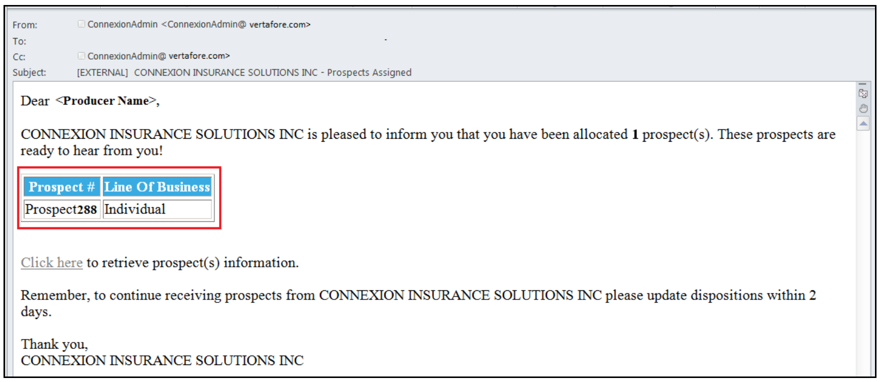
LEAD DISPOSITION ENTRY

1. When a new Prospect has been assigned, you will receive an email notification.
   - Email notification will include the Prospect #, the new Prospect's unique identifier
   - Email notification will also include the 'Line of Business' of the new Prospect

2. From the email notification, access 'MyBusiness' by clicking the 'Click Here' link.



From: ConnexionAdmin <ConnexionAdmin@ vertafore.com>
To:
Cc: ConnexionAdmin@ vertafore.com>
Subject: [EXTERNAL] CONNEXION INSURANCE SOLUTIONS INC - Prospects Assigned

Dear **<Producer Name>**,

CONNEXION INSURANCE SOLUTIONS INC is pleased to inform you that you have been allocated **1** prospect(s). These prospects are ready to hear from you!

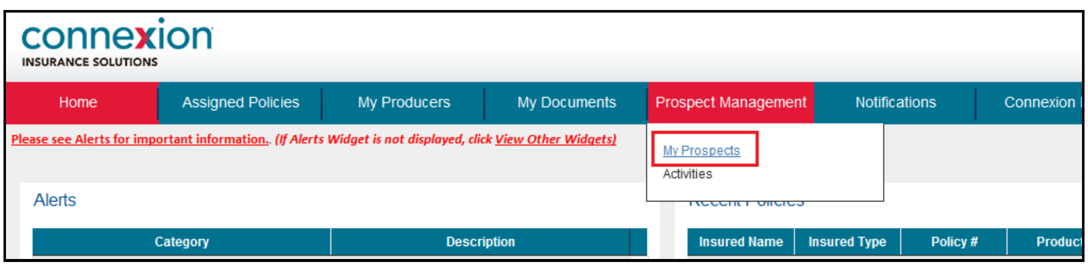
Prospect #	Line Of Business
Prospect288	Individual

Click here to retrieve prospect(s) information.

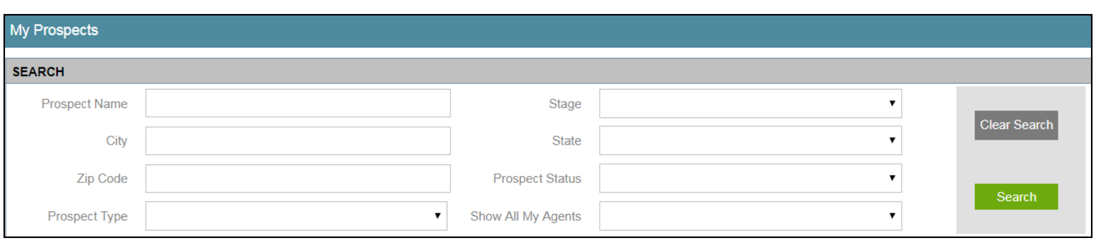
Remember, to continue receiving prospects from CONNEXION INSURANCE SOLUTIONS INC please update dispositions within 2 days.

Thank you,
CONNEXION INSURANCE SOLUTIONS INC

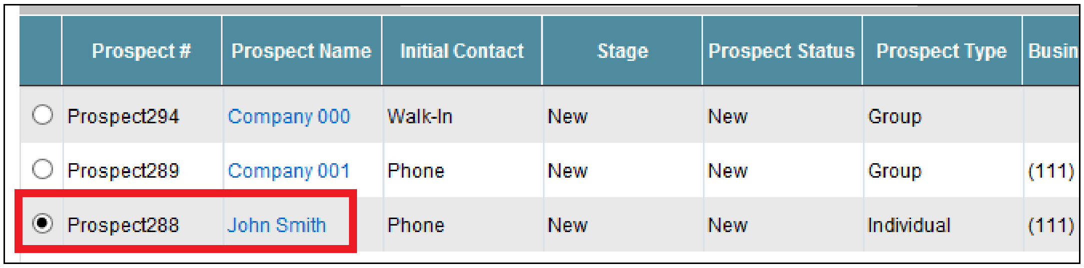
3. Once you have successfully logged into MyBusiness, hover on the 'Prospect Management' and select 'My Prospects'



4. In the 'My Prospects' page, new leads will appear at the top of the list. You may also utilize the search fields to search for specific prospects (leads).

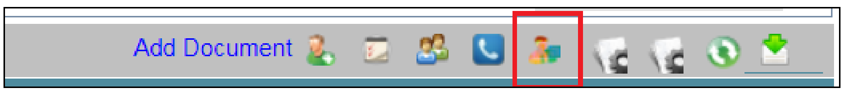


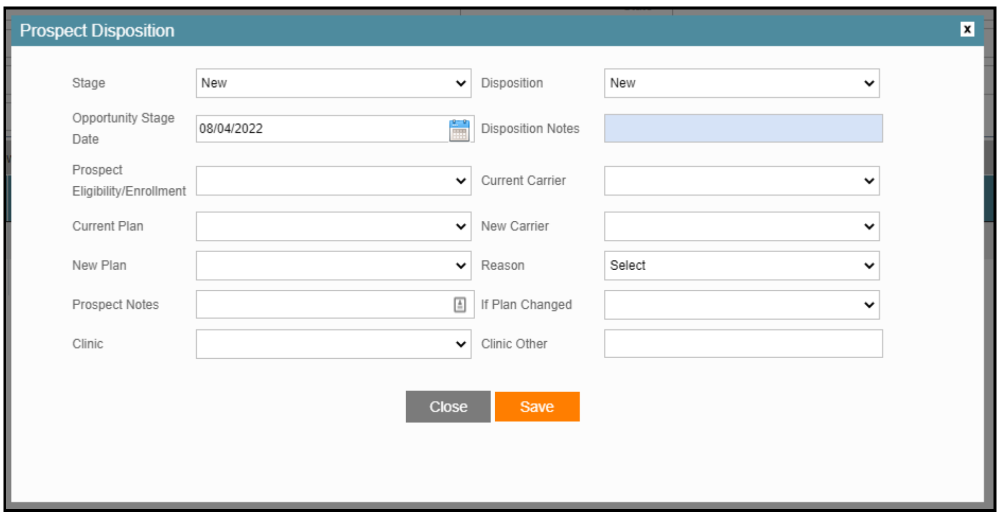
5. Using the Prospect # noted in your email notification, you can update the Prospect information by checking the 'radio button' on the same line item as the Prospect.



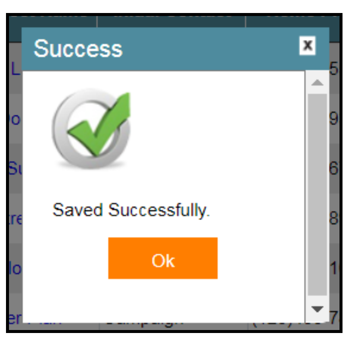
	Prospect #	Prospect Name	Initial Contact	Stage	Prospect Status	Prospect Type	Busin
○	Prospect294	Company 000	Walk-In	New	New	Group	
○	Prospect289	Company 001	Phone	New	New	Group	(111)
◉	Prospect288	John Smith	Phone	New	New	Individual	(111)

6. To update your Lead, click the 'Quick Disposition' icon. A pop-up window will appear, utilize the fields to add your updates.





7. After updating the lead click 'Save'. On screen message should appear that update was saved. Click 'OK'.



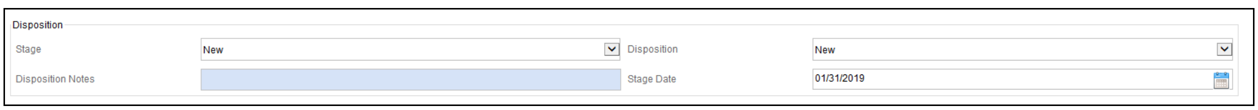
8. You can also view additional information and update the Prospect information by clicking on the Prospect Name from the Search Screen.

	Prospect #	Prospect Name	Initial Contact	Stage	Prospect Status
○	Prospect294	Company 000	Walk-In	Contacting	New
○	Prospect289	Company 001	Phone	New	New
○	Prospect288	John Smith	Phone	New	New

Prospect Information

First Name John
Last Name* Smith
Middle Name
DOB
County Snohomish

a. Update Disposition



Disposition

Stage New
Disposition New
Disposition Notes
Stage Date 01/31/2019

b. Update Prospect Notes

c. Notes from HomeOffice pertaining to the Prospect can be found here. You may also enter notes/updates in this area for HomeOffice to view

Notes

Notes
Add

HomeOffice added Comment - 6/25/2018 9:19:54 AM
Ageing in July
<Producer Name> added Comment - 6/25/2018 10:19:49 AM
Meeting set, but this is actually with her husband.

9. After changes have been completed, click ‘Save & Close’.

10. Click ‘OK’ after receivinig the ‘Saved Successfully’ prompt.