NatGen Coverage Builder

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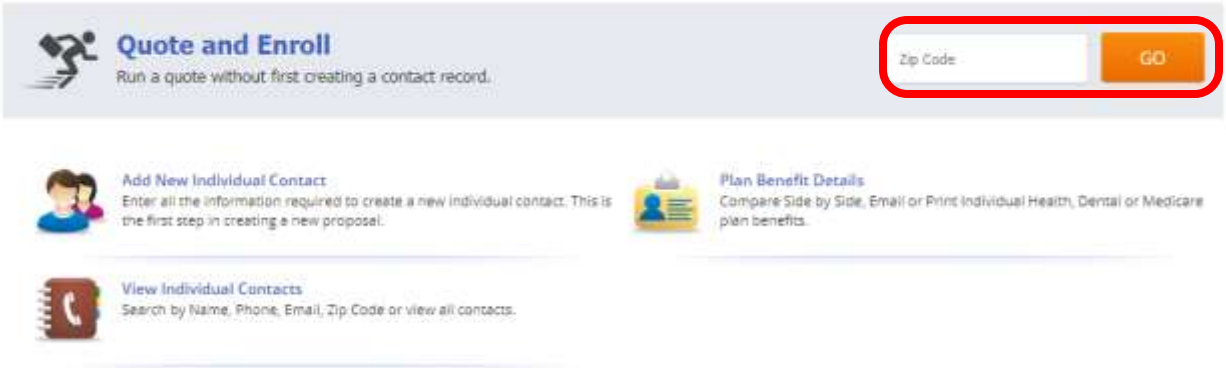
NatGen Coverage Builder

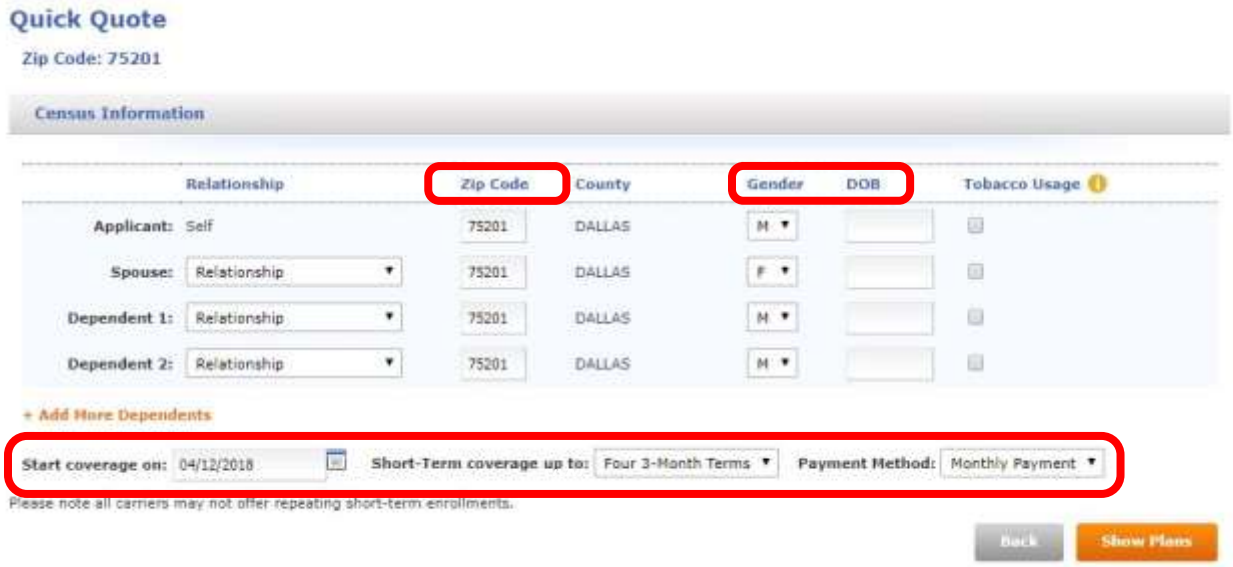
1. **Log in** using username and password you created.

2. **Enter in Client's zip code** and press GO

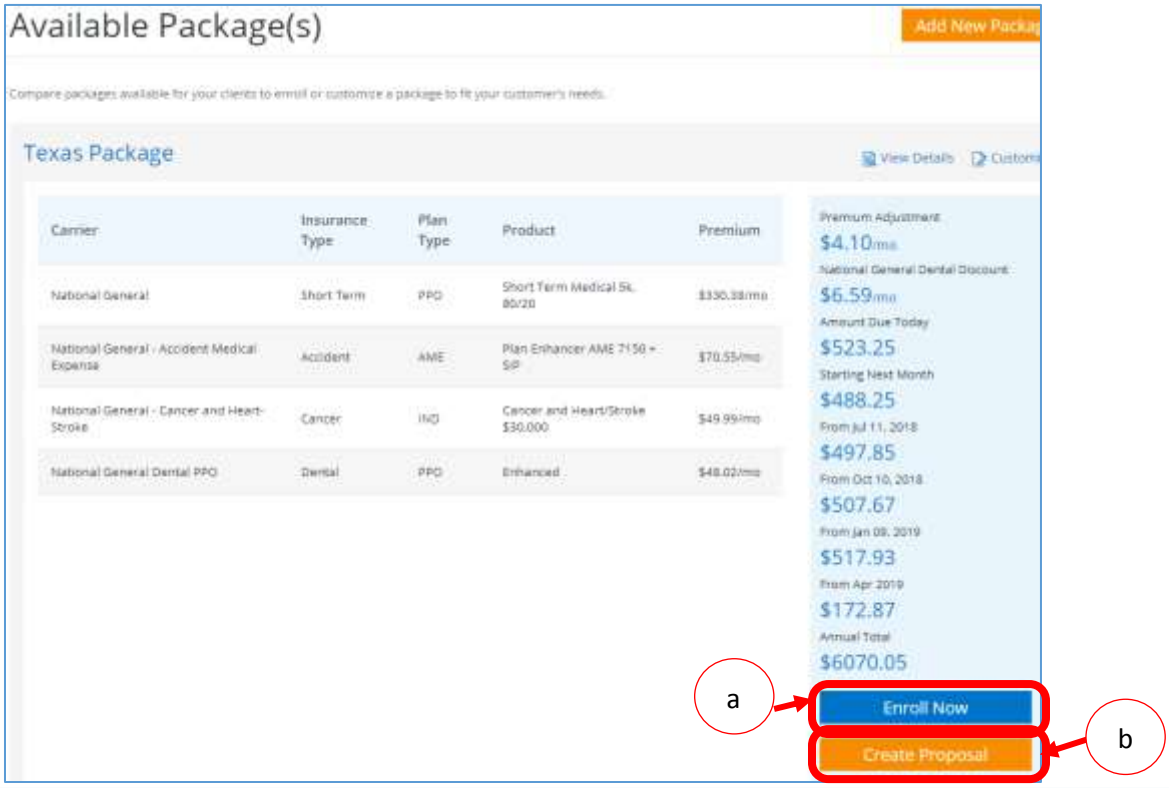


3. **Enter in Gender, DOB and Tobacco Usage** on each member on the policy.
   - To add additional dependents press +add more dependents.

Select **Start coverage on**, **payment method and coverage for up to** for your client.

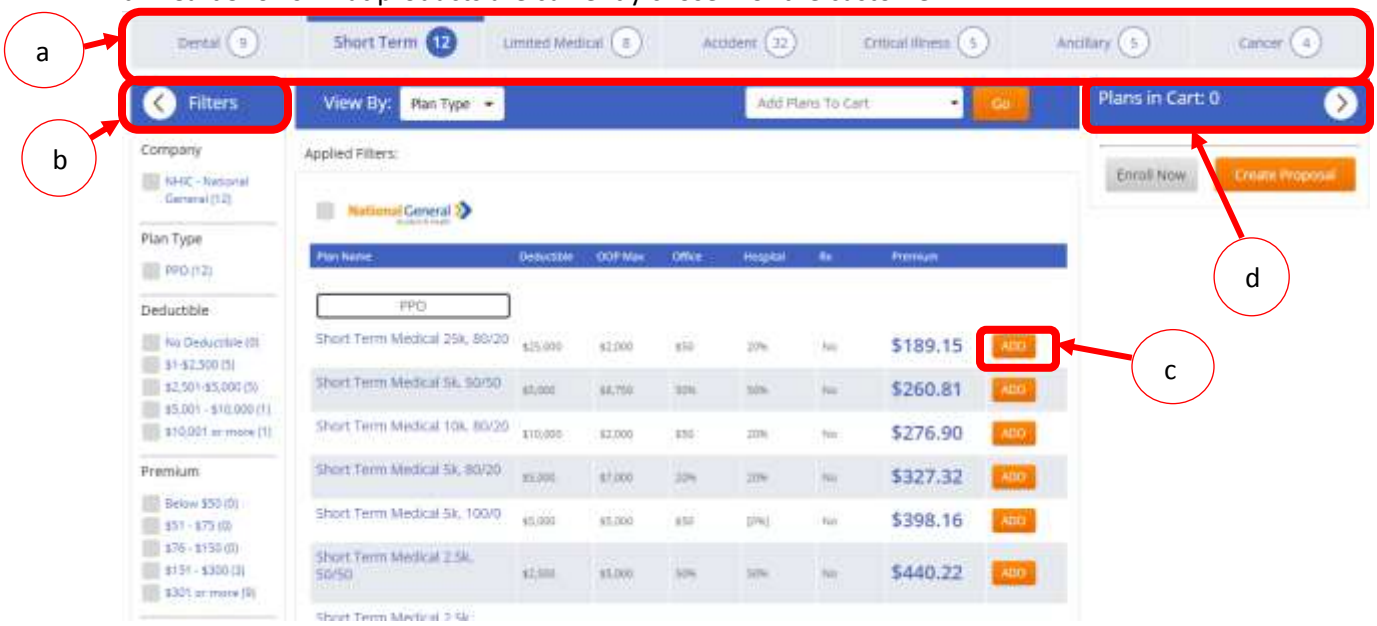


4. You will see any pre made packages
    a. You can enroll them into the package
    b. Go and great your own, Create Proposal



5. **Products available** in zip code/client age **will populate**

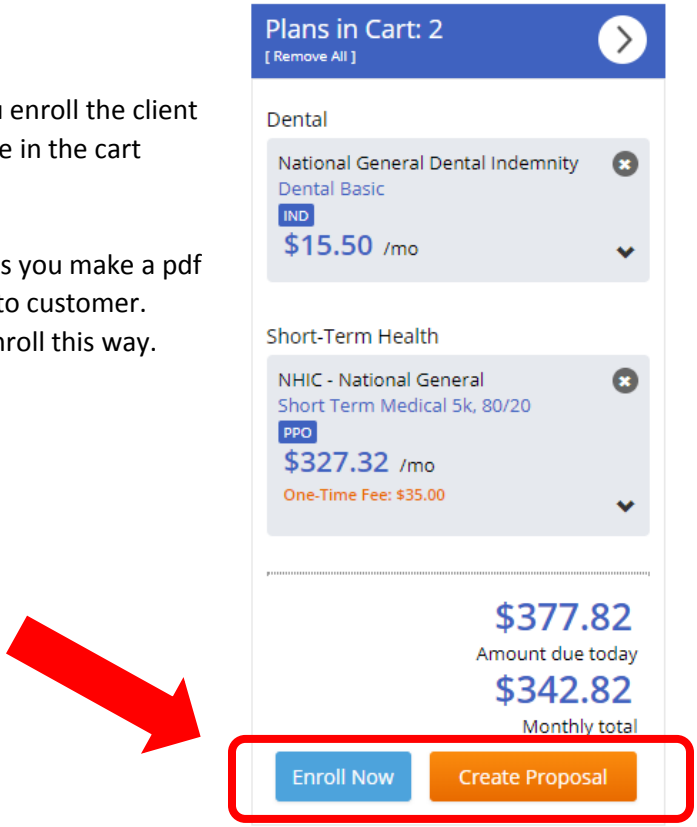
a. Product tabs let you select product type you would like
b. Filters let you narrow down product selection
c. ADD will add a product to your cart
d. Cart Shows what products are currently chosen for the customer



6. Cart has two options

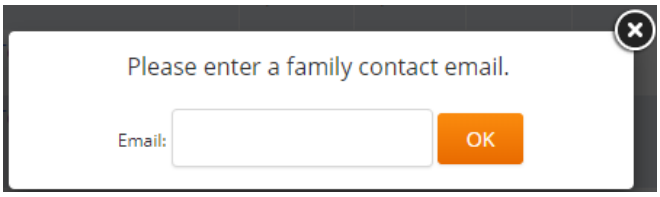
a. **Enroll Now** – Lets you enroll the client in whatever products are in the cart

b. **Create proposal** – Lets you make a pdf email option to send to customer. Customers can self-enroll this way.



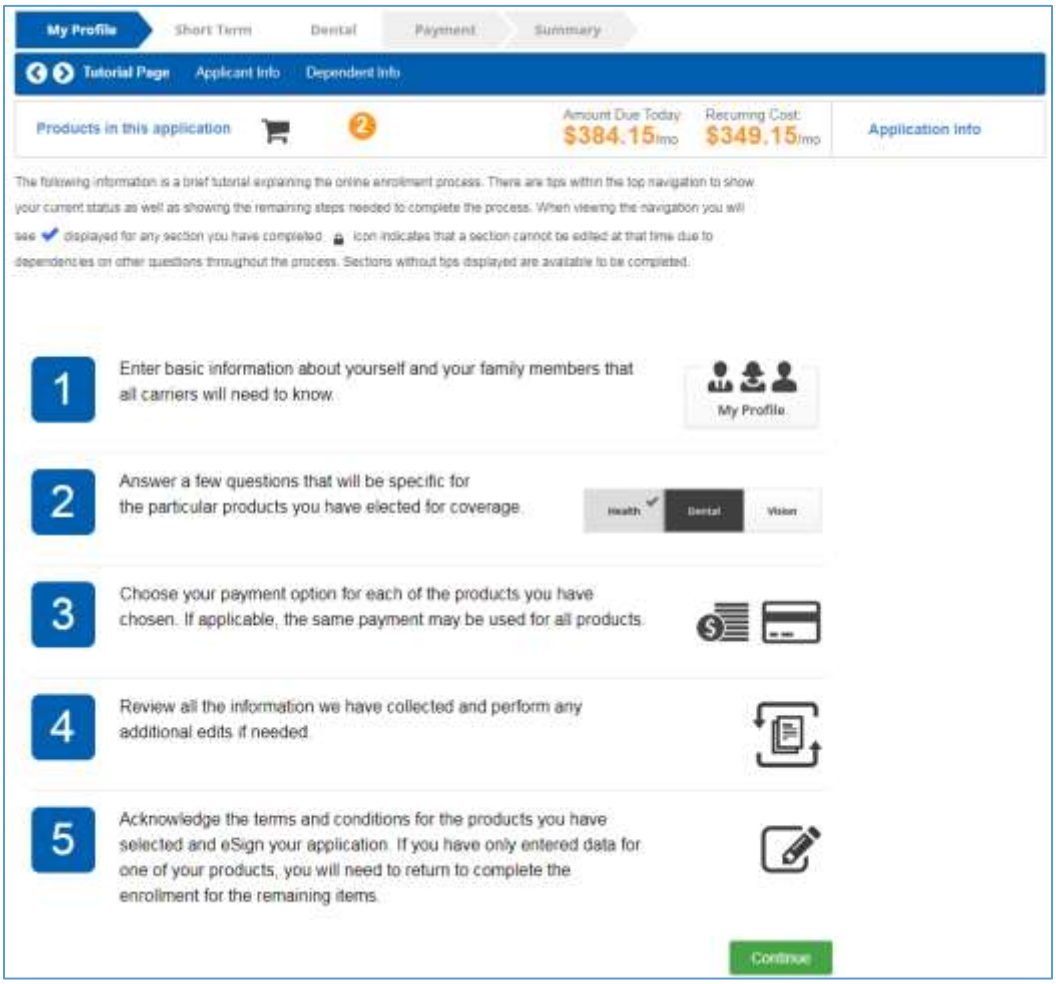
7. ENROLL NOW

a. Enter Client's email

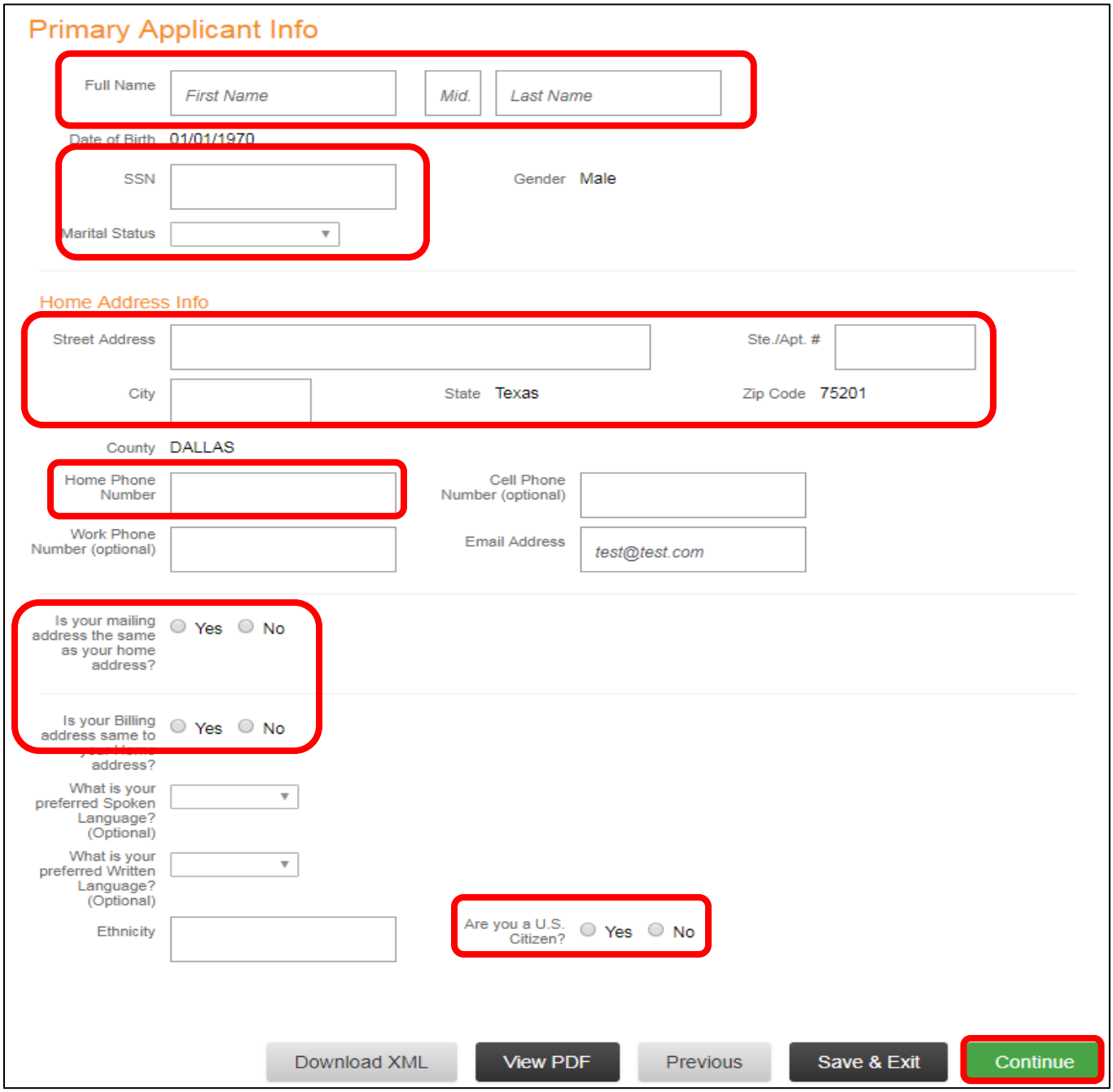


b. Page will show with future steps**. Press Continue**

NOTE: Two tables will open, one is client contact information, other is the quote page below.

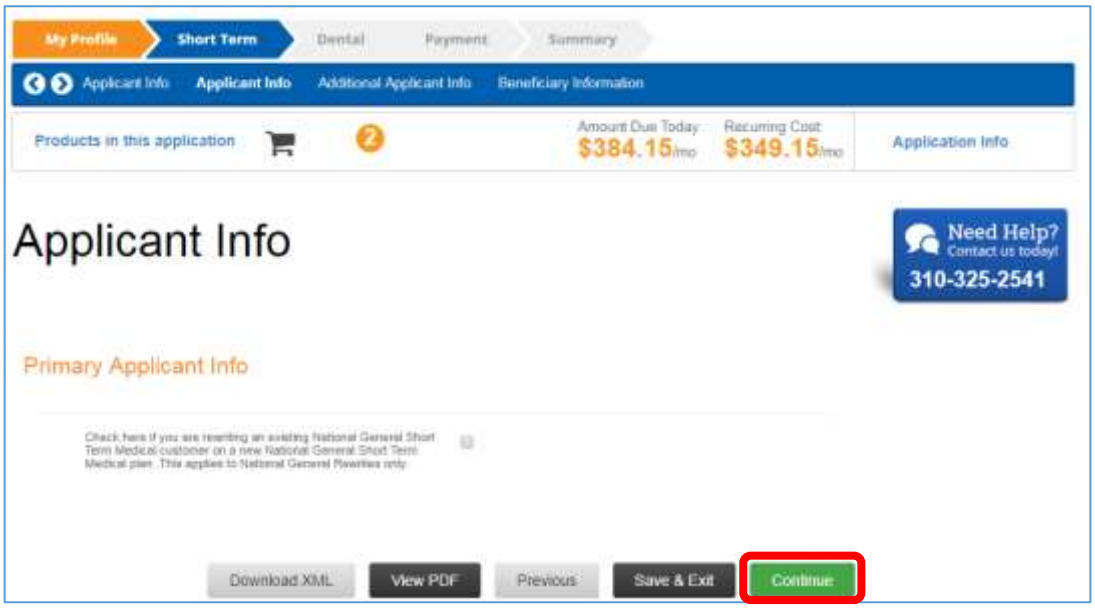


c. Fill in your client's information
   i. First Name and Last Name
   ii. Social Security Number & Martial Status
   iii. Address
   iv. Phone number
   v. Mailing and Billing address yes/no circles
   vi. US Citizenship
   vii. Press Continue

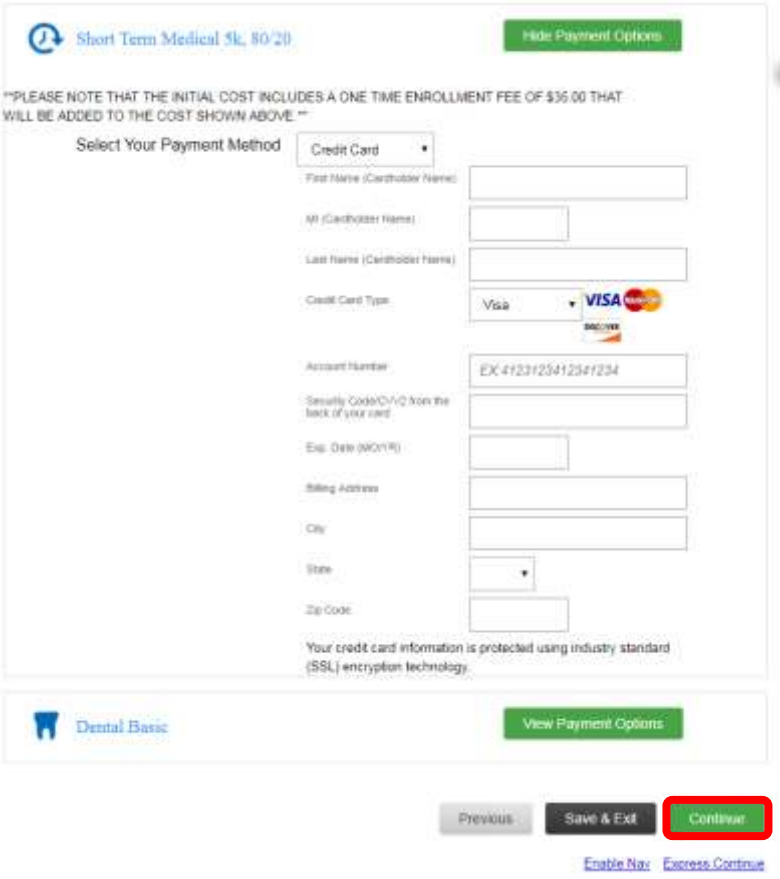


d. **Answer** Product Underwriting **Questions**

i. Press Continue

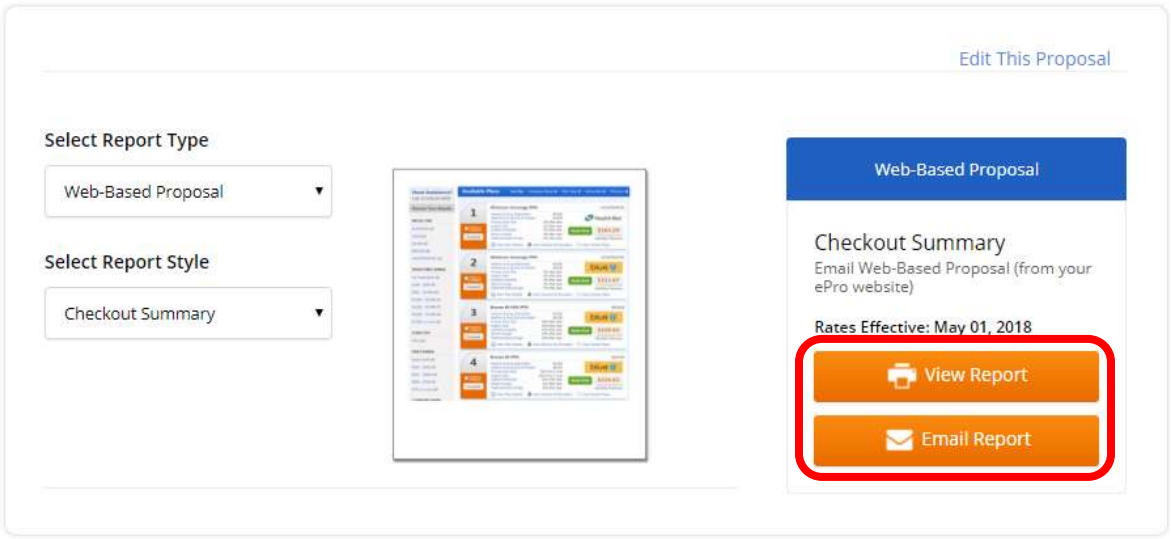


e. **Fill in Payment information** for each product

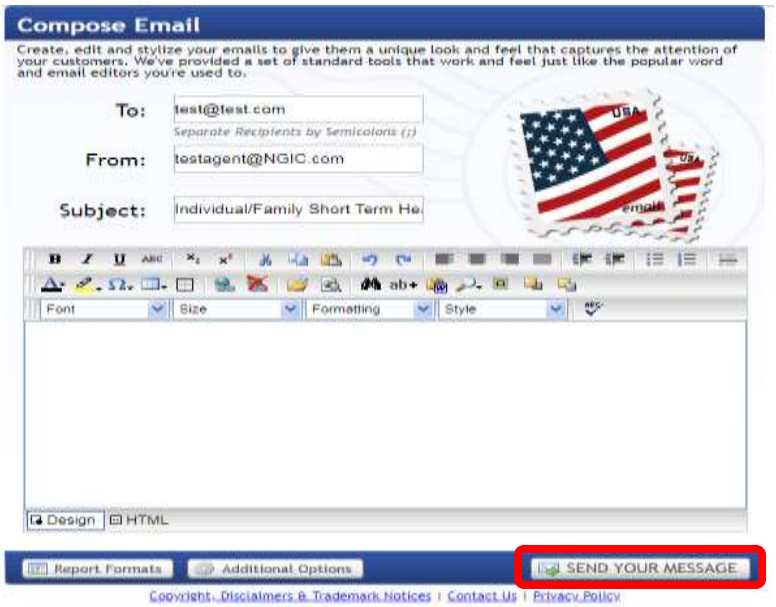


8. CREATE PROPOSAL
    a. If you chose Create Proposal Option instead of enroll

    b. Will present you two options
        i. **View Report** used to **print**
        ii. **Email Report** used for **clients to self-enroll**

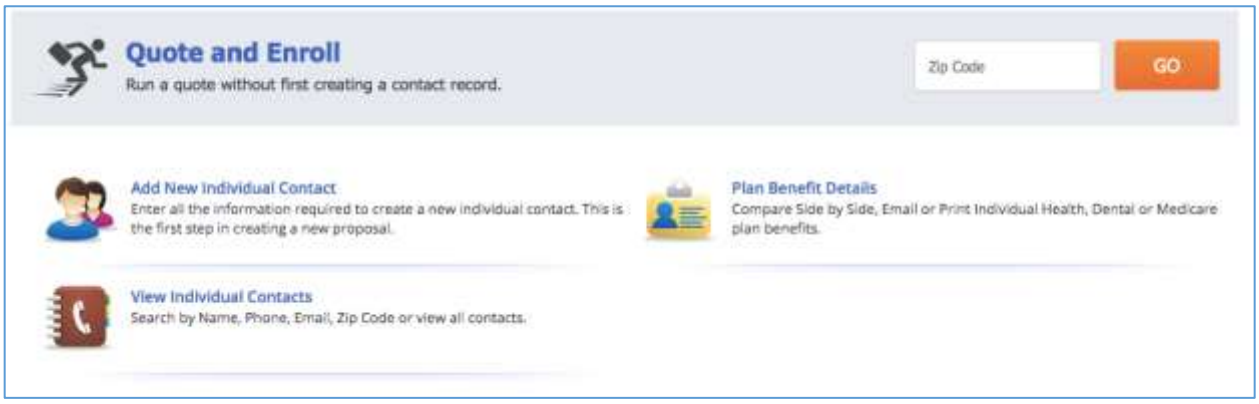


    c. If you pressed Email report fill in:
        i. To & From
        ii. Subject
        iii. Body
        iv. Press Send Your Message



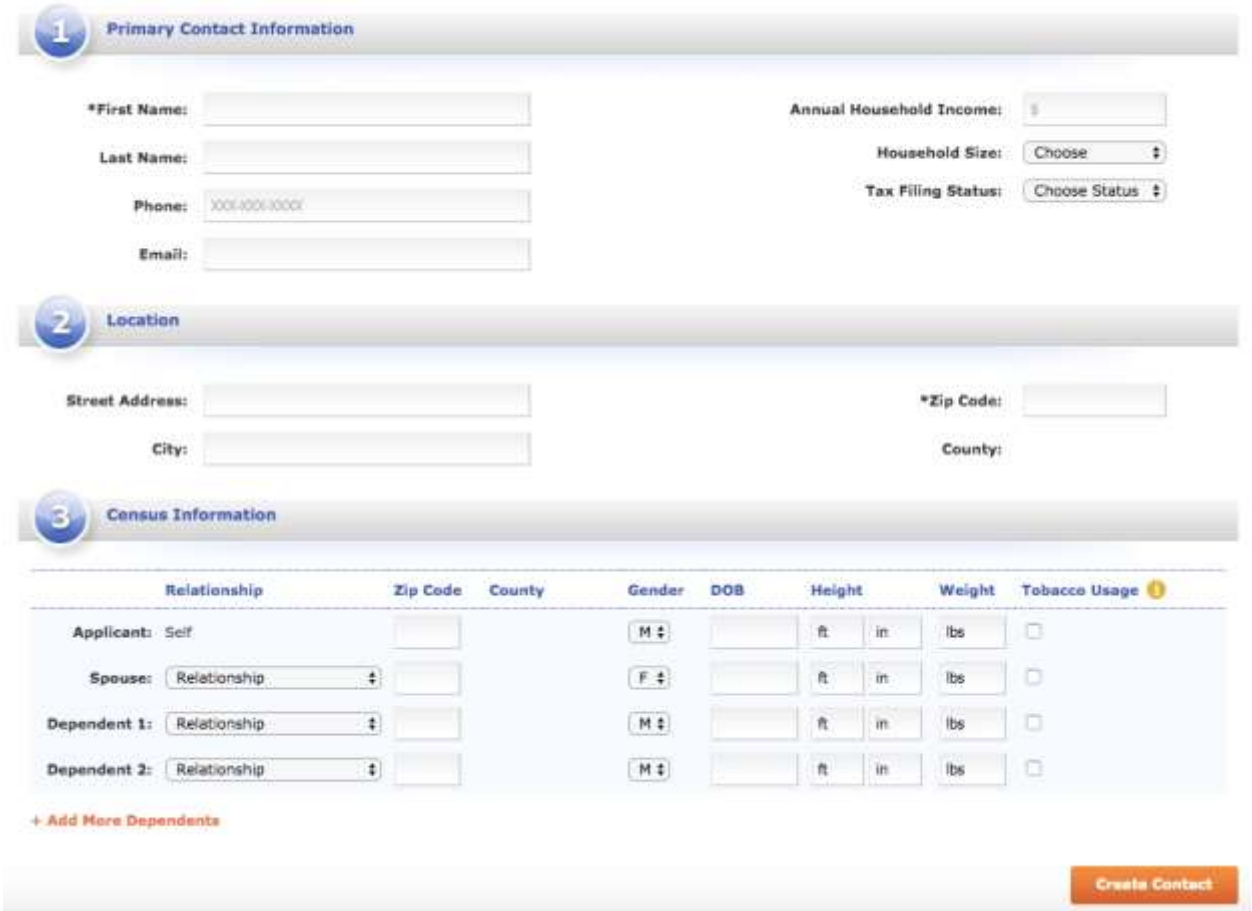
Customer Records Manager (CRM)

A. Add a new customer from scratch
B. Look up a previous customer you have quoted.



Add New Individual Contact

1. Need First Name, Last Name, Phone Email
2. Address
3. Those on the policy
4. Press Create Contact



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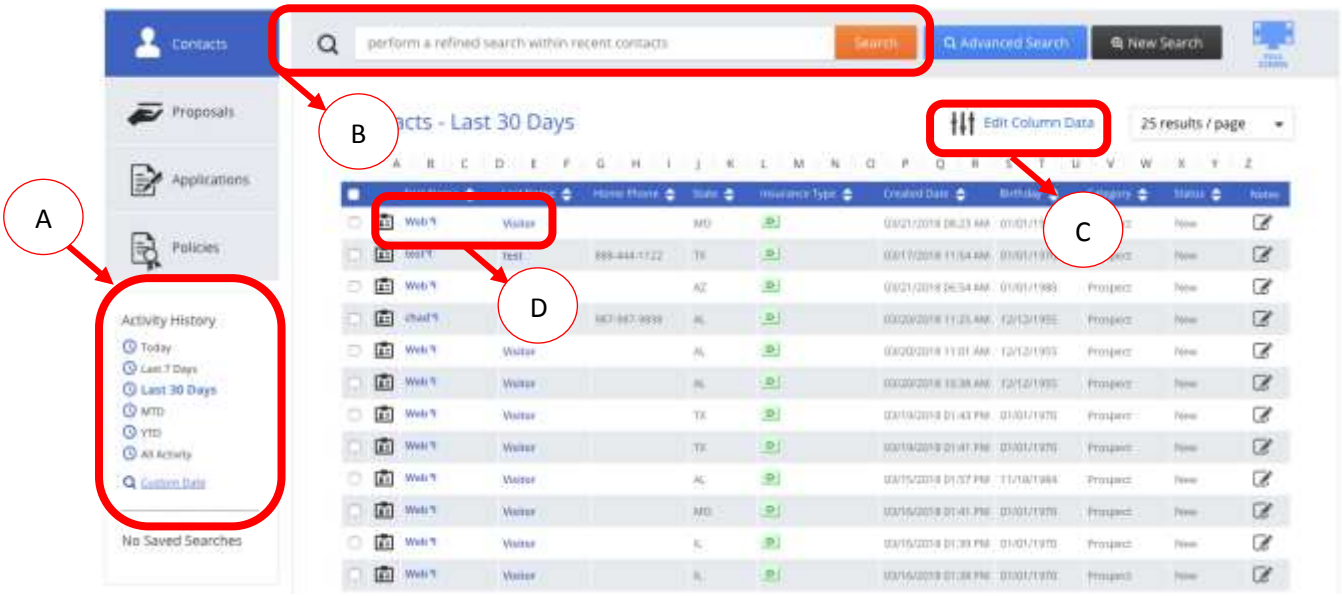
View Individual Contacts

A. Activity History – Sort by when you created the quote
B. Search – search for contact by name
C. Edit Column Data – Add or remove columns so edit what fields you see
D. Contacts, click on First OR Last name to get into the contact's information



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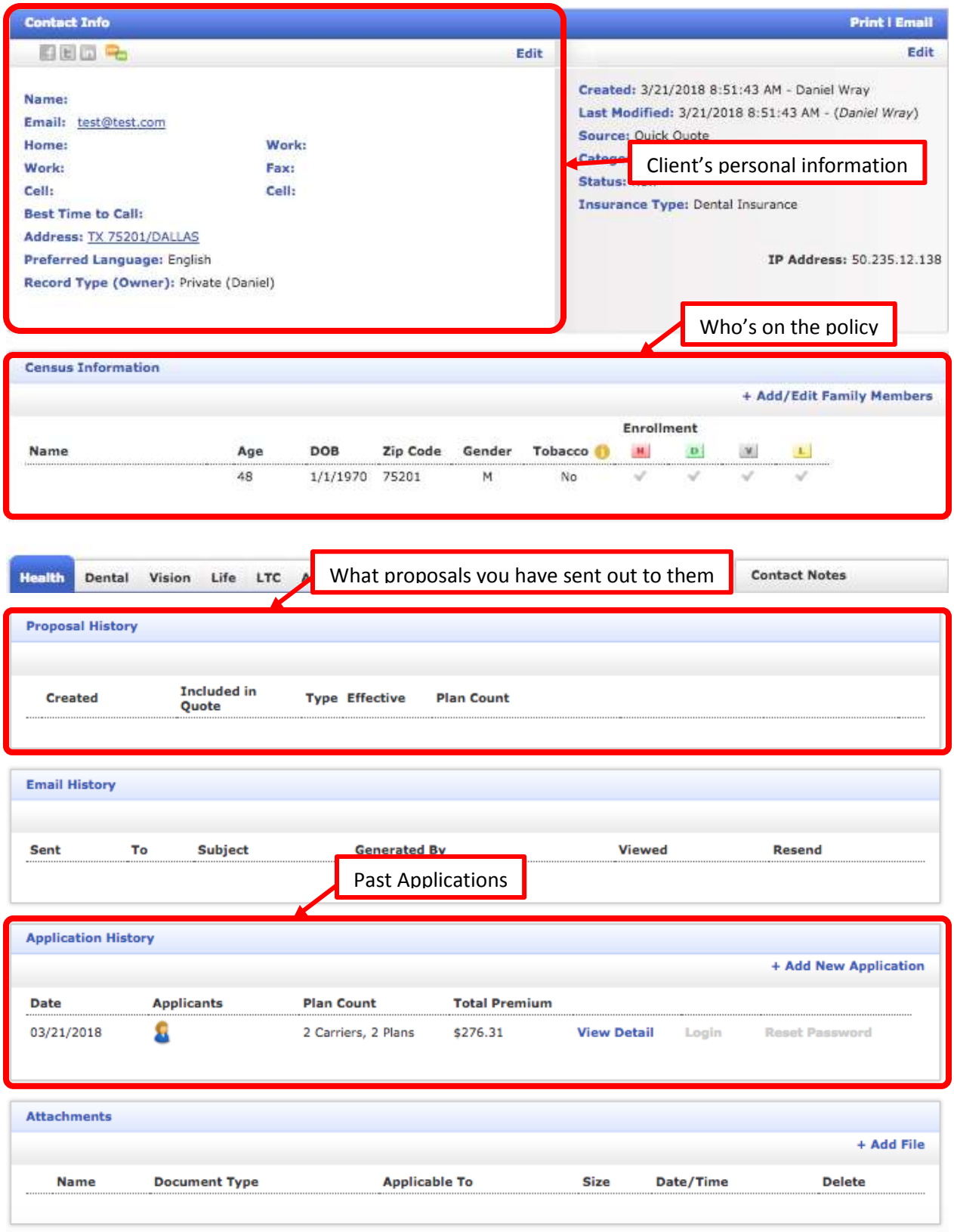
Inside a contact (once you press their first or last name)



Questions, contact:

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