



Client QuickLoad User Guide

- Load Client(s)
- New/Clear All
- Copy Client(s)
- Open Client Manager
- Save All
- Reset Client to Default Answers
- Email Illustration

Load Client(s):

Using the QuickLoad Clients Dialog

Group By: Category Search: []

<input type="checkbox"/>	Client List Five	10
<input type="checkbox"/>	Client List Four	10
<input type="checkbox"/>	Client List One	10
<input type="checkbox"/>	Client List Six	10
<input type="checkbox"/>	Client List Three	10
<input type="checkbox"/>	Client List Two	10

[UnCheck All](#) Remove Current Clients

Clients:

Please select a company and product.

To Open the QuickLoad Clients Dialog;
Click on the Load Clients Menu Option
or Navigate to the Client Menu and
Click on Load Client(s)

Click to Close the
Dialog and Go Back to
the Previous Screen

Product:

Company:
None Selected

Product:
None Selected

Concept:
NONE

Clients:

Please select a company and product.

Load Client(s):

Viewing your Saved Clients

Group By: Category Search:

<input type="checkbox"/>	Client List Five	10
<input type="checkbox"/>	Client List Four	10
<input type="checkbox"/>	Client List One	10
<input type="checkbox"/>	Client List Six	10
<input type="checkbox"/>	Client List Three	10
<input type="checkbox"/>	Client List Two	10

[UnCheck All](#)

Remove Current Clients

Each Group Listing Includes the Number of Clients

The QuickLoad Clients Dialog Displays All Saved Clients from your Client Manager - Active Clients List.
Note: Archived or Deleted Clients are Only Available in the Client Manager.

Product: **Change**

Company:
None Selected

Product:
None Selected

Concept:
NONE

Clients:

Please select a company and product.

Load Client(s):

Grouping your Client List

Group By: **Category** Search:

<input type="checkbox"/>	Client List Five	Company	10
<input type="checkbox"/>	Client List Four	Product	10
<input type="checkbox"/>	Client List One	Date	10
<input type="checkbox"/>	Client List Six	Client Name	10
<input type="checkbox"/>	Client List Three		10
<input type="checkbox"/>	Client List Two		10

[UnCheck All](#) **Load Client(s)** Remove Current Clients

Clients can be Grouped by Category, Company, Product, Date or Client Name

Product: **Change**

Company:
None Selected

Product:
None Selected

Concept:
NONE

Clients:

Please select a company and product.

Load Client(s):

Searching your Client List

Use the Text Search to Find Specific Clients

Click to Search

Click to Clear Search

Group By: Category Search: Client List Three

<input type="checkbox"/> Client List Three	10
--	----

UnCheck All

Load Client(s) Remove Current Clients

Product: **Change**



Company:
None Selected
Product:
None Selected
Concept:

Load Client(s):

Refresh the QuickLoad Client Dialog

Group By: Category Search: [input] [magnifying glass] [close]

<input type="checkbox"/>	Client List Five	10
<input type="checkbox"/>	Client List Four	10
<input type="checkbox"/>	Client List One	10
<input type="checkbox"/>	Client List Six	10
<input type="checkbox"/>	Client List Three	10
<input type="checkbox"/>	Client List Two	10

Click to Reload/Refresh

Load Client(s) Remove Current Clients

Clients:

Save Copy Remove Sort

Save Compare Composite Cancel

Save As **Client Name/Company - Product**

<input checked="" type="checkbox"/>	1	[Six Client Name]	AIG Life Brokerage - ContinUL Extend
<input checked="" type="checkbox"/>	2	[Six Client Name]	Aviva Life and Annuity Company Advantage Builder Series II
<input checked="" type="checkbox"/>	3	[Six Client Name]	Banner Life - Banner Life Umbrella UL 120
<input checked="" type="checkbox"/>	4	[Six Client Name]	ING - ING Indexed UL-CV
<input checked="" type="checkbox"/>	5	[Six Client Name]	Lincoln Life - Lincoln LifeCurrent UL
<input checked="" type="checkbox"/>	6	[Six Client Name]	MassMutual Universal Life Navigator (UL Nav)
<input checked="" type="checkbox"/>	7	[Six Client Name]	Mutual of Omaha - Companion Life Legacy SPL v1.00
<input checked="" type="checkbox"/>	8	[Six Client Name]	Phoenix - Phoenix UL with Guarantee
<input checked="" type="checkbox"/>	9	[Six Client Name]	Principal Life - Universal Life Flex
<input checked="" type="checkbox"/>	10	[Six Client Name]	Prudential - PruLife UL Plus (2001 CSO)

After Saving a New Group of Clients to the Client Manager, you must Reload/Refresh the QuickLoad Client Dialog to Add the New Clients to the List

Product:

- Calc
- Input
- Composite
- Multiplan Presentation
- Settings
- none selected



Concept:

Clients:

Please select a company and product

Load Client(s):

QuickLoad Dialog Preferences

The QuickLoad Client Dialog can be Configured to Open when WinFlex Web Starts Up by Navigating to the View Menu and Clicking on Settings

Group By: Category Search: [input] [magnifying glass] [close]

<input type="checkbox"/> Client List Five	10
<input type="checkbox"/> Client List Four	10
<input type="checkbox"/> Client List One	10
<input type="checkbox"/> Client List Six	10
<input type="checkbox"/> Client List Three	10
<input type="checkbox"/> Client List Two	10

[UnCheck All](#)

Remove Current Clients



More information is available at:

http://66.133.101.82/admin_help.htm