AHCP
America's Health Care Plan

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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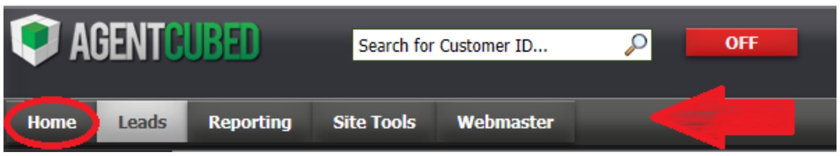
ABOUT AGENTCUBED

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

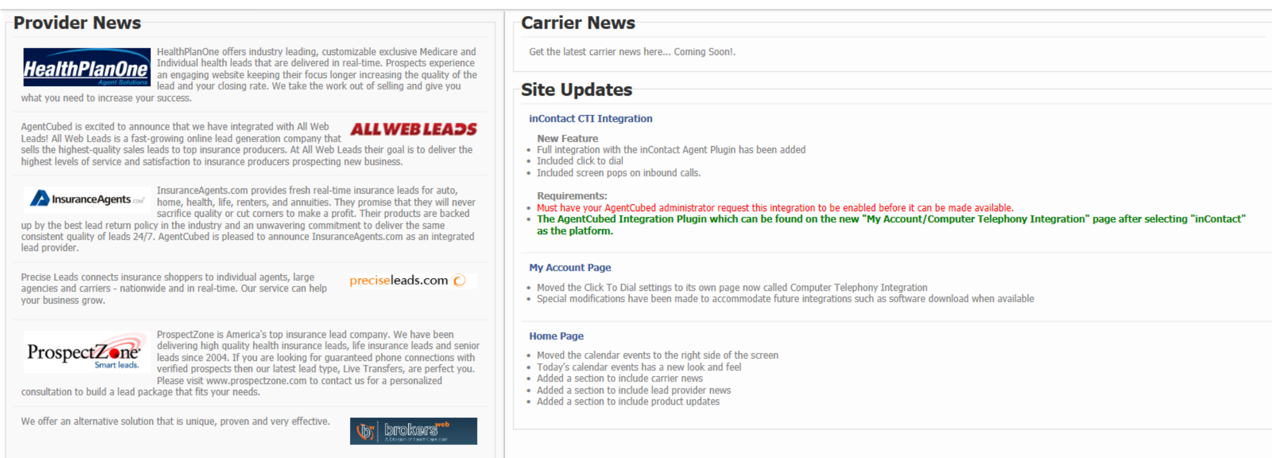
Home is where a user will be taken, once logging into the system. AgentCubed provides quick access to current news with Providers and Carriers. Also available is any recent site updates and changes made. Here, an agent can quickly view any scheduled calendar events for the day as well.

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



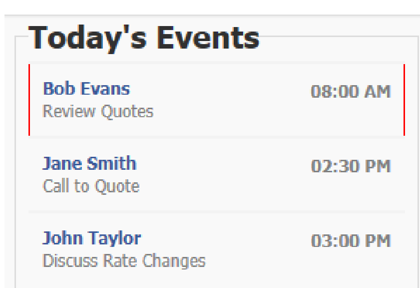
HOME PAGE

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.



TODAYS EVENTS

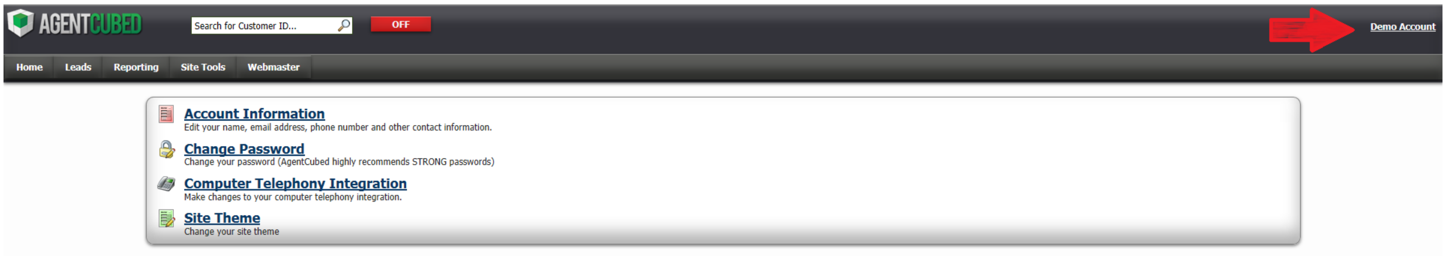
Today's Events will be displayed on the front page to the right of any current news. An agent can select an event to add, remove or edit any contact in regards to each scheduled event.



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.

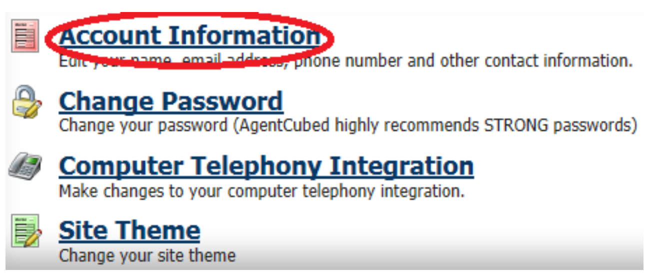
Account Information, password changes, site theme and Logging out can be accessed by hovering over the user's name located in the upper right hand corner of the screen.



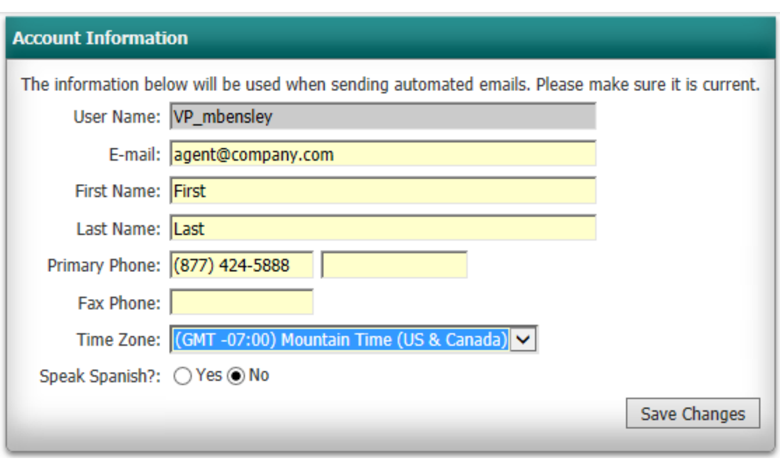
ACCOUNT INFORMATION

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'.

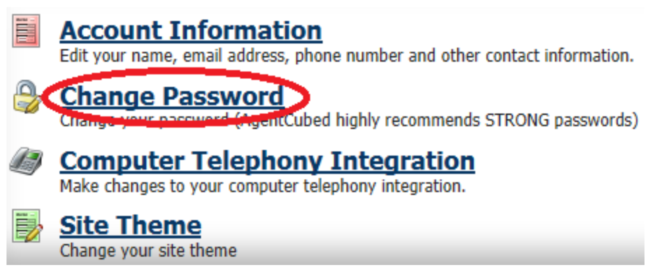


Once all information has been changed, select 'Save Changes' to proceed.

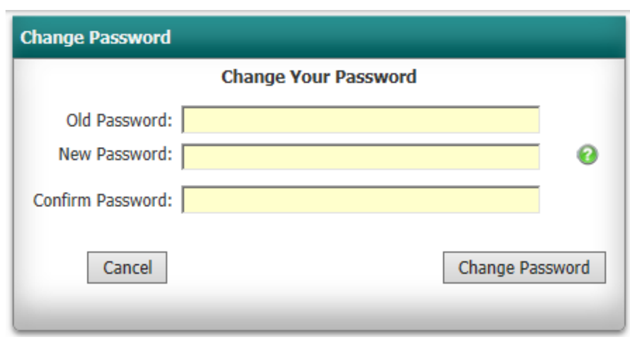
CHANGE PASSWORD

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.

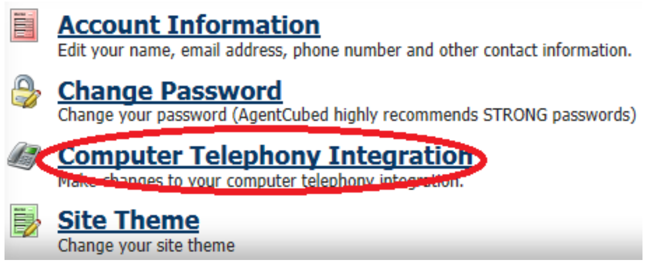


Select “Change Password” to save the new password or “Cancel” to maintain the old, current password.

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”.

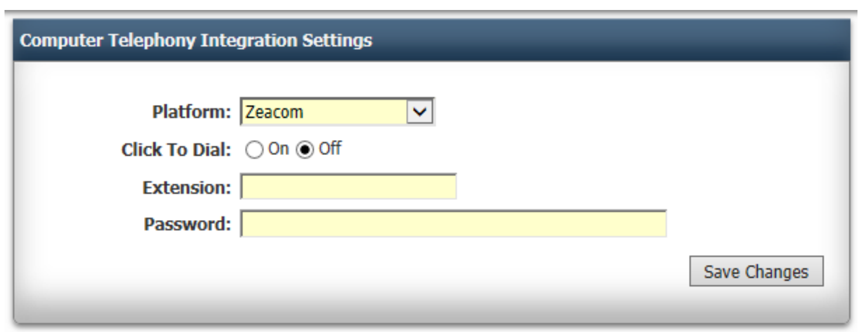


TELEPHONY INTEGRATION NOT CONFIGURED

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.

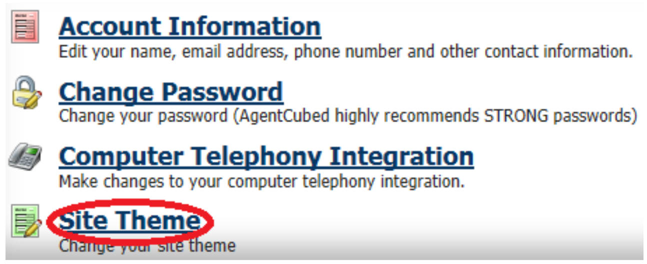
‘Extension’ and ‘Password’ is how an agent personalizes their specific account between AgentCubed and the telephony platform.

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

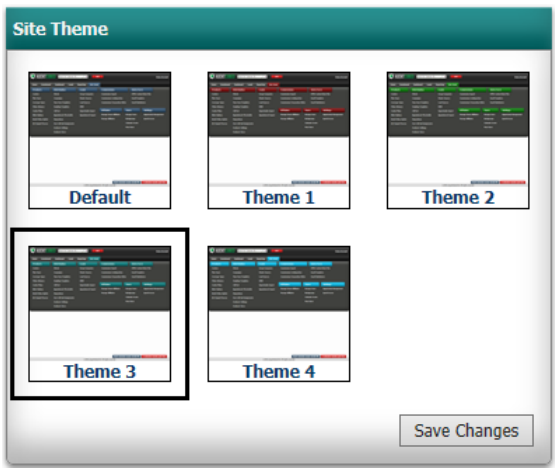
SITE THEME

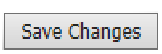
Site Theme provides the ability to personalize an AgentCubed account. Drop down to “Account Settings”.

Select "Site Theme".



Here, select the color preference and then select "Save Changes".





LOG OUT

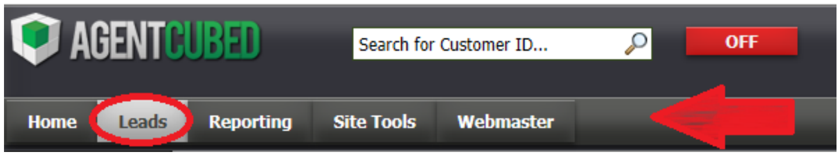
It is **extremely important** to Log Out of the AgentCubed platform as opposed to exiting out of the screen in the upper right corner.

To log out, drop down to "Log Out".

A user will be logged out immediately, once selected.

LEADS

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



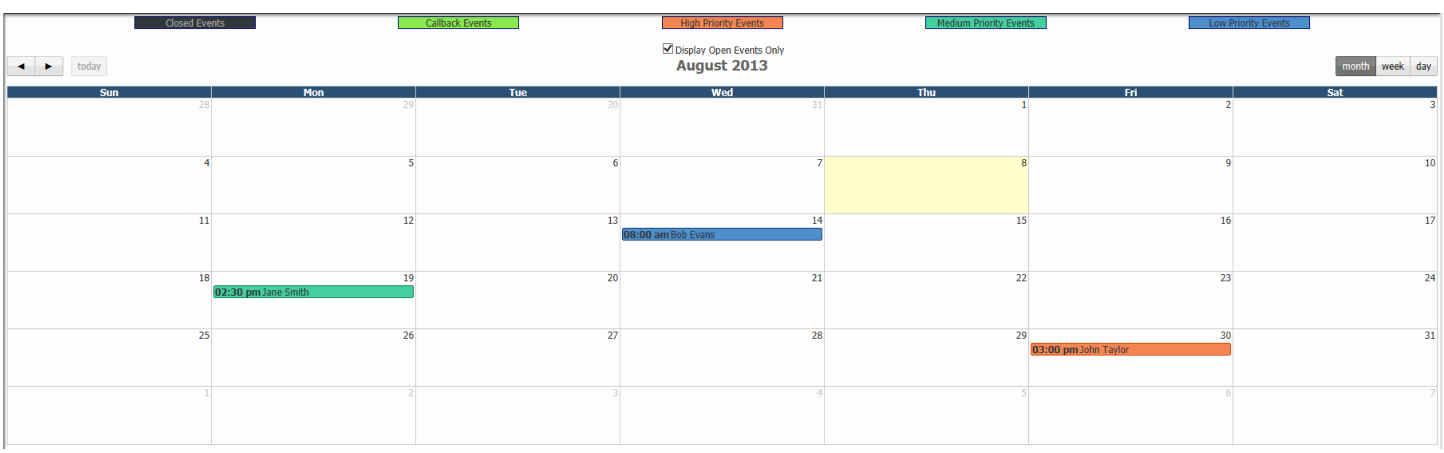
Under “Leads”, an agent can view all scheduled calendar events, search for a customer, add a new customer, buy additional leads, and manage their Lead Distributor, Carrier Appointments and external web links.

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.

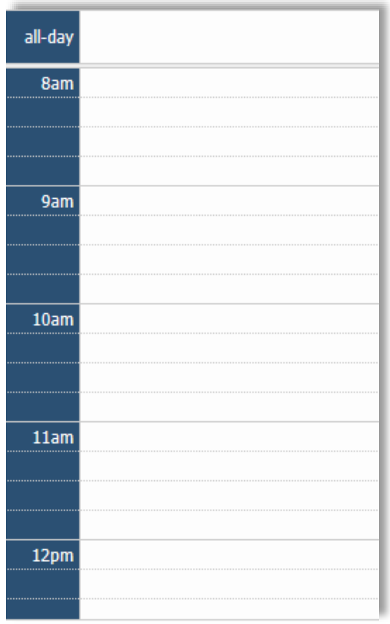
The calendar is the first screen an agent will be taken to upon selecting “Leads” from the top menu bar. To get back to the calendar view, select “Calendar Events” from the left menu option.

The below screen will appear once on Calendar Events.

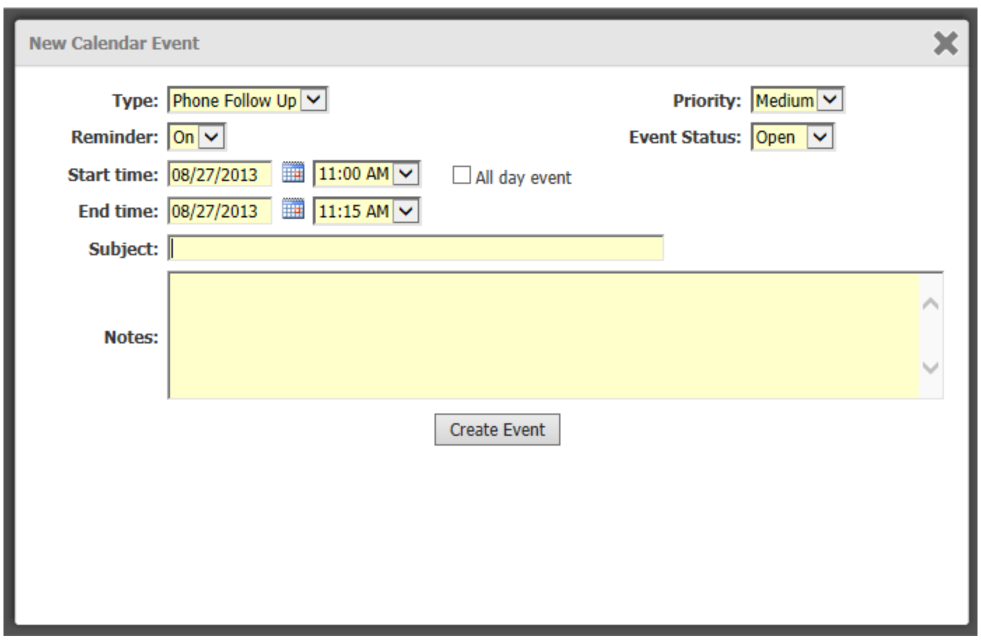


CREATE A CALENDAR EVENT

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.



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

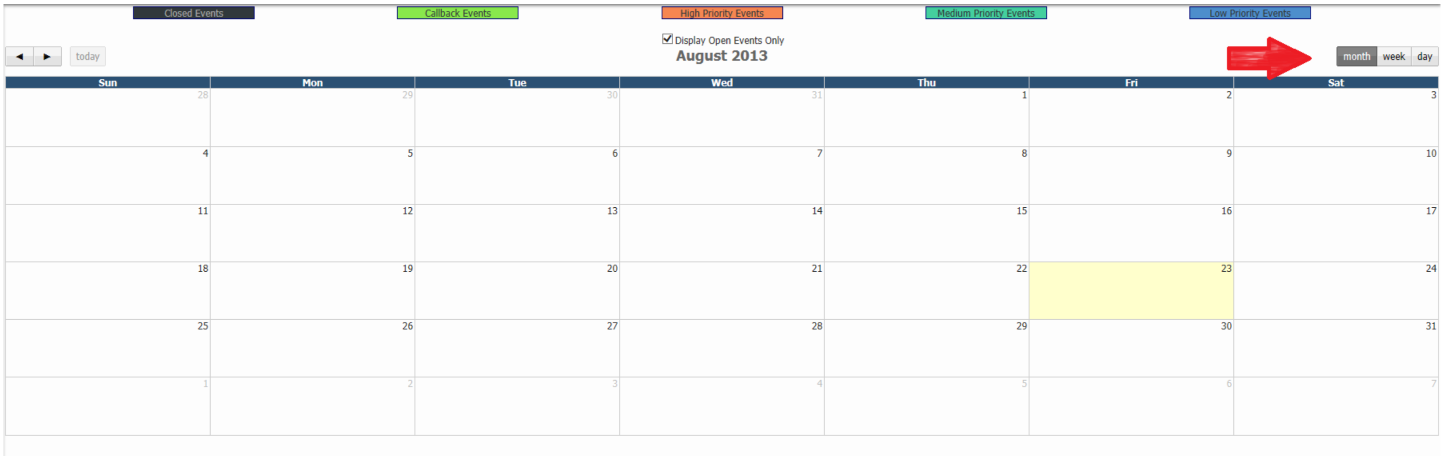


There is also an option to schedule a calendar event from within a lead.

CHANGING THE VIEW

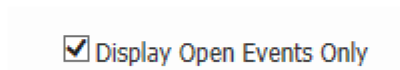
AgentCubed allows a user to view a calendar from a monthly view, weekly view or daily view.

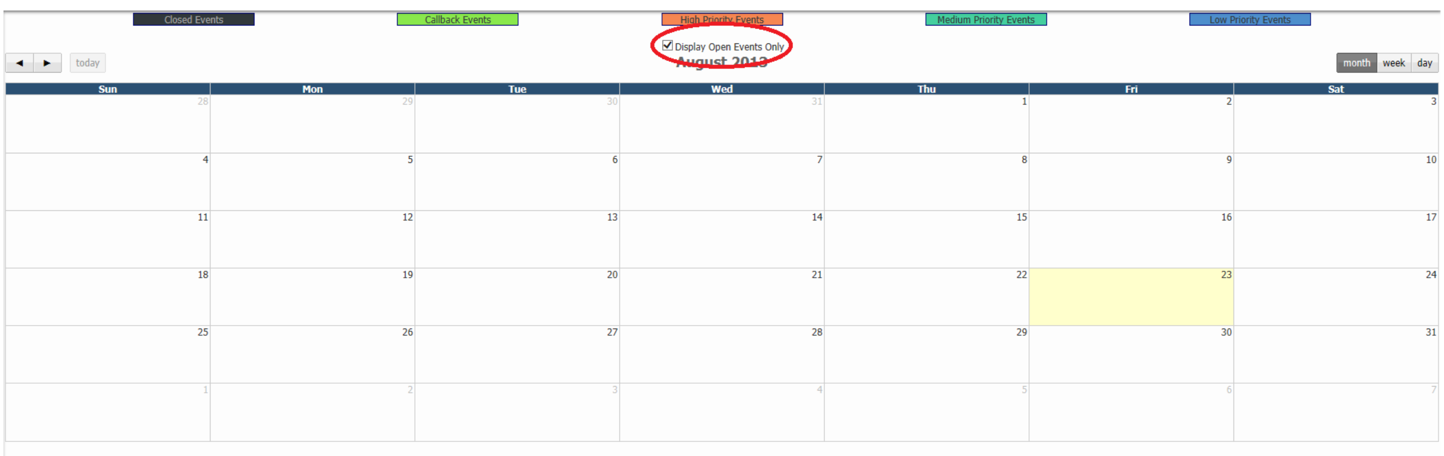
Change the view of the calendar by selecting which option to view using the icons located in the upper right of the calendar screen.



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.

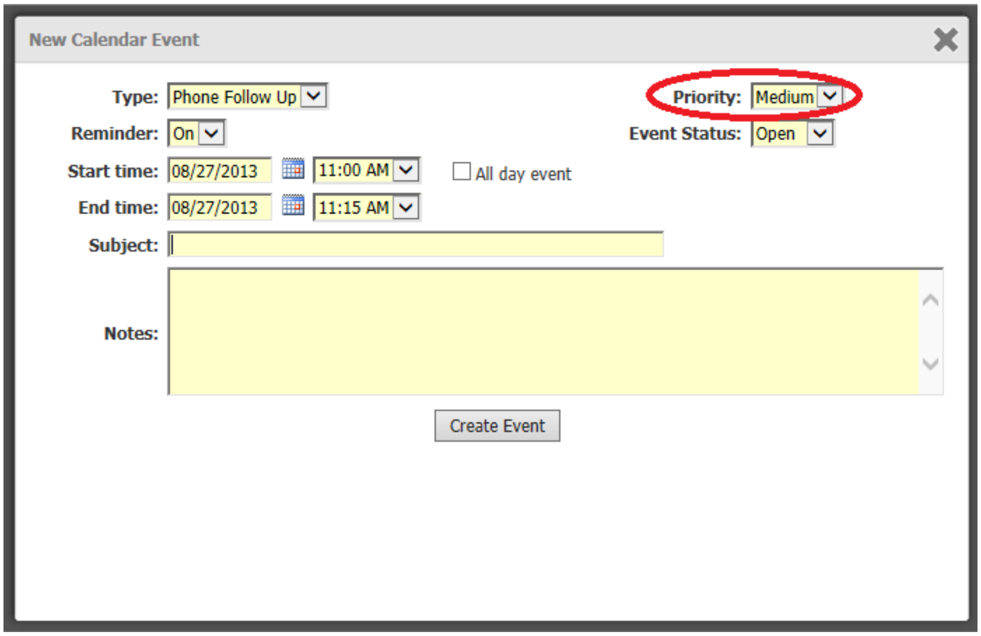




PRIORITY LEVEL

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.

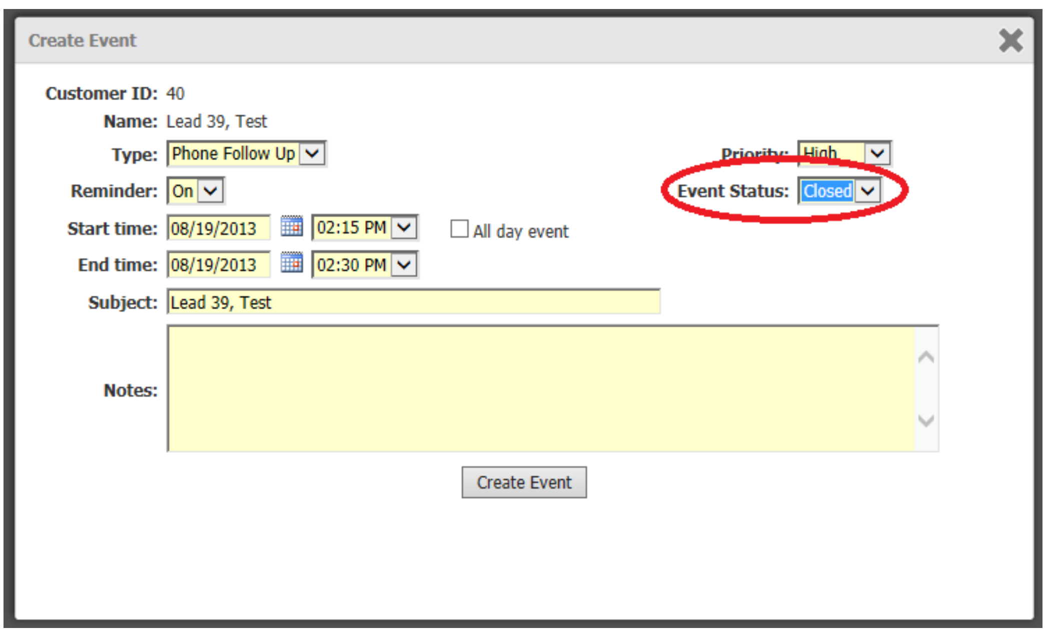
Providing a different priority level to an event is easy. When a scheduled event is open, the priority is located towards the right of the popup box. Select the dropdown box titled “Priority”.



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'.



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.

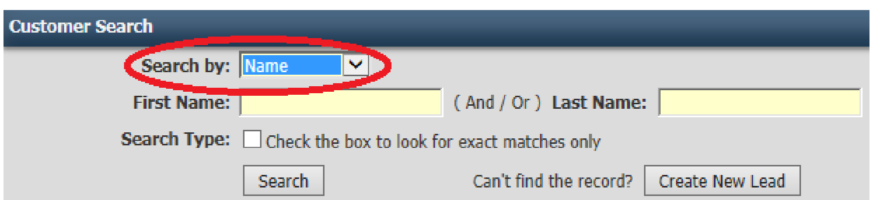
Once the information is entered, select the search icon. 

PERFORM CUSTOMER SEARCH

Select “Search” from the left menu option.

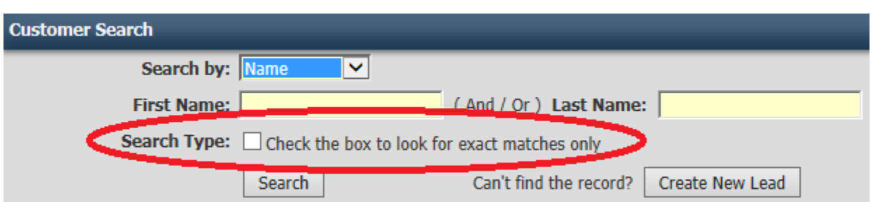
When performing a customer search, there are four options in which you can search by. These include name, customer ID, priority code and phone number.

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

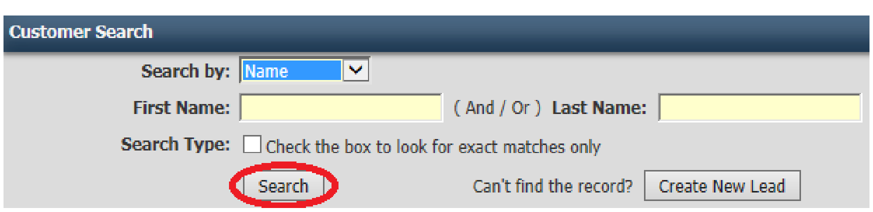


This will automatically populate the necessary fields in which to enter search criteria.

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’.



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



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	DOEER, 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

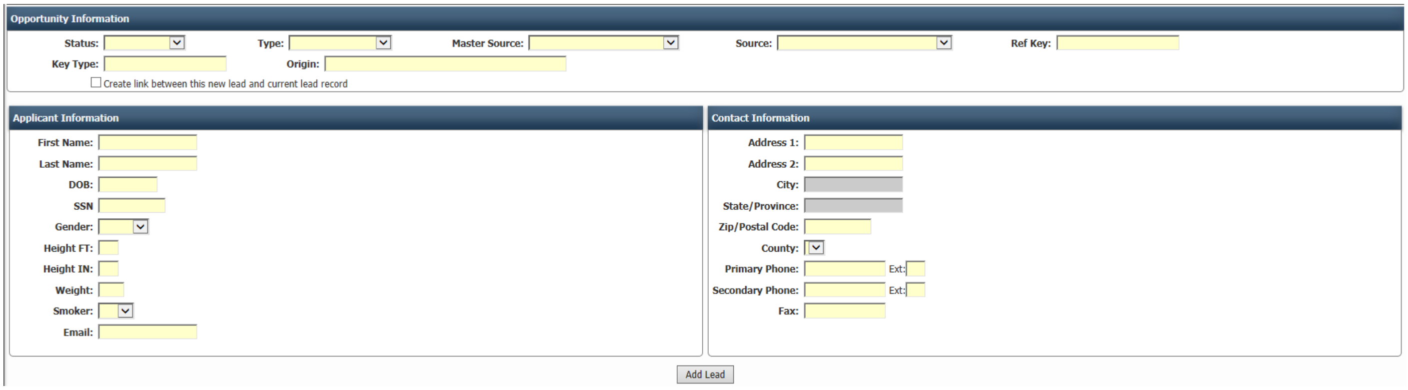
Cust ID	Full Name	Primary #	Secondary #	Relation	Source
19619	DOE, THERESA	(000) 000-0000		Self	RRD-Mailer-20130726.csv
28383	DOEBLER SR, NELSON	(000) 000-0000		Self	RRD-Mailer-20130726.csv
12054	DOEBLER, JOYCE	(000) 000-0000		Self	RRD-Mailer-20130726.csv
25912	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv
25913	DOEBLER, PEGGY	(000) 000-0000		Self	RRD-Mailer-20130726.csv
18131	DOEBLER, THEODORE	(000) 000-0000		Self	RRD-Mailer-20130726.csv
34311	DOEER, 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

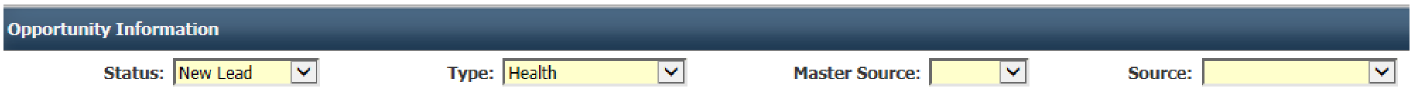
NEW CUSTOMER

Manually entering a new customer within AgentCubed is easy.

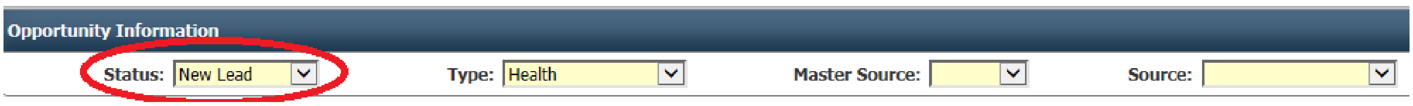
Select “New Customer” from the left hand navigation.



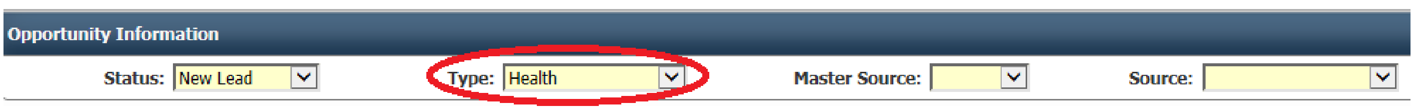
To add a new customer enter the pertinent information in the “Opportunity Information” box.



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

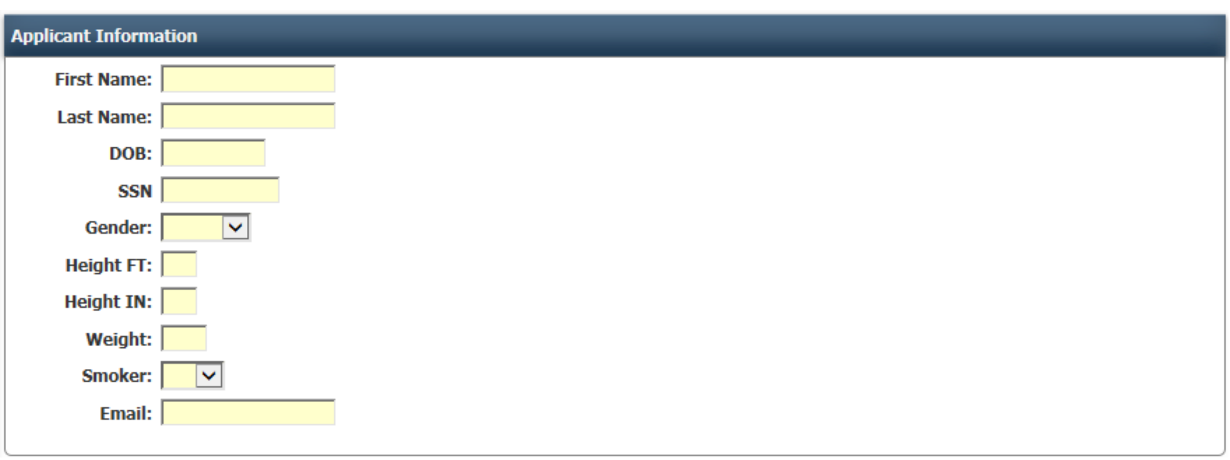


Type displays what type of opportunity is being assigned to the customer. Type is defined as the type of insurance in which is being sold such as health, auto, property, prescription, etc.

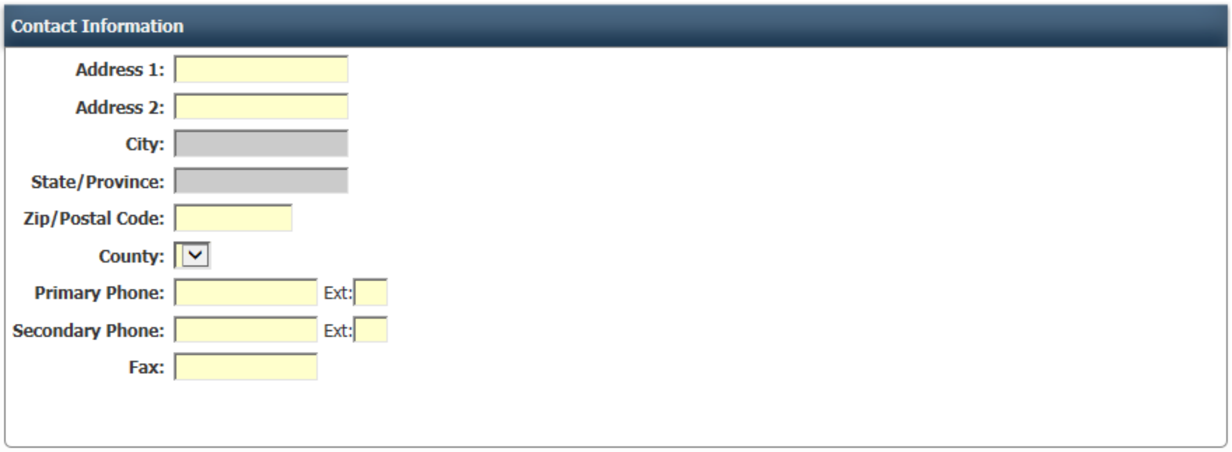


Master Source and Source dictate where the customer is coming from. Is this customer a call in? A mailer? Etc.

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.



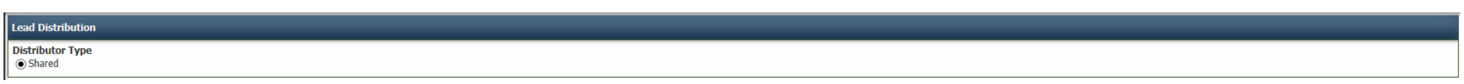
The last box is where contact information is provided. Here, supply the address and phone numbers to reach a customer.



Once complete, select "Add Lead"

DISTRIBUTOR

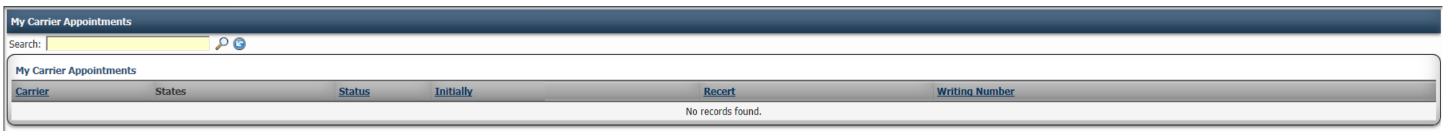
The 'Distributor' allows an agent to dictate what type of leads are being distributed. An agent has the option to select "Shared Leads", "Exclusive Leads" or both.



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.

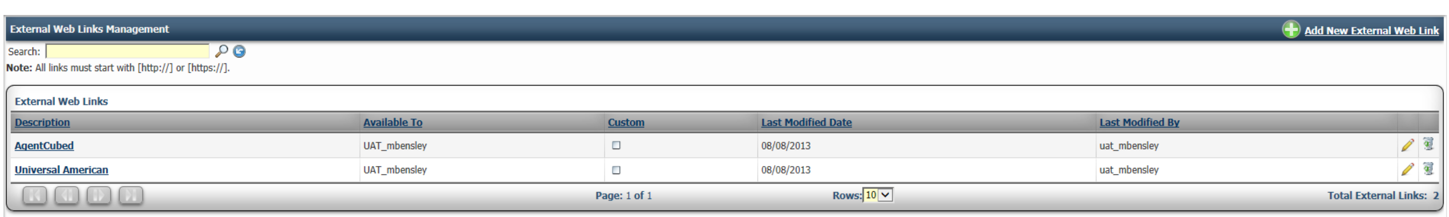


WEB LINKS

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.

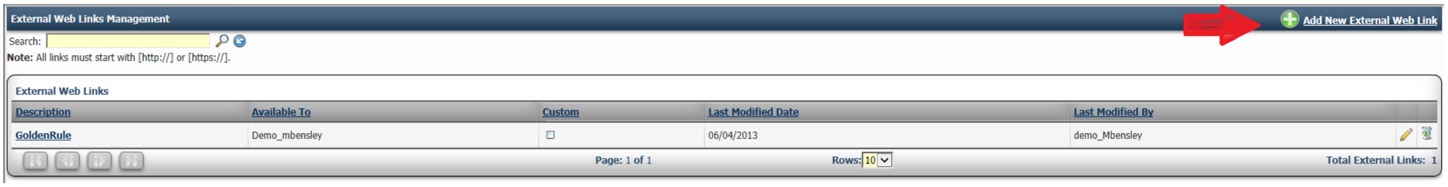
Select "Web Links"

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.

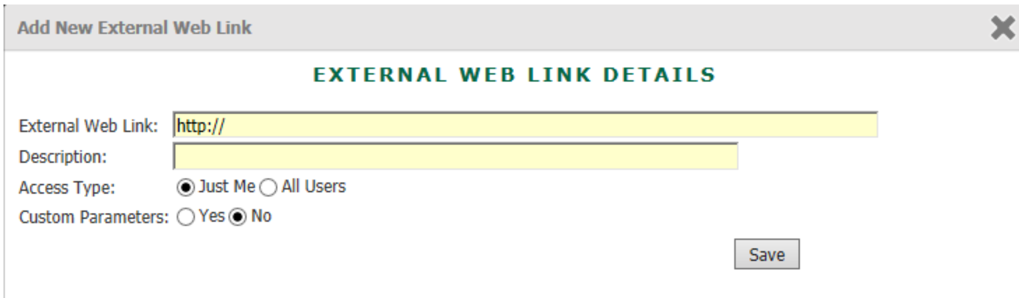


ADD WEB LINK

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.

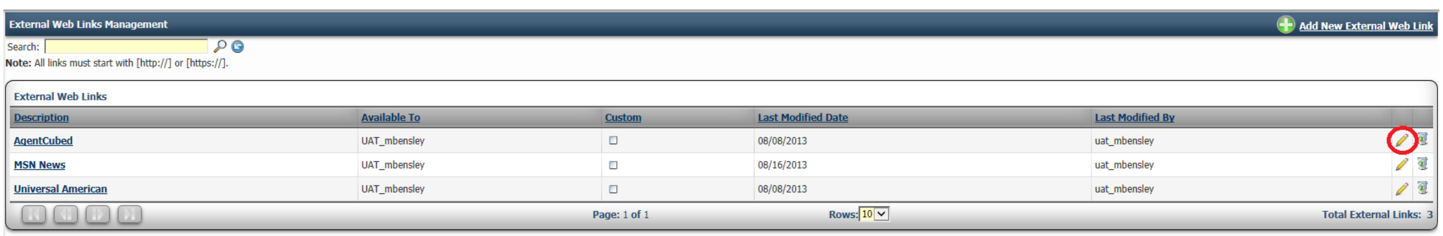


When creating a Web Link, provide the http address, a short description and who has access to the link. A user has the ability to keep a link private or share access with all users within the AgentCubed platform.

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.

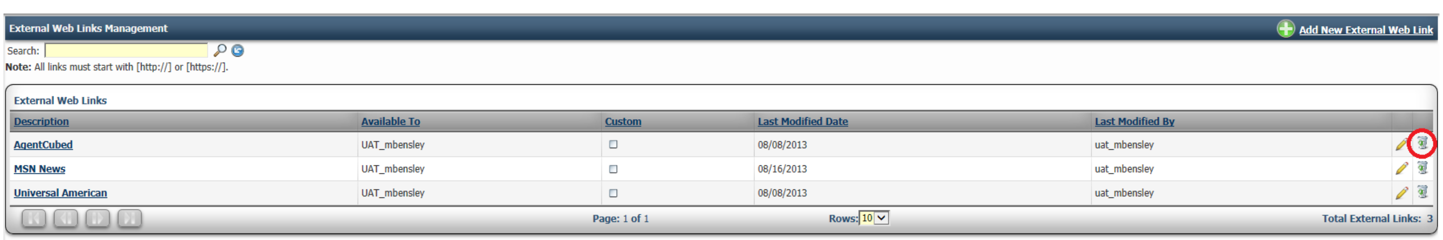


The Icon Looks Similar to this: 

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.

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.

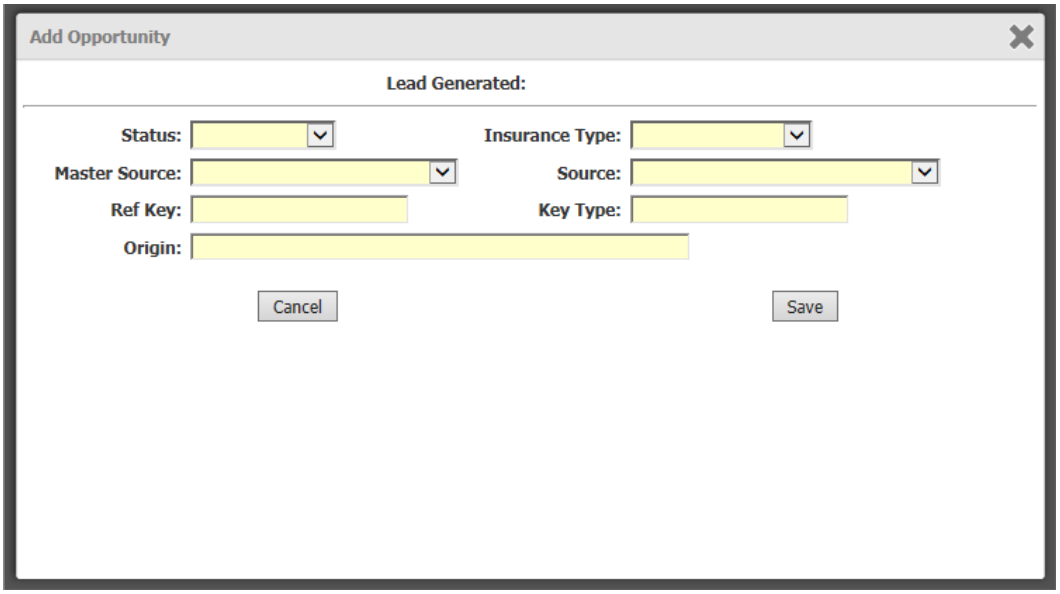
ADD NEW OPPORTUNITY

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.

The Icon Looks Similar to this: 

A box similar to the one below will generate.



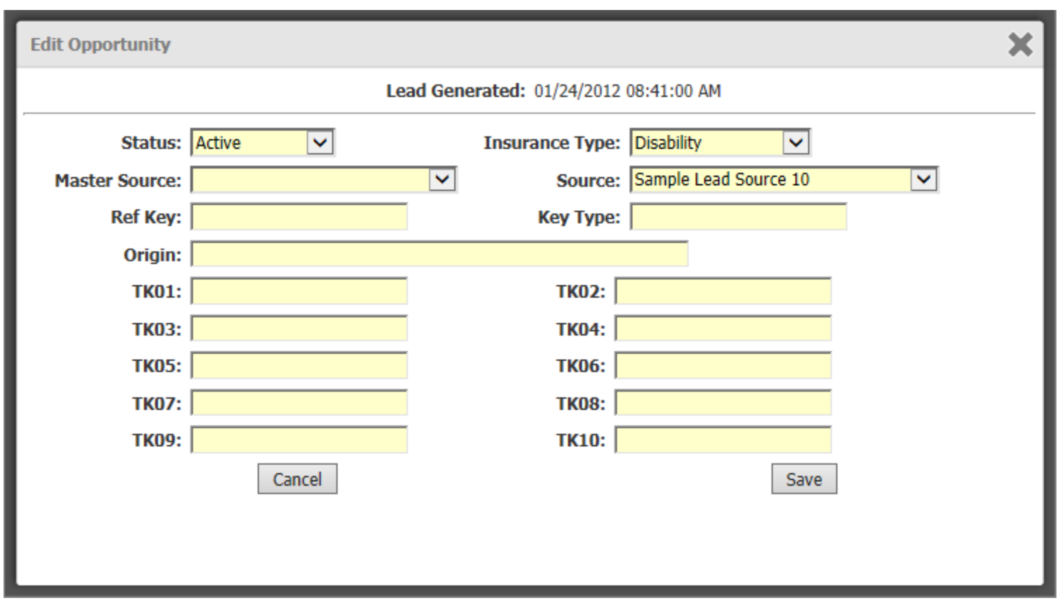
EDIT OPPORTUNITY

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.

The Icon Looks Similar to this: 

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



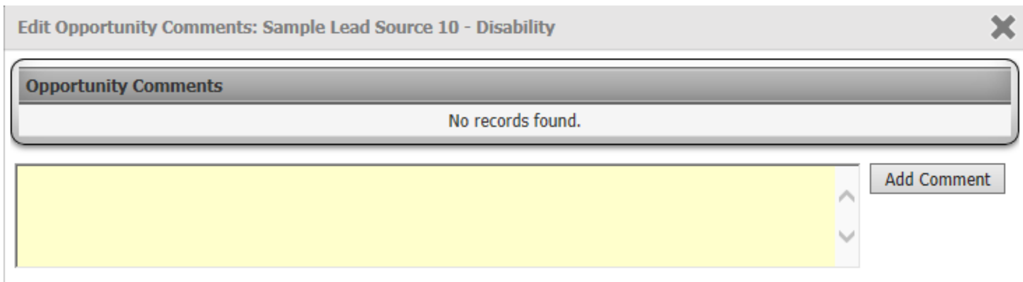
ADD NOTES TO OPPORTUNITY

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

Select the notepad to the right of the opportunity.

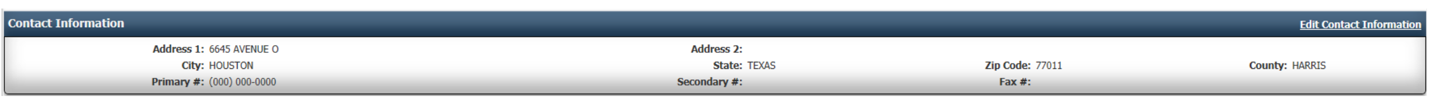
The Icon Looks Similar to this: 

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



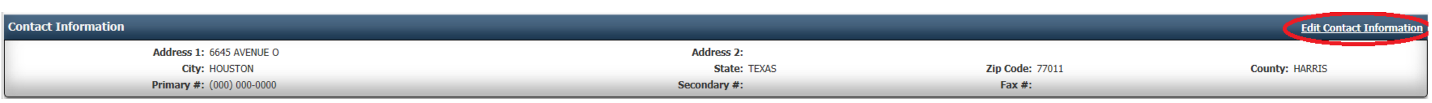
CONTACT INFORMATION

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



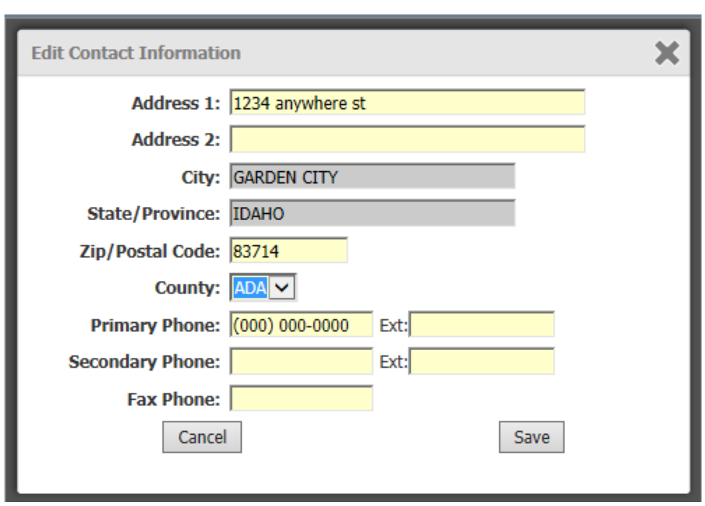
EDIT

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



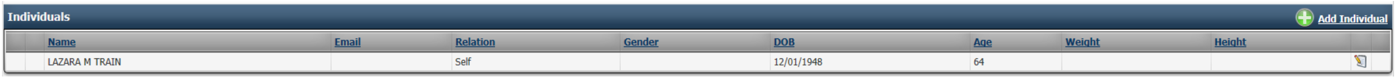
The Icon Looks Similar to this: 

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



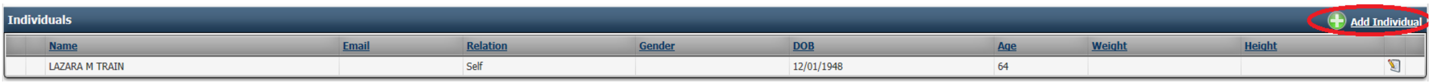
INDIVIDUALS

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



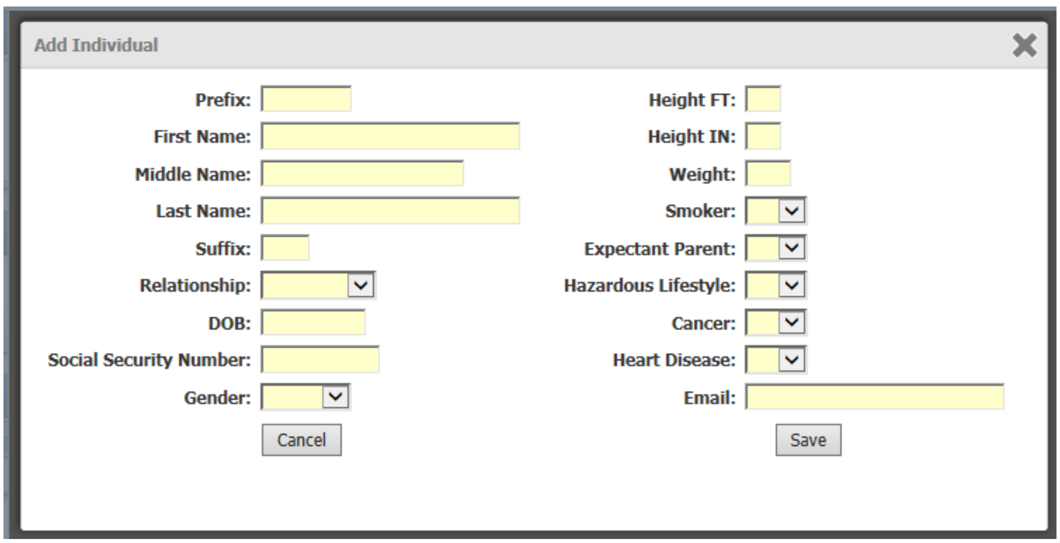
ADD NEW INDIVIDUAL

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



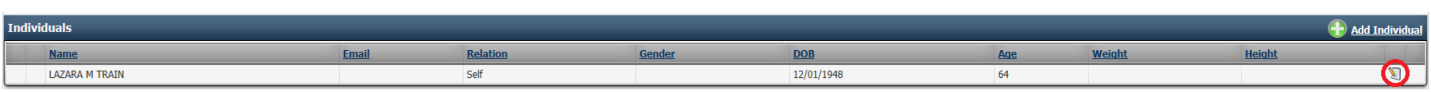
The Icon Looks Similar to this: 

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



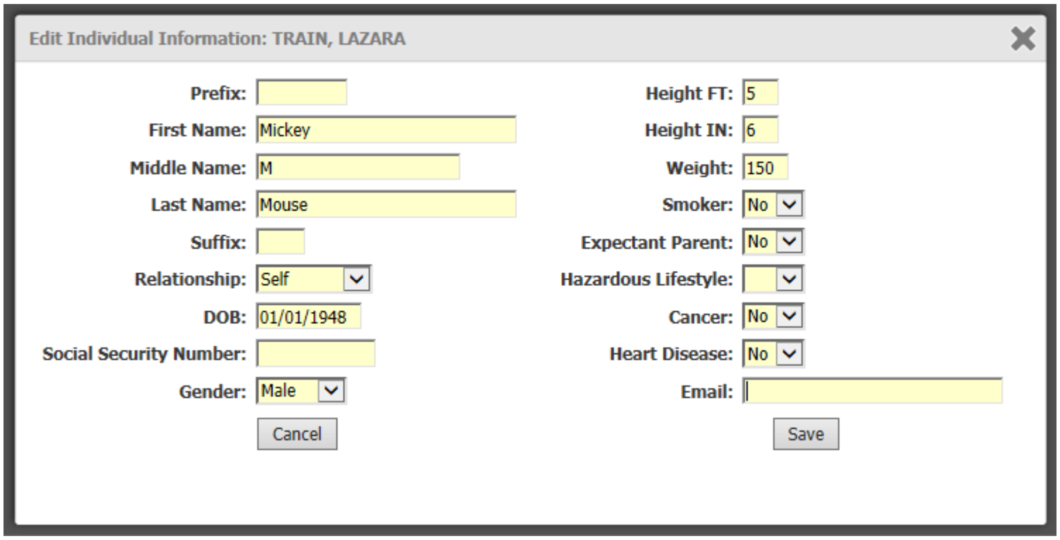
EDIT INDIVIDUAL

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.



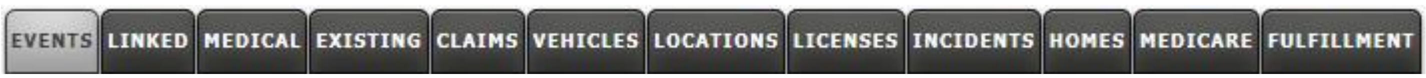
The Icon Looks Similar to this: 

Once selecting "Edit" a popup box will generate.



TABS (BOTTOM OF THE SCREEN)

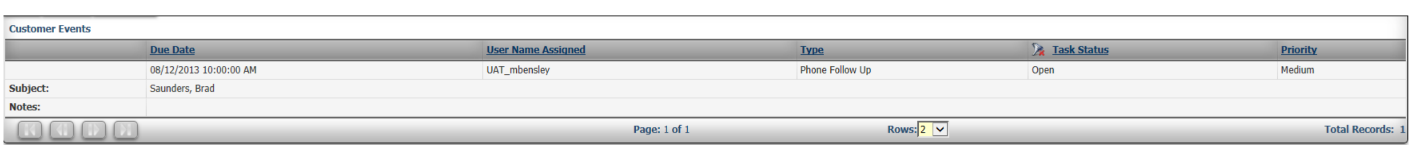
Located at the bottom of your screen is an array of different tabs providing additional information related to a customer.



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.

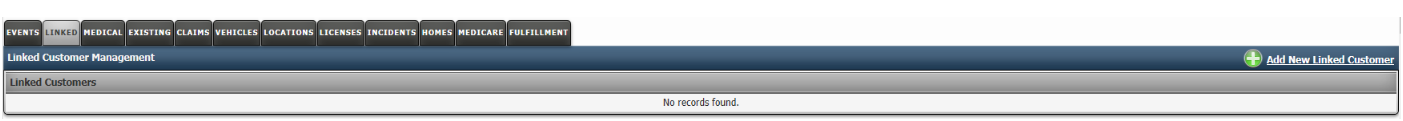
EVENTS

'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.



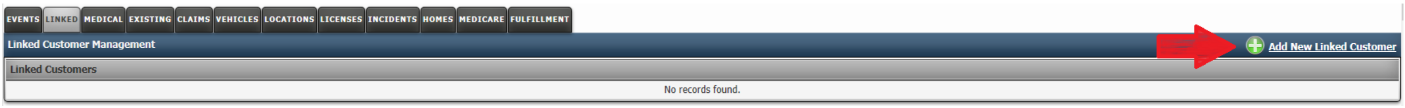
LINKED

'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.



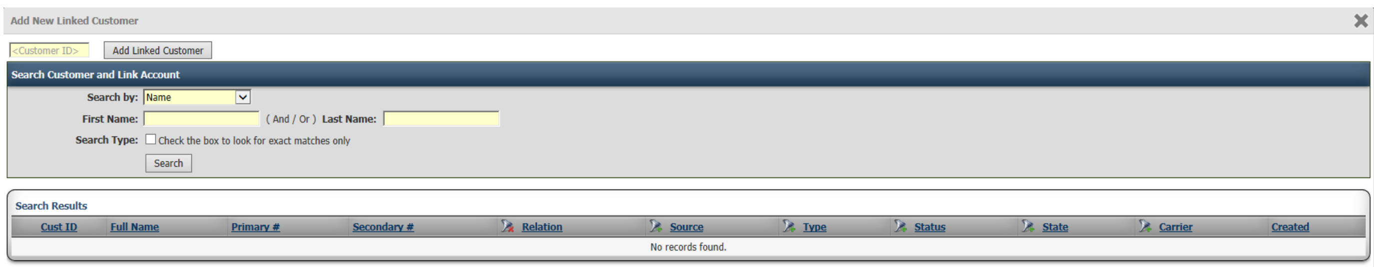
ADD LINKED CUSTOMER

Add a ‘Linked Customer’ to an open record by selecting the green plus sign and ‘Add New Linked Customer’ located in the blue hearder 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.

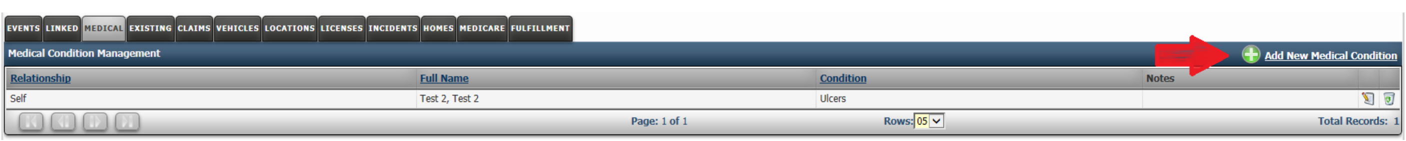


MEDICAL

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

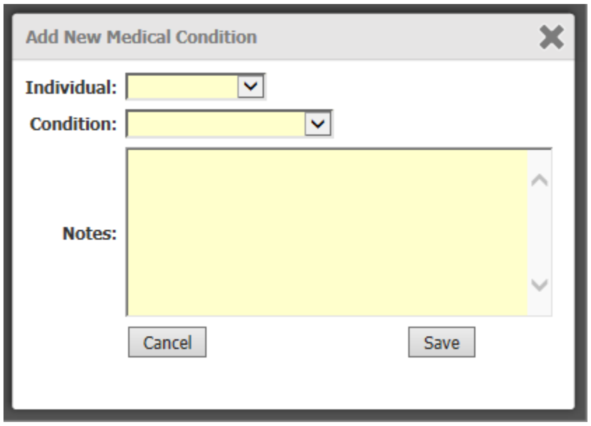
ADD MEDICAL CONDITION

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.



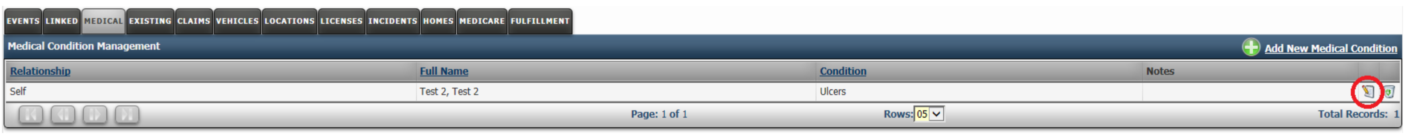
The Icon Looks Similar to this: 

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.



EDIT MEDICAL CONDITION

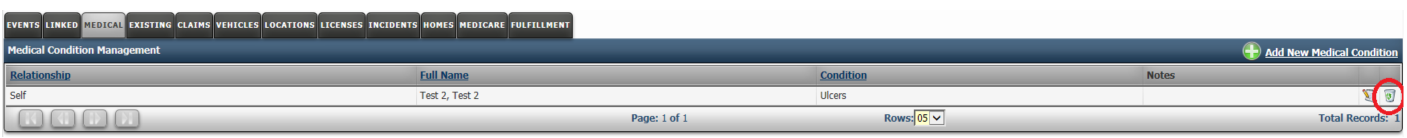
If a medical condition exists currently on a record, this can be edited. To edit information related to a medical condition, select the edit icon to the right of the condition.



The Icon Looks Similar to this: 

DELETE MEDICAL CONDITION

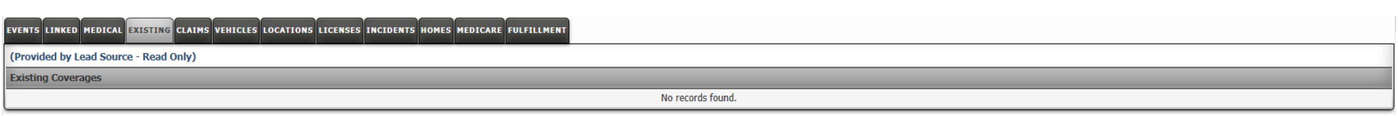
If for some reason a medical condition is no longer relevant to a customer, delete it. The icon is the trashcan located to the right of the condition.



The Icon Looks Similar to this: 

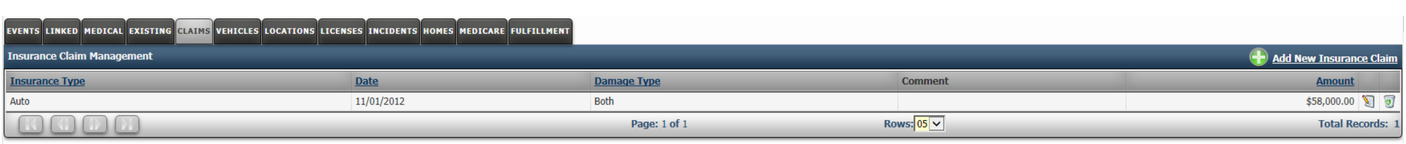
EXISTING

'Existing' displays any existing coverage associated with a lead. This is supplied once the lead is entered into the system and is a 'read-only' field.



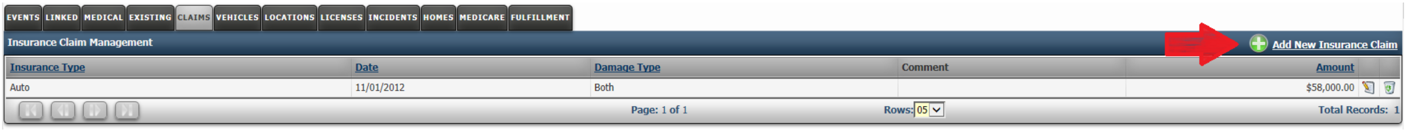
CLAIMS

'Claims' displays any known claims with a customer. Quickly view the insurance type, date damage and amount of claim.



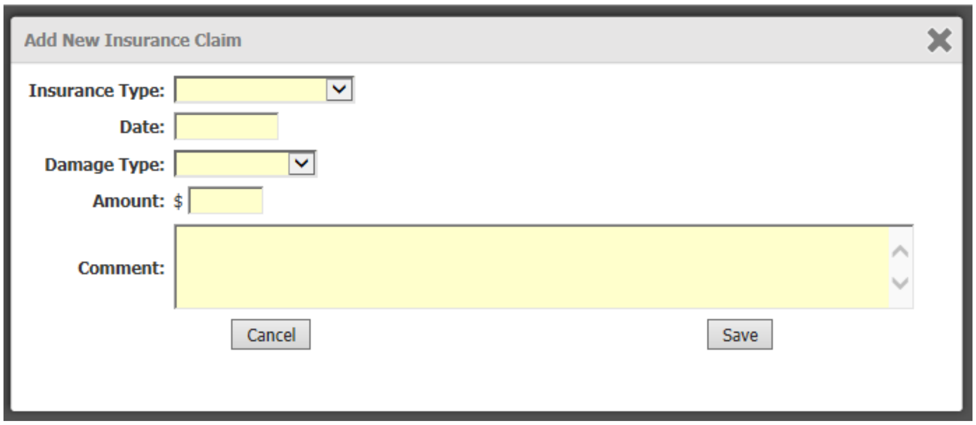
ADD CLAIM

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 insruance claim, date, type of damage and amount the claim paid out.



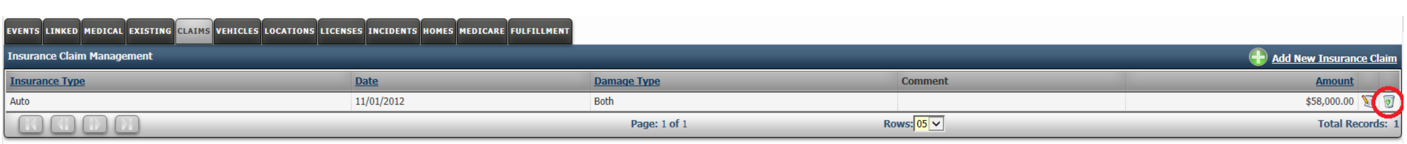
EDIT CLAIM

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

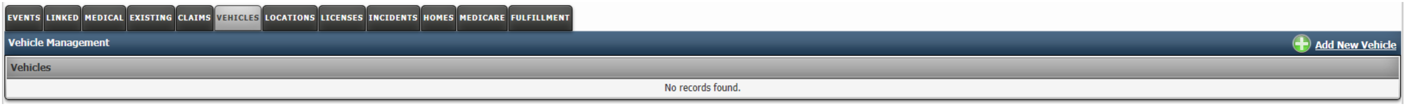
If a claim exists and is no longer relevant or perhaps inaccurate, a user can delete a claim. To do this select the delete icon located to the right of the claim.



The Icon Looks Similar to this: 

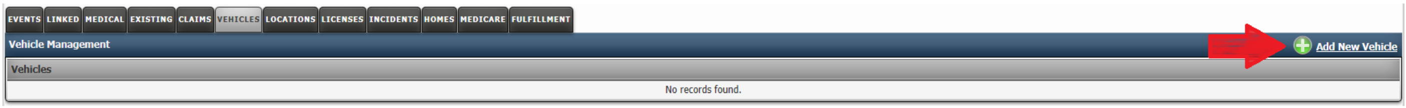
VEHICLES

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



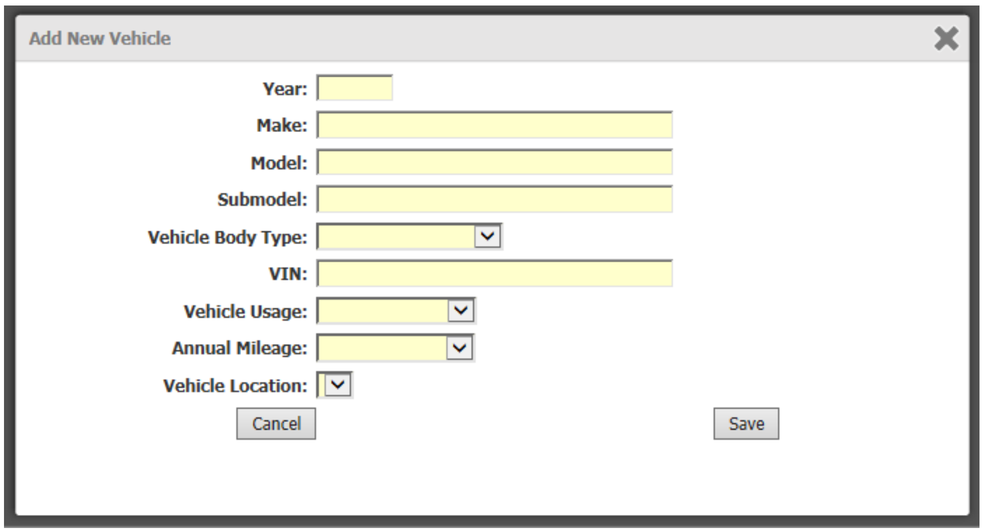
ADD VEHICLE

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



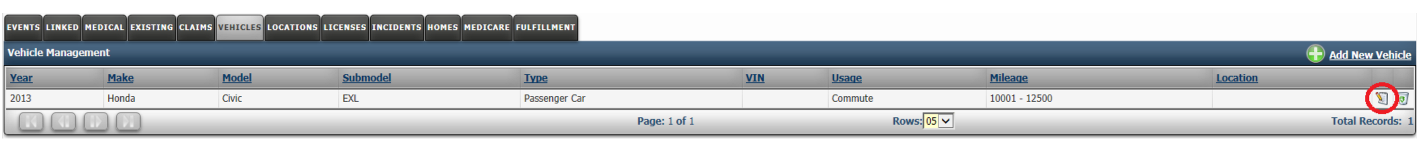
The Icon Looks Similar to this: 

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



EDIT VEHICLE

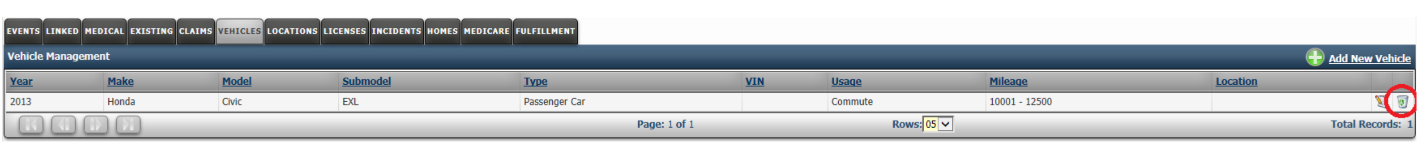
Easily edit an existing vehicle by selecting the edit icon located to the right of the vehicle.



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.



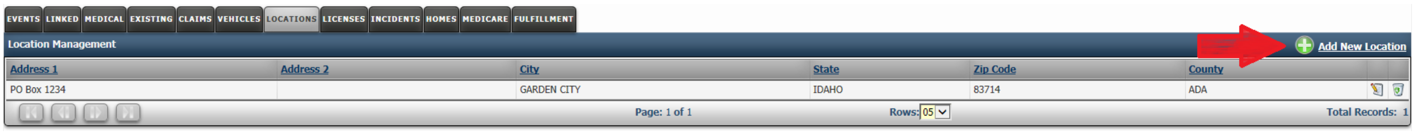
The Icon Looks Similar to this: 

LOCATIONS

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

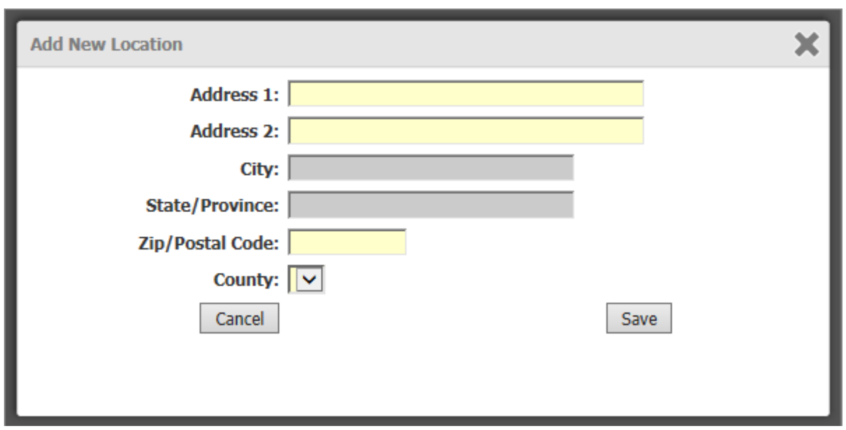
ADD LOCATION

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



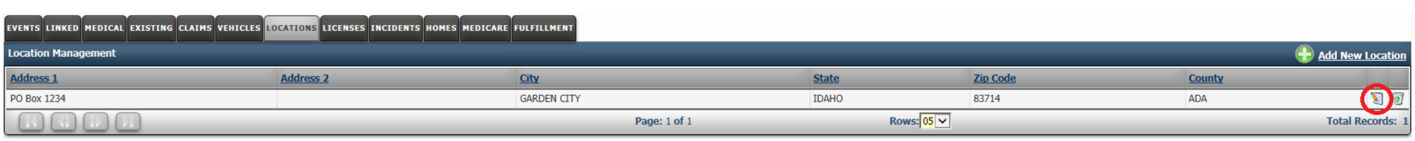
The Icon Looks Similar to this: 

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



EDIT LOCATION

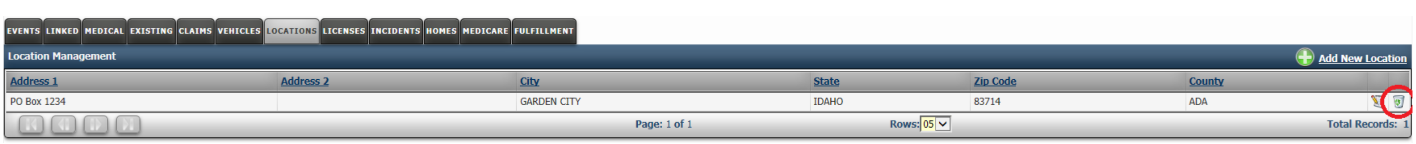
If a location address changes or it needs to be updated, select the edit icon located to the right of the address.



The Icon Looks Similar to this: 

DELETE LOCATION

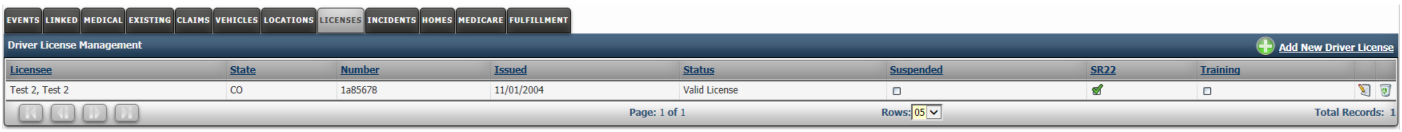
If a location no longer pertains to a customer, delete it by selection the delete icon located to the right of the address.



The Icon Looks Similar to this: 

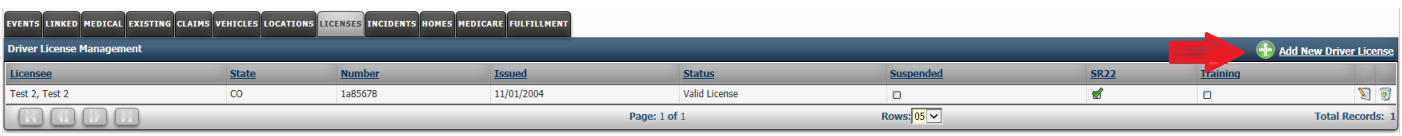
LICENSES

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



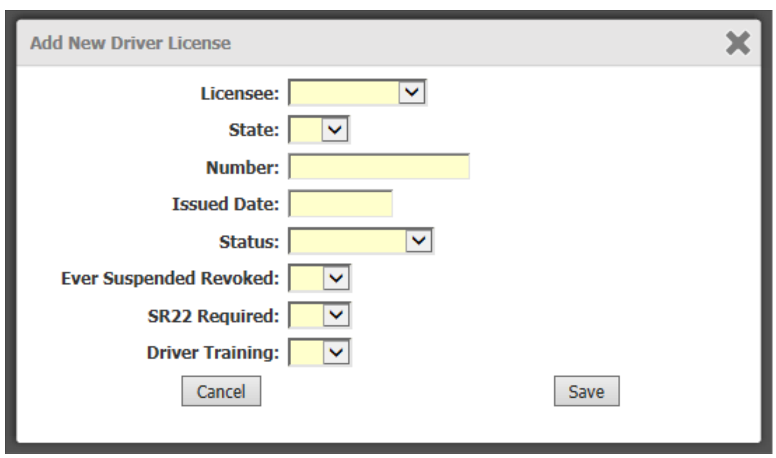
ADD LICENSE

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.



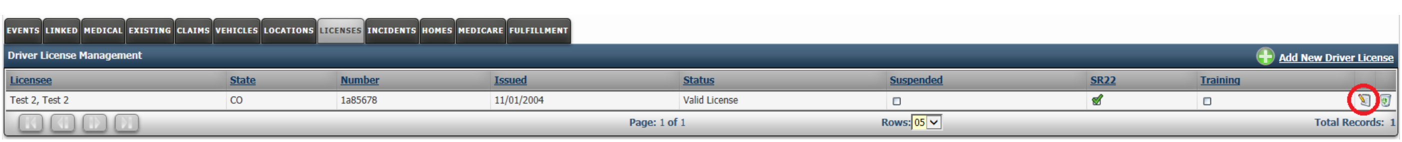
The Icon Looks Similar to this: 

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.



EDIT LICENSE

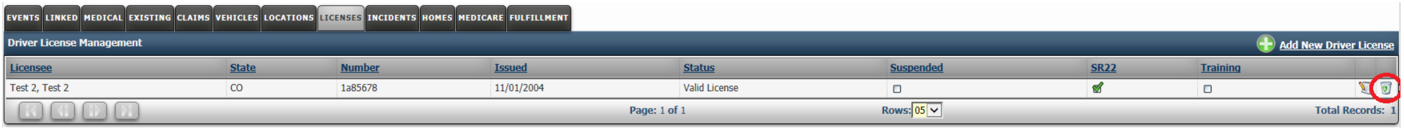
To edit a driver's license in the system, select the edit icon located to the right of the individuals name.



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.



The Icon Looks Similar to this: 

INCIDENTS

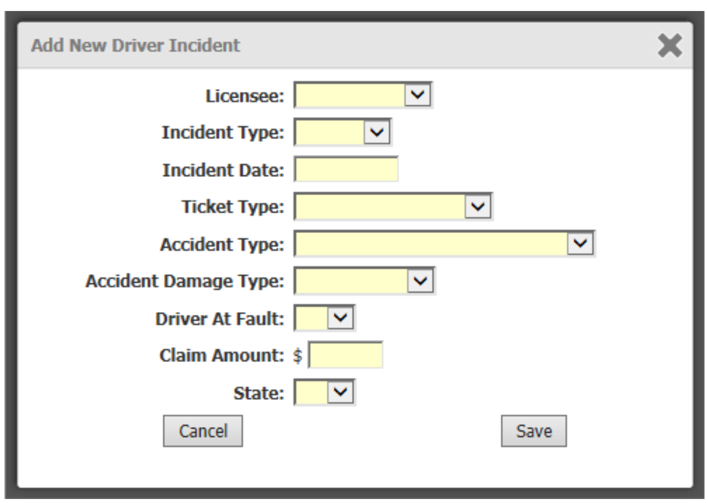
'Incidents' refers to any driving incident, such as a ticket or infraction, accident, or major moving violation, in relation to a user. View these by selecting 'Incidents'.

ADD INCIDENT

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

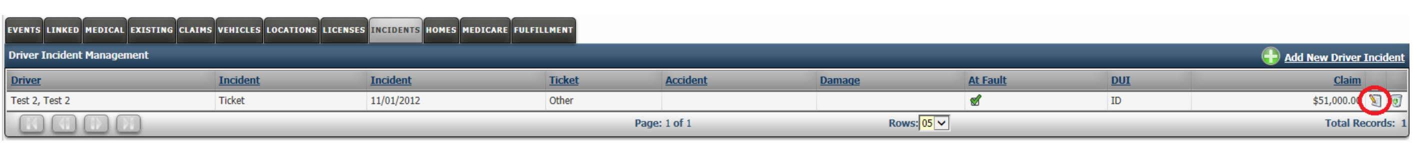
The Icon Looks Similar to this: 

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



EDIT INCIDENT

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



The Icon Looks Similar to this: 

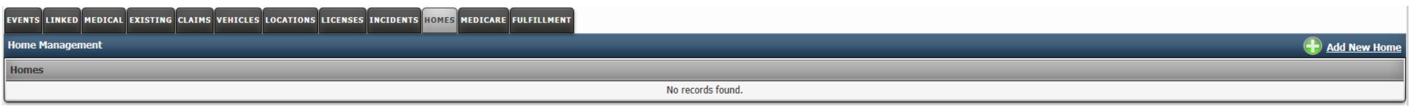
DELETE INCIDENT

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

The Icon Looks Similar to this: 

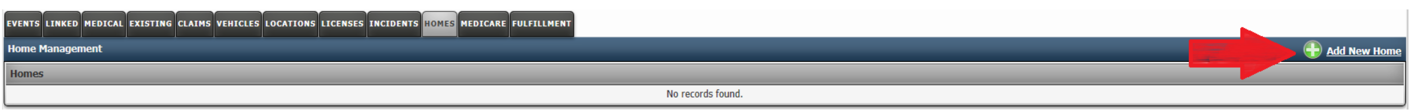
HOMES

‘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.



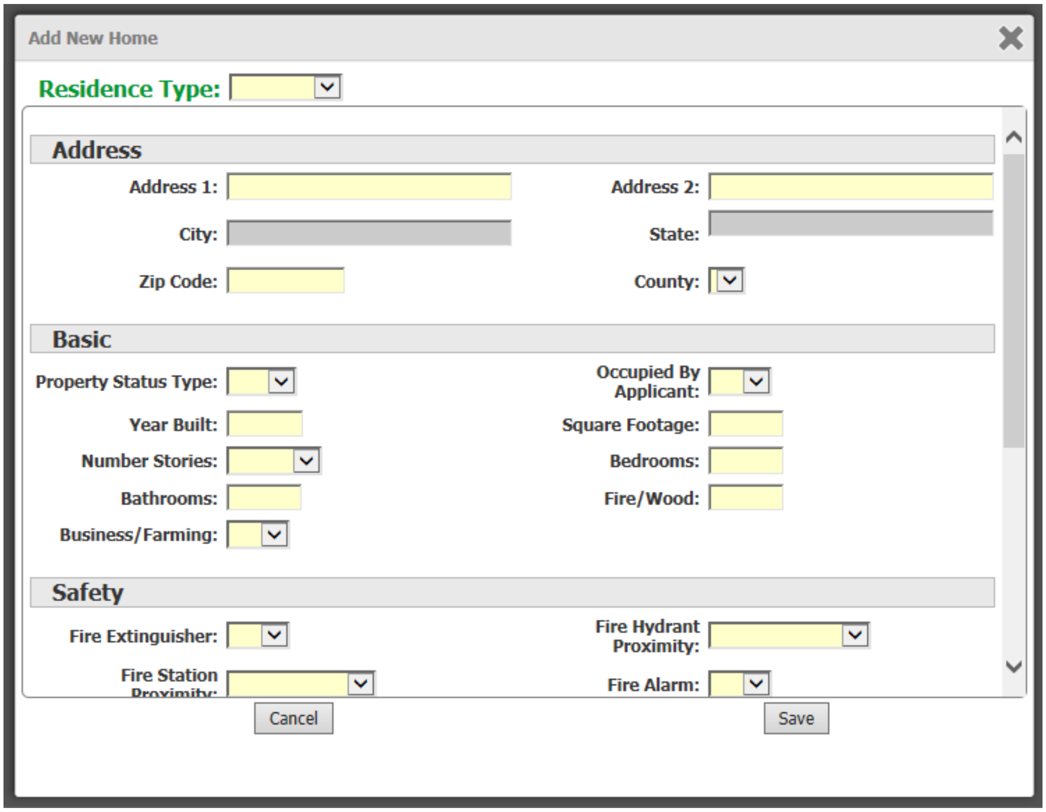
ADD HOME

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



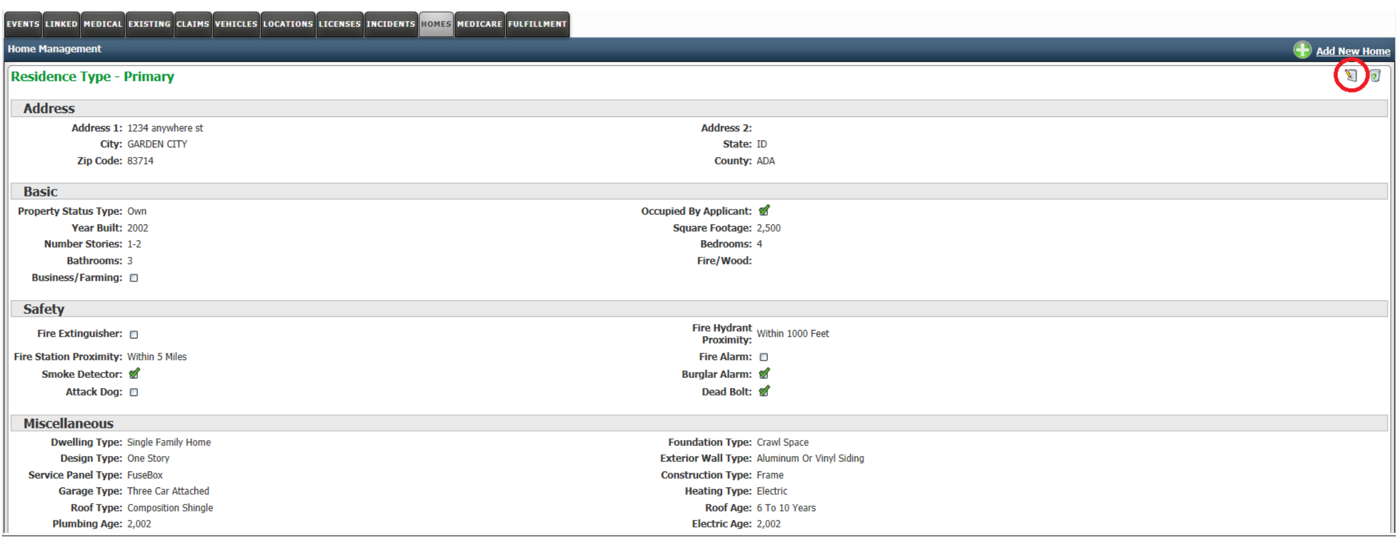
The Icon Looks Similar to this: 

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



EDIT HOME

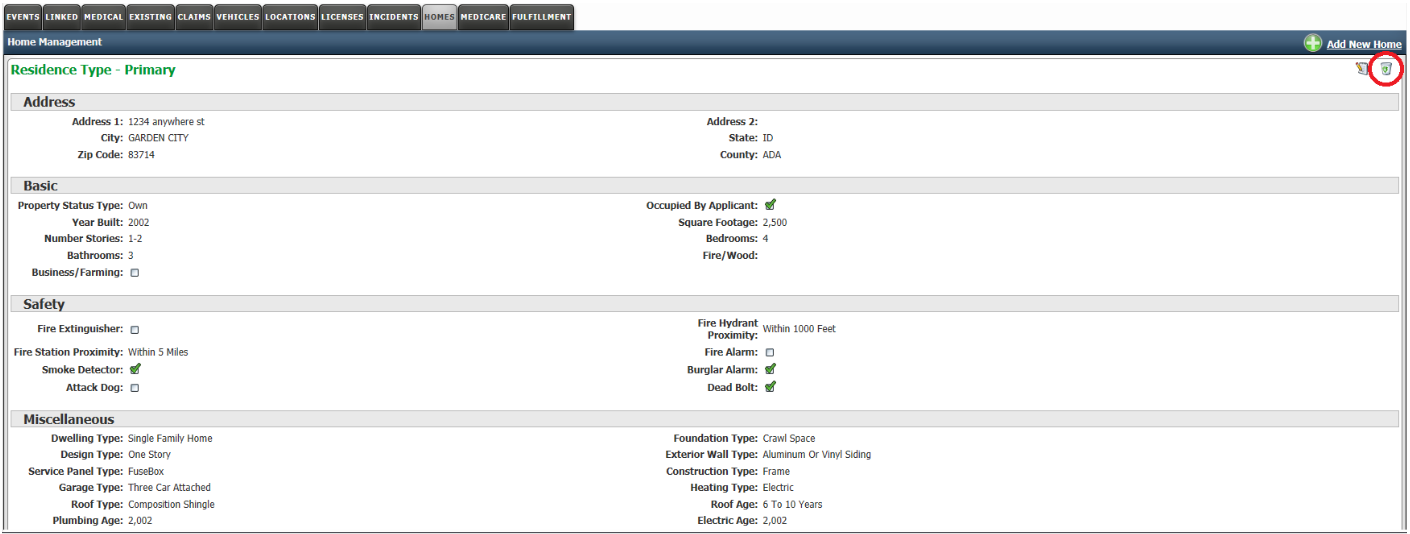
Quickly edit any information associated to a home by selecting the edit icon located towards right of 'Residence Type'.



The Icon Looks Similar to this: 

DELETE HOME

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



The Icon Looks Similar to this: 

MEDICARE

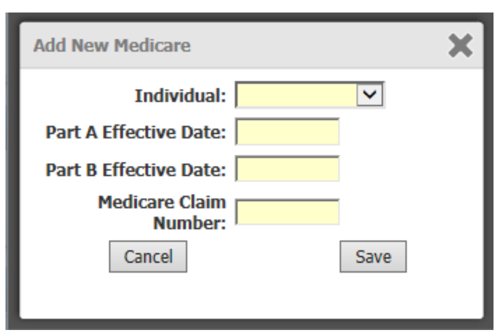
Medicare will display the prospects/customers Medicare number as well as Part A and Part B effective dates.

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.

The Icon Looks Similar to this: 

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



EDIT MEDICARE

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

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.

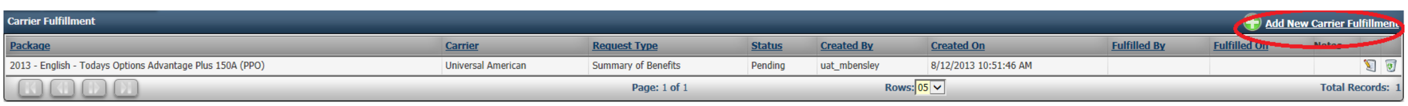
The Icon Looks Similar to this: 

FULFILLMENT

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

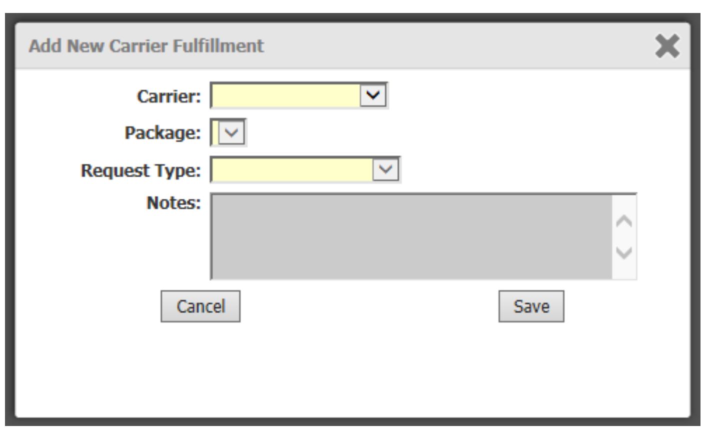
ADD FULFILLMENT

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.



The Icon Looks Similar to this: 

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



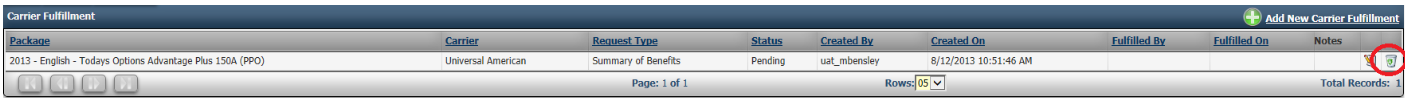
EDIT FULFILLMENT

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

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.

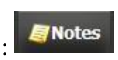


The Icon Looks Similar to this: 

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.

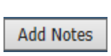
To view and leave notes on a particular record, select “Notes” on the right of a customer record.

The Icon Looks Similar to this: 

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

Easily scroll through any existing notes.

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

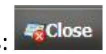


CLOSING A CUSTOMER

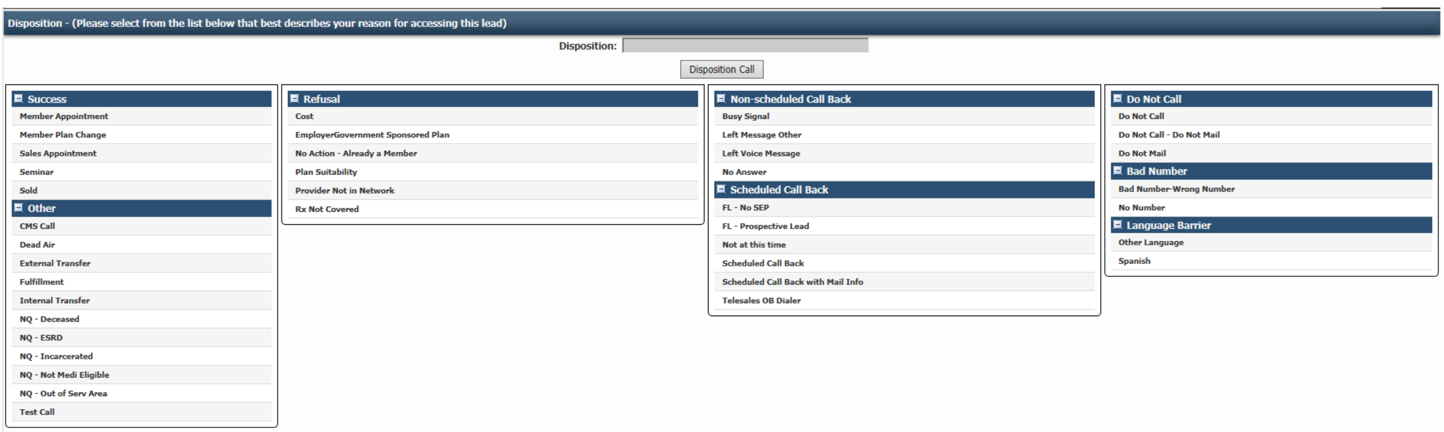
To close a customer there are two steps to address. The first is if a product was presented.

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.

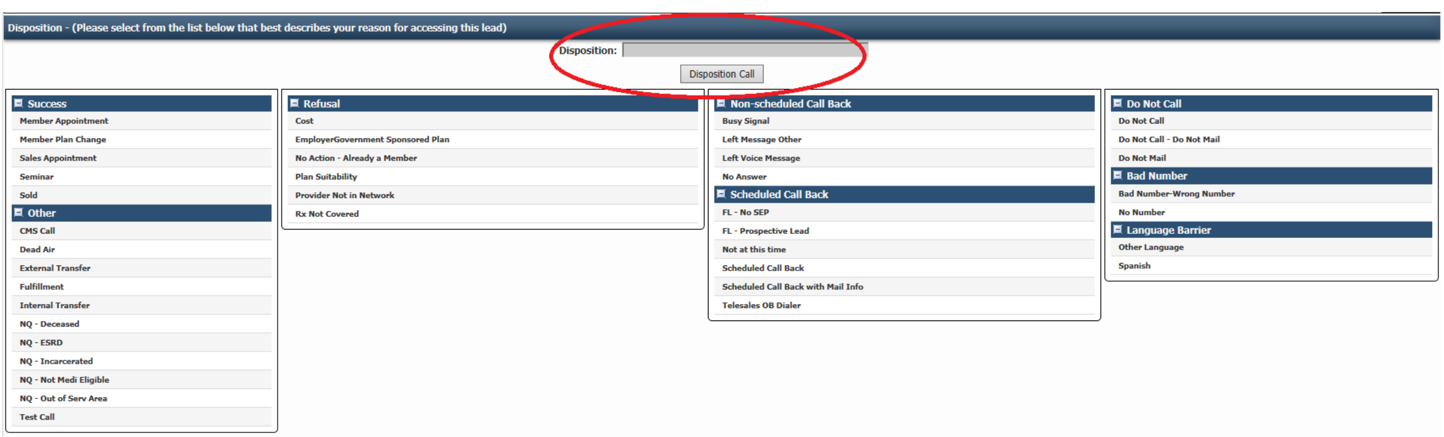
The second part of closing a customer is selecting “Close” to the right of ‘Presented’ on a customer record.

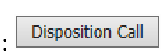
The Icon Looks Similar to this: 

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



Once the disposition is selected, it will populate next to ‘Disposition:’ and then select “Disposition Call”. The record will then be closed.

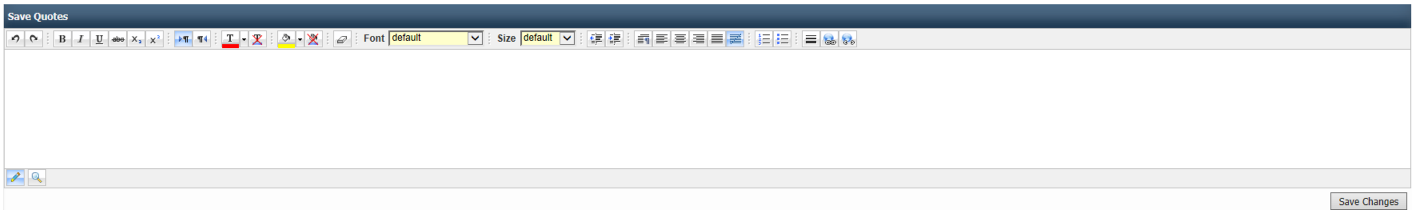


The Icon Looks Similar to this: 

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.

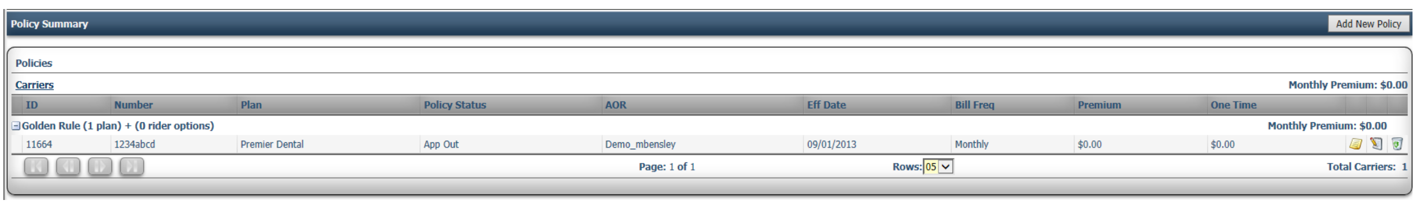


Once information is entered in the text box, be sure to select "Save Changes" at the bottom.

POLICIES

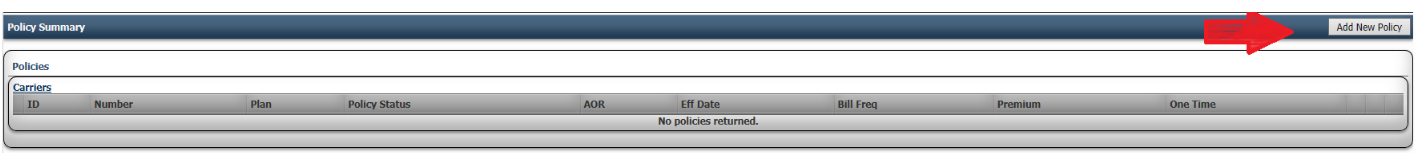
Policies view allows a user to see any policies a customer has, add new policies or edit existing policies.

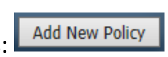
To do this, select "Policies" on the left hand side.



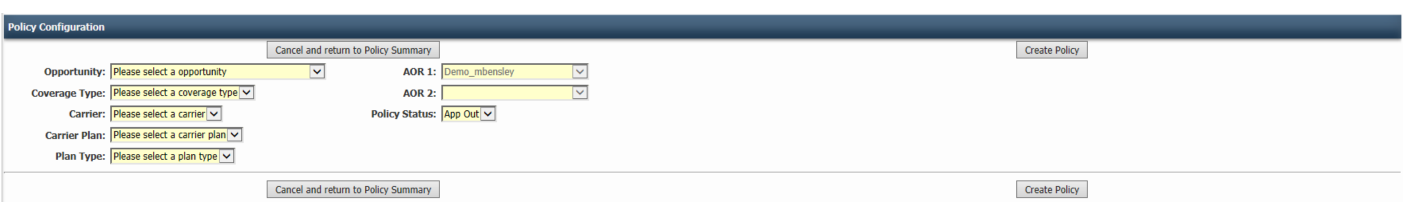
ADD NEW POLICY

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



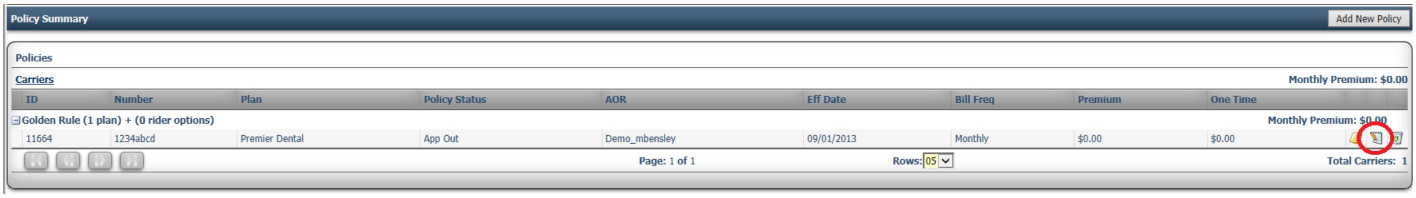
The Icon Looks Similar to this: 

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



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.



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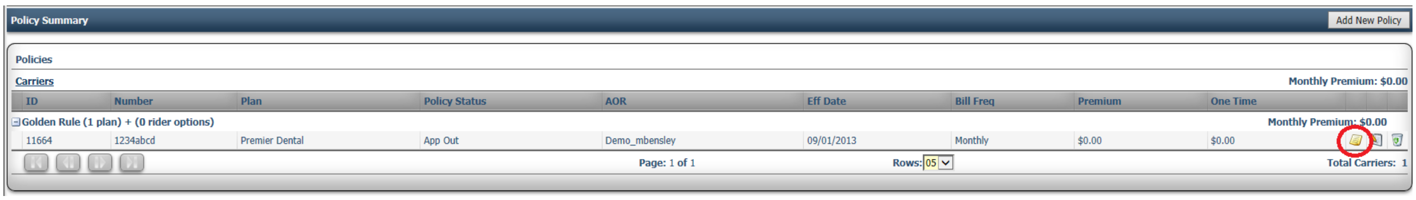
ADD NOTES TO EXISTING POLICY

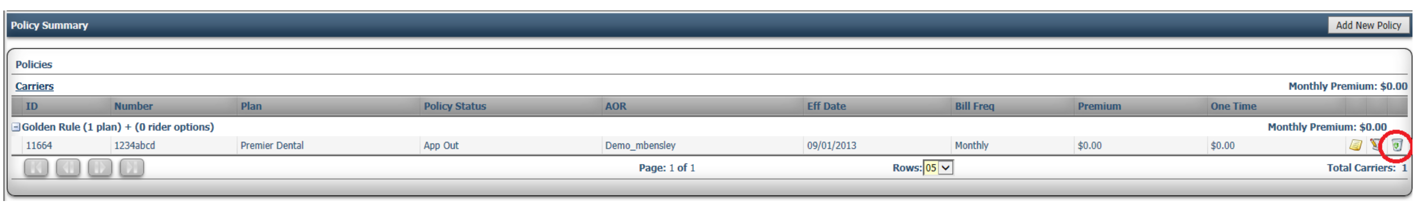
Provide comments, notes details in regards to a policy by selecting the 'Notes' icon located to the right of the policy.



The Icon Looks Similar to this: 

DELETE EXISTING POLICY

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

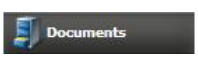


The Icon Looks Similar to this: 

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"

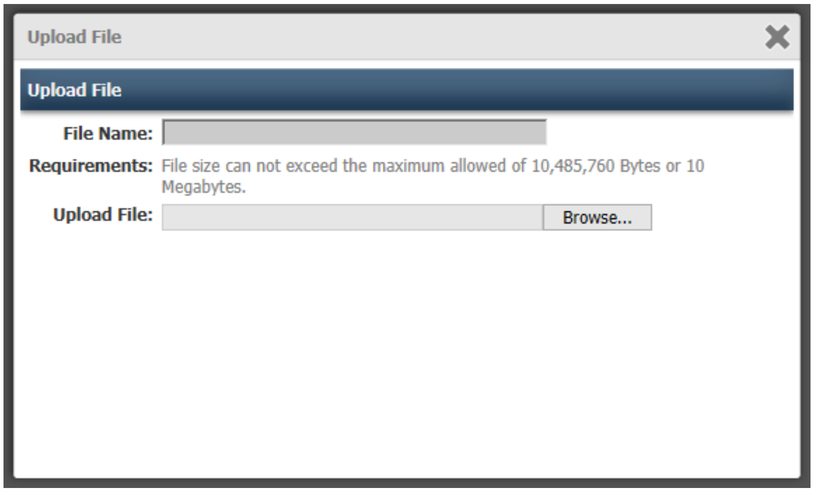


To view files located within a folder, select the folder. Any saved documents will appear, once open.

UPLOAD FILE

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

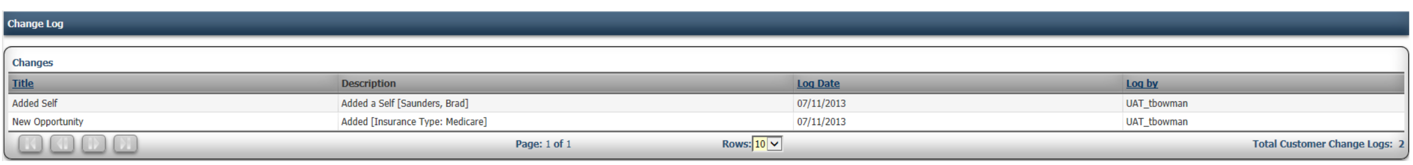
Once selected, the following popup box will appear.



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”

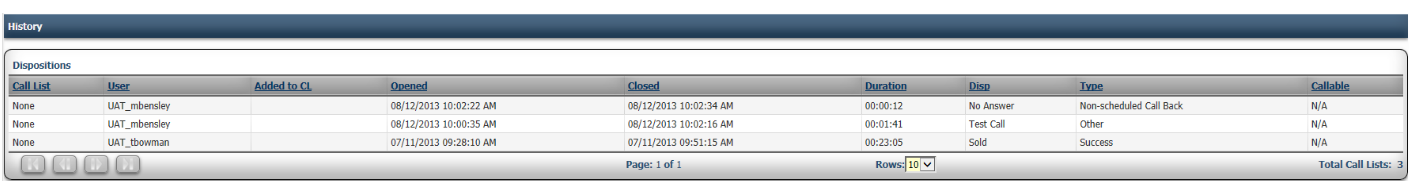


Title	Description	Log Date	Log by
Added Self	Added a Self [Saunders, Brad]	07/11/2013	UAT_tbowman
New Opportunity	Added [Insurance Type: Medicare]	07/11/2013	UAT_tbowman

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.

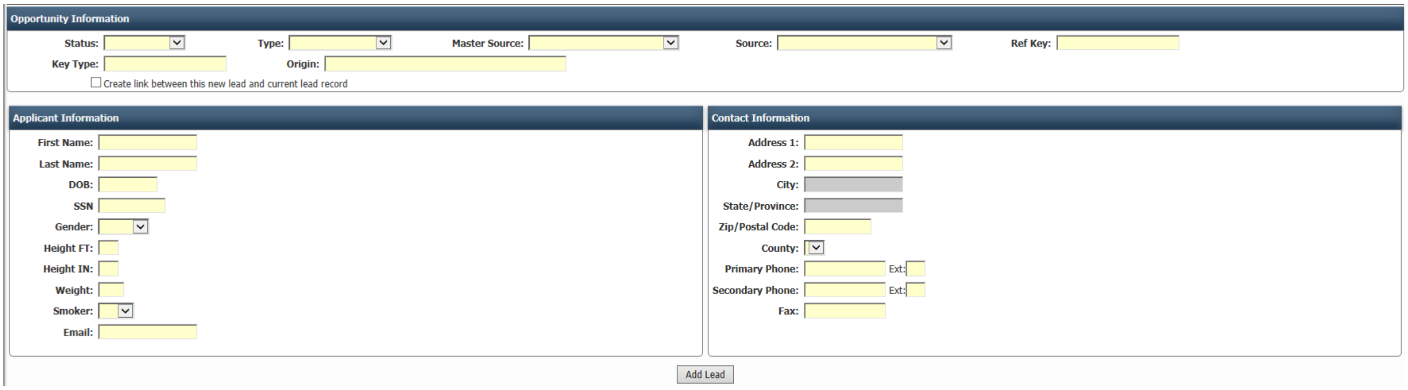
To access History within a customer record Select “History”



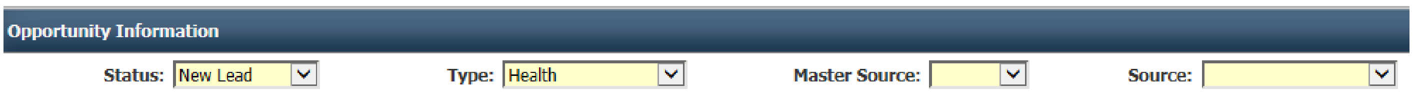
Call List	User	Added to CL	Opened	Closed	Duration	Disp	Type	Callable
None	UAT_mbensley		08/12/2013 10:02:22 AM	08/12/2013 10:02:34 AM	00:00:12	No Answer	Non-scheduled Call Back	N/A
None	UAT_mbensley		08/12/2013 10:00:35 AM	08/12/2013 10:02:16 AM	00:01:41	Test Call	Other	N/A
None	UAT_tbowman		07/11/2013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

NEW CUSTOMER

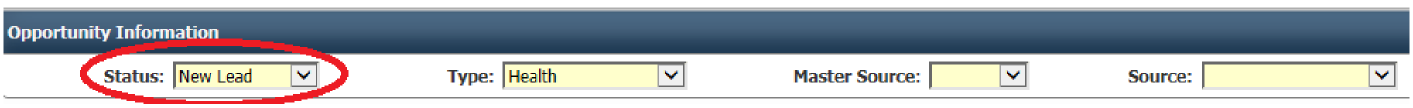
Select “New Customer”



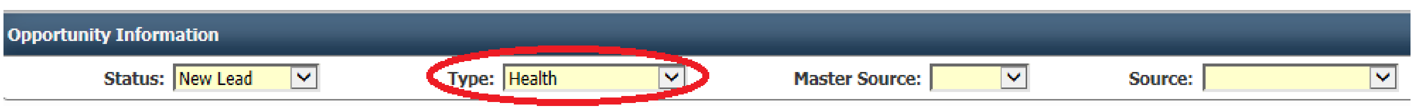
To add a new customer enter the pertinent information in the "Opportunity Information" box.



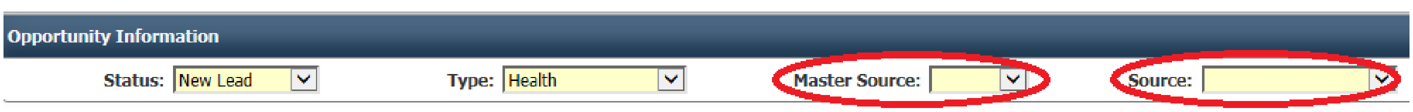
Status corresponds to the status of the new opportunity being assigned to this customer.



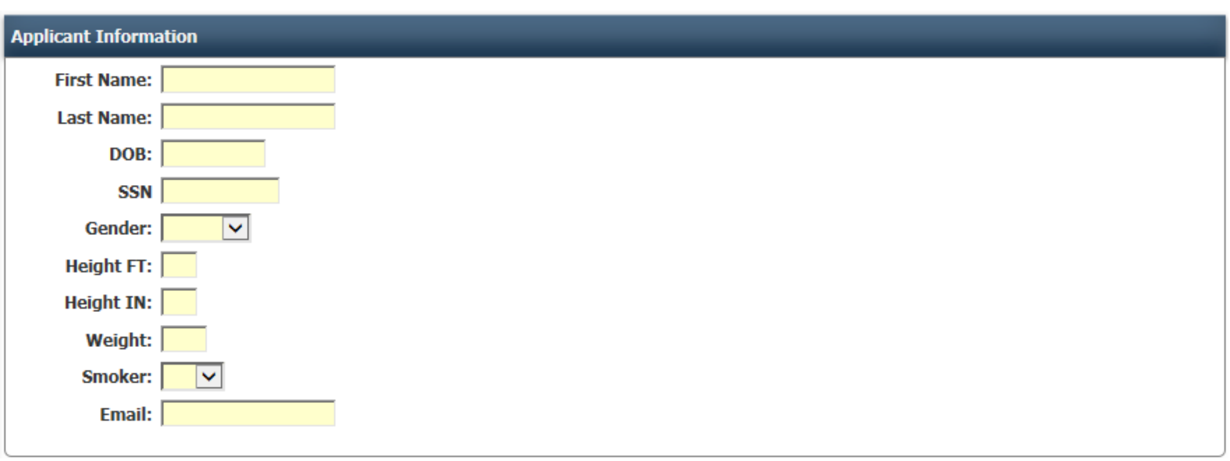
Type displays what type of opportunity is being assigned to the customer. Type is defined as the type of insurance in which is being sold such as health, auto, property, prescription, etc.



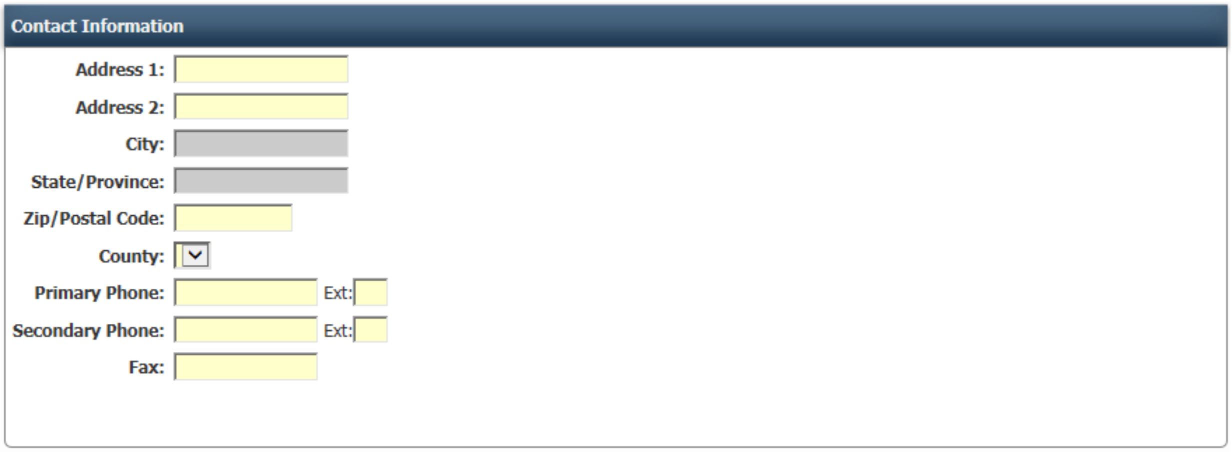
Master Source and Source dictate where the customer is coming from. Is this customer a call in? A mailer? Etc.



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.



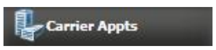
The last box is where contact information is provided. Here, supply the address and phone numbers to reach a customer.



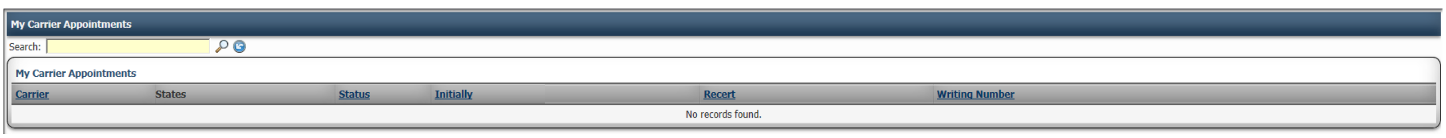
Once complete, select “Add Lead”

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.



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

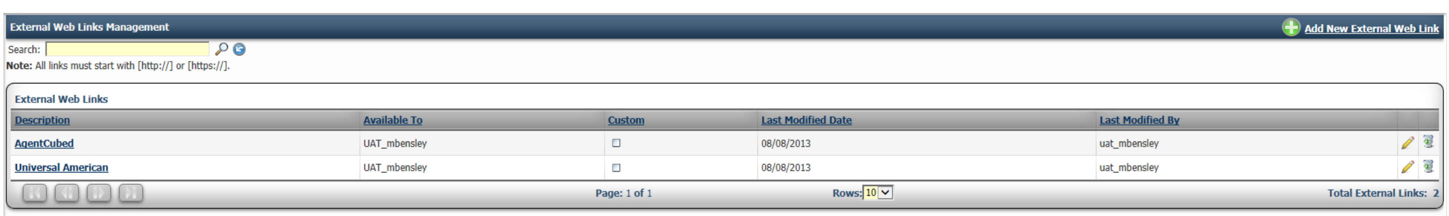


WEB LINKS

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.

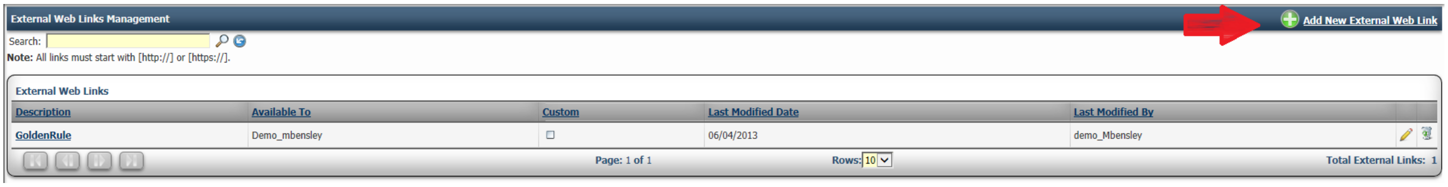
Select “Web Links”

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.

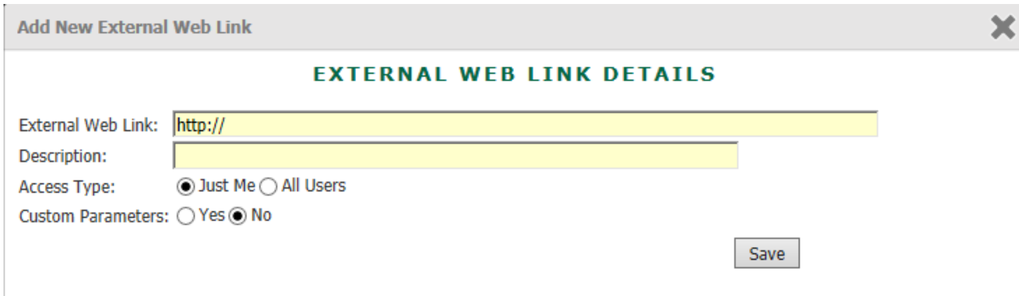


ADD WEB LINK

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.

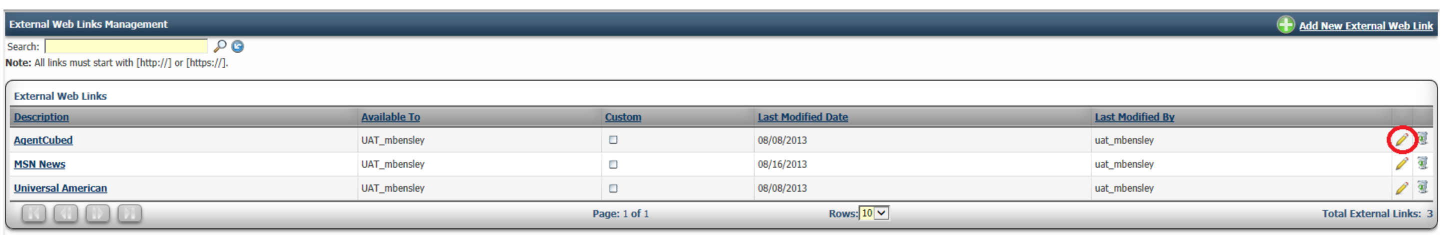


When creating a Web Link, provide the http address, a short description and who has access to the link. A user has the ability to keep a link private or share access with all users within the AgentCubed platform.

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.

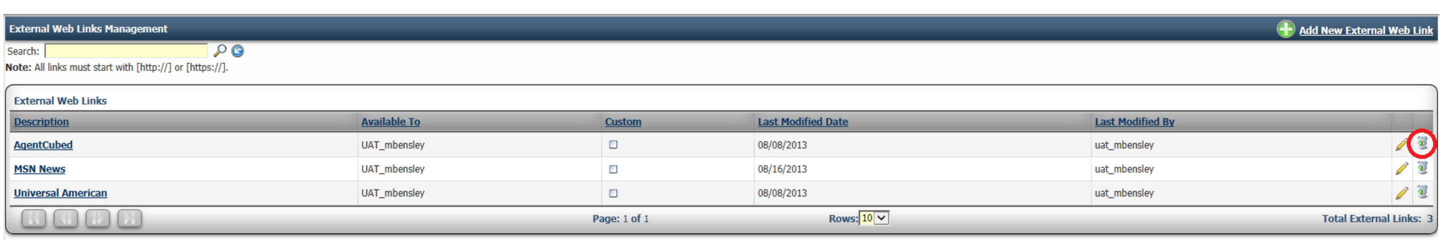


The Icon Looks Similar to this: 

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: 

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.