EBIX EXCHANGE

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

WinFlex Web

Welcome Jauna DuPratt
March 7, 2008

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

TOOLS
- Integrate Vitalsigns

GENERAL INFO
- Getting Started
- System Requirements
- Features
- Frequently Asked Questions
- Feedback New
- WF Express Help
- General Help

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

An EBIX Company

1

START WINFLEX WEB

WinFlex Web
- Fully customizable illustrations
- All product riders and features
- Product comparisons
- Advanced sales concepts
- Fully compliant illustrations

Begin on the Winflex Web Home Page:

1. Select 'Start Winflex Web'

☐ Open Last-Used Case (JH_All_Products) Refresh

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

WINFLEX EXPRESS

Find out more

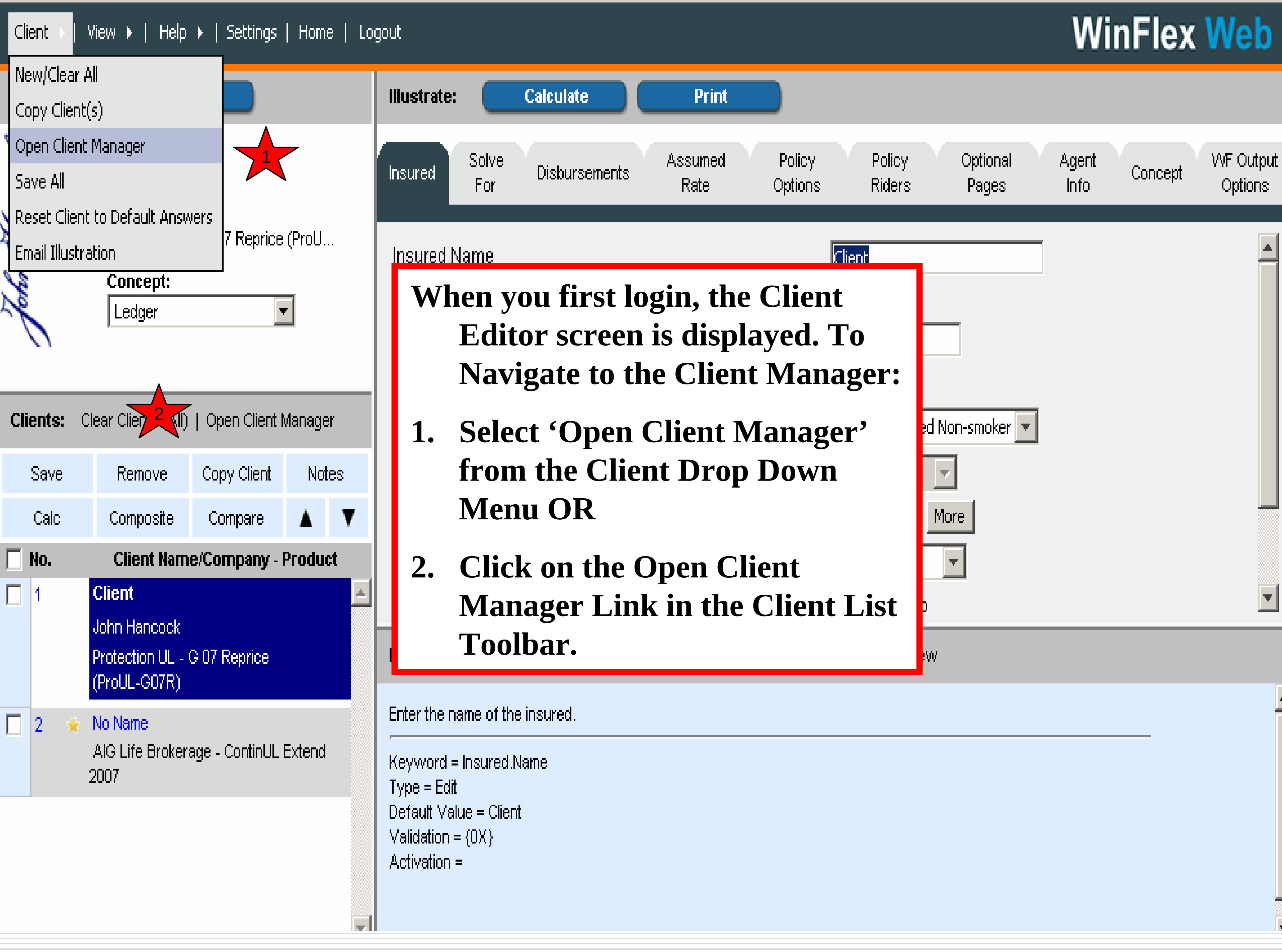
WinFlex Express
- Basic product input (no additional riders or features)
- Easy, quick product comparisons
- Fully compliant illustrations

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

- AIG American General
- Allianz
- AXA Equitable
- Bankers Life of NY
- Genworth Life and Annuity Insurance Company
- Genworth Life Insurance Company
- Genworth Life Insurance Company of New York
- Genworth Life of New York
- Genworth Life & Annuity
- Indianapolis Life
- ING
- Jefferson Pilot Financial
- John Hancock
- Lincoln Benefit Life
- Lincoln Life
- MassMutual
- MetLife
- 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.

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

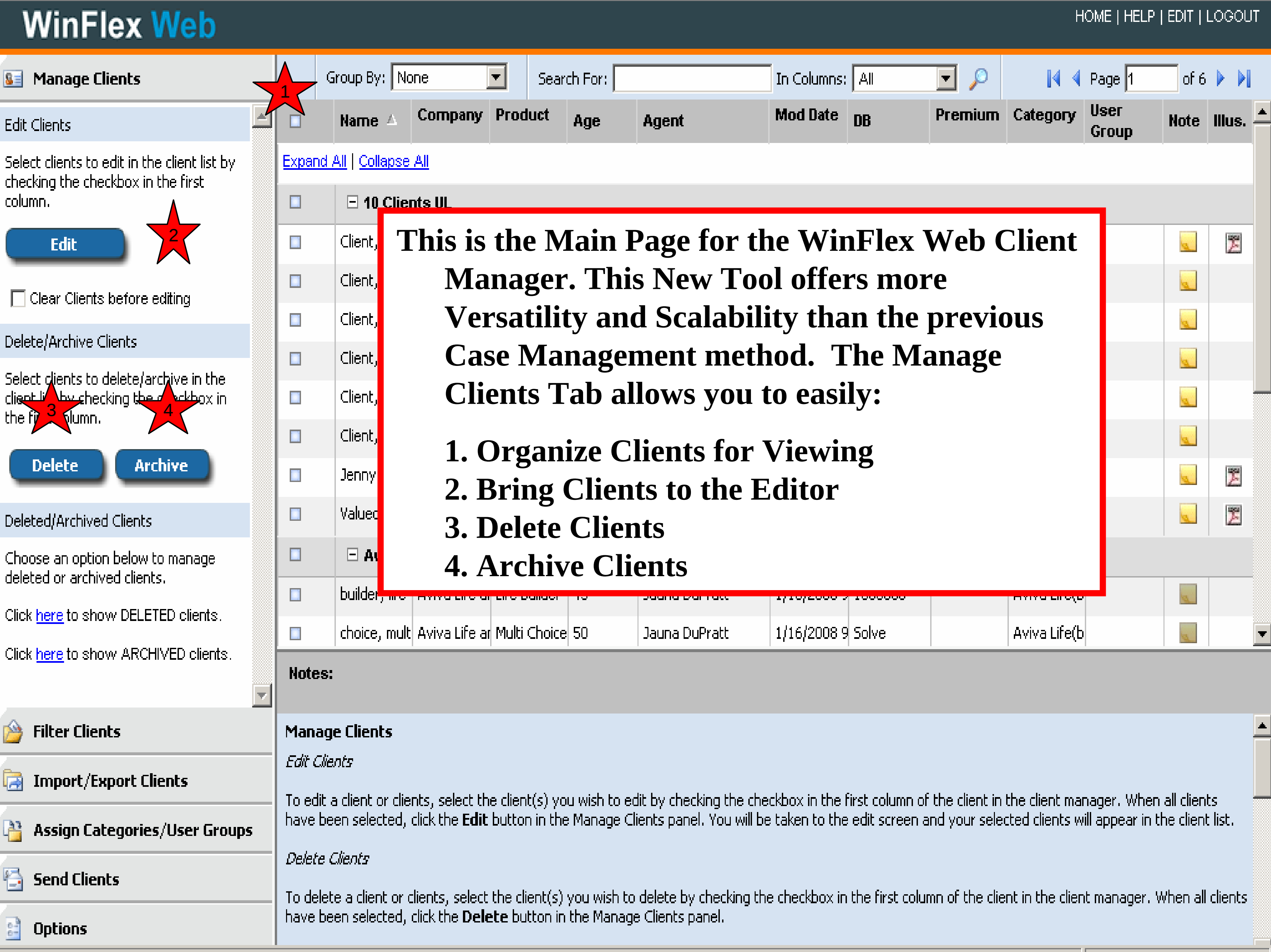
What's New/Updates



When you first login, the Client Editor screen is displayed. To Navigate to the Client Manager:

1. **Select 'Open Client Manager' from the Client Drop Down Menu OR**

2. **Click on the Open Client Manager Link in the Client List Toolbar.**



WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Group By: None
Search For:
In Columns: All
Page 1 of 6
Name
Company
Product
Age
Agent
Mod Date
DB
Premium
Category
User Group
Note
Illus.
Expand All | Collapse All
10 Clients UL
Edit Clients
Select clients to edit in the client list by checking the checkbox in the first column.
Edit
Clear Clients before editing
Delete/Archive Clients
Delete
Archive
Deleted/Archived Clients
Choose an option below to manage deleted or archived clients.
Click here to show DELETED clients.
Click here to show ARCHIVED clients.
Filter Clients
Import/Export Clients
Assign Categories/User Groups
Send Clients
Options
This is the Main Page for the WinFlex Web Client Manager. This New Tool offers more Versatility and Scalability than the previous Case Management method. The Manage Clients Tab allows you to easily:
1. Organize Clients for Viewing
2. Bring Clients to the Editor
3. Delete Clients
4. Archive Clients
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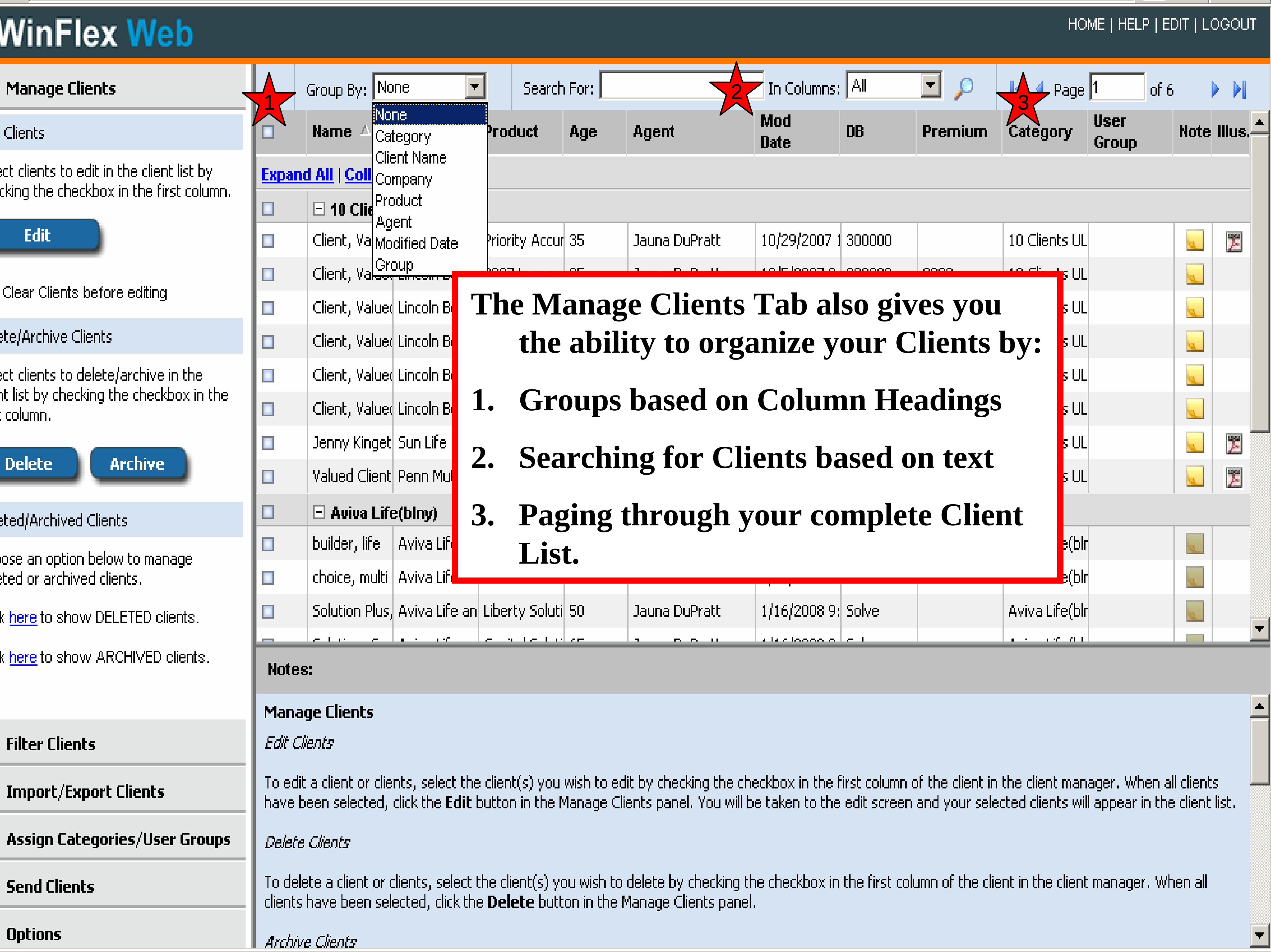
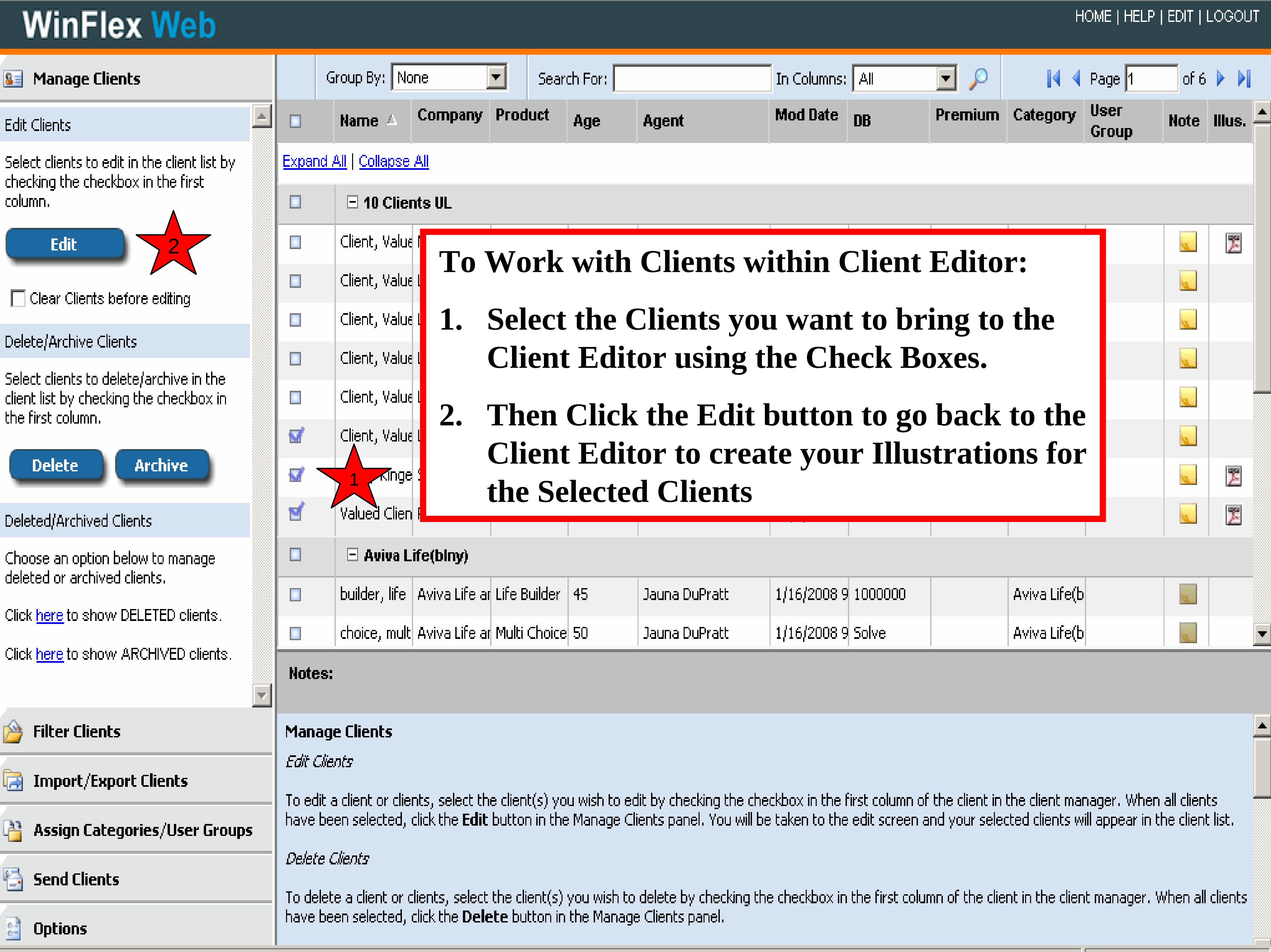
Multi Choice
50
Jauna DuPratt
1/16/2008 9
Solve
Aviva Life(b
Notes:
Manage Clients
Edit Clients
To edit a client or clients, select the client(s) you wish to edit by checking the checkbox in the first column of the client in the client manager. When all clients have been selected, click the Edit button in the Manage Clients panel. You will be taken to the edit screen and your selected clients will appear in the client list.
Delete Clients
To 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 clients have been selected, click the Delete button in the Manage Clients panel.



The Manage Clients Tab also gives you the ability to organize your Clients by:

1. **Groups based on Column Headings**
2. **Searching for Clients based on text**
3. **Paging through your complete Client List.**


WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Edit Clients
Select clients to edit in the client list by checking the checkbox in the first column.
Edit
2
Clear Clients before editing
Delete/Archive Clients
Select clients to delete/archive in the client list by checking the checkbox in the first column.
Delete
Archive
Deleted/Archived Clients
Choose an option below to manage deleted or archived clients.
Click here to show DELETED clients.
Click here to show ARCHIVED clients.
Filter Clients
Import/Export Clients
Assign Categories/User Groups
Send Clients
Options
Group By: None
Search For:
In Columns: All
Page 1 of 6
Name
Company
Product
Age
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Expand All | Collapse All
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1/16/2008 9
Solve
Aviva Life(b
To Work with Clients within Client Editor:
1. Select the Clients you want to bring to the Client Editor using the Check Boxes.
2. Then Click the Edit button to go back to the Client Editor to create your Illustrations for the Selected Clients
Notes:
Manage Clients
Edit Clients
To edit a client or clients, select the client(s) you wish to edit by checking the checkbox in the first column of the client in the client manager. When all clients have been selected, click the Edit button in the Manage Clients panel. You will be taken to the edit screen and your selected clients will appear in the client list.
Delete Clients
To 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 clients have been selected, click the Delete button in the Manage Clients panel.

WinFlex Web

HOME | HELP | EDIT | LOGOUT

Manage Clients

Edit Clients

Select clients to edit in the client list by checking the checkbox in the first column.

Edit

Clear Clients before editing

Delete/Archive Clients

Select clients to delete/archive in the client list by checking the checkbox in the first column.

Delete Archive

Deleted/Archived Clients

Choose an option below to manage deleted or archived clients.

Click here to show DELETED clients.

Click here to show ARCHIVED clients.

Filter Clients

Import/Export Clients

Assign Categories/User Groups

Send Clients

Options

Group By: None Search For: In Columns: All Page 1 of 6

	Name	Company	Product	Age	Agent	Mod Date	DB	Premium	Category	User Group	Note	Illus.
	Expand All | Collapse All											
	10 Clients UL											
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	Client, Value											
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	choice, mult	Aviva Life ar	Multi Choice	50	Jauna DuPratt	1/16/2008 9	Solve		Aviva Life(b			

To Delete or Archive Clients:

1. **Select the Clients you want to delete or archive by using the Check Boxes.**
2. **Then Click the Delete or Archive button to go to the next screen.**
3. **To view Clients already deleted or archived select the appropriate option.**

1

2

3

Notes:

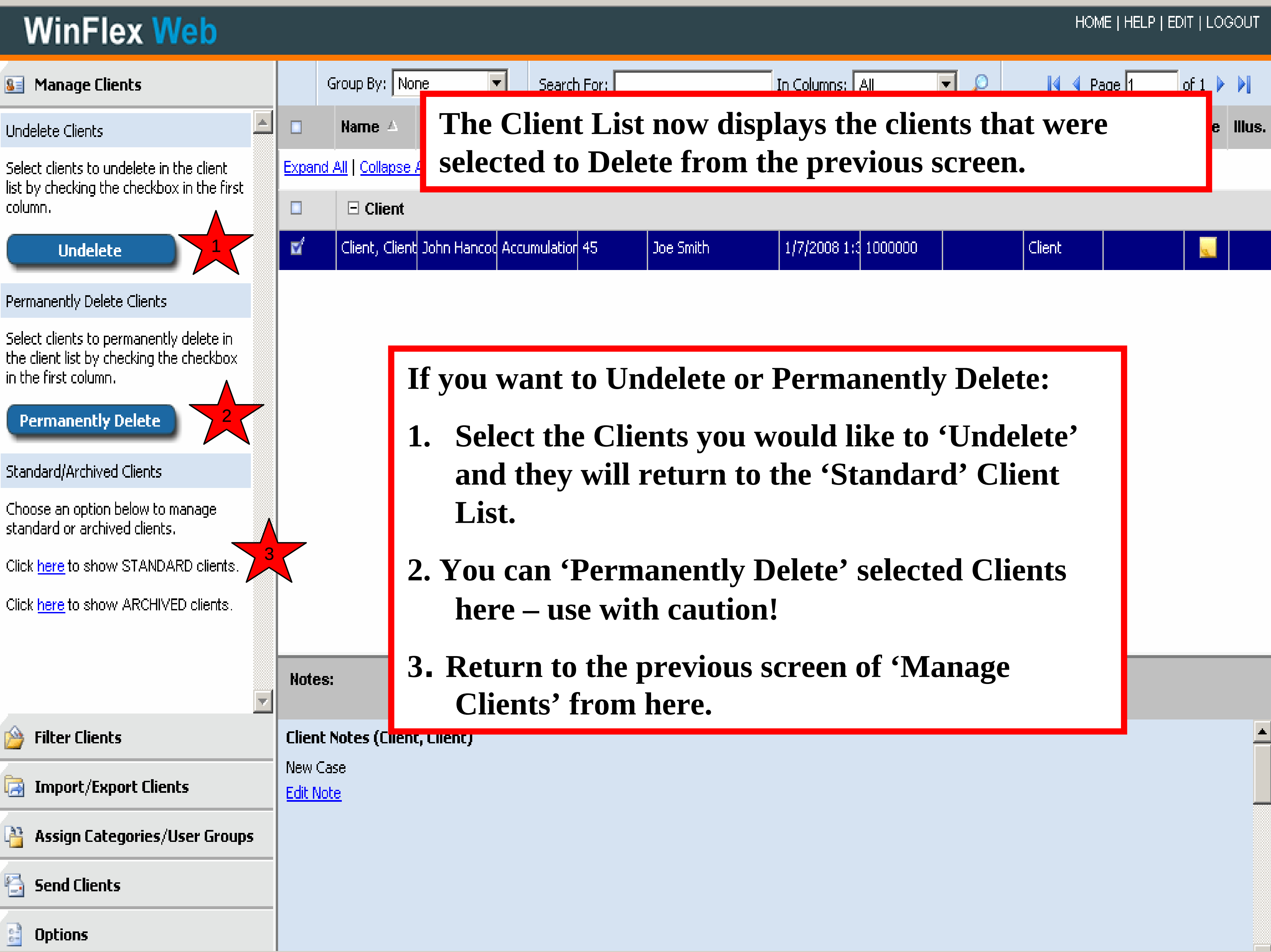
Manage Clients

Edit Clients

To edit a client or clients, select the client(s) you wish to edit by checking the checkbox in the first column of the client in the client manager. When all clients have been selected, click the **Edit** button in the Manage Clients panel. You will be taken to the edit screen and your selected clients will appear in the client list.

Delete Clients

To 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 clients have been selected, click the **Delete** button in the Manage Clients panel.



The Client List now displays the clients that were selected to Delete from the previous screen.

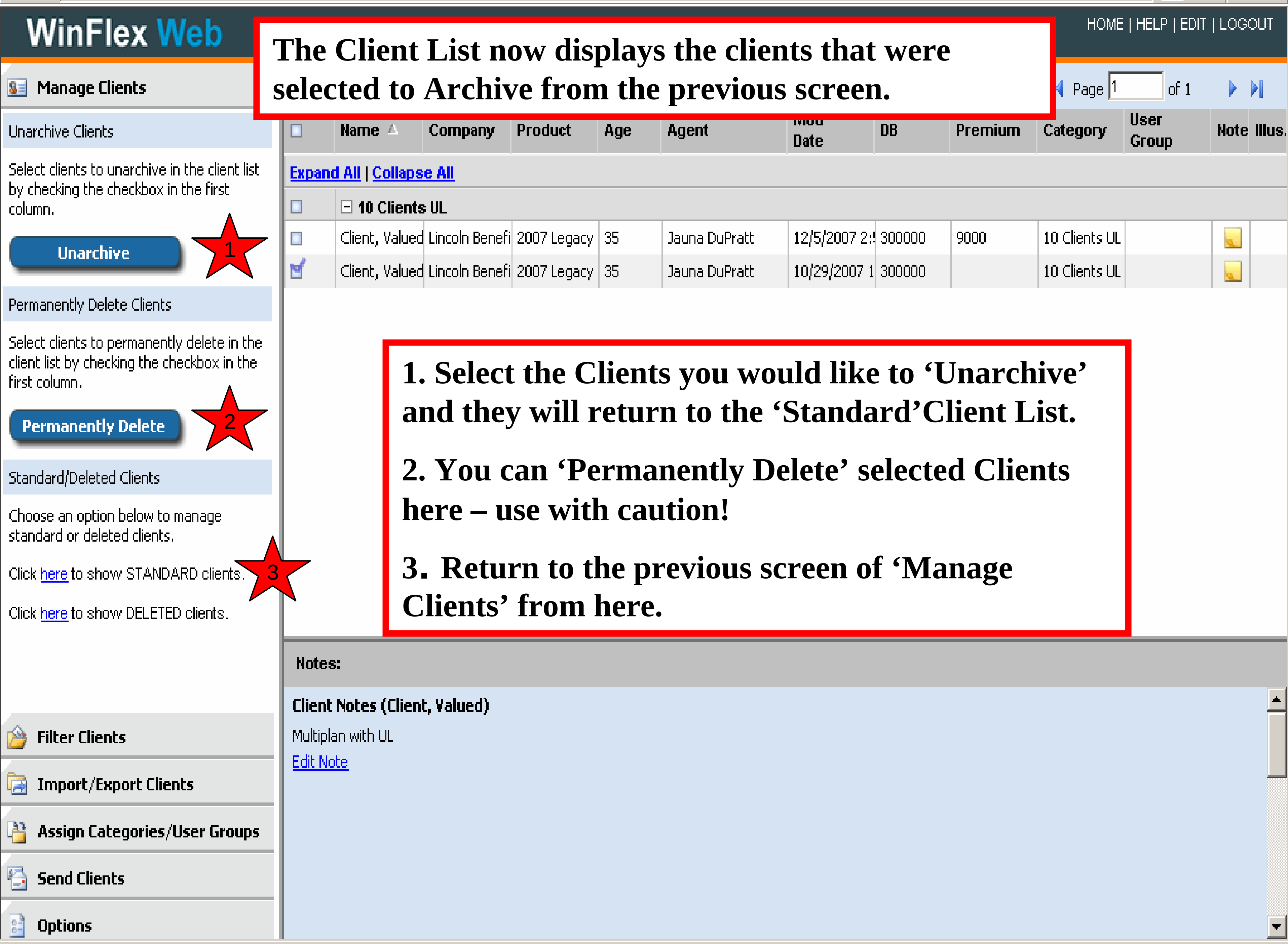
If you want to Undelete or Permanently Delete:

1. **Select the Clients you would like to 'Undelete' and they will return to the 'Standard' Client List.**

2. **You can 'Permanently Delete' selected Clients here – use with caution!**

3. **Return to the previous screen of 'Manage Clients' from here.**

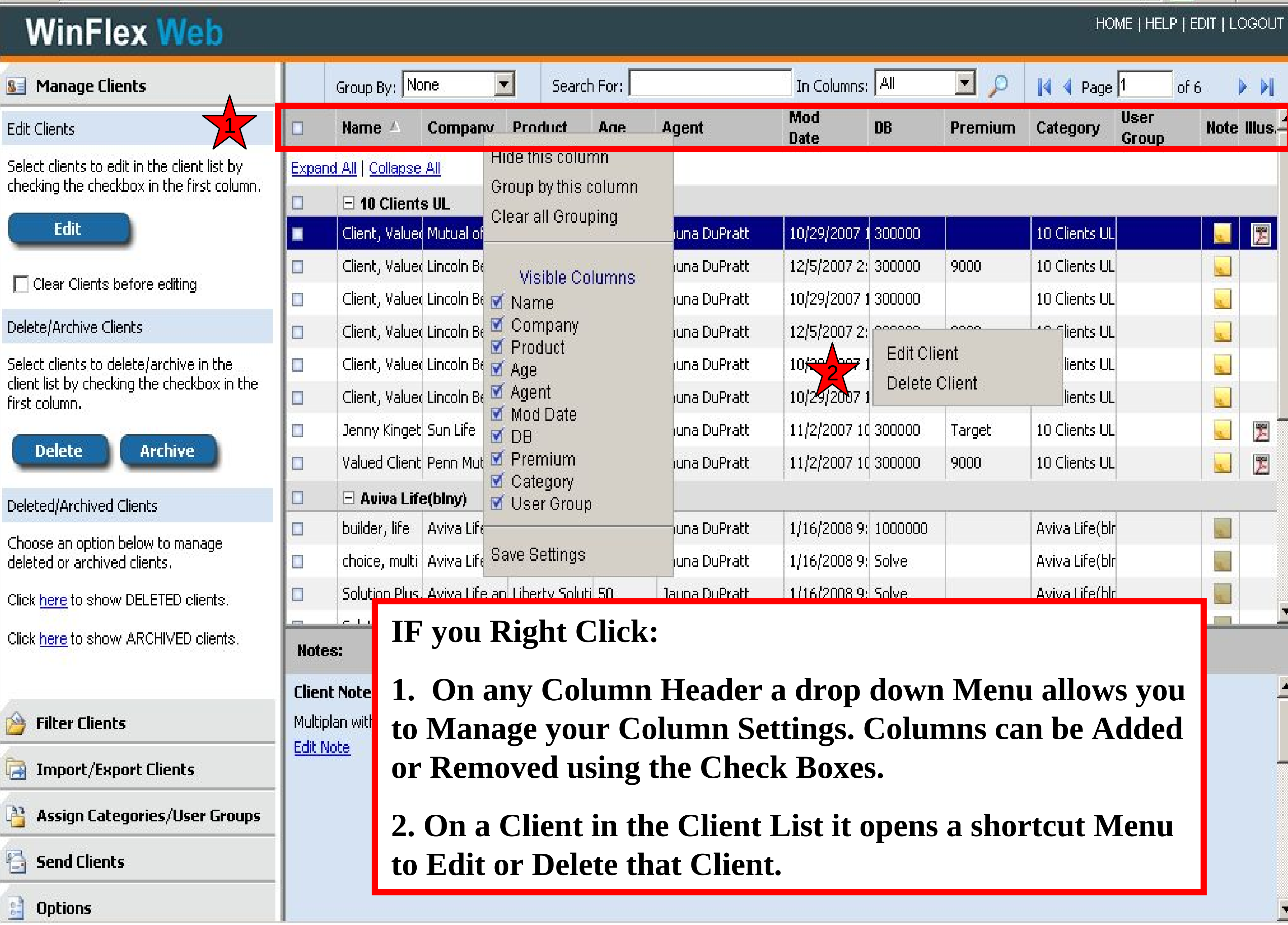
The Client List now displays the clients that were selected to Archive from the previous screen.



1. Select the Clients you would like to 'Unarchive' and they will return to the 'Standard' Client List.

2. You can 'Permanently Delete' selected Clients here – use with caution!

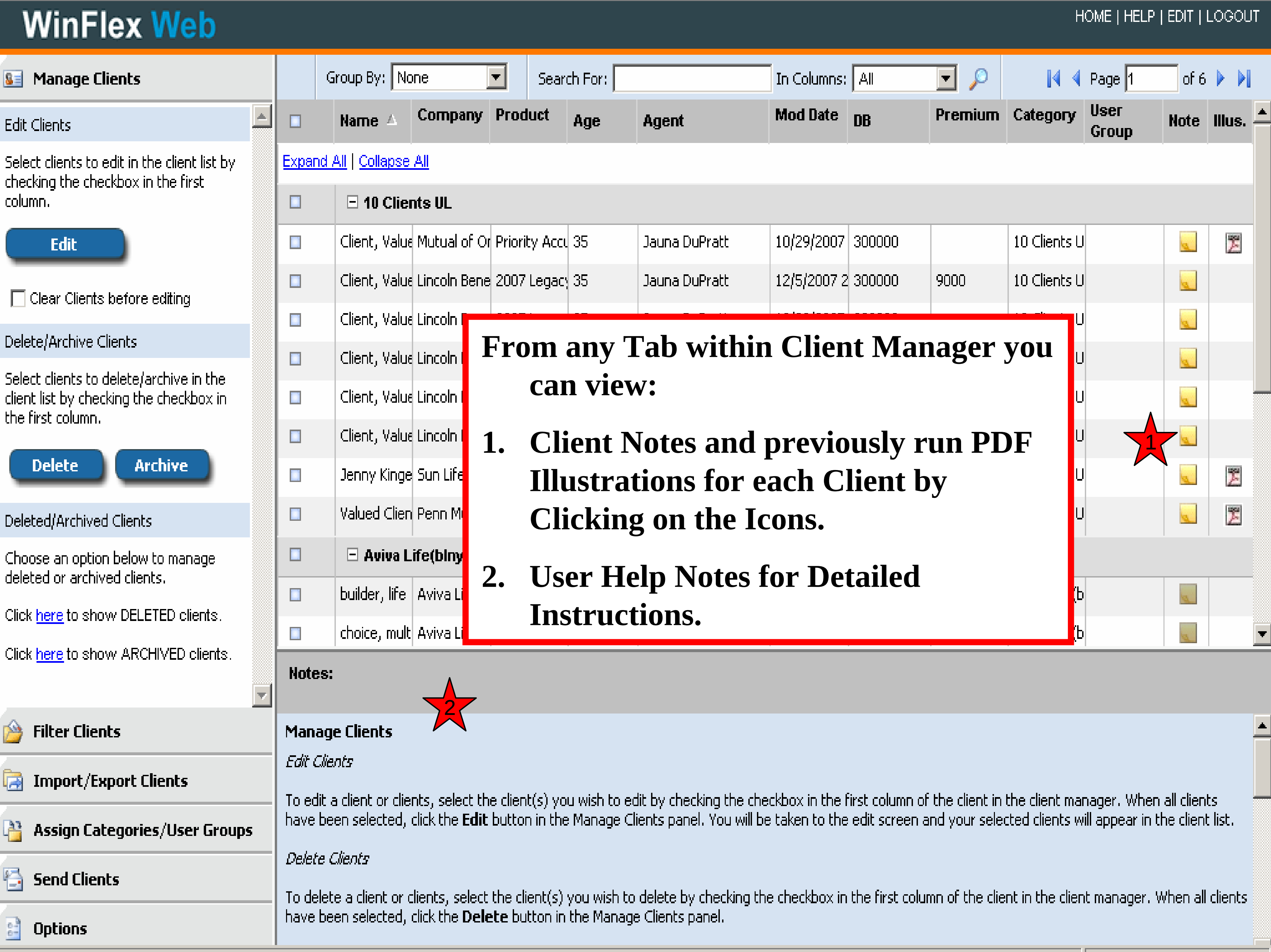
3. Return to the previous screen of 'Manage Clients' from here.



IF you Right Click:

1. On any Column Header a drop down Menu allows you to Manage your Column Settings. Columns can be Added or Removed using the Check Boxes.

2. On a Client in the Client List it opens a shortcut Menu to Edit or Delete that Client.


WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Edit Clients
Select clients to edit in the client list by checking the checkbox in the first column.
Edit
Clear Clients before editing
Delete/Archive Clients
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Assign Categories/User Groups
Send Clients
Options
Group By: None
Search For:
In Columns: All
Page 1 of 6
Name
Company
Product
Age
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Mod Date
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Premium
Category
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Note
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Expand All | Collapse All
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Client, Value Lincoln Bene 2007 Legacy 35 Jauna DuPratt 12/5/2007 2 300000 9000 10 Clients U
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Client, Value Lincoln
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From any Tab within Client Manager you can view:
1. Client Notes and previously run PDF Illustrations for each Client by Clicking on the Icons.
2. User Help Notes for Detailed Instructions.
1
2
Notes:
Manage Clients
Edit Clients
To edit a client or clients, select the client(s) you wish to edit by checking the checkbox in the first column of the client in the client manager. When all clients have been selected, click the Edit button in the Manage Clients panel. You will be taken to the edit screen and your selected clients will appear in the client list.
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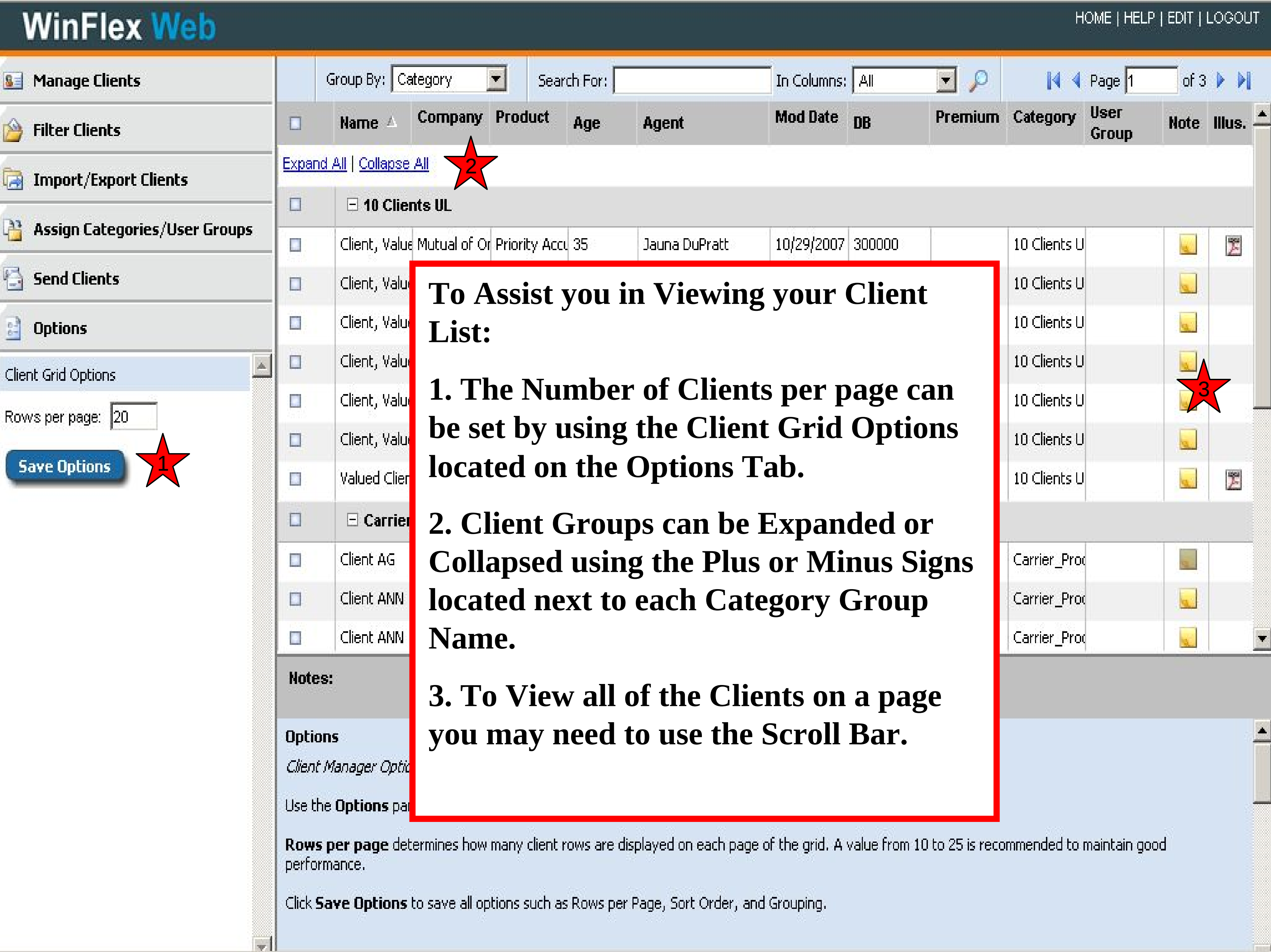
WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Filter Clients
Import/Export Clients
Assign Categories/User Groups
Send Clients
Options
Client Grid Options
Rows per page: 20
Save Options
1
Group By: Category
Search For:
In Columns: All
Page 1 of 3
Name
Company
Product
Age
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Expand All | Collapse All
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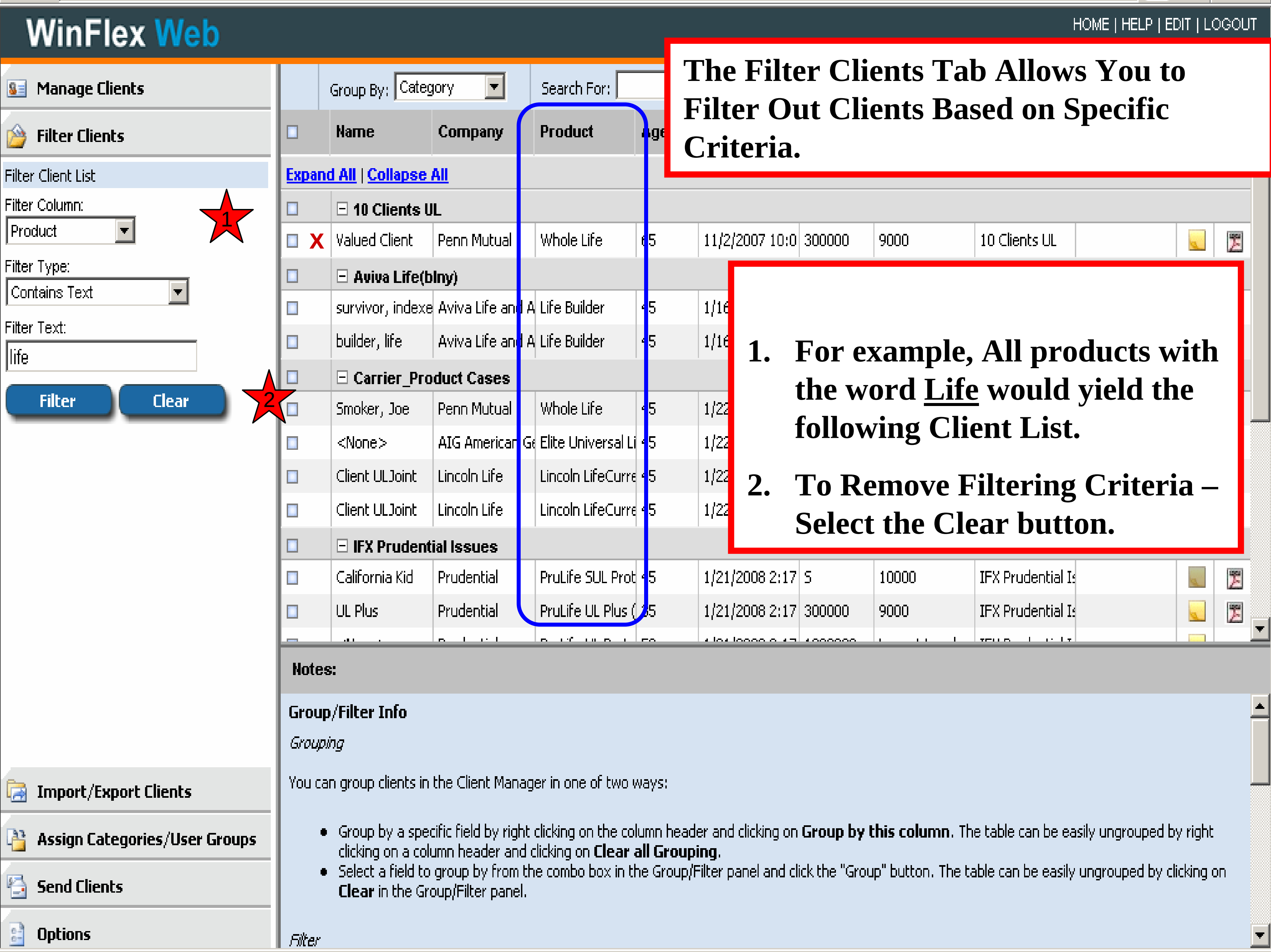
3
Notes:
Options
Client Manager Optic
Use the Options pa
Rows per page determines how many client rows are displayed on each page of the grid. A value from 10 to 25 is recommended to maintain good performance.
Click Save Options to save all options such as Rows per Page, Sort Order, and Grouping.
To Assist you in Viewing your Client List:
1. The Number of Clients per page can be set by using the Client Grid Options located on the Options Tab.
2. Client Groups can be Expanded or Collapsed using the Plus or Minus Signs located next to each Category Group Name.
3. To View all of the Clients on a page you may need to use the Scroll Bar.

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



The Filter Clients Tab Allows You to Filter Out Clients Based on Specific Criteria.
1. For example, All products with the word Life would yield the following Client List.
2. To Remove Filtering Criteria – Select the Clear button.
WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Filter Clients
Filter Client List
Filter Column:
Product
Filter Type:
Contains Text
Filter Text:
life
Filter
Clear
Group By:
Category
Search For:
Name
Company
Product
Expand All | Collapse All
10 Clients UL
Valued Client
Penn Mutual
Whole Life
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9000
10 Clients UL
Aviva Life(blny)
survivor, indexe
Aviva Life and A
Life Builder
builder, life
Carrier_Product Cases
Smoker, Joe
<None>
AIG American Ge
Elite Universal Li
Client ULJoint
Lincoln Life
Lincoln LifeCurre
IFX Prudential Issues
California Kid
Prudential
PruLife SUL Prot
1/21/2008 2:17
10000
IFX Prudential Is
UL Plus
PruLife UL Plus (
Import/Export Clients
Assign Categories/User Groups
Send Clients
Options
Notes:
Group/Filter Info
Grouping
You can group clients in the Client Manager in one of two ways:
Group by a specific field by right clicking on the column header and clicking on Group by this column. The table can be easily ungrouped by right clicking on a column header and clicking on Clear all Grouping.
Select a field to group by from the combo box in the Group/Filter panel and click the "Group" button. The table can be easily ungrouped by clicking on Clear in the Group/Filter panel.
Filter

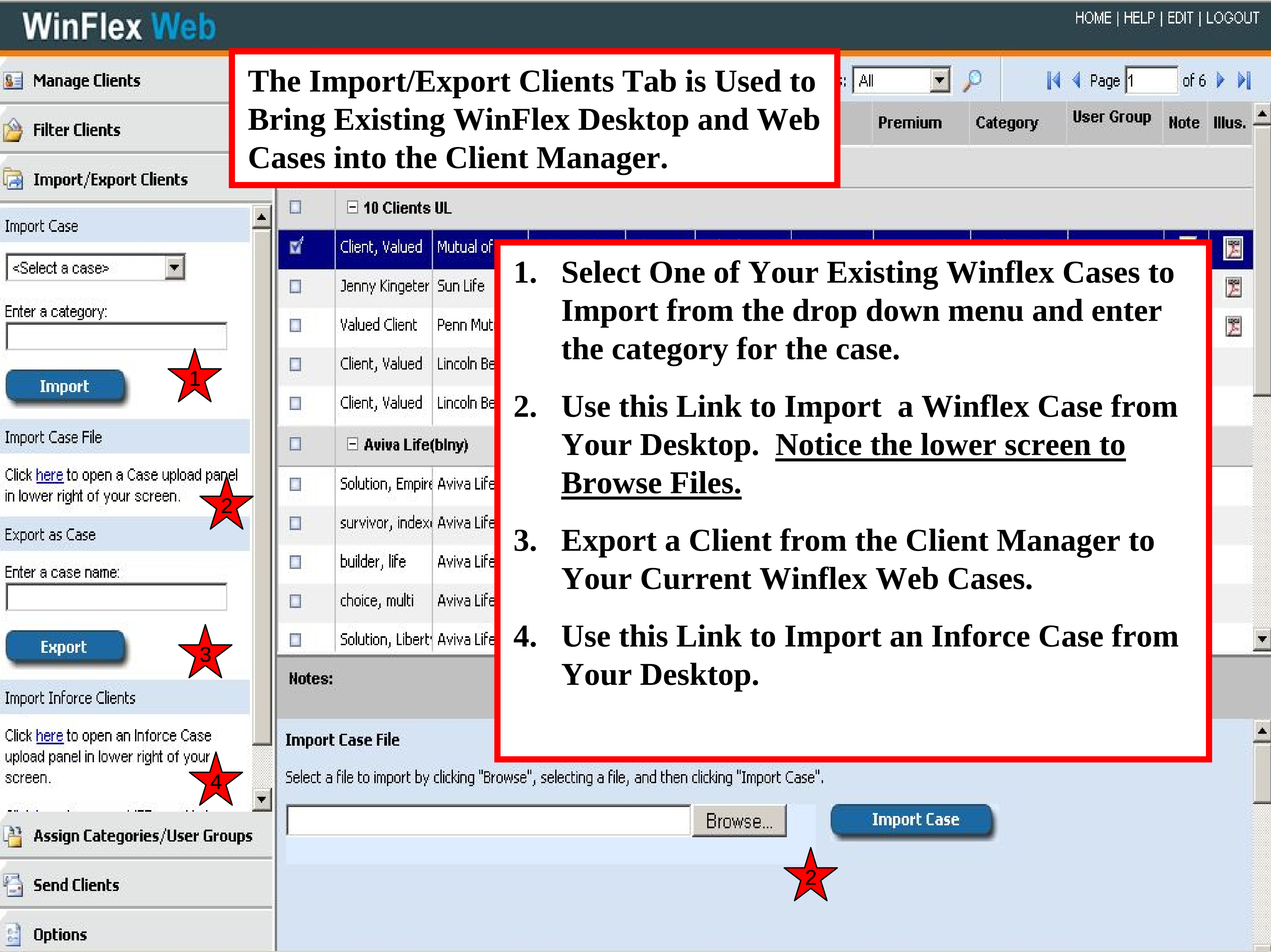
The Import/Export Clients Tab is Used to Bring Existing WinFlex Desktop and Web Cases into the Client Manager.

1. **Select One of Your Existing Winflex Cases to Import from the drop down menu and enter the category for the case.**

2. **Use this Link to Import a Winflex Case from Your Desktop. <u>Notice the lower screen to Browse Files.</u>**

3. **Export a Client from the Client Manager to Your Current Winflex Web Cases.**

4. **Use this Link to Import an Inforce Case from Your Desktop.**



WinFlex Web

HOME | HELP | EDIT | LOGOUT

The Assign Categories/Users Groups Tab is Used to Manage Your Client Categories and Your WinFlex User Groups

1. **Create and Assign a New Category to a Selected Client.**
2. **Assign an Existing Category to a Selected Client.**
3. **Delete an Existing Category to a Selected Client.**
4. **Assign a Winflex User Group to a Selected Client.**

- Manage Clients
- Filter Clients
- Import/Export Clients
- Assign Categories/User Groups

Create/Assign New Category

Prudential

Create & Assign (1)

Create Only

Assign/Delete Existing Category

[None]

Assign Category (2)

Delete Category (3)

Assign User Group

<< None >>

Assign User Group (4)

- Send Clients
- Options

Notes:

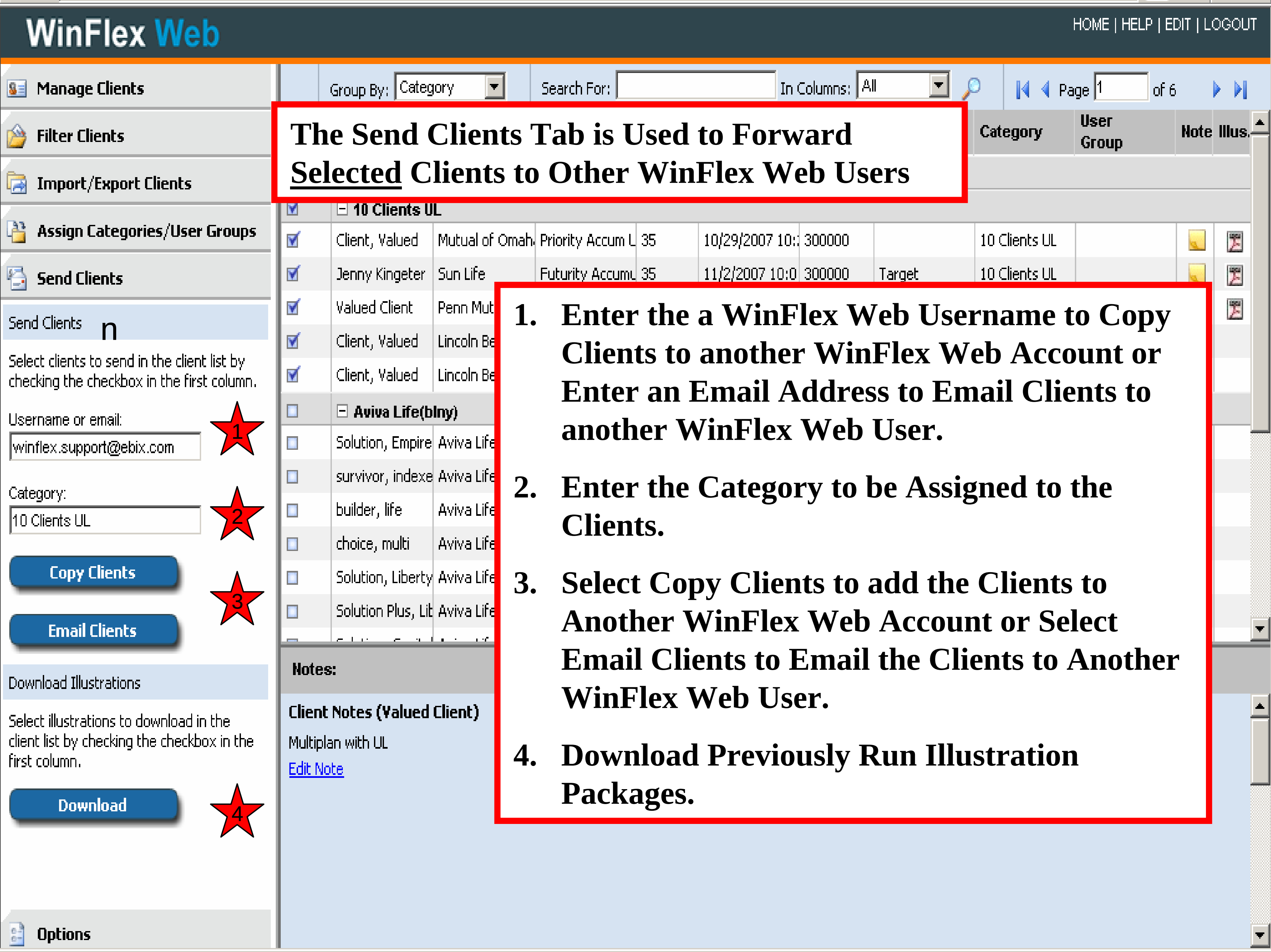
Assign Categories/Groups

Assign a New Category

To assign a new category, select clients to categorize in the client manager by checking the checkbox in the first column. Enter a new category in the **New Category** section of the Assign Categories panel and click the **Create and Assign** button.

Assign an Existing Category

To assign an existing category, select clients to categorize in the client manager by checking the checkbox in the first column. Select an existing category in the **Existing Category** section of the Assign Categories panel and click the **Assign** button.


WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Filter Clients
Import/Export Clients
Assign Categories/User Groups
Send Clients
Send Clients
Select clients to send in the client list by checking the checkbox in the first column.
Username or email:
winflex.support@ebix.com
Category:
10 Clients UL
Copy Clients
Email Clients
Download Illustrations
Select illustrations to download in the client list by checking the checkbox in the first column.
Download
Options
1
2
3
4
Group By: Category
Search For:
In Columns: All
Page 1 of 6
Category
User Group
Note
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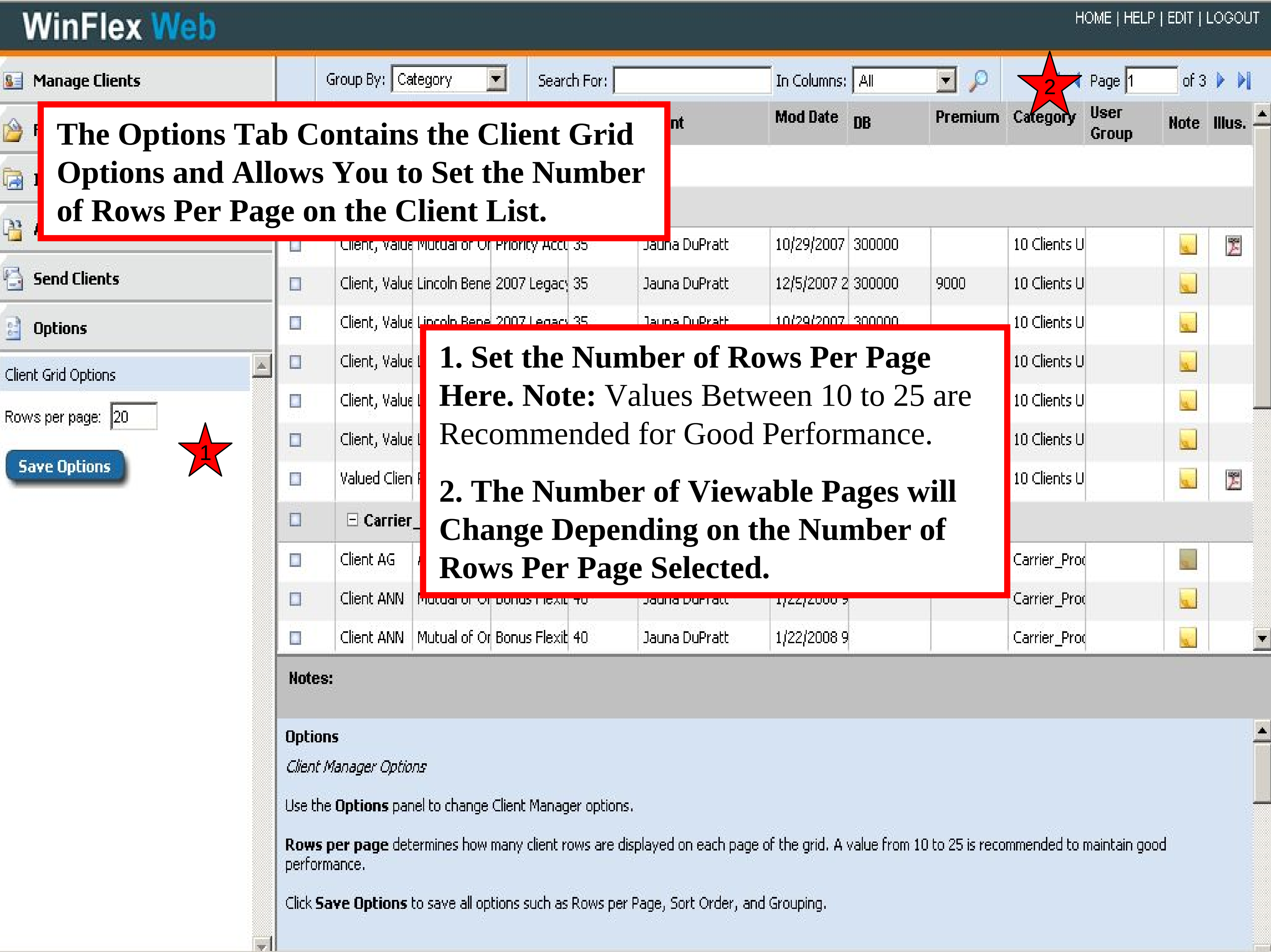
10 Clients UL
Client, Valued | Mutual of Omah | Priority Accum L | 35 | 10/29/2007 10: | 300000 | 10 Clients UL
Jenny Kingeter | Sun Life | Futurity Accumu | 35 | 11/2/2007 10:0 | 300000 | Target | 10 Clients UL
Valued Client | Penn Mut
Client, Valued | Lincoln Be
Client, Valued | Lincoln Be
Aviva Life(blny)
Solution, Empire | Aviva Life
survivor, indexe | Aviva Life
builder, life | Aviva Life
choice, multi | Aviva Life
Solution, Liberty | Aviva Life
Solution Plus, Lit | Aviva Life
Notes:
Client Notes (Valued Client)
Multiplan with UL
Edit Note
The Send Clients Tab is Used to Forward Selected Clients to Other WinFlex Web Users
1. Enter the a WinFlex Web Username to Copy Clients to another WinFlex Web Account or Enter an Email Address to Email Clients to another WinFlex Web User.
2. Enter the Category to be Assigned to the Clients.
3. Select Copy Clients to add the Clients to Another WinFlex Web Account or Select Email Clients to Email the Clients to Another WinFlex Web User.
4. Download Previously Run Illustration Packages.


WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Group By: Category
Search For:
In Columns: All
Page 1 of 3
The Options Tab Contains the Client Grid Options and Allows You to Set the Number of Rows Per Page on the Client List.
Mod Date
DB
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User Group
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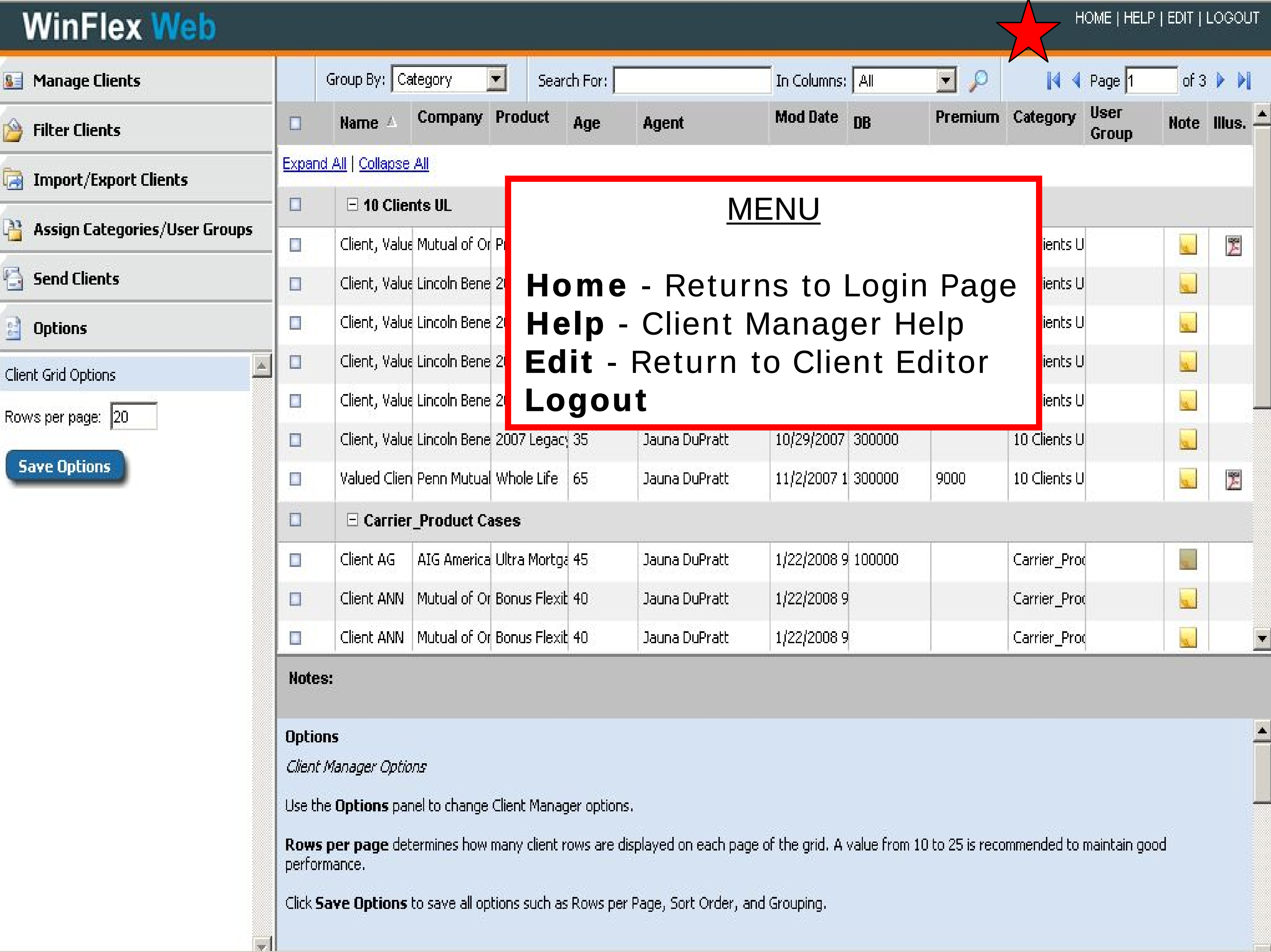
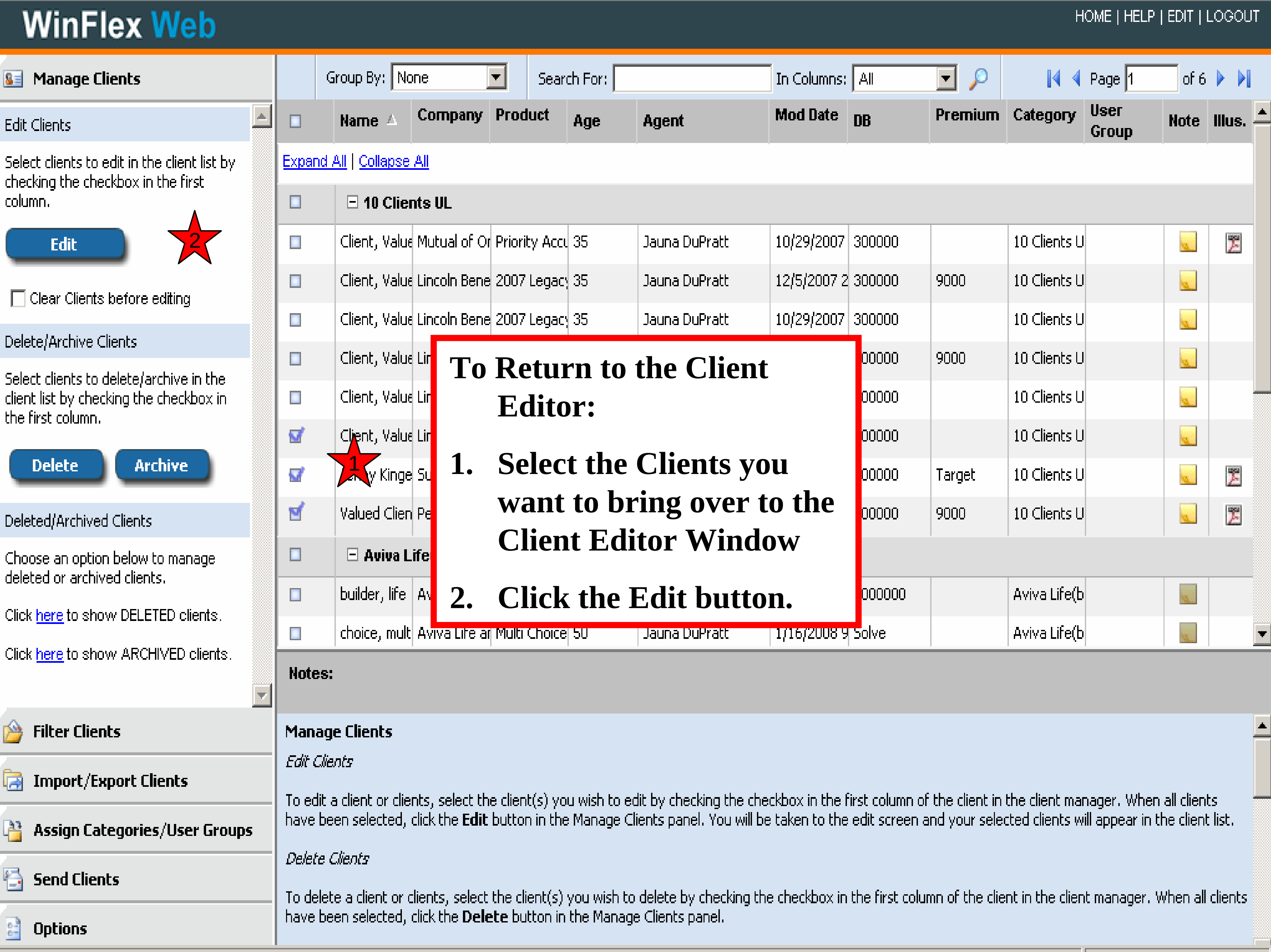
Send Clients
Options
Client Grid Options
Rows per page: 20
Save Options
1
2
1. Set the Number of Rows Per Page Here. Note: Values Between 10 to 25 are Recommended for Good Performance.
2. The Number of Viewable Pages will Change Depending on the Number of Rows Per Page Selected.
Carrier_
Notes:
Options
Client Manager Options
Use the Options panel to change Client Manager options.
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.



MENU

Home - Returns to Login Page
Help - Client Manager Help
Edit - Return to Client Editor
Logout


WinFlex Web
HOME | HELP | EDIT | LOGOUT
Manage Clients
Edit Clients
Select clients to edit in the client list by checking the checkbox in the first column.
Edit
2
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Page 1 of 6
Name
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Expand All | Collapse All
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Client, Value Lincoln Bene 2007 Legacy 35 Jauna DuPratt 12/5/2007 2 300000 9000 10 Clients U
Client, Value Lincoln Bene 2007 Legacy 35 Jauna DuPratt 10/29/2007 300000 10 Clients U
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1
To Return to the Client Editor:
1. Select the Clients you want to bring over to the Client Editor Window
2. Click the Edit button.
Notes:
Manage Clients
Edit Clients
To edit a client or clients, select the client(s) you wish to edit by checking the checkbox in the first column of the client in the client manager. When all clients have been selected, click the Edit button in the Manage Clients panel. You will be taken to the edit screen and your selected clients will appear in the client list.
Delete Clients
To 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 clients have been selected, click the Delete button in the Manage Clients panel.

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.