quick guide

Product Illustration and Marketing Software

LifeDesigns

Ameritas®
fulfilling life®

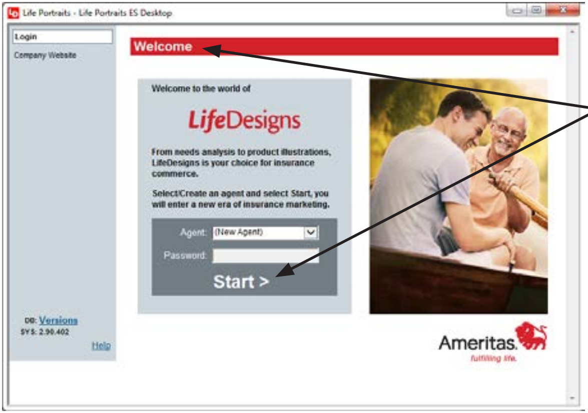
LI 1424 7-15

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.



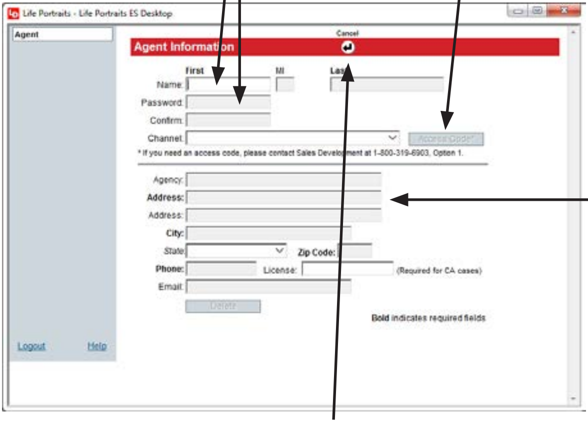
The first screen to appear is the Life Designs Welcome screen. Click on Start to continue. Passwords are not required.

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.

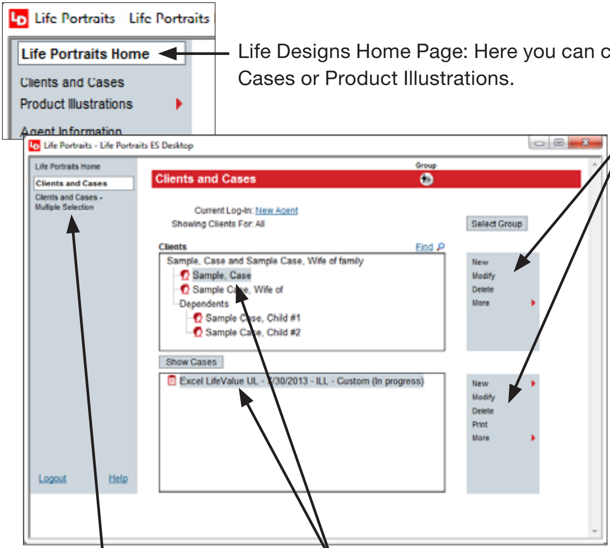


3) Enter the agent's address, city, state, ZIP and phone number.

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.

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.

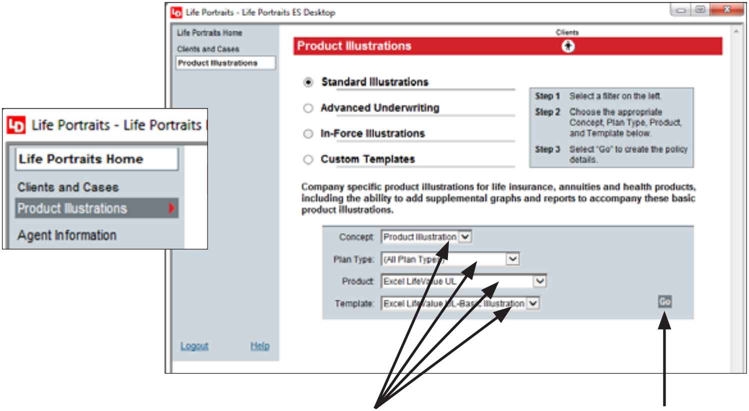
Click here to select more than one client from the menu.

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



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.

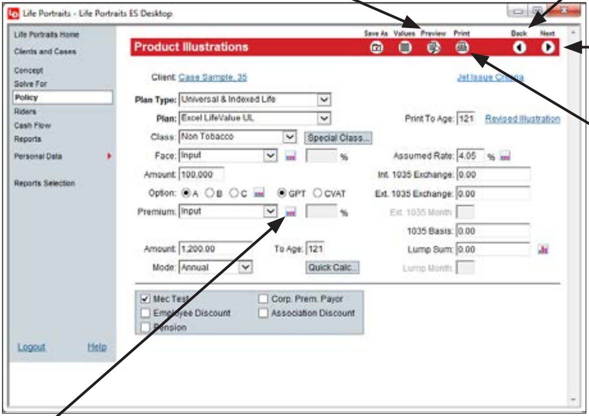
After making selections, click on Go.

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.

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.