eIdyia Solutions, inc.

Prospect
Tracking Module
version 2.06

Producers Edition

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Step One: Logging into your database

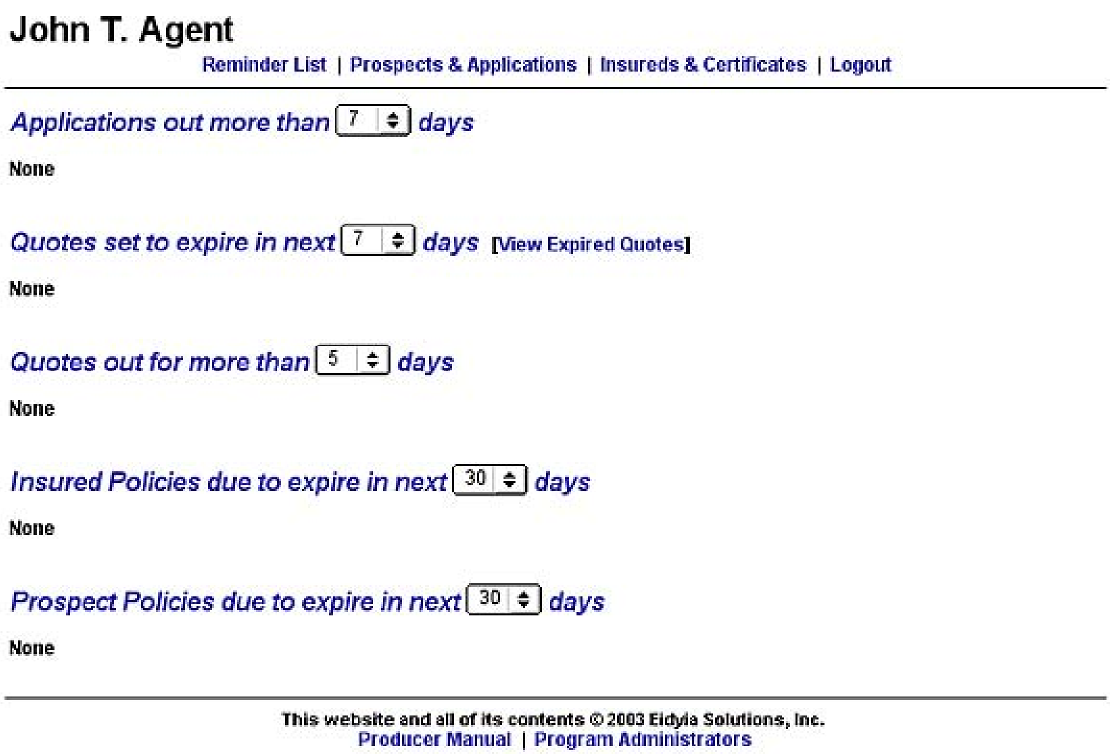
Once you've been included in the program. You will receive an e-mail containing your user ID and password and a link to your producer's home page. It should be similar to the one below. You may want to add this page to your favorites for ease of access later.

Enter your provided Producer ID and Password then click the "Login" button.

Note: The agents name will appear at the top each page within the database unless affiliated with a company that has provided a logo to the system administrators for implementation.

Step Two: Get to know your Reminder Page

Once you have “Logged In” you will see your reminders page, similar to the one below. Here you’ll find all the reminders that need you attention. Applications that you sent out to that client more than a week ago, maybe you should call him. Then there’s that quote you requested for your prospect more a business week ago, it might be time to call the underwriter.

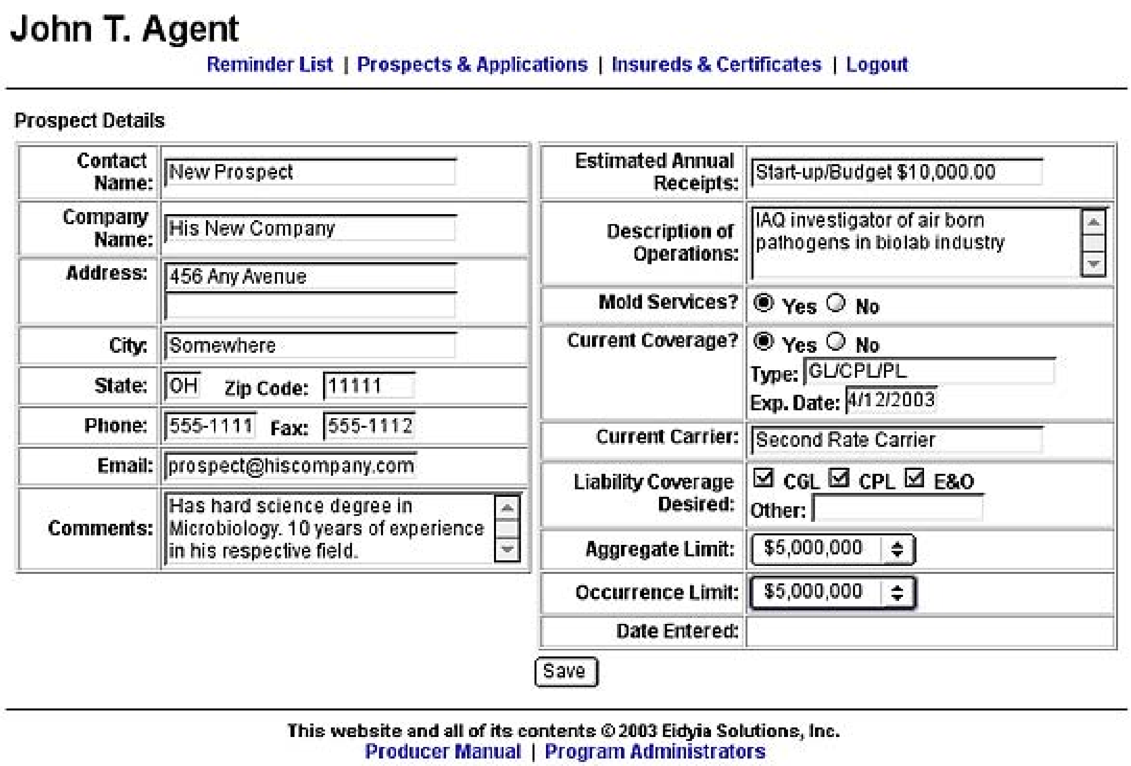


As we all know in this business most quotes have a 30-day shelf life, so it’s nice to be reminded of this as well. Last but not least, we have our renewals and of course we figured you might want to be reminded of this too. In an attempt to give those of you who are ever eager to do more, we even have a renewal date for that prospect that got away, until next year anyway.

Step Three: Entering a new prospect

To enter a new prospect just click on the blue link **Prospects and Applications** it will take you to your prospects page. It should look similar to the one below. Here you can search by name or to view all of your prospects listed in alphabetical order by company name, enter the percent symbol then click the search button.

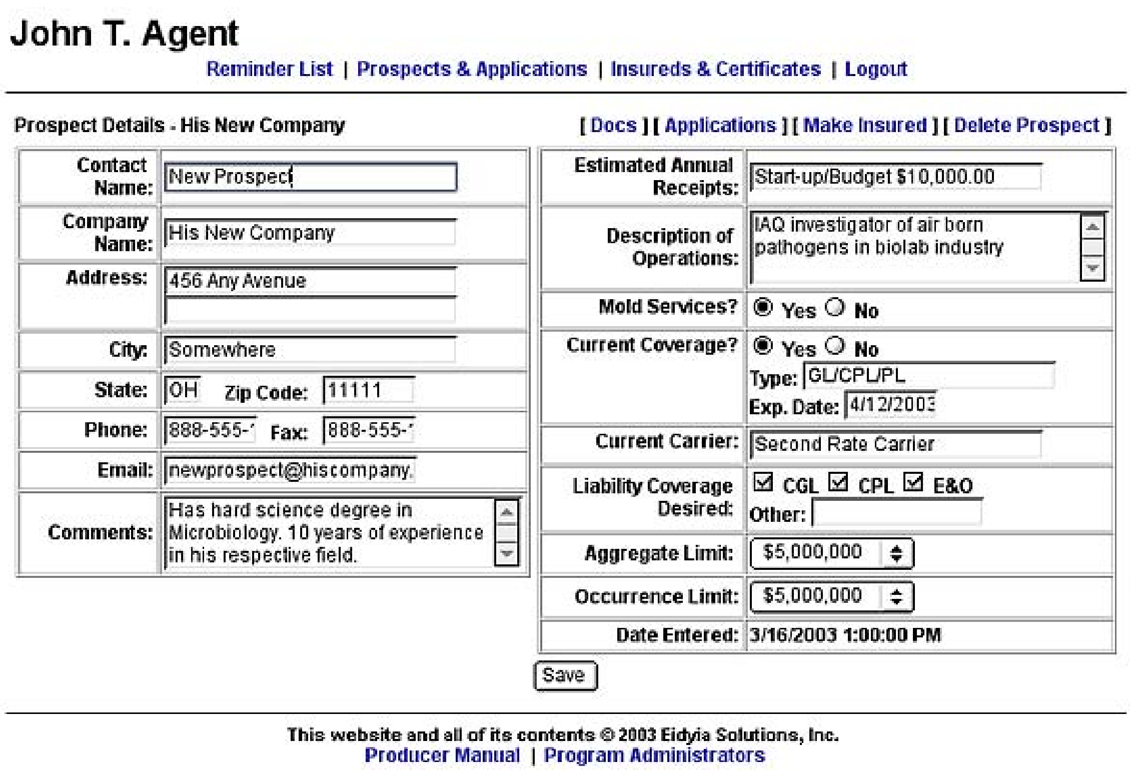
To add a new prospect to your database, just click on the “New” button. This will take you to a page that looks very similar to the one below. Once you’ve filled it out don’t forget to hit “Save”.



Step Three: Continued…

Now your back to this page again but this time when you enter the % symbol and hit the search button you will see the new prospect you entered into your database. Here you can enter another prospect or continue entering information on this new prospect. By clicking on the blue "Details" link on the left of the prospects information table.

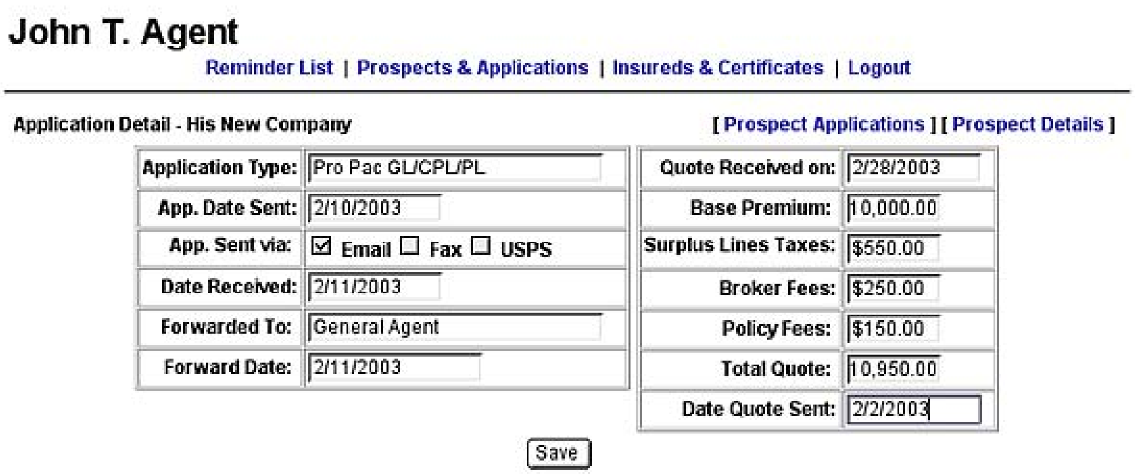
Now your Prospect Details page has some new blue links on the top right of the table. These will enable you to upload documents, view applications, make them an insured or delete the prospect.



Step Four: Managing your Applications

If you click on the applications link, you will be taken to a page that looks a lot like the one shown below. This is where you can manage the various applications that you may need to send to your prospect.

To create a new one or enter the current data regarding the application you sent out to this prospect, click on the blue link **"New Application"**. This will take you to page similar to the one below. Here you can enter all the pertinent data regarding the type of application you sent out, how you sent it out and it will be on your reminder page if you have not received it after one week alerting you to follow up on this prospect. Perhaps the insured is having trouble completing the application and could use your assistance. Once you have entered or updated this information remember to click "Save.



Continued….

Once you hit the save button you will be returned to the page below or at least one very similar to it. Here you will see a list of all the different applications you may have sent to this prospect. Here you can return to this prospects details as well by clicking on the blue link **"Prospect Details"**

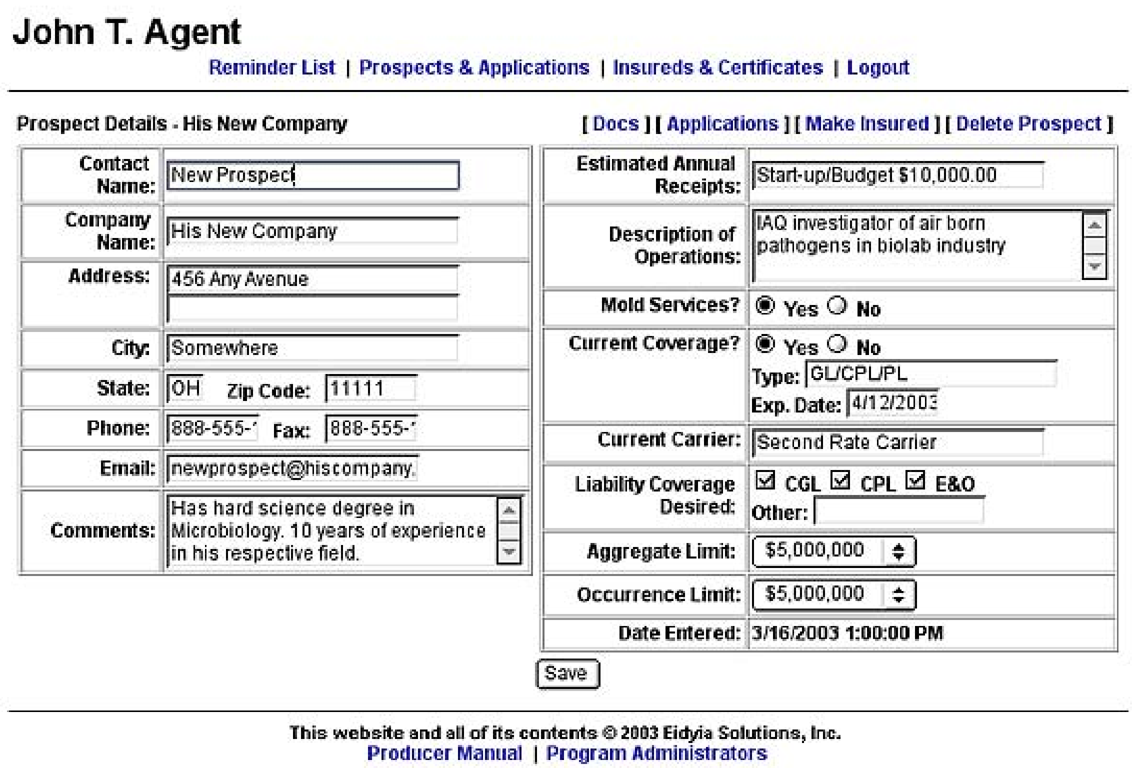

John T. Agent

Reminder List | Prospects & Applications | Insureds & Certificates | Logout

Applications - His New Company [New Application] [Prospect Details]

	Date Sent	Type	Date Recv	Forward Date	Recv Quote
View	2/10/2003	Pro Pac GL/CPL/PL	2/11/2003	2/11/2003	2/28/2003

Once returned here you can begin the process of uploading documents that are associated with this prospect. Scanned applications, e-mails as well as all other correspondence.


John T. Agent

Reminder List | Prospects & Applications | Insureds & Certificates | Logout

Prospect Details - His New Company [Docs] [Applications] [Make Insured] [Delete Prospect]

Contact Name:	New Prospect
Company Name:	His New Company
Address:	456 Any Avenue
City:	Somewhere
State:	OH Zip Code: 11111
Phone:	888-555-1 Fax: 888-555-1
Email:	newprospect@hiscompany.
Comments:	Has hard science degree in Microbiology. 10 years of experience in his respective field.

Estimated Annual Receipts:	Start-up/Budget $10,000.00
Description of Operations:	IAQ investigator of air born pathogens in biolab industry
Mold Services?	Yes No
Current Coverage?	Yes No Type: GL/CPL/PL Exp. Date: 4/12/2003
Current Carrier:	Second Rate Carrier
Liability Coverage Desired:	CGL CPL E&O Other:
Aggregate Limit:	$5,000,000
Occurrence Limit:	$5,000,000
Date Entered:	3/16/2003 1:00:00 PM

Save

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Step Five: Uploading Documents to Prospect Folder

From the Prospect Details page click on the blue link **"Docs"** and this will take you to the document uploading utility. It should look something similar to the one below.

Here you can see that a few documents have already been uploaded. Let's upload another one for good practice and for those who have never used a utility like this before. First you will need to click on the blue link **"Add Document"** in the middle of the page. This will take you to a page that looks very similar to the one below.

Here you will need to click the "Browse" button and then find the file you wish to upload to this prospects folder. Once you have navigated to the file in question click the "Open" button and then click the "Add Document" button again to upload the file.

Continued….

You will be directed back to the Documents home page where you will see all the docs including the one you just uploaded in this prospects folder. Remember to date these files as next year you will be uploading another application etc.

Helpful Hints:

To make your life easier you should save files to your desktop before attempting to upload the file to your database. For any attachment that can be e-mailed all you need to do is right click on the file within the email itself and choose "Save As". Then a "Save As" dialog box will open asking you where you want to save it. Choose; Your Desktop and then name the file appropriately so it can be easily found, then click the "Save" button. To save e-mails associated with a prospect, open the e-mail, from the File menu and Choose; "Save As". Another "Save As" dialog box will open and you will need to repeat the process outlined above.

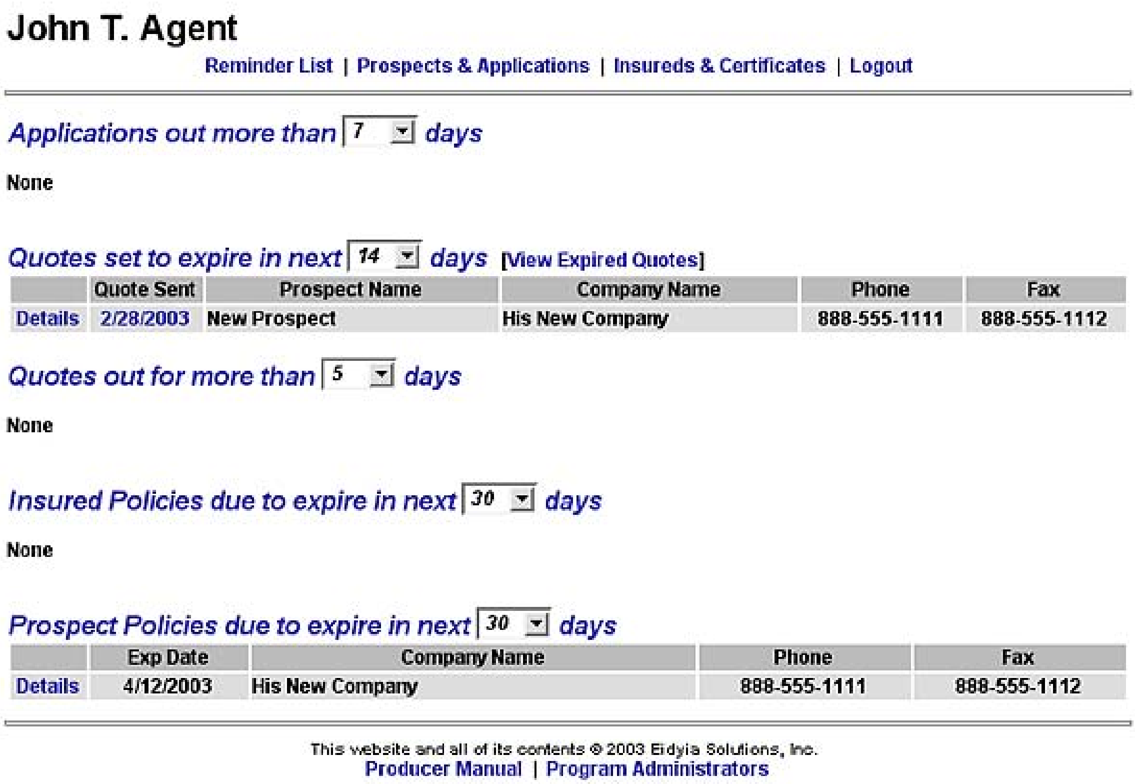
Any file pertaining to a specific prospect or client can be uploaded, just locate the file on your computer using the **"Add Document"** utility and upload it to your database. However your connection speed will affect the overall performance of this feature.

Note:

Your account will be limited to the storage plan that was selected when your account was setup. If you feel that you need more space please contact your system administrator.

Step Six: Checking up on your Reminders

Let's check on our Reminder Page. Now that you have put some files in your database, it could look a little like the one below. Each one of the categories can give you more lead-time. The dropdown boxes offer 7, 14, and 30 days in most and 30, 60, 90 for the renewal sections.



John T. Agent

Reminder List | Prospects & Applications | Insureds & Certificates | Logout

Applications out more than 7 *days*

None

Quotes set to expire in next 14 *days* [View Expired Quotes]

	Quote Sent	Prospect Name	Company Name	Phone	Fax
Details	2/28/2003	New Prospect	His New Company	888-555-1111	888-555-1112

Quotes out for more than 5 *days*

None

Insured Policies due to expire in next 30 *days*

None

Prospect Policies due to expire in next 30 *days*

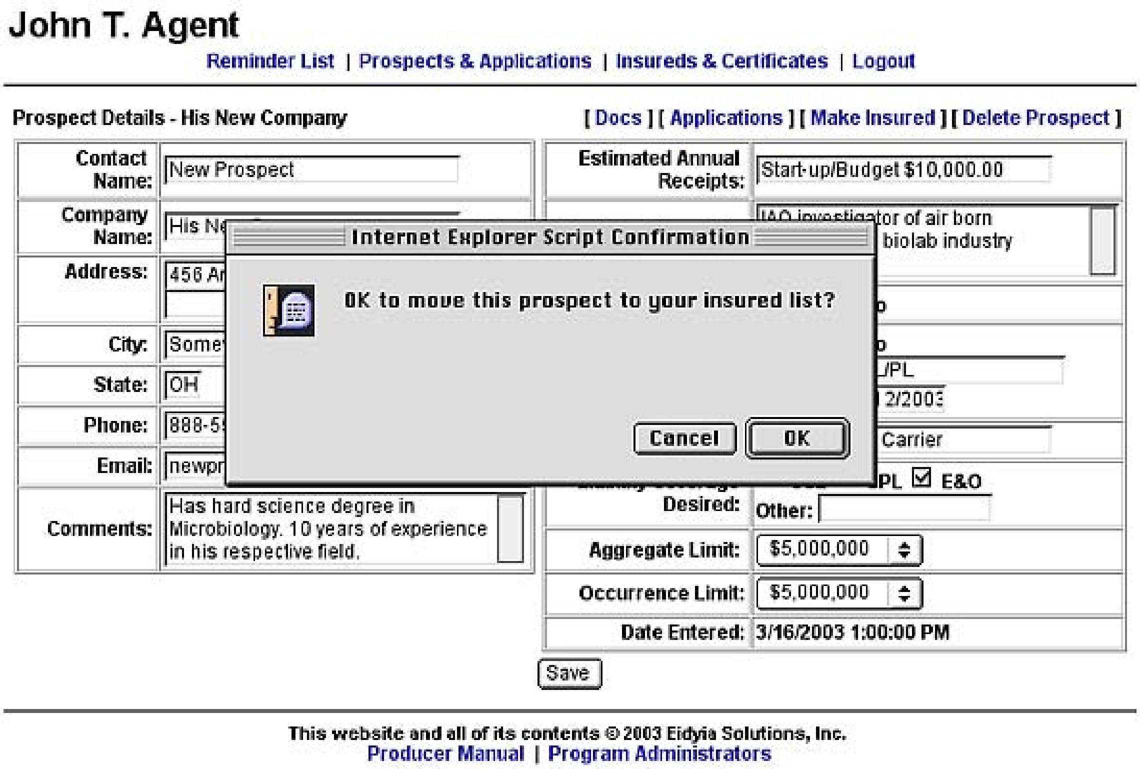
	Exp Date	Company Name	Phone	Fax
Details	4/12/2003	His New Company	888-555-1111	888-555-1112

Producer Manual | Program Administrators

To make any changes to the number of listings in the respective categories, just change the dropdown box to your desired time frame and the page will automatically refresh, reflecting the change in data you requested.

Step Seven: Making your Prospect an Insured

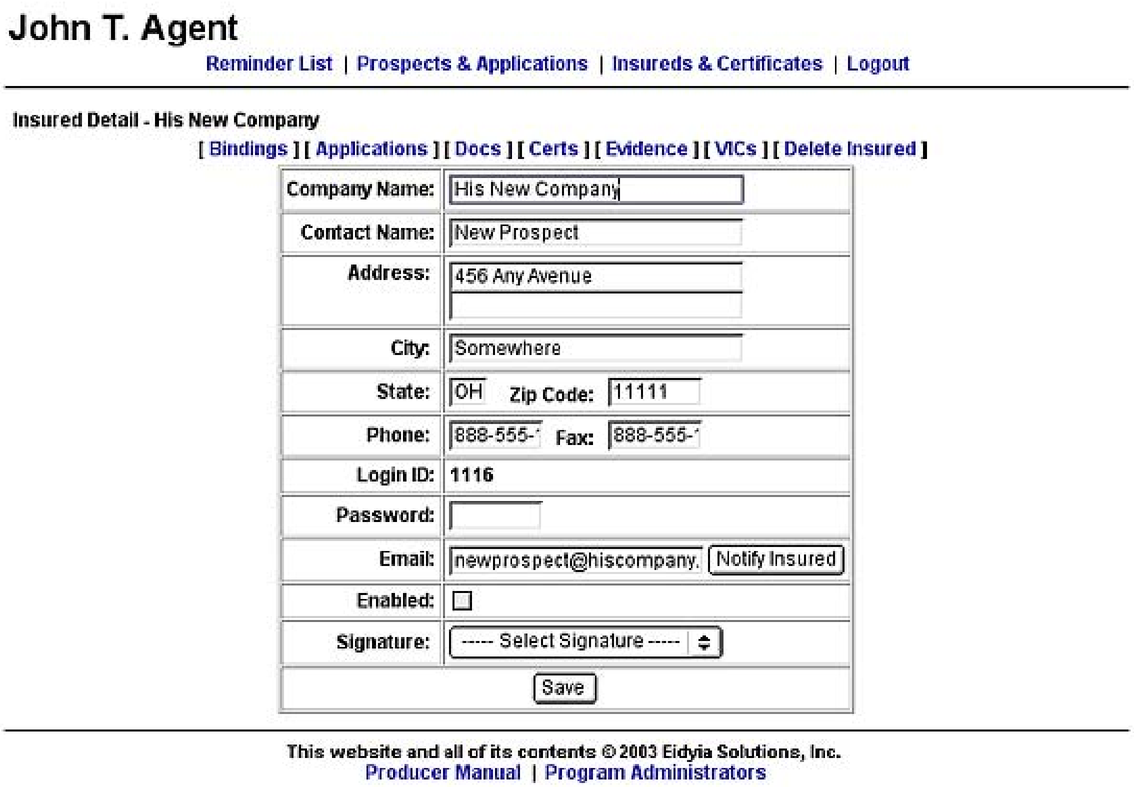
Once your prospect accepts your quote and has sent you the check you will want to make them an insured within the system. To do this just go to the Prospects Details page and click on the blue link **"Make Insured"**. Once this is done there's no going back. You will see a screen that looks similar to the one below.



Click the "OK" button and your prospects information will be moved to your Insured's Details page. This should help you keep track of who's who.

Continued….

Once you click the “OK” button you will be directed to a new version of their details. This page allows you much more control over your insured, as it should be. Here you can “Enable” their account just by checking the “Enable” box and clicking the “Save” button. If they don’t pay their premium then uncheck that box and their cut off from their certificates.

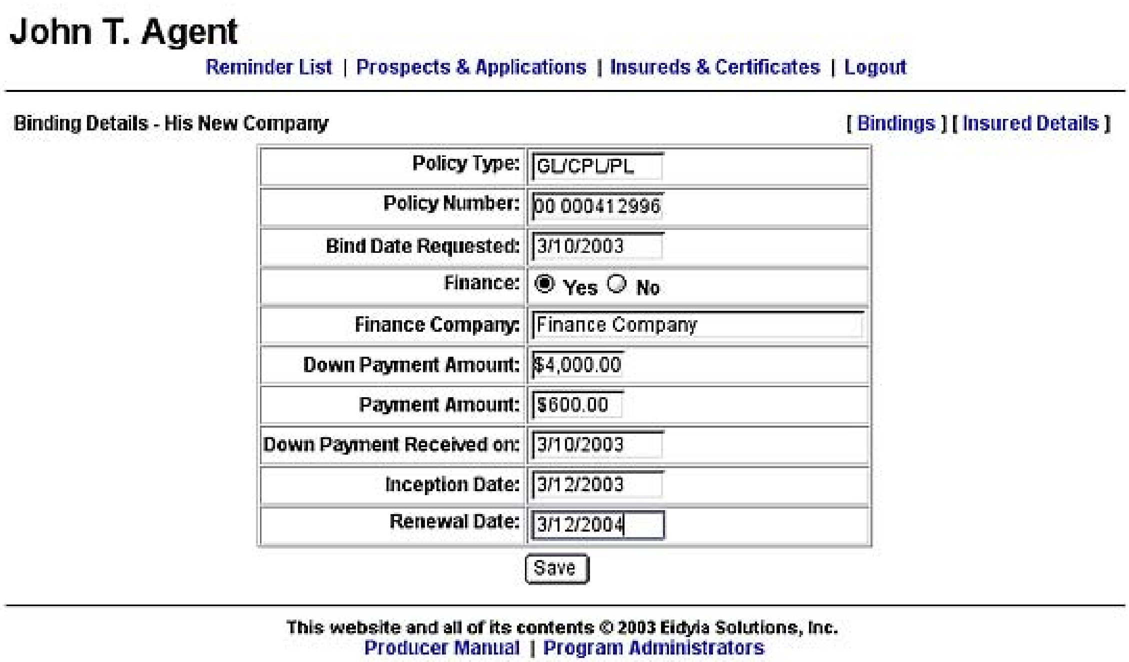


From here you have access to everything in this clients folder. You can view what applications were submitted as well view and edit the binding of all policies in force. You can manage all the documents associated with this client. Last but no least, you can generate their certificates and notify them via e-mail of there availability.

Step Eight: Documenting Policy Binding's

Once you click on the blue link "Bindings" you will be directed to a page that looks like the one below. Here you can keep track of all the bindings for this client. Binding information for more than one policy can be view and edited from this page.

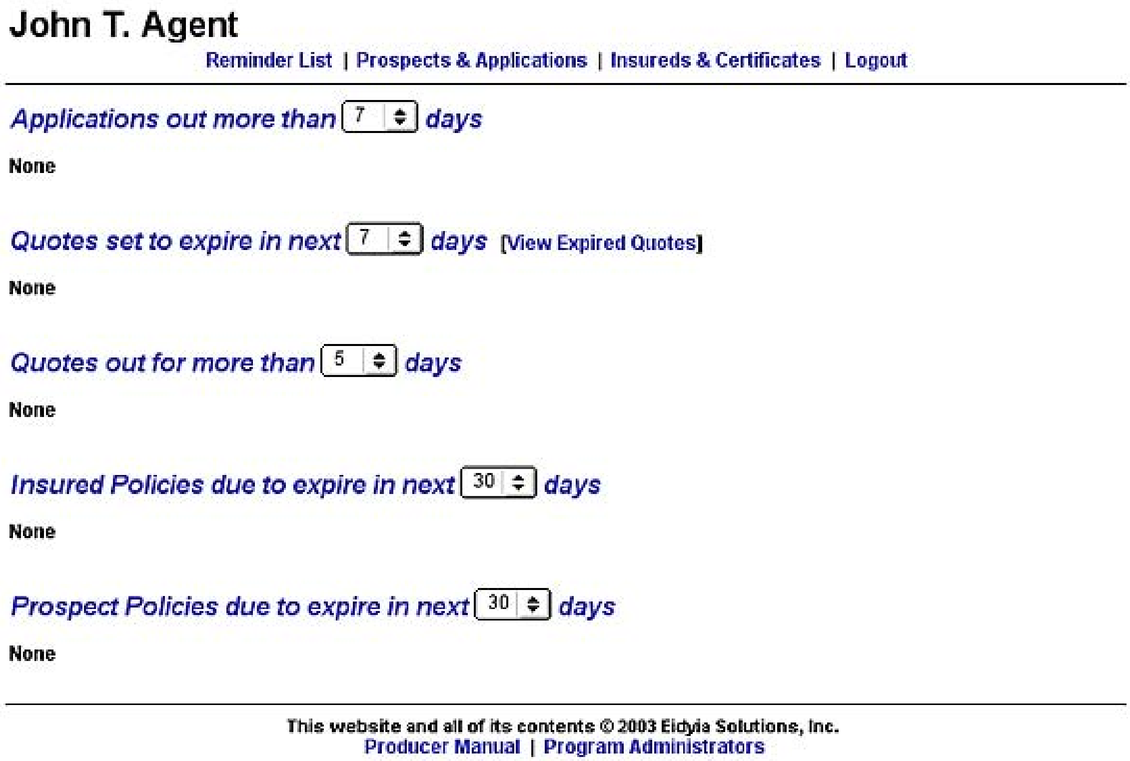
When you click on the blue link "New Binding" you will be directed to a page that looks like the one below. Here you can input all the pertinent data for this policy and click "Save"



The renewal date field will populate your reminder page next year, at renewal time.

Continued….

Once you have entered the renewal date and saved the data your reminder page will no longer have any reminders regarding that prospect.



In the next module I'll show you how to generate a certificate and notify the client via e-mail of their ability and requirements to access their certificate online. They can even add holders and print out certificates at will, from any computer with web access. They can provide their clients with certificates with such ease it will truly enhance their business and that means renewals.

Note:

To enter an existing client into the system you will need to start at the beginning. All entries into the database must be entered in the same way.