

quick guide

Product Illustration and Marketing Software

*Life*Designs

LI 1424 7-15

Ameritas 
fulfilling life.

installation

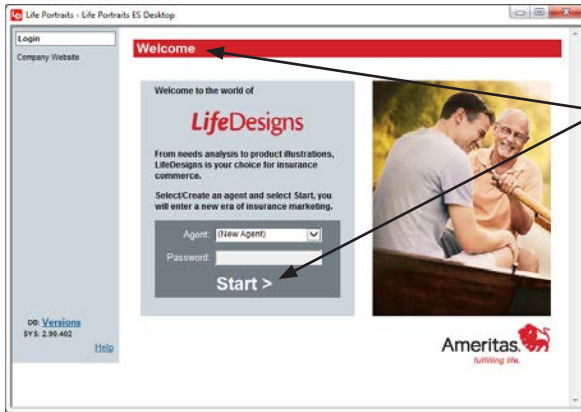
To install the Life Designs illustration system, log onto Producer Workbench. Once on Producer Workbench go to Selling & New Business > Create an Illustration > Software Downloads and click the “Download LifeDesigns now” link and then click the “Run” button.

getting started

To access Life Designs, click on the Life Designs icon



that was created on your desktop by the installation process.



The first screen to appear is the Life Designs Welcome screen. Click on Start to continue. Passwords are not required.

setting up a new agent

The first time you access the Life Designs Illustration System, you will need to set up your agent information.

1) Type in the agent's name.

Note: Passwords are not necessary and **CANNOT** be retrieved if forgotten.

2) Click on the Access Code box and enter the code(s) for your distribution channel(s) found above the "Download Life Designs now >>" link in bold font. Click on OK. If you cannot locate your access code, please notify Sales Development at 800-319-6903 option 1.

Life Portraits - Life Portraits ES Desktop

Agent Information

Name: First MI Last

Password: _____

Confirm: _____

Channel: _____ Access Codes

* If you need an access code, please contact Sales Development at 1-800-319-6903, Option 1.

Agency: _____

Address: _____

Address: _____

City: _____

State: _____ Zip Code: _____

Phone: _____ License: _____ (Required for CA cases)

Email: _____

Return

Bold indicates required fields

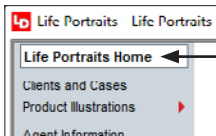
Logout Help

3) Enter the agent's address, city, state, ZIP and phone number.

4) Click on Return when your data input is finished.

running illustrations

Clients and Cases



Life Designs Home Page: Here you can choose Clients and Cases or Product Illustrations.

A screenshot of the 'Life Portraits - Life Portraits ES Desktop' application window. The main content area is titled 'Clients and Cases'. On the left is a vertical navigation bar with 'Clients and Cases' selected. The main area shows a list of clients under the heading 'Sample Case and Sample Case, Wife of family'. The list includes 'Sample Case', 'Sample Case, Wife of Dependents', 'Sample Case, Child #1', and 'Sample Case, Child #2'. Below this is a 'Show Cases' section with one entry: 'Excel LifeValue UL - 10/2013 - ILL - Custom (In progress)'. On the right side, there are two vertical panels, each with 'New', 'Modify', 'Delete', and 'More' options. A 'Select Group' button is also visible.

From the vertical navigation bars on the right side of the screen, you can create a new client or illustration; modify existing client/illustration data, delete client/illustration data or select More for other available options.

Click here to select more than one client from the menu.

Clients and Show Cases Selections:

- **Clients** – a listing of previously saved client data.
- **Show Cases** – reveals a listing of previously entered/saved illustrations for the highlighted client name.

product illustrations

Concepts available: Standard Illustrations and Advanced Sales Concepts

The screenshot shows the 'Life Portraits - Life Portraits ES Desktop' application. On the left is a navigation menu with 'Life Portraits Home', 'Clients and Cases', 'Product Illustrations' (highlighted), and 'Agent Information'. The main content area has a red header 'Product Illustrations' and a sub-header 'Clients'. Below the header are four radio button options: 'Standard Illustrations' (selected), 'Advanced Underwriting', 'In-Force Illustrations', and 'Custom Templates'. To the right of these options is a 'Step 1' box with instructions: 'Step 1 Select a filter on the left.', 'Step 2 Choose the appropriate Concept, Plan Type, Product, and Template below.', and 'Step 3 Select "Go" to create the policy details.' Below this is a descriptive paragraph: 'Company specific product illustrations for life insurance, annuities and health products, including the ability to add supplemental graphs and reports to accompany these basic product illustrations.' At the bottom is a form with four drop-down menus: 'Concept' (set to 'Product Illustration'), 'Plan Type' (set to '(All Plan Types)'), 'Product' (set to 'Excel LifeValue UL'), and 'Template' (set to 'Excel LifeValue UL-Basic Illustration'). A 'Go' button is located to the right of the form. Arrows point from the text below to the 'Go' button and each of the four drop-down menus.

To change the Concept, Plan Type, Product or Template, click on the arrow at the right of the appropriate field. Make your selection from the drop-down menu.

After making selections, click on Go.

product illustrations (continued)

Preview – Takes you to a screen preview of the illustration.

Back – Takes you back to the previous screen.

Next – Takes you forward to the next screen.

Print – Takes you to the reports selection/print screen. You can print from the screen and select any number of reports to accompany your basic illustration. (Report selection is also available from the vertical navigation bar on the policy screen.)

Note: If a box with an “M” appears to the right of the report, you can modify interest and/or term rates used by the report.

The screenshot shows the 'Product Illustrations' window in the 'Life Portraits ES Desktop' application. The window title is 'Life Portraits - Life Portraits ES Desktop'. The interface includes a left-hand navigation pane with options like 'Concept', 'Solve For', 'Riders', 'Cash Flow', 'Reports', 'Personal Data', and 'Reports Selection'. The main area is titled 'Product Illustrations' and contains several sections of data entry fields. At the top, there is a menu bar with 'Save As', 'Values', 'Preview', 'Print', 'Back', and 'Next'. A 'Preview' button is highlighted with an arrow from the text 'Preview - Takes you to a screen preview of the illustration.' The 'Preview' button is a bar graph icon. Below the menu bar, the 'Client' field is set to 'Case Sample_30'. The 'Plan Type' is 'Universal & Indexed Life', and the 'Plan' is 'Excel Life/Value UI'. The 'Class' is 'Non Tobacco' with a 'Special Class...' button. The 'Amount' is '100,000' and the 'Face' is 'Input'. The 'Premium' is 'Input' and has a bar graph icon next to it, with an arrow pointing to it from the text 'Bar graph button - This is the bar graph symbol displayed after an input field/box...'. The 'Mode' is 'Annual' and 'To Age' is '121'. On the right side, there are fields for 'Assumed Rate: 4.05 %', 'Int. 1035 Exchange: 0.00', 'Est. 1035 Exchange: 0.00', 'Est. 1035 Months', '1035 Basis: 0.00', 'Lump Sum: 0.00', and 'Lump Months'. At the bottom, there are checkboxes for 'Mec Test', 'Corp. Prem. Payor', 'Employee Discount', 'Association Discount', and 'Pension'. The 'Logout' and 'Help' buttons are at the bottom left.

Bar graph button – This is the bar graph symbol displayed after an input field/box. This symbol means the input field will accept changes to the data. One left click on the mouse will open the field and bring you to a screen where you can make changes to the input. The return arrow at the top of the screen will take you back to the policy illustration. **Note:** You can easily identify on the policy screen if input is changed within a variable button field; when data has been changed, the even bar graph symbol changes to an uneven bar graph symbol.