

Client Manager Features

- View and Manage all Clients in a Single Interface
 - New Versatile Client Manager Tool no more 'cases' to manage.
 - Group Clients by User-Defined Categories
 - Delete and Archive Clients
 - Import and Export Clients
 - Share Clients with Other Users
 - View Helpful User Notes at the bottom of every screen and from the Help Menu

HOME

- Start WinFlex Web
- WinFlex Express
- WinFlex Web Home
- Logout
- IFX Clients
- IFX Edit

MANAGE

- Cases
- Agents
- Groups
- Profile

CARRIER INFO

- Request a Carrier
- Carrier/Contacts
 Technical Support
- Technical Support

TOOLS

Integrate Vitalsigns

GENERAL INFO

- Getting Started
- System Requirements
- Features
 Frequently Asked Questions
- Frequency Asked Quesci
 Feedback New
- WF Express Help
- General Help

EbixExchange Inc. 1441 West Ute Blvd. Suite 340 Park City, UT 84098



START WINFLEX WEB

- Fully customizable illustrations
 All product riders and features
- An product nuels and
 Product comparisons

WinFlex Web

- Advanced sales concepts
- Fully compliant illustrations

Open Last-Used Case (JH_All_Products) Refresh

WinFlex Express

- Basic product input (no additional riders or features)
- 🔹 Easy, quick product comparisons
- Fully compliant illustrations

Participating Carriers See Profile for a list of your approved carriers or to request additional carriers.

- AIG American General
- Allianz

WINFLEX

EXPRESS

Find out more

- AXA Equitable
- Bankers Life of NY
- Genworth Life and Annuity Insurance Company Annuity Insurance
- Genworth Life Insurance Company 👩
- Genworth Life Insurance Company of New York A
- Genworth Life of New York 🝙
- Genworth Life & Annuity 👝
- Indianapolis Life
- ING
- Jefferson Pilot Financial
- John Hancock
- 🔹 Lincoln Benefit Life 🔒

Click here for information on how to request access to these carriers!

What's New/Updates

Lincoln Life

- MassMutual
- MetLife

Page:

- MetLife Investors
- Mutual of Omaha Companion Life
- Mutual of Omaha Health
- Mutual of Omaha United of Omaha
- Nationwide
- Pacific Life
- Phoenix
- Principal Financial Group
- · Protective Life
- · Protective Life & Annuity (NY only)
- Prudential
- Sun Life
- Transamerica
- West Coast Life Ins. Co.

The Minimum Java plug-in requirement for WinFlex Web is 1.6 Download latest Java Platform

Begin on the Winflex Web Home

1. Select 'Start Winflex Web'



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HOME | HELP | EDIT | LOGOUT WinFlex Web Group By: None -Search For: In Columns: All **T** Note 1 of 1 🕨 🚺 Manage Clients The Client List now displays the clients that were ۸ Name / Illus. Undelete Clients selected to Delete from the previous screen. Expand All | Collapse Select clients to undelete in the client list by checking the checkbox in the first column. Client Client, Client John Hancod Accumulation 45 1/7/2008 1:3 1000000 Joe Smith Client Undelete Permanently Delete Clients Select clients to permanently delete in the client list by checking the checkbox If you want to Undelete or Permanently Delete: in the first column. **Permanently Delete** 1. Select the Clients you would like to 'Undelete' Standard/Archived Clients and they will return to the 'Standard' Client Choose an option below to manage List. standard or archived clients. Click here to show STANDARD clients. 2. You can 'Permanently Delete' selected Clients here – use with caution! Click here to show ARCHIVED clients. **3.** Return to the previous screen of 'Manage Notes: **Clients' from here.** 🖄 Filter Clients Client Notes (Client, Client) New Case 🟹 Import/Export Clients Edit Note Assign Categories/User Groups 🔄 Send Clients

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Rows per page determines how many client rows are displayed on each page of the grid. A value from 10 to 25 is recommended to maintain go performance.

Click Save Options to save all options such as Rows per Page, Sort Order, and Grouping.

Enhanced Client Manager Features

- Filter/Clear Clients
 - Easily select clients to view based on any text
- Import/Export Clients
 - Inforce clients
 - Sharing of Clients among groups
- Assign Categories/Groups to Clients
 - User defined categories for ease of use
- Send Client Info
 - Send Clients to other Winflex Users
 - Email Illustrations

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Rows per page determines how many client rows are displayed on each page of the grid. A value from 10 to 25 is recommended to maintain good performance.

Click **Save Options** to save all options such as Rows per Page, Sort Order, and Grouping.

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2 Options		To delet have be	o delete a client or clients, select the client(s) you wish to delete by checking the checkbox in the first column of the client in the client manager. When all clie ave been selected, click the Delete button in the Manage Clients panel.											clients	

Conclusion

Thank you for taking the time to preview these slides and we hope you will now take advantage of all the great features within Client Manager.

Please contact your carrier for further assistance.