



**AGENTCUBED**

Agent User Guide

AHCP - Help Center:

877.228.8773

[Grab your reader’s attention with a great quote from the document or use this space to emphasize a key point. To place this text box anywhere on the page, just drag it.]

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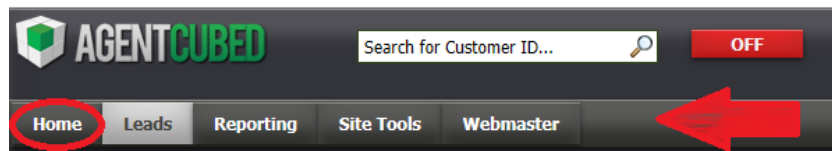
## ABOUT AGENTCUBED

AgentCubed was founded in 2009 with the goal of creating an unrivaled lead management and CRM solution designed specifically for the insurance industry. Unlike companies that offer one-size-fits-all solutions, we have tailored our solution for insurance agents, agencies and call centers. We have strategically partnered with industry-leading companies to offer a single solution that spans the entire lead-to-customer lifecycle. The end result is a product that bridges the gap between receiving leads and converting those same leads into revenue.

## HOME

Home is where a user will be taken, once logging into the system. AgentCubed provides quick access to current news with Providers and Carriers. Also available is any recent site updates and changes made. Here, an agent can quickly view any scheduled calendar events for the day as well.


To view this, select “Home” located on the top menu bar.



## HOME PAGE

The view of the home page looks similar as below. However the data will constantly change based on AgentCubed’s updates and changes made within the system.


### Provider News




HealthPlanOne offers industry leading, customizable exclusive Medicare and Individual health leads that are delivered in real-time. Prospects experience an engaging website keeping their focus longer increasing the quality of the lead and your closing rate. We take the work out of selling and give you what you need to increase your success.


AgentCubed is excited to announce that we have integrated with All Web Leads! All Web Leads is a fast-growing online lead generation company that sells the highest-quality sales leads to top insurance producers. At All Web Leads their goal is to deliver the highest levels of service and satisfaction to insurance producers prospecting new business.

**ALL WEB LEADS**


 InsuranceAgents.com provides fresh real-time insurance leads for auto, home, health, life, renters, and annuities. They promise that they will never sacrifice quality or cut corners to make a profit. Their products are backed up by the best lead return policy in the industry and an unwavering commitment to deliver the same consistent quality of leads 24/7. AgentCubed is pleased to announce InsuranceAgents.com as an integrated lead provider.

Precise Leads connects insurance shoppers to individual agents, large agencies and carriers - nationwide and in real-time. Our service can help your business grow.



 ProspectZone is America's top insurance lead company. We have been delivering high quality health insurance leads, life insurance leads and senior leads since 2004. If you are looking for guaranteed phone connections with verified prospects then our latest lead type, Live Transfers, are perfect you. Please visit [www.prospectzone.com](http://www.prospectzone.com) to contact us for a personalized consultation to build a lead package that fits your needs.

We offer an alternative solution that is unique, proven and very effective.



### Carrier News

Get the latest carrier news here... Coming Soon!

### Site Updates

#### InContact CTI Integration

**New Feature**

- Full integration with the InContact Agent Plugin has been added
- Included click to dial
- Included screen pops on inbound calls.

**Requirements:**

- Must have your AgentCubed administrator request this integration to be enabled before it can be made available.
- The AgentCubed Integration Plugin which can be found on the new "My Account/Computer Telephony Integration" page after selecting "InContact" as the platform.

#### My Account Page

- Moved the Click To Dial settings to its own page now called Computer Telephony Integration
- Special modifications have been made to accommodate future integrations such as software download when available

#### Home Page

- Moved the calendar events to the right side of the screen
- Today's calendar events has a new look and feel
- Added a section to include carrier news
- Added a section to include lead provider news
- Added a section to include product updates

## TODAYS EVENTS

Today's Events will be displayed on the front page to the right of any current news. An agent can select an event to add, remove or edit any contact in regards to each scheduled event.

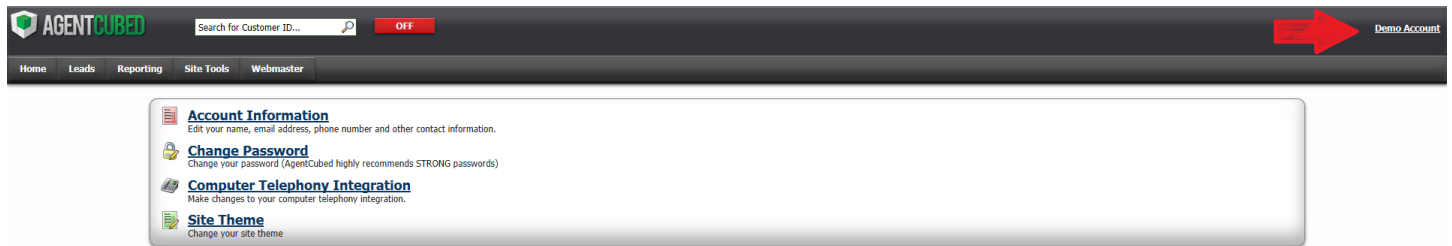
### Today's Events

<b>Bob Evans</b> Review Quotes	<b>08:00 AM</b>
<b>Jane Smith</b> Call to Quote	<b>02:30 PM</b>
<b>John Taylor</b> Discuss Rate Changes	<b>03:00 PM</b>

## MY ACCOUNT

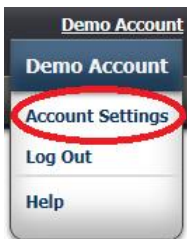
It is important to keep account information current and up-to date. Quickly edit personal information, change a user's password, or personalize an AgentCubed account when selecting "Account Settings. Here, an agent can also manage a telephony system as well.

Account Information, password changes, site theme and Logging out can be accessed by hovering over the user's name located in the upper right hand corner of the screen.

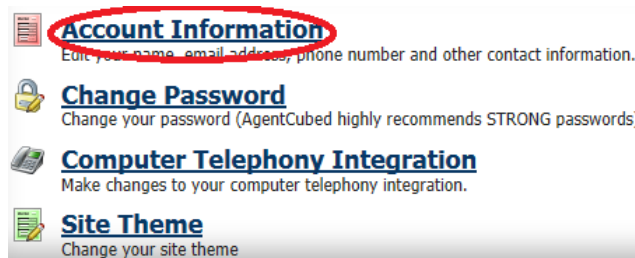


## ACCOUNT INFORMATION

To edit personal information associated with an agent's AgentCubed account, drop down to "Account Settings".



Select "Account Information".



All fields in yellow can be edited. The only thing a user is unable to change is the 'username'.

**Account Information**

The information below will be used when sending automated emails. Please make sure it is current.

User Name: VP\_mbensley

E-mail: agent@company.com

First Name: First

Last Name: Last

Primary Phone: (877) 424-5888

Fax Phone:

Time Zone: (GMT -07:00) Mountain Time (US & Canada)

Speak Spanish?: ☐ Yes ☒ No

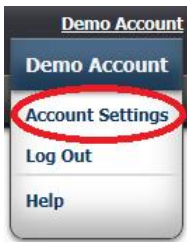
Save Changes

Once all information has been changed, select 'Save Changes' to proceed.

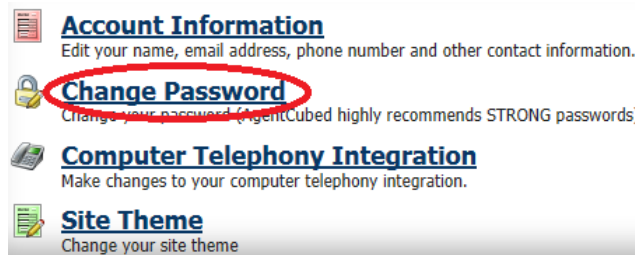
Save Changes

## CHANGE PASSWORD

To change the password associated with an AgentCubed account, drop down to “Account Settings”.



Select “Change Password”.



Once selected, a screen similar to the one below will appear. Here enter the old, or current, password associated with the account and then enter the new, desired password twice.

A screenshot of the 'Change Password' form. The title 'Change Password' is at the top. Below it, the instruction 'Change Your Password' is centered. There are three input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. To the right of the 'New Password' field is a green question mark icon. At the bottom, there are two buttons: 'Cancel' and 'Change Password'.

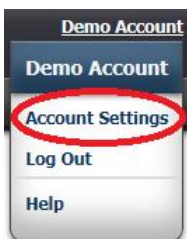
Select “Change Password” to save the new password or “Cancel” to maintain the old, current password.

Cancel

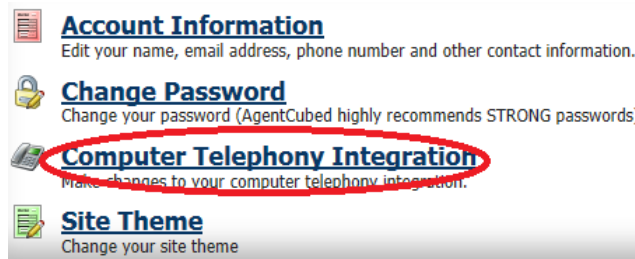
Change Password

## COMPUTER TELEPHONY INTEGRATION

Telephony Integration is where an agent can maintain a combination of AgentCubed alongside a Telephony source. To manage a telephony source with AgentCubed, access ‘Computer Telephony Integration.’ To get started, select “Account Settings”.



Select “Computer Telephony Integration”.



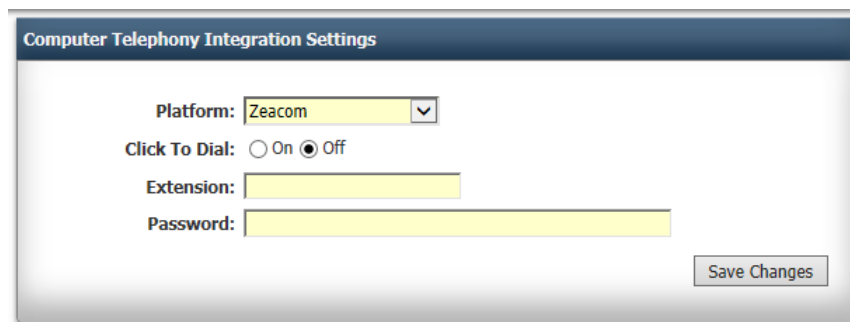
## TELEPHONY INTEGRATION NOT CONFIGURED

If a telephony system has not been set up with an AgentCubed account, a screen similar to below will appear. Here, a user is asked to contact the AgentCubed administrator to request integration.



## TELEPHONY INTEGRATION CONFIGURED

If a telephony system has been set up, a different box will appear. Here, the ability to manage different aspects of the telephony integration piece is displayed.

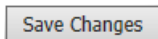


‘Platform’ is the name of the integration piece. Use the drop down box to select the telephony integration piece.

If ‘Click to Dial’ is turned on, a phone icon will appear next to an open leads phone number. This allows an agent to click the phone number and it will dial automatically.

‘Extension’ and ‘Password’ is how an agent personalizes their specific account between AgentCubed and the telephony platform.

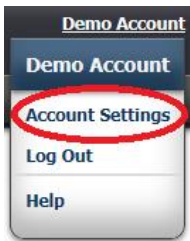
Once necessary changes have been made, select “Save Changes”.



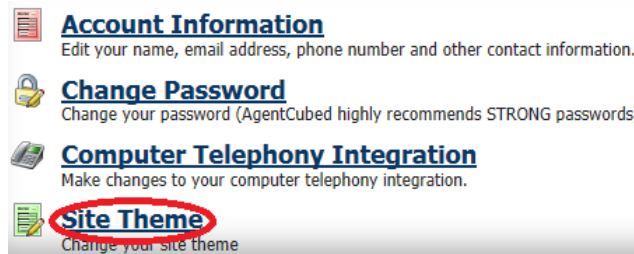
## SITE THEME

Site Theme provides the ability to personalize an AgentCubed account. Drop down to “Account Settings”.

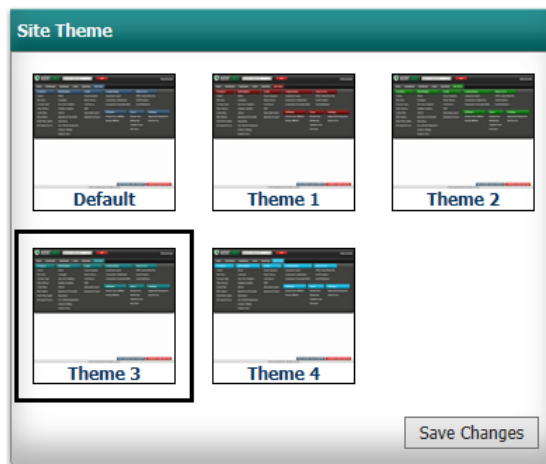




Select “Site Theme”.



Here, select the color preference and then select “Save Changes”.

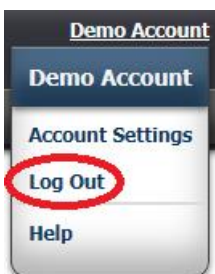


Save Changes

## LOG OUT

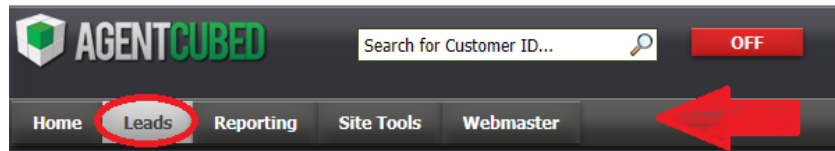
It is **extremely important** to Log Out of the AgentCubed platform as opposed to exiting out of the screen in the upper right corner.

To log out, drop down to “Log Out”.



**A user will be logged out immediately, once selected.**

Individual Customers and Opportunities are located under the “Leads” tab, located on the top menu bar.



Under “Leads”, an agent can view all scheduled calendar events, search for a customer, add a new customer, buy additional leads, and manage their Lead Distributor, Carrier Appointments and external web links.

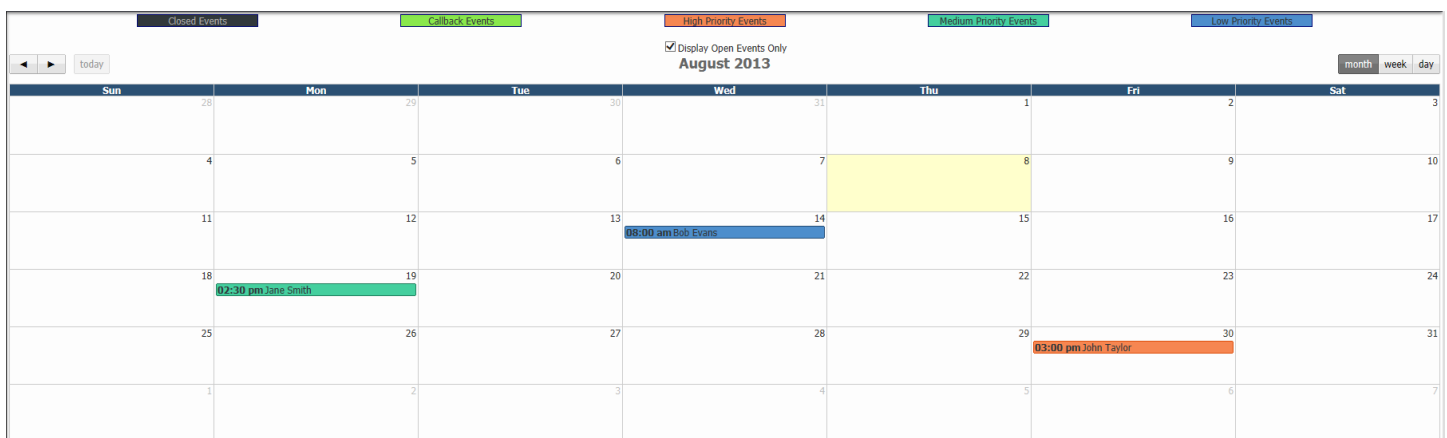
## CALENDAR EVENTS

The Calendar within AgentCubed is user friendly. View calendar details from a high level when looking at a monthly view or get a little more granular and look at the calendar from a daily view. Add, dismiss or edit events directly from the view of the calendar.

The calendar is the first screen an agent will be taken to upon selecting “Leads” from the top menu bar. To get back to the calendar view, select “Calendar Events” from the left menu option.



The below screen will appear once on Calendar Events.



## CREATE A CALENDAR EVENT

There are a few different ways to create calendar events. To add a calendar event directly from the calendar view, use the mouse to click on the date and time to schedule an event.

all-day	
8am	
9am	
10am	
11am	
12pm	

When selecting on the specific time, it will pull up an event looking similar to the box below:

New Calendar Event

Type: Phone Follow Up

Priority: Medium

Reminder: On

Event Status: Open

Start time: 08/27/2013 11:00 AM

☐ All day event

End time: 08/27/2013 11:15 AM

Subject:

Notes:

Create Event

There is also an option to schedule a calendar event from within a lead.

## CHANGING THE VIEW

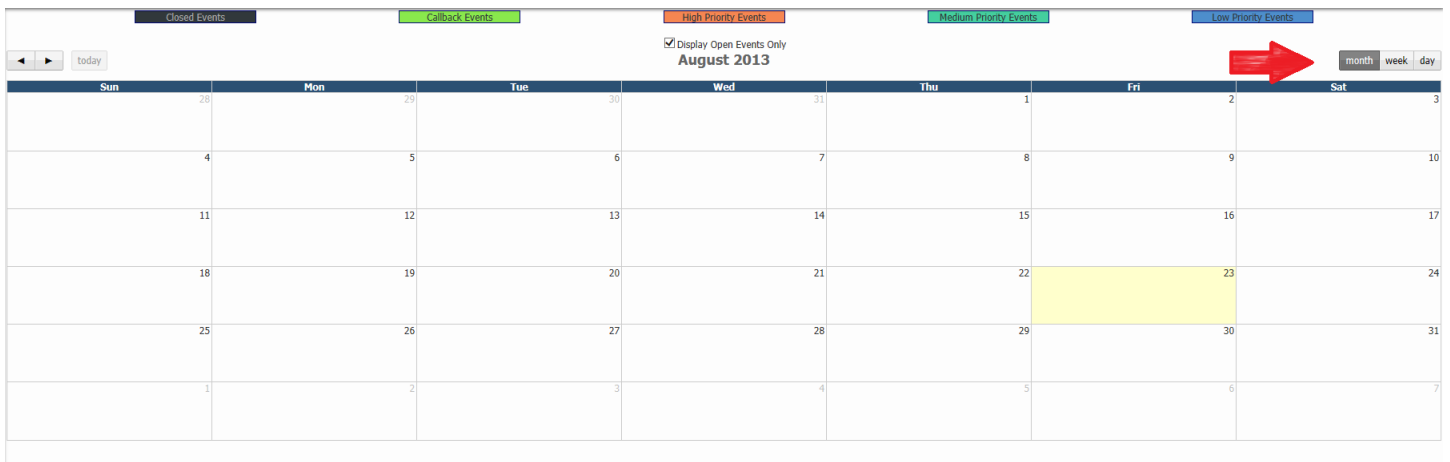
AgentCubed allows a user to view a calendar from a monthly view, weekly view or daily view.

Change the view of the calendar by selecting which option to view using the icons located in the upper right of the calendar screen.

month

week

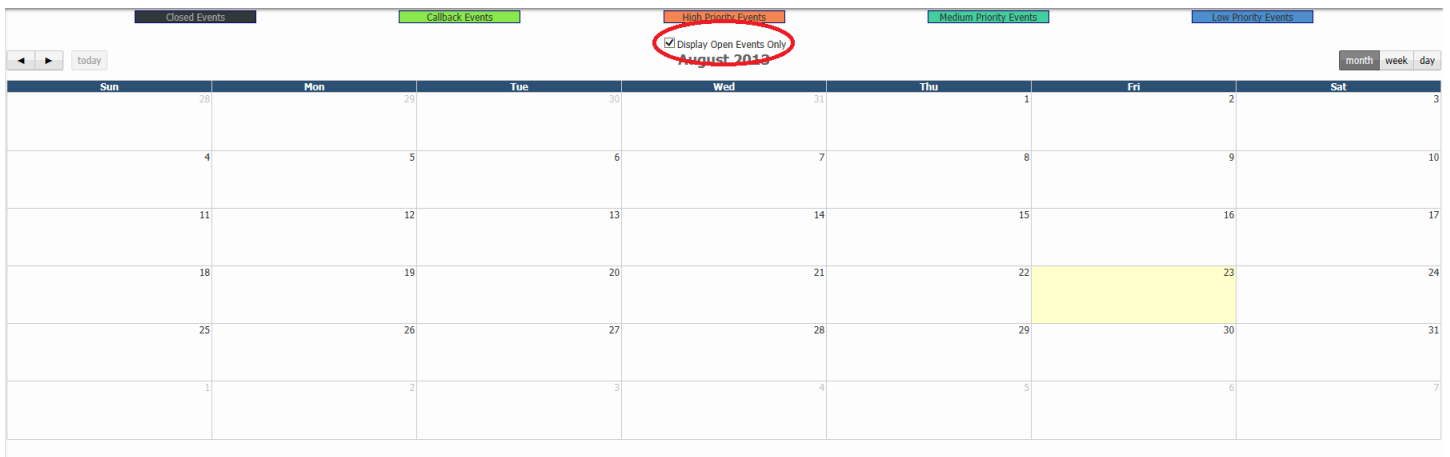
day



## VIEW OPEN AND CLOSED EVENTS

AgentCubed defaults to only show any 'Open Events'. To display all events, remove the check box titled "Display Open Events Only" directly above the date on the calendar.

☒ Display Open Events Only



## PRIORITY LEVEL

There are three different priority levels, as well as a scheduled call back. Each one translated with different colors. The colors are dictated at the top of the AgentCubed calendar screen. Once an event is finalized and 'closed' it then changes to black.

Providing a different priority level to an event is easy. When a scheduled event is open, the priority is located towards the right of the popup box. Select the dropdown box titled "Priority".

**New Calendar Event**

Type: Phone Follow Up

Reminder: On

Start time: 08/27/2013 11:00 AM ☐ All day event

End time: 08/27/2013 11:15 AM

Subject:

Notes:

Priority: Medium

Event Status: Open

Create Event

## CLOSING AN EVENT

Once an event is complete, change the status to 'closed'. To do this, open the scheduled event.

On the right side of the event box is a drop down titled "Event Status", change the status to 'closed'.

**Create Event**

Customer ID: 40

Name: Lead 39, Test

Type: Phone Follow Up

Reminder: On

Start time: 08/19/2013 02:15 PM ☐ All day event

End time: 08/19/2013 02:30 PM

Subject: Lead 39, Test

Notes:

Priority: High

Event Status: Closed

Create Event


## SEARCH

Quickly search for an existing customer within the AgentCubed platform by performing a customer search at the top of your screen, or performing a 'search' located on the left menu.

## QUICK CUSTOMER SEARCH

Easily search for a customer from any screen in AgentCubed by selecting the search criteria and typing in the known information in the white search bar as indicated below.



Once the information is entered, select the search icon. 

## PERFORM CUSTOMER SEARCH

Select "Search" from the left menu option.



When performing a customer search, there are four options in which you can search by. These include name, customer ID, priority code and phone number.

To select the search criteria use the drop down box located by 'Search By'.

The image shows the 'Customer Search' form. It has a title bar 'Customer Search'. Below it is a dropdown menu labeled 'Search by:' with 'Name' selected. Below the dropdown are two text input fields: 'First Name:' and 'Last Name:'. Below these is a 'Search Type:' section with a checkbox labeled 'Check the box to look for exact matches only'. At the bottom are three buttons: 'Search', 'Can't find the record?', and 'Create New Lead'. The 'Search by:' dropdown is highlighted with a red circle.

This will automatically populate the necessary fields in which to enter search criteria.

Within AgentCubed's Customer Search, there is the ability to search for 'Exact Matches' or 'Partial Matches'. To do this select the check box located next to 'Search Type'.

The image shows the 'Customer Search' form. It has a title bar 'Customer Search'. Below it is a dropdown menu labeled 'Search by:' with 'Name' selected. Below the dropdown are two text input fields: 'First Name:' and 'Last Name:'. Below these is a 'Search Type:' section with a checkbox labeled 'Check the box to look for exact matches only'. At the bottom are three buttons: 'Search', 'Can't find the record?', and 'Create New Lead'. The 'Search Type:' section is highlighted with a red circle.

Once the specific search criteria is entered, click on 'Search'.

The image shows the 'Customer Search' form. It has a title bar 'Customer Search'. Below it is a dropdown menu labeled 'Search by:' with 'Name' selected. Below the dropdown are two text input fields: 'First Name:' and 'Last Name:'. Below these is a 'Search Type:' section with a checkbox labeled 'Check the box to look for exact matches only'. At the bottom are three buttons: 'Search', 'Can't find the record?', and 'Create New Lead'. The 'Search' button is highlighted with a red circle.

## SEARCH RESULTS

The search results will populate in a box below.

Search Results										
Cust ID	Full Name	Primary #	Secondary #	Relation	Source	Type	Status	State	Carrier	Created
19619	DOE, THERESA	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	NY		07/27/2013
28383	DOEBLER SR, NELSON	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	PA		07/27/2013
12054	DOEBLER, JOYCE	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	NY		07/26/2013
25912	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	PA		07/27/2013
25913	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	PA		07/27/2013
18131	DOEBLER, THEODORE	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	NY		07/27/2013
34311	DOER, GERALD	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	TX		07/27/2013
9484	DOELL, DONALD	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	NY		07/26/2013
64208	DOENGES, JOSEPH	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	TX		07/27/2013
30464	DOERING, MAXINE	(000) 000-0000		Self	RRD-Mailer-20130726.csv	Medicare	New Lead	PA		07/27/2013

Page: 1 of 2 Rows: 10 Total Results: 17

Sort through results by any of the columns listed by choosing the underlined gray title, as circled below.

Search Results					
<u>Cust ID</u>	<u>Full Name</u>	<u>Primary #</u>	<u>Secondary #</u>	<u>Relation</u>	<u>Source</u>
19619	DOE, THERESA	(000) 000-0000		Self	RRD-Mailer-20130726.csv
28383	DOEBLER SR, NELSON	(000) 000-0000		Self	RRD-Mailer-20130726.csv
12054	DOEBLER, JOYCE	(000) 000-0000		Self	RRD-Mailer-20130726.csv
25912	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv
25913	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv
18131	DOEBLER, THEODORE	(000) 000-0000		Self	RRD-Mailer-20130726.csv
34311	DOER, GERALD	(000) 000-0000		Self	RRD-Mailer-20130726.csv
9484	DOELL, DONALD	(000) 000-0000		Self	RRD-Mailer-20130726.csv
64208	DOENGES, JOSEPH	(000) 000-0000		Self	RRD-Mailer-20130726.csv
30464	DOERING, MAXINE	(000) 000-0000		Self	RRD-Mailer-20130726.csv

Page: 1 of 2

## NEW CUSTOMER

Manually entering a new customer within AgentCubed is easy.

Select "New Customer" from the left hand navigation.



Opportunity Information	
Status: <input type="text"/>	Type: <input type="text"/> Master Source: <input type="text"/> Source: <input type="text"/> Ref Key: <input type="text"/>
Key Type: <input type="text"/>	Origin: <input type="text"/>
<input type="checkbox"/> Create link between this new lead and current lead record	

Applicant Information	Contact Information
First Name: <input type="text"/>	Address 1: <input type="text"/>
Last Name: <input type="text"/>	Address 2: <input type="text"/>
DOB: <input type="text"/>	City: <input type="text"/>
SSN: <input type="text"/>	State/Province: <input type="text"/>
Gender: <input type="text"/>	Zip/Postal Code: <input type="text"/>
Height FT: <input type="text"/>	County: <input type="text"/>
Height IN: <input type="text"/>	Primary Phone: <input type="text"/> Ext: <input type="text"/>
Weight: <input type="text"/>	Secondary Phone: <input type="text"/> Ext: <input type="text"/>
Smoker: <input type="text"/>	Fax: <input type="text"/>
Email: <input type="text"/>	

Add Lead

To add a new customer enter the pertinent information in the “Opportunity Information” box.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Status corresponds to the status of the new opportunity being assigned to this customer.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Type displays what type of opportunity is being assigned to the customer. Type is defined as the type of insurance in which is being sold such as health, auto, property, prescription, etc.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Master Source and Source dictate where the customer is coming from. Is this customer a call in? A mailer? Etc.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Provide the customer information in the “Applicant Information” box. This includes the first name, last name, date of birth, social, height, weight and additional personal information.

Applicant Information	
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
DOB:	<input type="text"/>
SSN:	<input type="text"/>
Gender:	<input type="text"/>
Height FT:	<input type="text"/>
Height IN:	<input type="text"/>
Weight:	<input type="text"/>
Smoker:	<input type="text"/>
Email:	<input type="text"/>

The last box is where contact information is provided. Here, supply the address and phone numbers to reach a customer.



Contact Information	
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>
County:	<input type="text"/>
Primary Phone:	<input type="text"/> Ext: <input type="text"/>
Secondary Phone:	<input type="text"/> Ext: <input type="text"/>
Fax:	<input type="text"/>

Once complete, select “Add Lead”

Add Lead

## DISTRIBUTOR

The ‘Distributor’ allows an agent to dictate what type of leads are being distributed. An agent has the option to select “Shared Leads”, “Exclusive Leads” or both.



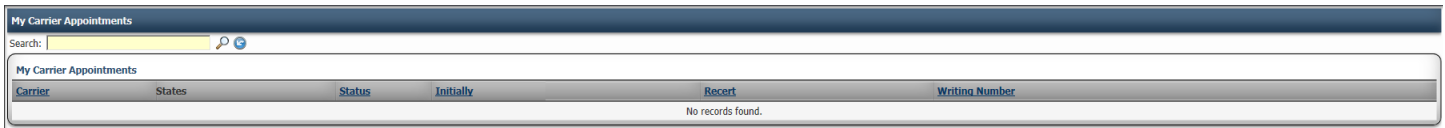
Lead Distribution
Distributor Type
<input checked="" type="radio"/> Shared

## CARRIER APPOINTMENTS

AgentCubed Administrators have the ability to enter Carrier Appointments for an agent. This allows an agent to review and monitor different carrier appointments at a glance. It also helps prevent Agents from selling products, they are not licensed to sell. To view current Carrier Appointments, select “Carrier Appointments” located on the left navigation.



The screen will look similar to below, displaying any Carriers, States, the status and additional important information.



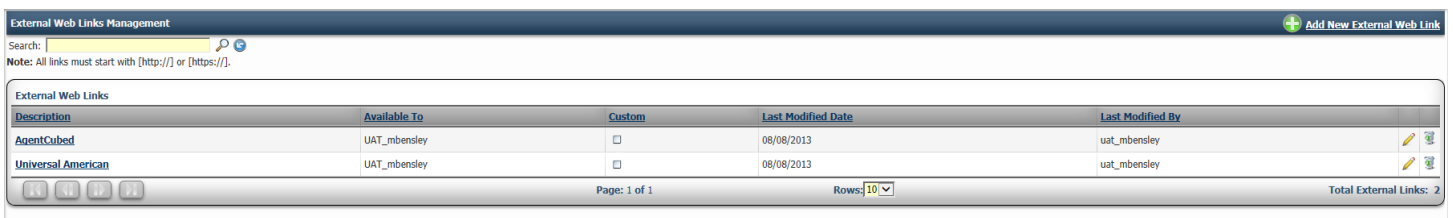
## WEB LINKS

Web Links provide an effortless way to promptly access external websites. They are simple to setup within the AgentCubed platform and provide a user to keep links private or share with all other users.

Select “Web Links”



From here, easily view all External Web Links created. To access the website, click on the link description and the window will appear within AgentCubed.



## ADD WEB LINK

## Select “Add New External Web Link”



In the popup box, provide the http address, a description or name of the Web Site and who should have access to the link.

The popup box is titled 'Add New External Web Link' and has a close button (X) in the top right corner. Below the title, it says 'EXTERNAL WEB LINK DETAILS'. The form contains the following fields and options:

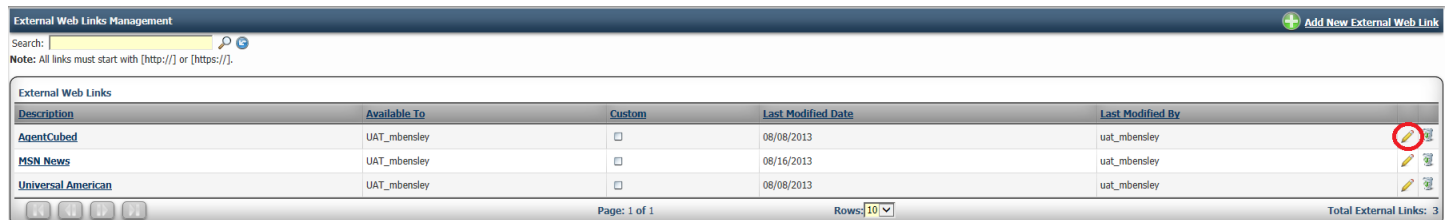
- External Web Link:
- Description:
- Access Type: ☒ Just Me ☐ All Users
- Custom Parameters: ☐ Yes ☒ No
- Save button

When creating a Web Link, provide the http address, a short description and who has access to the link. A user has the ability to keep a link private or share access with all users within the AgentCubed platform.

## EDIT WEB LINKS

Users have the ability to 'edit' web links. This is however only provided to the individual user which created the actual web link.

To edit a web link select the 'edit' icon located to the right side of the web site.

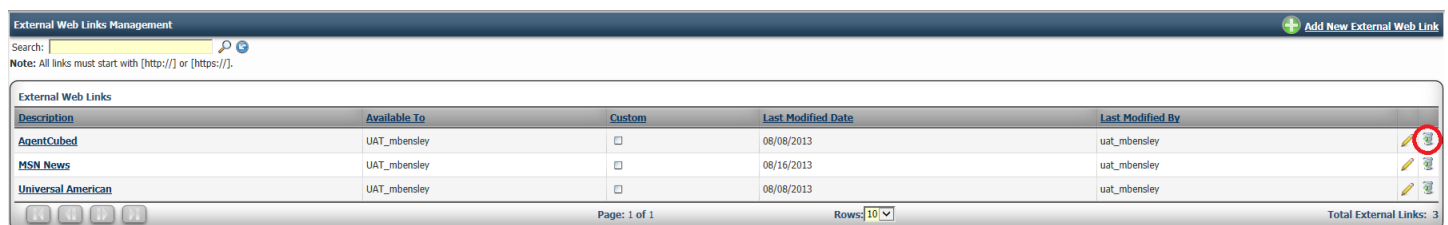


The Icon Looks Similar to this: 

## DELETE WEB LINKS

A web link can also be deleted by the user who created the link.

Select the 'Delete' icon located to the right of the site name.



The Icon Looks Similar to this: 

## OPEN RECORD

When a customer record is open, a user has access to any personal information associated with the record. Individuals can be added to a record, address changes can be made, policies can be viewed, appointments can be scheduled, and so much more.

## CUSTOMER SUMMARY

When a record is first opened a gray box will be located at the top of the screen. This box is static and will stay throughout the navigation of the lead. This is convenient as it provides the name, phone number, email, customer ID and other valuable data.

Name:  Test 2, Test 2	Customer ID: 196374	Close DNS Event Notes
Primary #: (555) 555-7113	Screener: <input type="text"/>	
Secondary #:	Assigned To: <input type="text"/>	
Email:	Presented: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Time Zone:		

## OPPORTUNITIES

Whenever a record is created, it has an “Opportunity” associated with it. An Opportunity is a chance to sell a product to a lead. You can have multiple opportunities associated with a lead.

Opportunities will provide a source, date and age of each opportunity. Opportunities can be edited as well.

Opportunities	
Source: RRD-Mailer-20130726.csv [56859]	Status:  New Lead
Type: Medicare	Date Time: 07/27/2013
Ref Key:	Age: 17 Day(s)
Ref Type:	Origin:

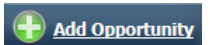
## ADD NEW OPPORTUNITY

A lead can have multiple opportunities. If you sell multiple plans or products, this is a great way to cross sell a lead.

To get started, select ‘Add Opportunity’ located in the blue header bar.

Opportunities	
Source: RRD-Mailer-20130726.csv [82]	Status:  New Lead
Type: Medicare	Date Time: 07/26/2013
Ref Key:	Age: 22 Day(s)
Ref Type:	Origin:

The Icon Looks Similar to this:



A box similar to the one below will generate.

Add Opportunity

Lead Generated:

Status:

Insurance Type:

Master Source:

Source:

Ref Key:

Key Type:

Origin:

Cancel

Save

## EDIT OPPORTUNITY

Opportunities can be edited.

To change the status or edit additional information on an opportunity select the 'Edit' icon located to the right of the opportunity.

Opportunities

Source: RRD-Mailer-20130726.csv [56859]  
Type: Medicare  
Ref Key:  
Ref Type:

Status: New Lead  
Date Time: 07/27/2013  
Age: 17 Day(s)  
Origin:

Add Opportunity

The Icon Looks Similar to this:



A popup box will generate looking similar to the box below.

Edit Opportunity

Lead Generated: 01/24/2012 08:41:00 AM

Status:

Insurance Type:

Master Source:

Source:

Ref Key:

Key Type:

Origin:

TK01:

TK02:

TK03:

TK04:

TK05:

TK06:

TK07:

TK08:

TK09:

TK10:

Cancel

Save

## ADD NOTES TO OPPORTUNITY

For each opportunity, a user can provide notes specific in relation.

Select the notepad to the right of the opportunity.

Opportunities		Add Opportunity
Source: RRD-Mailer-20130726.csv [56859]	Status: New Lead	
Type: Medicare	Date Time: 07/27/2013	
Ref Key:	Age: 17 Day(s)	
Ref Type:	Origin:	

The Icon Looks Similar to this:



Once the “notes” icon was selected, a box generates to provide notes or additional information in.

**Edit Opportunity Comments: Sample Lead Source 10 - Disability** ✕

**Opportunity Comments**

No records found.

Add Comment

## CONTACT INFORMATION

Contact Information displays the address, phone number and fax number associated with the open record.

Contact Information			Edit Contact Information
Address 1: 6645 AVENUE O	Address 2:	Zip Code: 77011	County: HARRIS
City: HOUSTON	State: TEXAS	Fax #:	
Primary #: (000) 000-0000	Secondary #:		

## EDIT

Edit contact information associated with a record by selecting the ‘Edit Contact Information’ icon located in the blue title bar on the right.

Contact Information			Edit Contact Information
Address 1: 6645 AVENUE O	Address 2:	Zip Code: 77011	County: HARRIS
City: HOUSTON	State: TEXAS	Fax #:	
Primary #: (000) 000-0000	Secondary #:		

The Icon Looks Similar to this: **Edit Contact Information**

When selecting “Edit Contact Information” a popup box will appear looking similar below.

**Edit Contact Information** ✕

Address 1: 1234 anywhere st

Address 2:

City: GARDEN CITY

State/Province: IDAHO

Zip/Postal Code: 83714

County: ADA

Primary Phone: (000) 000-0000 Ext:



Secondary Phone: Ext:

Fax Phone:

Cancel Save



## INDIVIDUALS


Individuals display all people associated with an account. This can include a spouse, children, parents, etc.

Individuals								 Add Individual
Name	Email	Relation	Gender	DOB	Age	Weight	Height	
LAZARA M TRAIN		Self		12/01/1948	64			

## ADD NEW INDIVIDUAL

Adding new individuals to a record is easy. Select the Green Plus Sign and 'Add Individual' in the blue header.

Individuals								 Add Individual
Name	Email	Relation	Gender	DOB	Age	Weight	Height	
LAZARA M TRAIN		Self		12/01/1948	64			

The Icon Looks Similar to this: 

Once selecting "Add Individual" a popup box will generate similar to below.

Add Individual

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Relationship:

DOB:

Social Security Number:

Gender:

Height FT:

Height IN:

Weight:

Smoker:

Expectant Parent:

Hazardous Lifestyle:

Cancer:

Heart Disease:



Email:

Cancel

Save

## EDIT INDIVIDUAL

There is an option to edit an individual. Perhaps the customer just disclosed they are pregnant or needs to update their email address, it's an easy change. Select the Edit Icon located to the right of the individual.

Individuals								 Add Individual
Name	Email	Relation	Gender	DOB	Age	Weight	Height	
LAZARA M TRAIN		Self		12/01/1948	64			

The Icon Looks Similar to this: 

Once selecting "Edit" a popup box will generate.

**Edit Individual Information: TRAIN, LAZARA**

Prefix:		Height FT:	5
First Name:	Mickey	Height IN:	6
Middle Name:	M	Weight:	150
Last Name:	Mouse	Smoker:	No
Suffix:		Expectant Parent:	No
Relationship:	Self	Hazardous Lifestyle:	
DOB:	01/01/1948	Cancer:	No
Social Security Number:		Heart Disease:	No
Gender:	Male	Email:	

Cancel Save

## TABS (BOTTOM OF THE SCREEN)

Located at the bottom of your screen is an array of different tabs providing additional information related to a customer.



If not all tabs are utilized, change which tabs are displayed. To do this, hover over the orange hyperlink at the top of the screen.

Name: Test 2, Test 2 Customer ID: 196374  
 Primary #: (555) 555-7113 Screener:   
 Secondary #: Assigned To:   
 Email: Presented: Yes No  
 Time Zone: Notes

[Show/Hide tab items](#)

**Opportunities** Add Opportunity

Source: Sample Lead Source 10 [158046] Type: Disability Ref Key: Ref Type:	Status: Active Date Time: 01/24/2012 Age: 581 Day(s) Origin:
Source: Sample Lead Source 10 [158042] Type: Dental Ref Key: Ref Type:	Status: Not Interested Date Time: 01/09/2012 Age: 596 Day(s) Origin:

## EVENTS

'Events' will display any events that a record has or had scheduled at some point. This displays the date and time, along with the user and notes that correspond with the event.

Customer Events					
	Due Date	User Name Assigned	Type	Task Status	Priority
Subject:	08/12/2013 10:00:00 AM	UAT_mbensley	Phone Follow Up	Open	Medium
Notes:	Saunders, Brad				
    		Page: 1 of 1		Rows: <div><div>2</div><div></div></div>	Total Records: 1

## LINKED

'Linked' displays any additional customers linked with the open record. They could be linked based on a relationship or perhaps they were a referral or provided a referral. Individuals can be linked for an array of reasons.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT

**Linked Customer Management** Add New Linked Customer

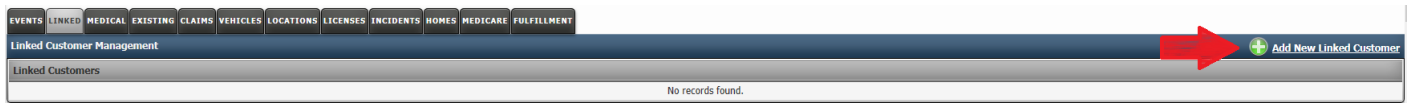
Linked Customers

No records found.



## ADD LINKED CUSTOMER

Add a 'Linked Customer' to an open record by selecting the green plus sign and 'Add New Linked Customer' located in the blue header bar.



The Icon Looks Similar to this:



Once you select 'Add New Linked Customer' a search box will pull up, providing the ability to search for a customer within the AgentCubed platform.

## MEDICAL

'Medical' displays any medical conditions on file with the open customer record.

## ADD MEDICAL CONDITION

To add a new medical condition to a record, select the green plus sign and 'Add New Medical Condition' located in the blue header bar.



The Icon Looks Similar to this:

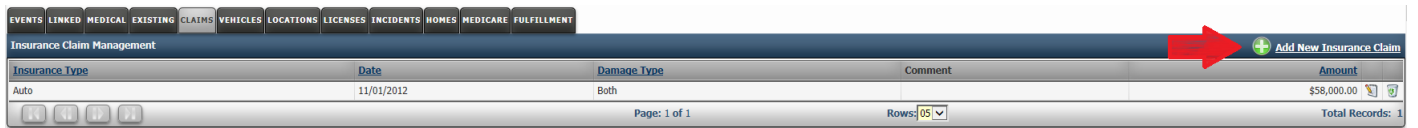


Once you select this, a popup box similar to the one below will appear. Here you can dictate who has the medical condition, what the medical condition is and provide any beneficial notes.



## ADD CLAIM

Quickly add a new claim the system by selecting the green plus sign and 'Add New Insurance Claim' in the blue header bar.



The Icon Looks Similar to this:

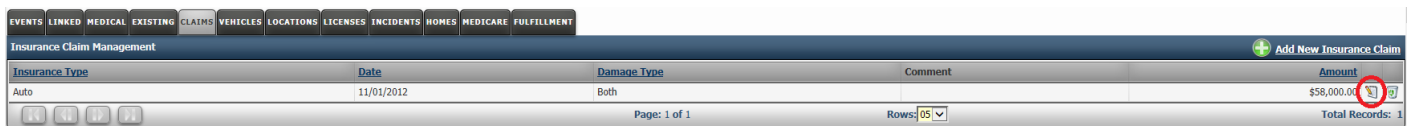


Once you select the icon a box similar to the one below will appear. Provide the type of insurance claim, date, type of damage and amount the claim paid out.

A screenshot of the 'Add New Insurance Claim' form. It has a title bar with a close button (X). The form contains the following fields: 'Insurance Type' (a dropdown menu), 'Date' (a text input field), 'Damage Type' (a dropdown menu), 'Amount: \$' (a text input field), and 'Comment' (a large text area). At the bottom of the form are two buttons: 'Cancel' and 'Save'.

## EDIT CLAIM

If there is an existing claim on file, a user has the ability to edit details in relation to the claim. Doing so is easy. Select the 'edit' icon located next to the claim.



The Icon Looks Similar to this:



## DELETE CLAIM

If a claim exists and is no longer relevant or perhaps inaccurate, a user can delete a claim. To do this select the delete icon located to the right of the claim.

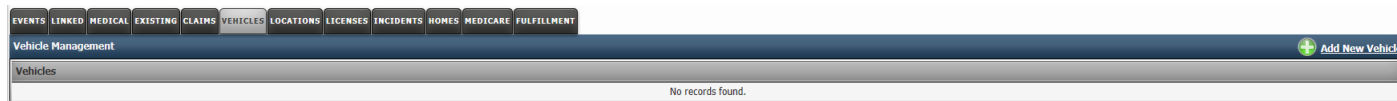


The Icon Looks Similar to this:



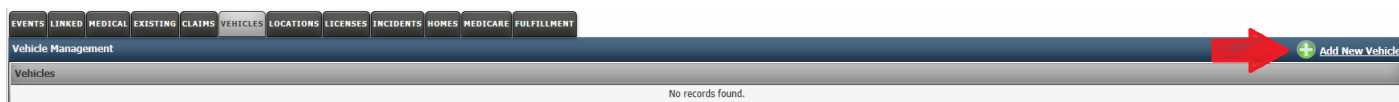
## VEHICLES


If a household has vehicles, this information can be located under the 'Vehicles' tab.



## ADD VEHICLE

To add a vehicle to a household, select the green plus sign and 'Add New Vehicle'.



The Icon Looks Similar to this: 

Once selected, a box similar to the one below will appear.

Add New Vehicle

Year:   
Make:   
Model:   
Submodel:   
Vehicle Body Type:   
VIN:   
Vehicle Usage:   
Annual Mileage:   
Vehicle Location:

Cancel
Save

## EDIT VEHICLE

Easily edit an existing vehicle by selecting the edit icon located to the right of the vehicle.



The Icon Looks Similar to this: 

## DELETE VEHICLE



If a vehicle is no longer owned by a customer, delete the vehicle. This can be done, by selecting the delete icon located to the right of each vehicle.



The Icon Looks Similar to this: 

## LOCATIONS

If a person maintains multiple homes or has a mailing address separate from the residing address, this information can be stored in 'Locations'.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT						
Location Management						
Address 1	Address 2	City	State	Zip Code	County	
PO Box 1234		GARDEN CITY	IDAHO	83714	ADA	 
		Page: 1 of 1		Rows: 05	Total Records: 1	

## ADD LOCATION

To add a new 'Location', select the green plus sig and 'Add New Location' located in the blue header bar.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT						
Location Management						
Address 1	Address 2	City	State	Zip Code	County	
PO Box 1234		GARDEN CITY	IDAHO	83714	ADA	 
		Page: 1 of 1		Rows: 05	Total Records: 1	

The Icon Looks Similar to this:



Once selected, a box similar to the one below will appear.

Add New Location

Address 1:

Address 2:

City:

State/Province:

Zip/Postal Code:



County:

Cancel

Save

## EDIT LOCATION

If a location address changes or it needs to be updated, select the edit icon located to the right of the address.



EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT						
Location Management						
Address 1	Address 2	City	State	Zip Code	County	
PO Box 1234		GARDEN CITY	IDAHO	83714	ADA	 
		Page: 1 of 1		Rows: 05	Total Records: 1	

The Icon Looks Similar to this:



## DELETE LOCATION

If a location no longer pertains to a customer, delete it by selection the delete icon located to the right of the address.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT						
Location Management						
Address 1	Address 2	City	State	Zip Code	County	
PO Box 1234		GARDEN CITY	IDAHO	83714	ADA	 
		Page: 1 of 1		Rows: 05	Total Records: 1	

The Icon Looks Similar to this: 

## LICENSES

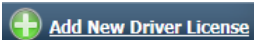
'Licenses' displays a customer's driver's license and additional information, such as if they are currently suspended or require an SR22.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT							
Driver License Management							
+ Add New Driver License							
Licensee	State	Number	Issued	Status	Suspended	SR22	Training
Test 2, Test 2	CO	1a85678	11/01/2004	Valid License	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Page: 1 of 1				Rows: 05	Total Records: 1		

## ADD LICENSE

It is easy to add a new license to the system. Select the green plus sign and 'Add New Driver License' located in the blue header bar.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT							
Driver License Management							
+ Add New Driver License							
Licensee	State	Number	Issued	Status	Suspended	SR22	Training
Test 2, Test 2	CO	1a85678	11/01/2004	Valid License	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Page: 1 of 1				Rows: 05	Total Records: 1		

The Icon Looks Similar to this: 

Once selected, a box similar to the one below will generate. Here you can dictate the driver, the status of the license as well as other pertinent information.

Add New Driver License

Licensee:

State:

Number:

Issued Date:

Status:

Ever Suspended Revoked:

SR22 Required:

Driver Training:

Cancel

Save

## EDIT LICENSE


To edit a driver's license in the system, select the edit icon located to the right of the individuals name.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT							
Driver License Management							
+ Add New Driver License							
Licensee	State	Number	Issued	Status	Suspended	SR22	Training
Test 2, Test 2	CO	1a85678	11/01/2004	Valid License	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Page: 1 of 1				Rows: 05	Total Records: 1		

The Icon Looks Similar to this: 

## DELETE LICENSE

Delete a drivers' license by selecting the delete icon to the right of the individual's name.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Driver License Management											 Add New Driver License
Licensee	State	Number	Issued	Status	Suspended	SR22	Training				
Test 2, Test 2	CO	1a85678	11/01/2004	Valid License	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Page: 1 of 1					Rows: 05	Total Records: 1					

The Icon Looks Similar to this:



## INCIDENTS

'Incidents' refers to any driving incident, such as a ticket or infraction, accident, or major moving violation, in relation to a user. View these by selecting 'Incidents'.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT

Driver Incident Management + Add New Driver Incident

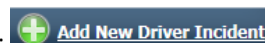
Driver	Incident	Incident	Ticket	Accident	Damage	At Fault	DUI	Claim
Test 2, Test 2	Ticket	11/01/2012	Other				ID	\$51,000.00
Page: 1 of 1				Rows: 05	Total Records: 1			

## ADD INCIDENT

To add a new incident not currently on file, select the green plus sign and 'Add New Driver Incident'.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Driver Incident Management											
Driver	Incident	Incident	Ticket	Accident	Damage	At Fault	DUI	Claim			
Test 2, Test 2	Ticket	11/01/2012	Other				ID	\$51,000.00			
Page: 1 of 1					Rows: 05	Total Records:					

The Icon Looks Similar to this:



A box similar to the one below will appear. Here provide the user, tickets and claim information.

Add New Driver Incident

Licensee:

Incident Type:

Incident Date:

Ticket Type:

Accident Type:

Accident Damage Type:

Driver At Fault:

Claim Amount: \$

State:

Cancel

Save

## EDIT INCIDENT

To edit a driving incident, select the edit icon located to the right of the incident.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Driver Incident Management											
Driver	Incident	Incident	Ticket	Accident	Damage	At Fault	DUI	Claim			
Test 2, Test 2	Ticket	11/01/2012	Other				ID	\$51,000.00			
Page: 1 of 1					Rows: 05	Total Records: 1					

The Icon Looks Similar to this:



## DELETE INCIDENT

Delete an incident no longer relevant to a user by selecting the delete icon located to the right of the incident.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Driver Incident Management											
Add New Driver Incident											
Driver	Incident	Incident	Ticket	Accident	Damage	At Fault	DUI	Claim			
Test 2, Test 2	Ticket	11/01/2012	Other				ID	\$51,000.00			
Page: 1 of 1 Rows: 05 Total Records: 1											

The Icon Looks Similar to this:

## HOMES

‘Homes’ tab displays any home associated with a record. This allows a user view, add, edit and delete a property in relation to a customer record.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Home Management											
<div><div></div><div>Add New Home</div></div>											
Homes											
No records found.											

## ADD HOME

Adding a home is easy. Select the green plus sign and ‘Add New Home’ located in the blue header bar.

EVENTS	LINKED	MEDICAL	EXISTING	CLAIMS	VEHICLES	LOCATIONS	LICENSES	INCIDENTS	HOMES	MEDICARE	FULFILLMENT
Home Management											
<div><div></div><div>+ Add New Home</div></div>											
Homes											
No records found.											

The Icon Looks Similar to this:

Once selecting this, a box will generate allowing a user to provide an array of details in regards to the property.



Add New Home

Residence Type:

Address

Address 1:

Address 2:

City:

State:

Zip Code:

County:

Basic

Property Status Type:

Year Built:

Number Stories:

Bathrooms:

Business/Farming:

Occupied By Applicant:

Square Footage:

Bedrooms:

Fire/Wood:

Safety

Fire Extinguisher:

Fire Station Proximity:

Fire Hydrant Proximity:

Fire Alarm:

Cancel
Save

## EDIT HOME

Quickly edit any information associated to a home by selecting the edit icon located towards right of ‘Residence Type’.

EVENTS
LINKED
MEDICAL
EXISTING
CLAIMS
VEHICLES
LOCATIONS
LICENSES
INCIDENTS
HOMES
MEDICARE
FULFILLMENT

Home Management

Add New Home

Residence Type - Primary

Address

Address 1: 1234 anywhere st

Address 2:

City: GARDEN CITY

State: ID

Zip Code: 83714

County: ADA

Basic

Property Status Type: Own

Year Built: 2002

Number Stories: 1-2

Bathrooms: 3

Business/Farming: ☐

Occupied By Applicant: ☒

Square Footage: 2,500

Bedrooms: 4

Fire/Wood:

Safety

Fire Extinguisher: ☐

Fire Hydrant Proximity: Within 1000 Feet

Fire Station Proximity: Within 5 Miles

Fire Alarm: ☐

Smoke Detector: ☒

Burglar Alarm: ☒

Attack Dog: ☐

Dead Bolt: ☒

Miscellaneous

Dwelling Type: Single Family Home

Foundation Type: Crawl Space

Design Type: One Story

Exterior Wall Type: Aluminum Or Vinyl Siding

Service Panel Type: FuseBox

Construction Type: Frame

Garage Type: Three Car Attached

Heating Type: Electric

Roof Type: Composition Shingle

Roof Age: 6 To 10 Years

Plumbing Age: 2,002

Electric Age: 2,002

The Icon Looks Similar to this:

## DELETE HOME

Easily delete a home by selecting the delete icon located towards the right of ‘Residence Type’.

EVENTS LINKED MEDICAL EXISTING CLAIMS VEHICLES LOCATIONS LICENSES INCIDENTS HOMES MEDICARE FULFILLMENT

Home Management + Add New Home

**Residence Type - Primary**

**Address**

Address 1: 1234 anywhere st  
City: GARDEN CITY  
Zip Code: 83714

Address 2:  
State: ID  
County: ADA

**Basic**

Property Status Type: Own  
Year Built: 2002  
Number Stories: 1-2  
Bathrooms: 3  
Business/Farming: ☐

Occupied By Applicant: ☒  
Square Footage: 2,500  
Bedrooms: 4  
Fire/Wood: ☒

**Safety**

Fire Extinguisher: ☐  
Fire Station Proximity: Within 5 Miles  
Smoke Detector: ☒  
Attack Dog: ☐

Fire Hydrant Proximity: Within 1000 Feet  
Fire Alarm: ☐  
Burglar Alarm: ☒  
Dead Bolt: ☒

**Miscellaneous**

Dwelling Type: Single Family Home  
Design Type: One Story  
Service Panel Type: Fusebox  
Garage Type: Three Car Attached  
Roof Type: Composition Shingle  
Plumbing Age: 2,002

Foundation Type: Crawl Space  
Exterior Wall Type: Aluminum Or Vinyl Siding  
Construction Type: Frame  
Heating Type: Electric  
Roof Age: 6 To 10 Years  
Electric Age: 2,002

The Icon Looks Similar to this: 

## MEDICARE

Medicare will display the prospects/customers Medicare number as well as Part A and Part B effective dates.

Medicare Management <span style="float: right;">+ Add New Medicare</span>			
Individual	Part A Effective Date	Part B Effective Date	Medicare Claim Number
Saunders, Brad	09/01/2013	09/01/2013	1234abcd
Page: 1 of 1		Rows: 05	Total Records: 1

## ADD MEDICARE

It is easy to add a Medicare information to AgentCubed. To do this, select the Green Plus Sign and 'Add New Medicare' on the right side of the blue header bar.

Medicare Management <span style="float: right;">+ Add New Medicare</span>			
Individual	Part A Effective Date	Part B Effective Date	Medicare Claim Number
Saunders, Brad	09/01/2013	09/01/2013	1234abcd
Page: 1 of 1		Rows: 05	Total Records: 1

The Icon Looks Similar to this: 

**Add New Medicare**

A popup box with generate looking similar to the box located below.

Add New Medicare

Individual:

Part A Effective Date:

Part B Effective Date:

Medicare Claim Number:

Cancel

Save

## EDIT MEDICARE

To edit existing Medicare information is easy. Select the notepad and pencil to the right of the individual Medicare line.

Medicare Management				Add New Medicare	
Individual	Part A Effective Date	Part B Effective Date	Medicare Claim Number		
Saunders, Brad	09/01/2013	09/01/2013	1234abcd		
Page: 1 of 1			Rows: 05	Total Records: 1	

The Icon Looks Similar to this:



## DELETE MEDICARE

There is also an option to delete Medicare information. To do this, select the trashcan located to the right of the Medicare line.

Medicare Management				Add New Medicare	
Individual	Part A Effective Date	Part B Effective Date	Medicare Claim Number		
Saunders, Brad	09/01/2013	09/01/2013	1234abcd		
Page: 1 of 1			Rows: 05	Total Records: 1	

The Icon Looks Similar to this:



## FULFILLMENT

Fulfillment will be used when a customer requests information on a plan in their area.

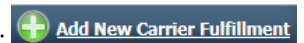
Carrier Fulfillment									Add New Carrier Fulfillment	
Package	Carrier	Request Type	Status	Created By	Created On	Fulfilled By	Fulfilled On	Notes		
2013 - English - Todays Options Advantage Plus 150A (PPO)	Universal American	Summary of Benefits	Pending	uat_mbensley	8/12/2013 10:51:46 AM					
Page: 1 of 1			Rows: 05	Total Records: 1						

## ADD FULFILLMENT

It is easy to add a fulfillment to AgentCubed. To do this, select the Green Plus Sign and 'Add New Carrier Fulfillment' on the right side of the blue header bar.

Carrier Fulfillment									Add New Carrier Fulfillment	
Package	Carrier	Request Type	Status	Created By	Created On	Fulfilled By	Fulfilled On	Notes		
2013 - English - Todays Options Advantage Plus 150A (PPO)	Universal American	Summary of Benefits	Pending	uat_mbensley	8/12/2013 10:51:46 AM					
Page: 1 of 1			Rows: 05	Total Records: 1						

The Icon Looks Similar to this:



A popup box with generate looking similar to the box located below.

Add New Carrier Fulfillment

Carrier:

Package:

Request Type:

Notes:


Cancel

Save

## EDIT FULFILLMENT

Editing an existing fulfillment is simple. Select the notepad and pencil to the right of the individual fulfillment.

Carrier Fulfillment <span>+</span> Add New Carrier Fulfillment								
Package	Carrier	Request Type	Status	Created By	Created On	Fulfilled By	Fulfilled On	Notes
2013 - English - Todays Options Advantage Plus 150A (PPO)	Universal American	Summary of Benefits	Pending	uat_mbensley	8/12/2013 10:51:46 AM			
Page: 1 of 1				Rows: 05	Total Records: 1			

The Icon Looks Similar to this: 

## DELETE FULFILLMENT

There is also an option to delete a fulfillment within AgentCubed. To do this, select the trashcan located to the right of the fulfillment.

Carrier Fulfillment <span>+</span> Add New Carrier Fulfillment								
Package	Carrier	Request Type	Status	Created By	Created On	Fulfilled By	Fulfilled On	Notes
2013 - English - Todays Options Advantage Plus 150A (PPO)	Universal American	Summary of Benefits	Pending	uat_mbensley	8/12/2013 10:51:46 AM			
Page: 1 of 1				Rows: 05	Total Records: 1			

The Icon Looks Similar to this: 

## NOTES

Notes are an important tool to use. It is easy to provide any details relevant to contact, the client, or any potential information another agent might need.

To view and leave notes on a particular record, select “Notes” on the right of a customer record.

<b>Name:</b>  Test 2, Test 2 <b>Primary #:</b> (555) 555-7113 <b>Secondary #:</b> <b>Email:</b> <b>Time Zone:</b>	<b>Customer ID:</b> 196374 <b>Screeners:</b> <input type="text"/> <b>Assigned To:</b> <input type="text"/> <b>Presented:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	   
--	---	---

The Icon Looks Similar to this: 

A box will generate to the right of screen, similar to the box below.

Comments

\*\*\*\*\*

User: uat\_mbensley  
Date Time: 08/12/2013 10:15  
-----  
Left Message.

\*\*\*\*\*

Add Notes

Easily scroll through any existing notes.

Or type and add new notes in the yellow box and select “Add Notes”.

Add Notes

## CLOSING A CUSTOMER

To close a customer there are two steps to address. The first is if a product was presented.

Name: Test 2, Test 2 Primary #: (555) 555-7113 Secondary #: Email: Time Zone:	Customer ID: 196374 Screener: Assigned To: Presented: <input checked="" type="radio"/> Yes <input type="radio"/> No	Close DNS Event Notes
---	--	--------------------------------

Next to 'Presented' this is defined by selecting 'Yes' or 'No'. Once a product has been presented, the radio button will always be marked as 'Yes' and cannot be changed.

The second part of closing a customer is selecting "Close" to the right of 'Presented' on a customer record.

Name: Test 2, Test 2 Primary #: (555) 555-7113 Secondary #: Email: Time Zone:	Customer ID: 196374 Screener: Assigned To: Presented: <input checked="" type="radio"/> Yes <input type="radio"/> No	Close DNS Event Notes
---	--	--------------------------------

The Icon Looks Similar to this:



A new page will then generate asking for a disposition. Provide a disposition that best dictates what happened and why the record was opened.

Disposition: (Please select from the list below that best describes your reason for accessing this lead)			
Disposition: <input type="text"/>			
Disposition Call			
<b>Success</b> Member Appointment Member Plan Change Sales Appointment Seminar Sold <b>Other</b> CMS Call Dead Air External Transfer Fulfillment Internal Transfer NQ - Deceased NQ - ESRD NQ - Incarcerated NQ - Not Medi Eligible NQ - Out of Serv Area Test Call	<b>Refusal</b> Cost Employer/Government Sponsored Plan No Action - Already a Member Plan Suitability Provider Not in Network Rx Not Covered	<b>Non-scheduled Call Back</b> Busy Signal Left Message Other Left Voice Message No Answer <b>Scheduled Call Back</b> FL - No SEP FL - Prospective Lead Not at this time Scheduled Call Back Scheduled Call Back with Mail Info Telesales OB Dialer	<b>Do Not Call</b> Do Not Call Do Not Call - Do Not Mail Do Not Mail <b>Bad Number</b> Bad Number-Wrong Number No Number <b>Language Barrier</b> Other Language Spanish

Once the disposition is selected, it will populate next to 'Disposition:' and then select "Disposition Call". The record will then be closed.

Disposition: (Please select from the list below that best describes your reason for accessing this lead)			
Disposition: <input type="text"/>			
Disposition Call			
<b>Success</b> Member Appointment Member Plan Change Sales Appointment Seminar Sold <b>Other</b> CMS Call Dead Air External Transfer Fulfillment Internal Transfer NQ - Deceased NQ - ESRD NQ - Incarcerated NQ - Not Medi Eligible NQ - Out of Serv Area Test Call	<b>Refusal</b> Cost Employer/Government Sponsored Plan No Action - Already a Member Plan Suitability Provider Not in Network Rx Not Covered	<b>Non-scheduled Call Back</b> Busy Signal Left Message Other Left Voice Message No Answer <b>Scheduled Call Back</b> FL - No SEP FL - Prospective Lead Not at this time Scheduled Call Back Scheduled Call Back with Mail Info Telesales OB Dialer	<b>Do Not Call</b> Do Not Call Do Not Call - Do Not Mail Do Not Mail <b>Bad Number</b> Bad Number-Wrong Number No Number <b>Language Barrier</b> Other Language Spanish

The Icon Looks Similar to this:



## SAVE QUOTES

A user has the ability to save quotes. This is a text box allowing one to copy and paste information and then save. The text box also provides the ability to color, highlight, bold, resize fonts and so much more.

To access this, select 'Save Quotes' on the left hand navigation.

A screenshot of the "Save Quotes" form. It features a rich text editor toolbar at the top with options for bold, italic, underline, text color, background color, font face, and font size. The main area is a large text box. At the bottom right, there is a "Save Changes" button.

Once information is entered in the text box, be sure to select "Save Changes" at the bottom.

Save Changes

## POLICIES

Policies view allows a user to see any policies a customer has, add new policies or edit existing policies.

To do this, select "Policies" on the left hand side.






Policy Summary

Add New Policy

Policies

Carriers

Monthly Premium: \$0.00

ID	Number	Plan	Policy Status	AOR	Eff Date	Bill Freq	Premium	One Time	
Golden Rule (1 plan) + (0 rider options)									
11664	1234abcd	Premier Dental	App Out	Demo_mbnsley	09/01/2013	Monthly	\$0.00	\$0.00	  

Page: 1 of 1

Rows: 05

Total Carriers: 1

## ADD NEW POLICY

To add a new policy to a household, select "Add New Policy" located on the right side of the blue header bar.

A screenshot of the "Policy Summary" header bar. It is a dark blue bar with the text "Policy Summary" on the left and a red arrow pointing to the "Add New Policy" button on the right.

The Icon Looks Similar to this:


Add New Policy

Once selected, a user will be redirected to the below screen.

A screenshot of the "Policy Configuration" form. It has a dark blue header bar with "Policy Configuration" on the left and "Cancel and return to Policy Summary" and "Create Policy" buttons on the right. The main area contains several dropdown menus for "Opportunity", "Coverage Type", "Carrier", "Carrier Plan", "Plan Type", "AOR 1", "AOR 2", and "Policy Status".

## EDIT EXISTING POLICY

Quickly change the status, update premium or provide any additional policy changes by selecting the edit icon located to the right of the policy.

Policy Summary										Add New Policy
Policies										
Carriers										Monthly Premium: \$0.00
ID	Number	Plan	Policy Status	AOR	Eff Date	Bill Freq	Premium	One Time		
Golden Rule (1 plan) + (0 rider options)										Monthly Premium: \$0.00
11664	1234abcd	Premier Dental	App Out	Demo_mbensley	09/01/2013	Monthly	\$0.00	\$0.00		
Page: 1 of 1										Total Carriers: 1

The Icon Looks Similar to this: 

## ADD NOTES TO EXISTING POLICY


Provide comments, notes details in regards to a policy by selecting the 'Notes' icon located to the right of the policy.


Policy Summary										Add New Policy
Policies										
Carriers										Monthly Premium: \$0.00
ID	Number	Plan	Policy Status	AOR	Eff Date	Bill Freq	Premium	One Time		
Golden Rule (1 plan) + (0 rider options)										Monthly Premium: \$0.00
11664	1234abcd	Premier Dental	App Out	Demo_mbensley	09/01/2013	Monthly	\$0.00	\$0.00		
Page: 1 of 1										Total Carriers: 1

The Icon Looks Similar to this: 

## DELETE EXISTING POLICY

Quickly delete a policy by selecting the icon to the right of the policy.

Policy Summary										Add New Policy
Policies										
Carriers										Monthly Premium: \$0.00
ID	Number	Plan	Policy Status	AOR	Eff Date	Bill Freq	Premium	One Time		
Golden Rule (1 plan) + (0 rider options)										Monthly Premium: \$0.00
11664	1234abcd	Premier Dental	App Out	Demo_mbensley	09/01/2013	Monthly	\$0.00	\$0.00		
Page: 1 of 1										Total Carriers: 1

The Icon Looks Similar to this: 

## DOCUMENTS

The Documents menu tab, provides a quick and easy view to any saved documents for the open customer to be readily available at the agent's fingertips.

To access this, select "Documents"



Documents			
Upload File			
Default	Name	Size	Modified
Applications	Applications		08/12/2013 10:03 AM
Misc	Misc		08/12/2013 10:03 AM
Quotes	Quotes		08/12/2013 10:03 AM

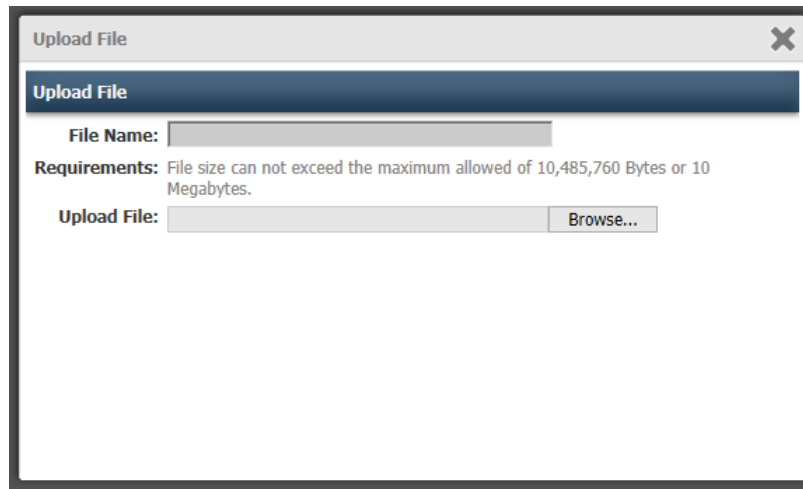
To view files located within a folder, select the folder. Any saved documents will appear, once open.

## UPLOAD FILE

To upload a file into a folder, select 'Upload File' located to the left, under Documents.



Once selected, the following popup box will appear.



## LOG

The “Log” displays all changes made on a lead. There is a short description along with the date, time and individual who made each change.

To access this tool, select “Log”



Change Log			
Changes			
Title	Description	Log Date	Log by
Added Self	Added a Self [Saunders, Brad]	07/11/2013	UAT_tbowman
New Opportunity	Added [Insurance Type: Medicare]	07/11/2013	UAT_tbowman

Page: 1 of 1 Rows: 10 Total Customer Change Logs: 2

## HISTORY

History displays when and how a lead was accessed. (If it was distributed via a distributor and call list, what call list or if it was manually retrieved) It then provides the disposition a user provided. The History also displays when a lead was opened and closed, providing data on how long a lead was open.

To access History within a customer record Select “History”



History								
Dispositions								
Call List	User	Added to CL	Opened	Closed	Duration	Disp	Type	Callable
None	UAT_mbensley		08/12/2013 10:02:22 AM	08/12/2013 10:02:34 AM	00:00:12	No Answer	Non-scheduled Call Back	N/A
None	UAT_mbensley		08/12/2013 10:00:35 AM	08/12/2013 10:02:16 AM	00:01:41	Test Call	Other	N/A
None	UAT_tbowman		07/11/2013 09:28:10 AM	07/11/2013 09:51:15 AM	00:23:05	Sold	Success	N/A

Page: 1 of 1 Rows: 10 Total Call Lists: 3

## NEW CUSTOMER

Select “New Customer”





Opportunity Information	
Status: <input type="text"/>	Type: <input type="text"/>
Master Source: <input type="text"/>	Source: <input type="text"/>
Key Type: <input type="text"/>	Ref Key: <input type="text"/>
Origin: <input type="text"/>	
<input type="checkbox"/> Create link between this new lead and current lead record	

Applicant Information	Contact Information
First Name: <input type="text"/>	Address 1: <input type="text"/>
Last Name: <input type="text"/>	Address 2: <input type="text"/>
DOB: <input type="text"/>	City: <input type="text"/>
SSN: <input type="text"/>	State/Province: <input type="text"/>
Gender: <input type="text"/>	Zip/Postal Code: <input type="text"/>
Height FT: <input type="text"/>	County: <input type="text"/>
Height IN: <input type="text"/>	Primary Phone: <input type="text"/> Ext: <input type="text"/>
Weight: <input type="text"/>	Secondary Phone: <input type="text"/> Ext: <input type="text"/>
Smoker: <input type="text"/>	Fax: <input type="text"/>
Email: <input type="text"/>	

Add Lead

To add a new customer enter the pertinent information in the “Opportunity Information” box.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Status corresponds to the status of the new opportunity being assigned to this customer.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Type displays what type of opportunity is being assigned to the customer. Type is defined as the type of insurance in which is being sold such as health, auto, property, prescription, etc.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Master Source and Source dictate where the customer is coming from. Is this customer a call in? A mailer? Etc.

Opportunity Information			
Status: <input type="text"/>	Type: <input type="text"/>	Master Source: <input type="text"/>	Source: <input type="text"/>

Provide the customer information in the “Applicant Information” box. This includes the first name, last name, date of birth, social, height, weight and additional personal information.

Applicant Information	
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
DOB:	<input type="text"/>
SSN:	<input type="text"/>
Gender:	<input type="text"/>
Height FT:	<input type="text"/>
Height IN:	<input type="text"/>
Weight:	<input type="text"/>
Smoker:	<input type="text"/>
Email:	<input type="text"/>

The last box is where contact information is provided. Here, supply the address and phone numbers to reach a customer.

Contact Information

Address 1:

Address 2:

City:

State/Province:

Zip/Postal Code:

County:

Primary Phone:

Ext:

Secondary Phone:

Ext:

Fax:

Once complete, select “Add Lead”

Add Lead

## CARRIER APPOINTMENTS

AgentCubed Administrators have the ability to enter Carrier Appointments for an agent. This allows an agent to review and monitor different carrier appointments at a glance. It also helps prevent Agents from selling products, they are not licensed to sell. To view current Carrier Appointments, select “Carrier Appointments” located on the left navigation.



Carrier Appts

The screen will look similar to below, displaying any Carriers, States, the status and additional important information.

My Carrier Appointments

Search:

My Carrier Appointments

Carrier	States	Status	Initially	Recert	Writing Number
No records found.					

## WEB LINKS

Web Links provide an effortless way to promptly access external websites. They are simple to setup within the AgentCubed platform and provide a user to keep links private or share with all other users.

Select “Web Links”



Web Links

From here, easily view all External Web Links created. To access the website, click on the link description and the window will appear within AgentCubed.

External Web Links Management

Search:

Note: All links must start with [http://] or [https://].

External Web Links

Description	Available To	Custom	Last Modified Date	Last Modified By
AgentCubed	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley
Universal American	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley

Page: 1 of 1

Rows: 10

Total External Links: 2

## ADD WEB LINK

Select “Add New External Web Link”

External Web Links Management				
Search: <input type="text"/> Note: All links must start with [http://] or [https://].				
<div> <div> <div>+</div> <div>Add New External Web Link</div> </div> </div>				
External Web Links				
Description	Available To	Custom	Last Modified Date	Last Modified By
GoldenRule	Demo_mbensley	<input type="checkbox"/>	06/04/2013	demo_mbensley
<div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> </div> <div>Page: 1 of 1</div> <div>Rows: 10</div> <div>Total External Links: 1</div> </div>				

In the popup box, provide the http address, a description or name of the Web Site and who should have access to the link.

Add New External Web Link

EXTERNAL WEB LINK DETAILS

External Web Link:

Description:

Access Type: ☒ Just Me ☐ All Users

Custom Parameters: ☐ Yes ☒ No

Save

When creating a Web Link, provide the http address, a short description and who has access to the link. A user has the ability to keep a link private or share access with all users within the AgentCubed platform.

## EDIT WEB LINKS

Users have the ability to 'edit' web links. This is however only provided to the individual user which created the actual web link.

To edit a web link select the 'edit' icon located to the right side of the web site.

External Web Links Management				
Search: <input type="text"/> Note: All links must start with [http://] or [https://].				
<div> <div> <div>+</div> <div>Add New External Web Link</div> </div> </div>				
External Web Links				
Description	Available To	Custom	Last Modified Date	Last Modified By
AgentCubed	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley
MSN News	UAT_mbensley	<input type="checkbox"/>	08/16/2013	uat_mbensley
Universal American	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley
<div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> </div> <div>Page: 1 of 1</div> <div>Rows: 10</div> <div>Total External Links: 3</div> </div>				

The Icon Looks Similar to this:

## DELETE WEB LINKS

A web link can also be deleted by the user who created the link.

Select the 'Delete' icon located to the right of the site name.

External Web Links Management				
Search: <input type="text"/> Note: All links must start with [http://] or [https://].				
<div> <div> <div>+</div> <div>Add New External Web Link</div> </div> </div>				
External Web Links				
Description	Available To	Custom	Last Modified Date	Last Modified By
AgentCubed	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley
MSN News	UAT_mbensley	<input type="checkbox"/>	08/16/2013	uat_mbensley
Universal American	UAT_mbensley	<input type="checkbox"/>	08/08/2013	uat_mbensley
<div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> </div> <div>Page: 1 of 1</div> <div>Rows: 10</div> <div>Total External Links: 3</div> </div>				

The Icon Looks Similar to this:

## CALENDAR EVENTS

Quickly view a user's calendar while in an open record by selecting 'Calendar Events'.



Doing this, will pull up a user's calendar to quickly view when a user might be free to schedule an appointment, call back or any additional events.

Closed Events

Callback Events

High Priority Events

Medium Priority Events

Low Priority Events

◀

▶

today

☒ Display Open Events Only

August 2013

month

week

day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7