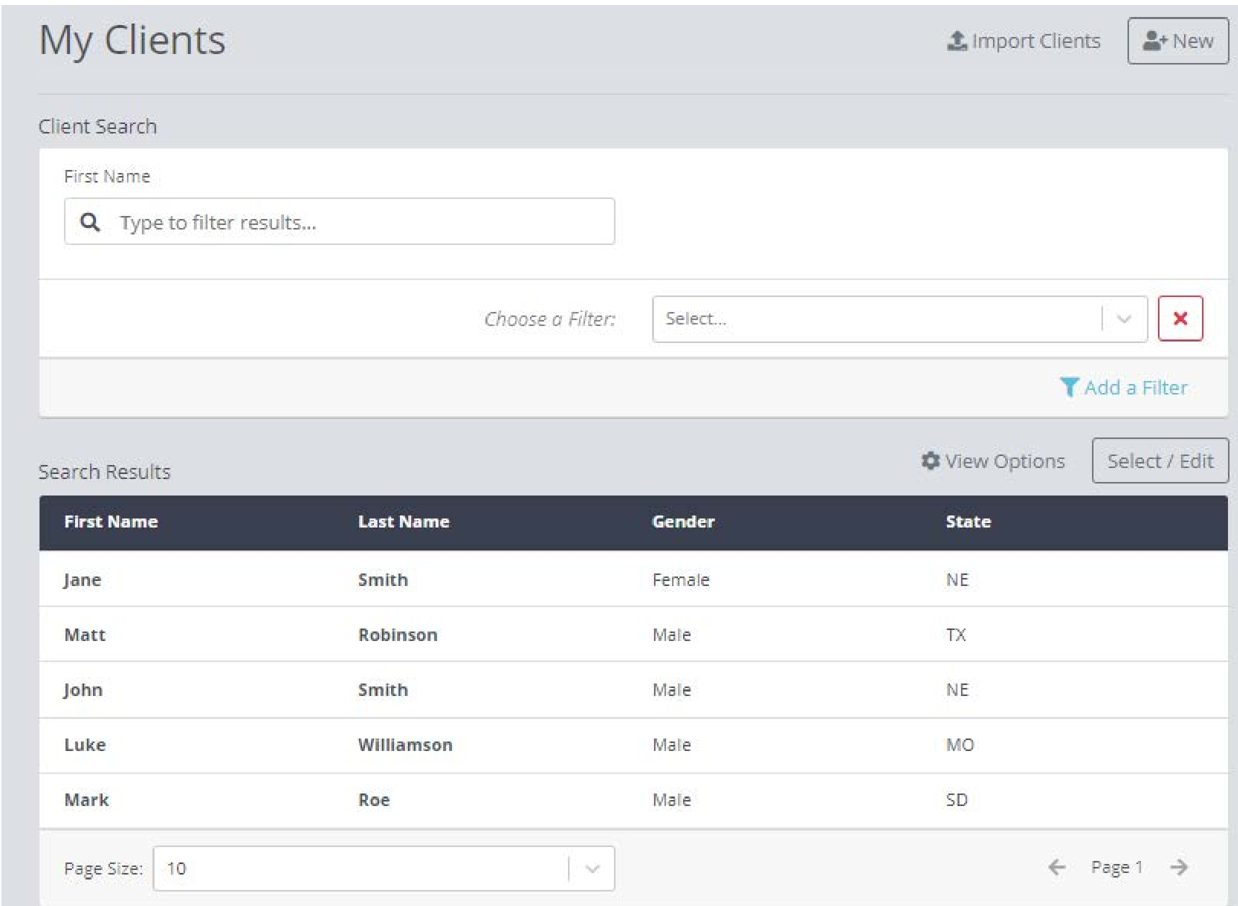
5. Include client’s current in-force policies by selecting **Show Current Products** on client profile. Enter **Plan Type, Carrier Name and Plan Premium.** Click **Save.**



CREATE LIST SEGMENTS

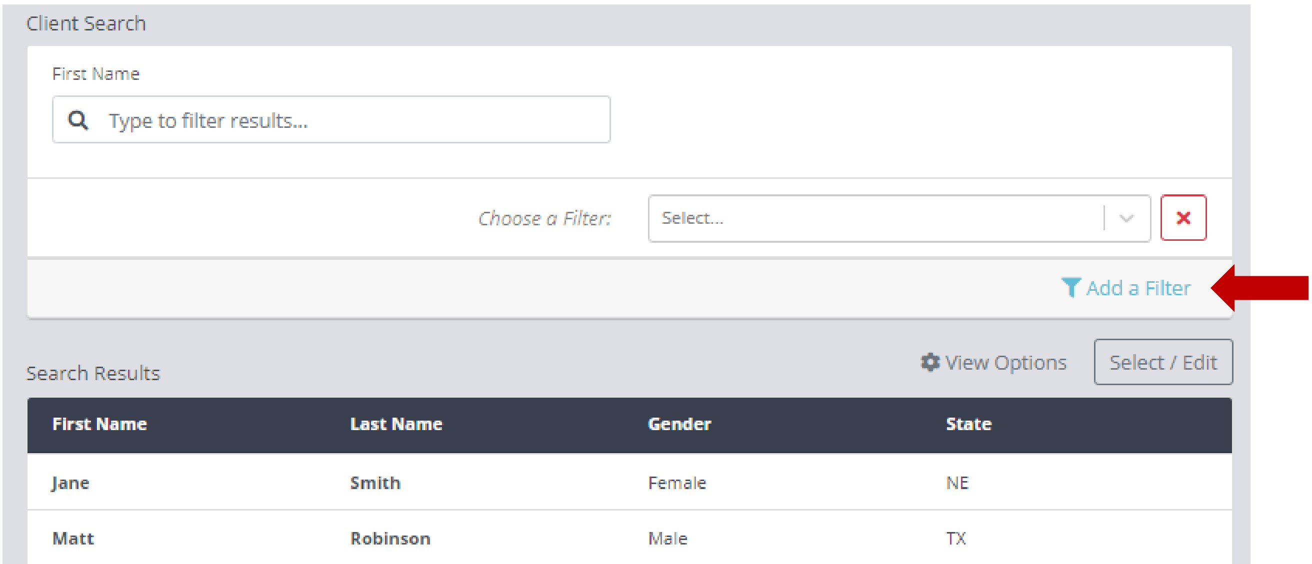
Overview of Client Search & Search Results

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

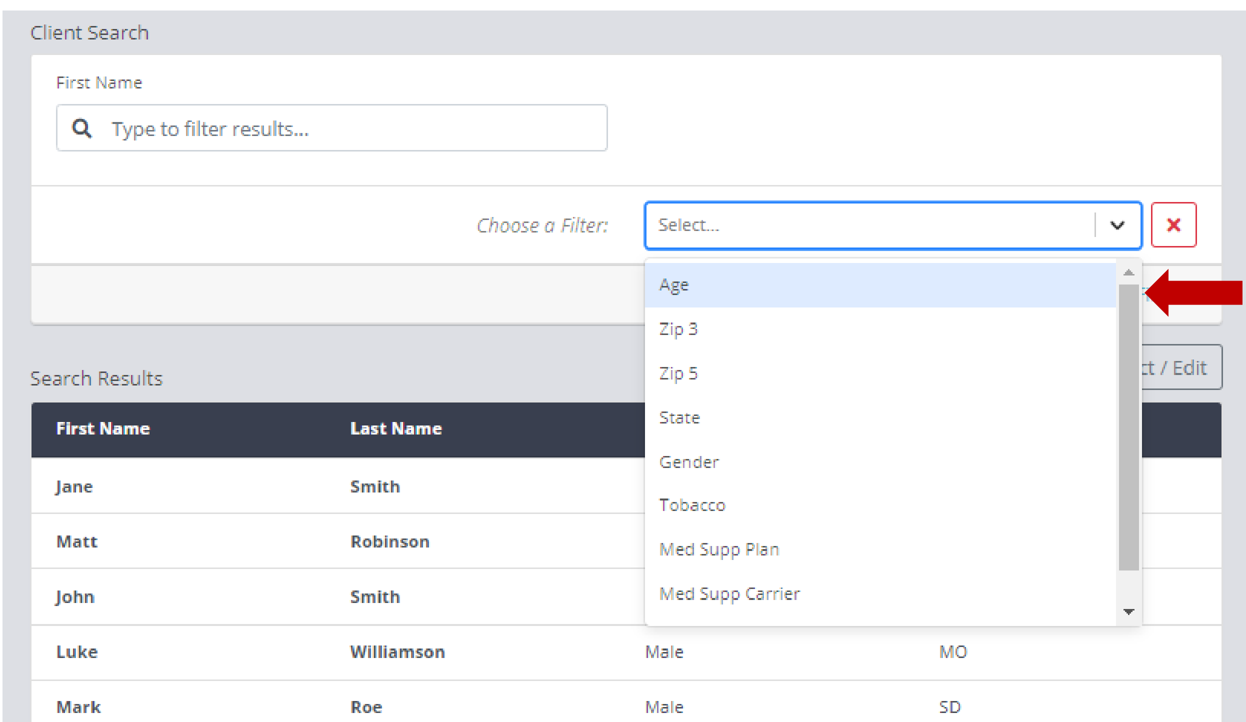


Add a Filter to Create Segmented Lists.

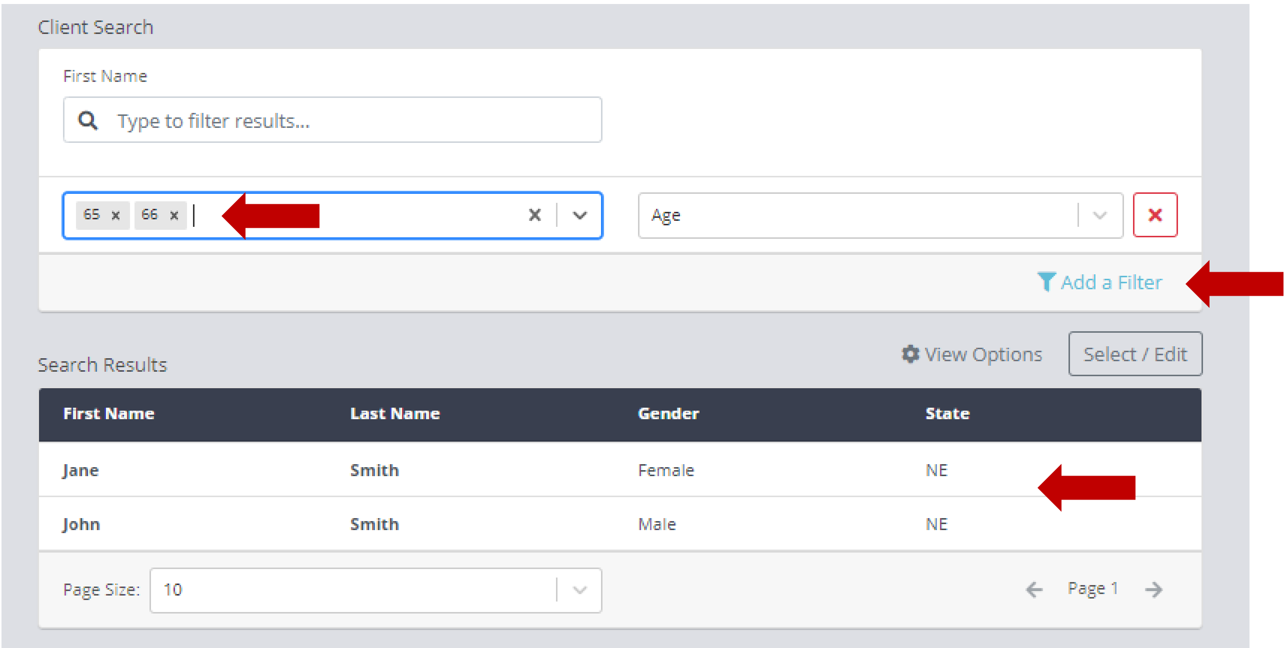
1. Click **Add a Filter**



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



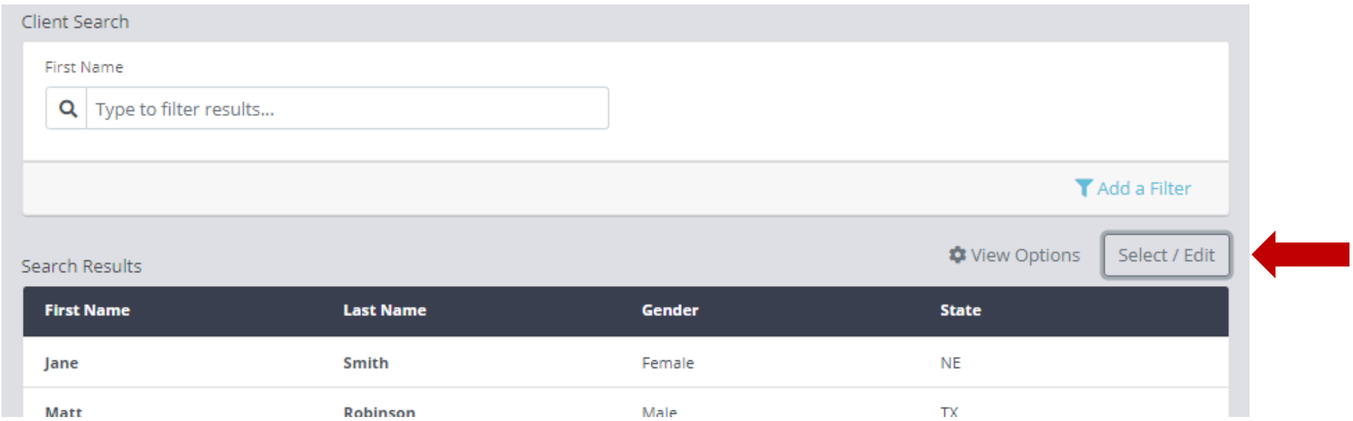
3. A sub-filter will populate. Select filter categories.
4. Multiple filters and filter categories can be added.
5. Clients that meet those filter requirements will appear in Search Results.



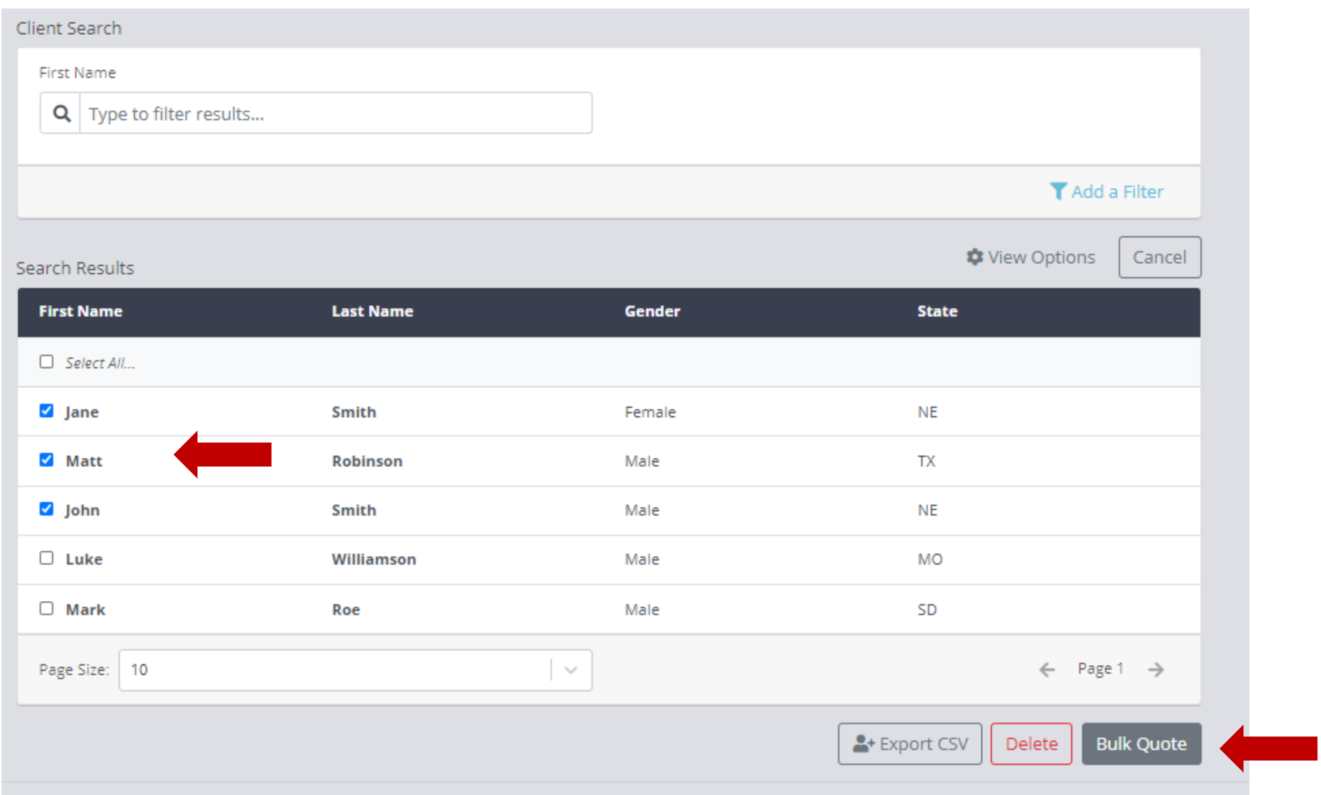
Multi-Client Quoting

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.

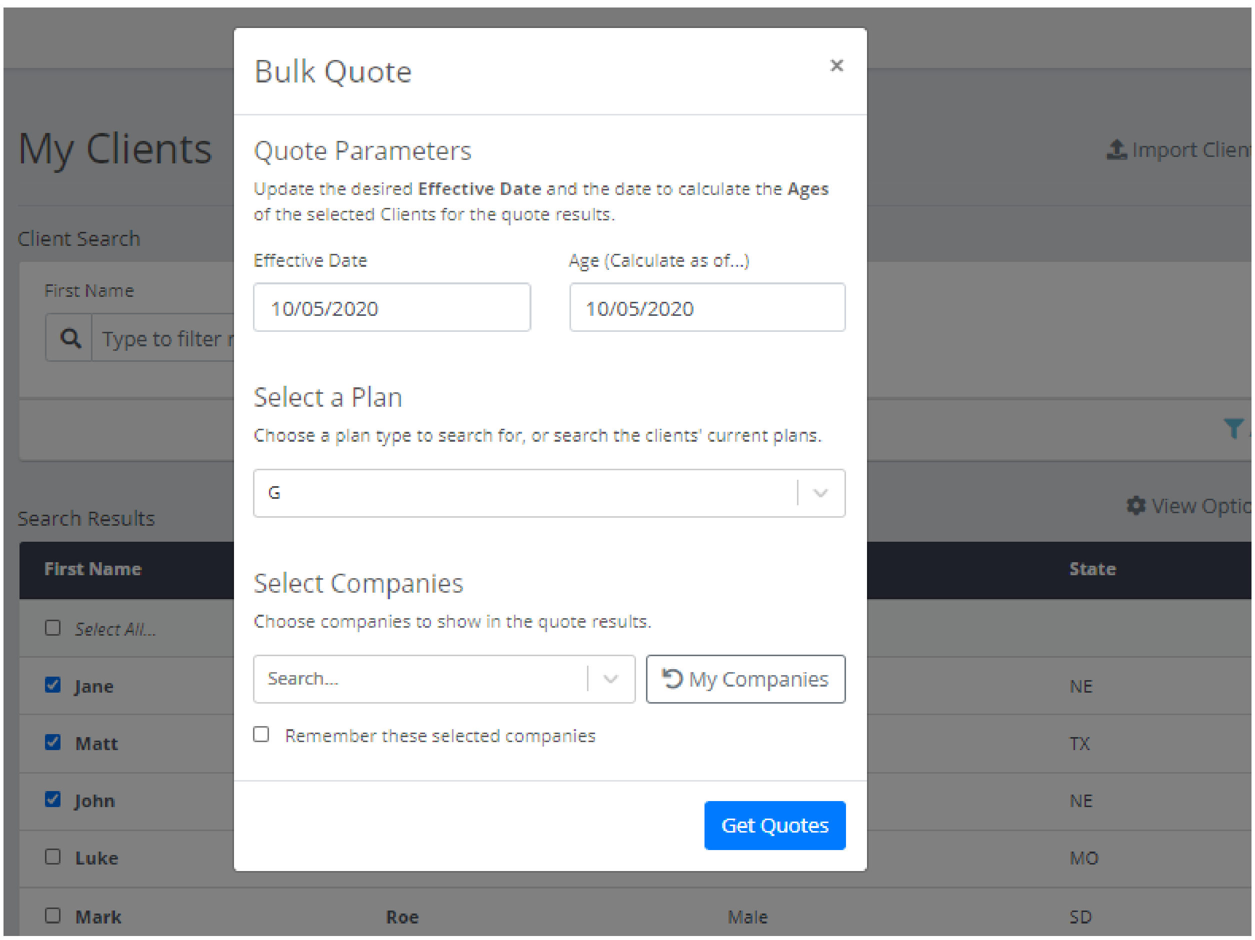
1. Click on **Select/Edit.**



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



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.