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# ForeSight v6.4 User Guide

foresight

## FORESIGHT V6.4 USER GUIDE

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# Getting Started

**NOTE:** The ForeSight® images in this guide may look slightly different depending on the web browser you are using. This guide uses images from the Microsoft Internet Explorer web browser view.

Step through the following to get started quickly.

## What's New

Following are what's new in ForeSight® version 6.4.

### ACORD

- Upgraded ACORD from 2.27 to 2.38.

### Annuities

- Added solves for all accumulation annuity products.
- Added quotes for the Fixed Annuity (FA) product. Fixed Annuity can illustrate "Accumulation Only" and "Accumulation with Payout Quote". (Quotes are not available for SPIA products.)
- Added solves and solve messages for Fixed Annuity, Fixed Indexed Annuity, and Variable Annuity products.

### Contacts

- Added the ability to select a contact (participant) from within an illustration from either the ForeSight Contact Management module or from one or more external CRMs (Redtail, Salesforce, etc.). This is dependent on your carrier configuration for ForeSight.
- The Contact Management module now contains a single Contact List page where you can initiate adding, deleting and searching for contacts and starting an illustration. The former Individuals, Producers, Households, Groups, Businesses, and Trusts filter tabs were removed from Contact Management and replaced by a View drop-down list with selections for Individuals, Producers, Businesses, and Trusts.

## Life

- Added CSO 2017 updates for Universal Life and Whole Life.
- Added solve messages for Universal Life and Whole Life products.

## Messaging

- Added solves messaging (information, warnings, errors) through the Show Alerts messaging grid.

## Reports

- Added Zip file reports output from multi-illustration type cases, such as Multilife.
- Added single participant reports output from the census page of multi-illustration type cases.

# Tour the Workspace

Find details about the two page views and instructions for the main sections of the ForeSight workspace.

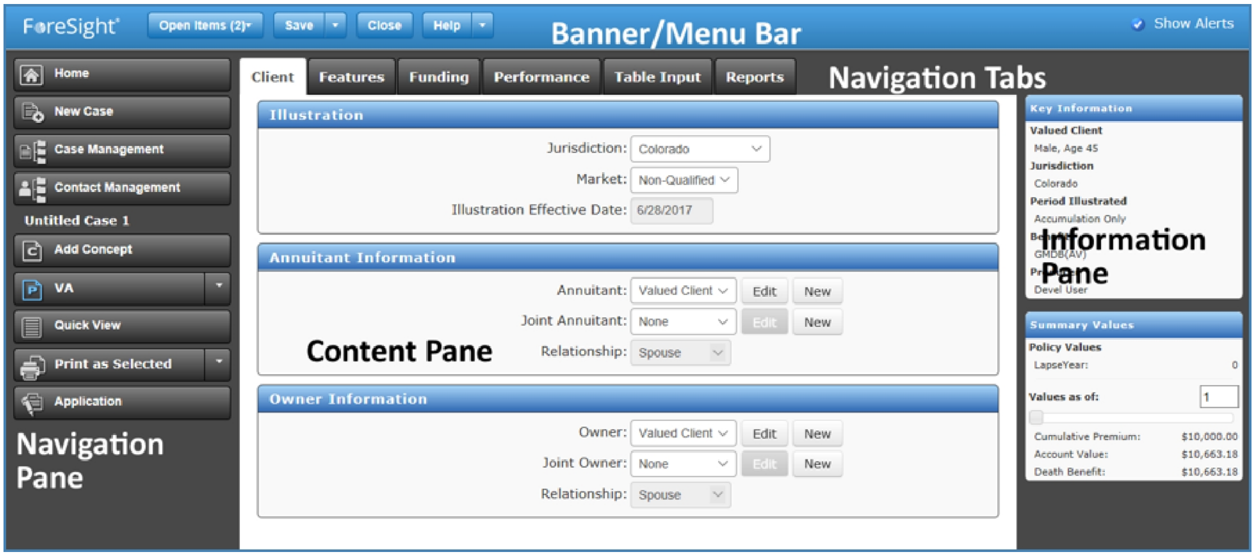
## Page Views

ForeSight senses the screen width and re-sizes the screen to maximize viewing comfort in either full view or optimized view.

### Full View

When ForeSight senses a screen width greater than 1200 pixels, it displays the screen in full view with the navigation pane on the left side and the information pane on the right side fully visible. The icon for the active page or group of pages is blue. In the following example, the VA product pages are active. The following example labels Standard page elements (Banner/Menu Bar, Content Pane, Information Pane, Navigation Pane).


ForeSight
Open Items (2)
Save
Close
Help
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Show Alerts
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New Case
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Contact Management
Untitled Case 1
Add Concept
VA
Quick View
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Navigation Pane
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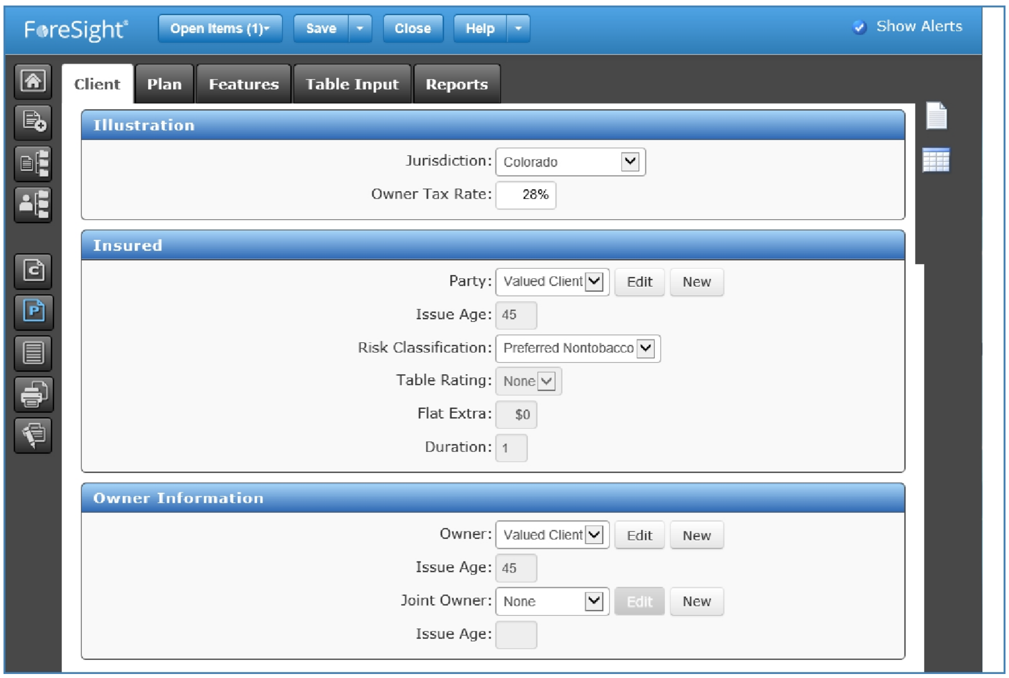
Features
Funding
Performance
Table Input
Reports
Navigation Tabs
Illustration
Jurisdiction: Colorado
Market: Non-Qualified
Illustration Effective Date: 6/28/2017
Annuitant Information
Annuitant: Valued Client Edit New
Joint Annuitant: None Edit New
Content Pane
Relationship: Spouse
Owner Information
Owner: Valued Client Edit New
Joint Owner: None Edit New
Relationship: Spouse
Key Information
Valued Client
Male, Age 45
Jurisdiction
Colorado
Period Illustrated
Accumulation Only
Information Pane
Devel User
Summary Values
Policy Values
LapseYear: 0
Values as of: 1
Cumulative Premium: $10,000.00
Account Value: $10,663.18
Death Benefit: $10,663.18

## Optimized View

When ForeSight senses a screen width less than 1200 pixels, it re-sizes the screen by shrinking the left side navigation pane and right side information pane to their minimum icon sizes as shown below. Point to an icon in the minimized right side pane to expand the information pane. Click an icon on the left side to go to the associated page. The icon for the active page or group of pages is blue. In the following example, the Product icon is blue, which indicates the product pages are active. Point to an icon in the minimized left side pane to expand the navigation pane and click a navigation button to go to the associated page.

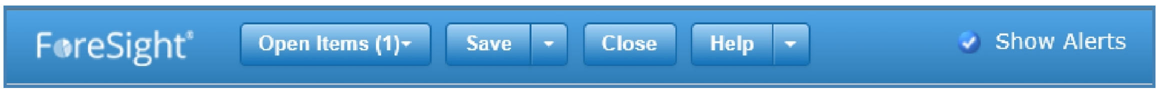


## Banner, Menu Bar, and Show Alerts

The banner and menu bar are located at the top of the viewable area of the browser.

Use the banner logo and menu bar to navigate to the Home page, access common menu commands, and view alerts of any errors, warnings or informational messages.




### Banner

The banner extends the width of the logo from the left side. On the banner, click the **Logo** to go to the Home page.

### Menu Bar

The menu bar extends from the right of the Logo to the right side. The menu bar contains the following menus and commands.

> **NOTE:** The active page in the system determines the availability of menus and commands. For example, more menus and commands become available when a case is open.

**Open Items Menu**


Use the Open Items menu to move among multiple open cases and contacts. The list of items sorts from most recent items at the top of the list to least recent items at the bottom of the list.

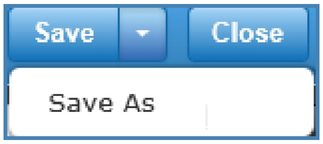
**Move among Open Items**

1. On the menu bar, click the **Open Items** menu and then click an item in the list to go to the selected item.

2. The selected item is active until you close the item, select a different item from the Open Items menu, or click a navigation button to go to another system page.

**Save Menu**




Use the Save menu to save open cases and contacts or to create a copy of a case by saving the case with a new name.

- Click **Save** to save the active case or save the active contact.
- Click the **Down Arrow** to the right of **Save** and then click **Save As** to save a case with a new name or folder location or as a user-defined template, which creates a copy of the active case.

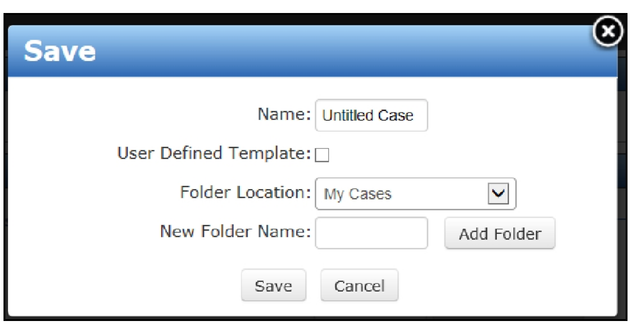
  You cannot save In-Force cases or Multilife or Composite concept cases as user-defined templates.

## Save a Case

When you create a new case or update an existing case, do the following to save the case.

1. On the menu bar, click **Save**.

   If you did not save the illustration with a case name, the Save dialog box opens.

2. On the **Save** dialog box, type a **Name** in the box.
3. In **Folder Location**, select an existing folder from the list.

To add a new folder for the case, type a folder name in **New Folder Name** and click **Add Folder**.

All cases initially get stored in the preset default My Cases folder until you add and use your own folders in Case Management. For instructions, see Case Management.

4. Click **Save** to save the case and return to the previous page.

   Click **Cancel** or the close button to not save the case and return to the previous page.

### Save a Contact

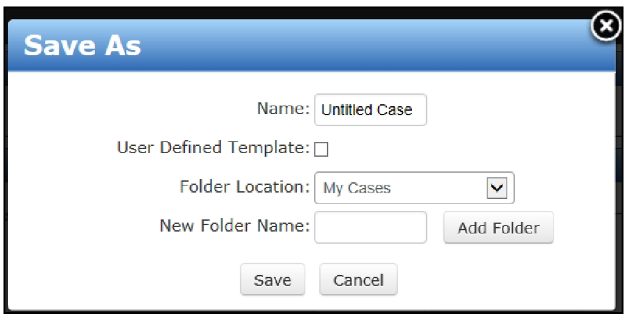
1. Add a new contact or edit an existing contact. For instructions, see Contact List.
2. On the menu bar, click **Save**.

   The system saves all of the contact's data.

## Copy a Case

Save a case with a new name to make a copy of the case.

1. On the menu bar, click the **Down Arrow** on the right of the **Save** button and then click **Save As**.
2. On the **Save As** dialog box, type a **Name** that is different from the originating case name.




3. In **Folder Location**, select an existing folder from the list.

   To add a new folder for the case, type a folder name in **New Folder Name** and click **Add Folder**.

4. Click **Save**.

   Click **Cancel** to close the dialog box without saving the case.

### Close Button


1. Click the **Close** button on the menu bar to close the active item (case or contact).
2. If you did not save the item or it has unsaved changes, the Close dialog box opens.

3. On the **Close** dialog box, click one of the following buttons.

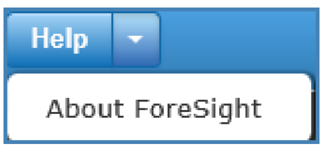
   **Yes** to save your changes. If the open item is a new case, the Save dialog box opens so you can save the case. If the open item is a case that has errors, the Yes button is not available.

   **No** to close the item without saving it.

   **Cancel** to return to the item without closing it.

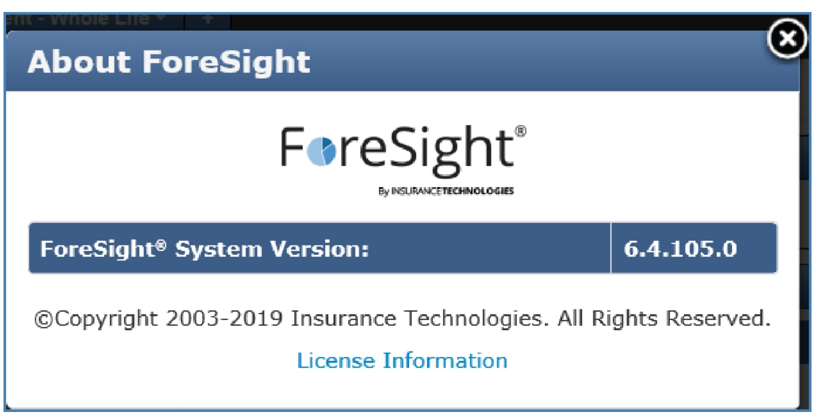
> **NOTE:** If you do not save a new open item before closing, you can close ForeSight, log back on to ForeSight and then go to Unsaved Items in the Home pages to restore the unsaved items. For instructions, see Unsaved Items.

#### Help Menu




Use the **Help** menu to open Help and view system information.

- Click **Help** to open the ForeSight System Help in a separate browser tab or window.
- Click the **Down Arrow** to the right of **Help** and then click **About ForeSight** to open the About ForeSight dialog box for viewing the ForeSight system version. Click on the upper right of the dialog box to return to ForeSight.



## Show Alerts

Use the Show Alerts icon and link on the right of the menu bar to view alerts for any errors, warnings or informational messages in a display grid. ForeSight displays an icon for the highest level of alert next to the Show Alerts link. All errors activate the Show Alerts link.

### Use the Show Alerts Icons and Display Grid

The icon indicates no alerts, and the icon indicates errors exist.


The following icons indicate the severity of the alert or error:

icon indicates the most severe error is a fatal error.

icon indicates the most severe error is a warning.

icon indicates an informational message only.

Use the message icons next to entries for viewing alert messages that provide warnings, additional information, and guidance for correcting errors.

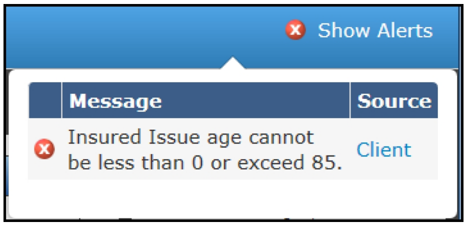
- Page error icons display next to the erroneous input on the page.
- Schedule error icons display in the left most column of the schedule row.
- Table Input error icons display in the column header.
- Error icons do not display on the Quickview or Reports pages. If an error occurs on one of these pages, the icon and Show Alerts link become active on the menu bar.

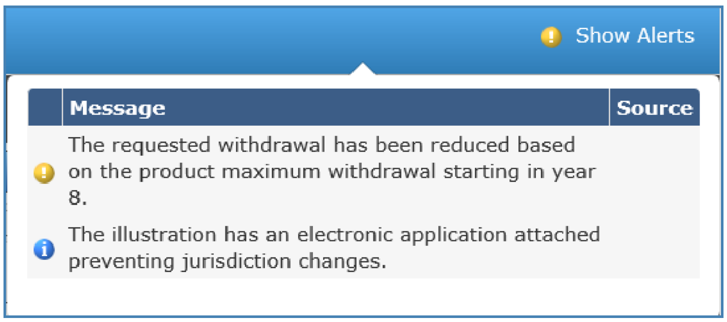
> **NOTE:** Set the **Alerts Display Grid** option in the System section of Preferences to have the Show Alerts display grid automatically open or open only when clicked. For instructions, see Preferences.

On the right of the menu bar, click the **Show Alerts** icon or link to open the Show Alerts display grid and view all messages for the case.

- Left column displays an icon to indicate the severity of the alert.
- Message column displays the alert message.

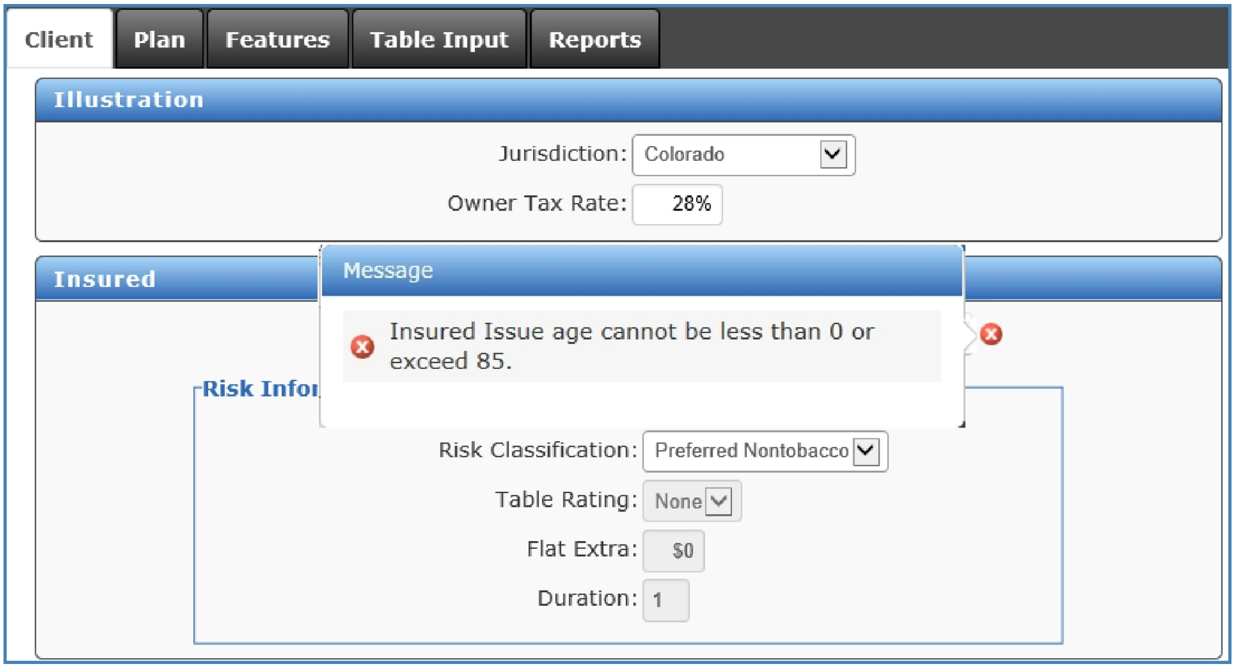
- Source column contains links to the case page location of the alert. Click a Source link to go to the page where errors exist.




**View and Correct Errors**

1. Click the **Show Alerts** error icon or link on the right of the menu bar to open the Show Alerts display grid.
2. In the display grid **Source** column, click a link to go to the page where an error icon appears next to the invalid entry.
3. Point to the icon to view the alert message.
   In the following example, the Issue Age entry on the Client page exceeds the maximum value.

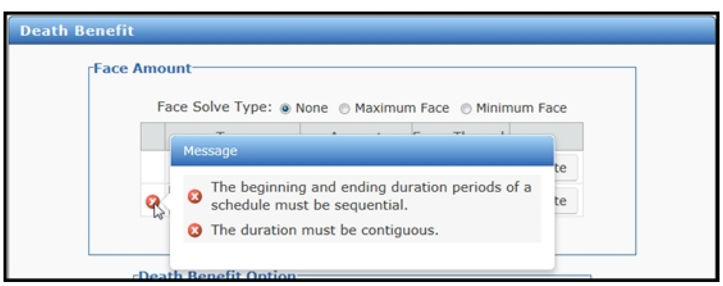



4. Make the required changes to correct the error and tab to (or click in) another field to clear the alert.

5. Click the **Show Alerts** icon or link to view any additional errors or warnings and case page locations.

### View and Correct Schedule Errors

In schedules, the first column on the left displays alert icons. Point to the icon to view the message for the schedule row and then make changes to the schedule to fix the error.

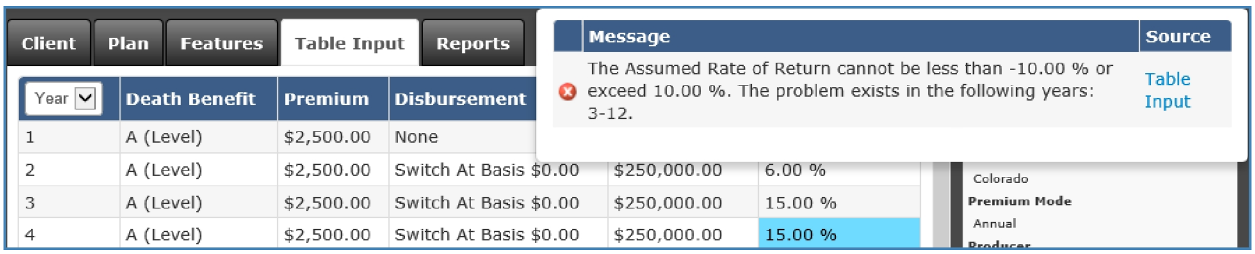


## View Table Input Page Errors and Messages

ForeSight displays errors and messages differently for the Table Input page.

- An alert icon is located in the column header.
- The message includes a list of the affected cells.
- Each cell in the column that is in error displays the text in red.
- When you select a solve in a schedule on a case page, solve error messages do not display on the Table Input page because you cannot correct them on this page.



## Navigation Pane

The navigation pane on the left side contains two primary navigation panes (global and active case) that control ForeSight navigation and activities.

> **NOTE:** When the page view is optimized, ForeSight displays icons instead of panes on the left and right sides of the screen.

### Global Pane

The Global pane contains the primary navigation buttons (or icons in optimized view) to access the global page groups, dialog boxes, and activities within the system: Home, New Case, Case Management, and Contact Management pages. These pages are always available.


#### Home Navigation Button

Click the **Home** navigation button to access Start Illustration, Application Status, Unsaved Items, and Preferences pages. For instructions, see Home.

- Start Illustration page - start a new product or composite, sales concept, template, or in-force reprojection illustration
- Application Status page - view the status of active applications for the selected producer
- Unsaved Items page - recover unsaved items (cases and contacts)
- Preferences page - set system and illustration defaults

#### New Case Navigation Button

Click the **New Case** navigation button to open the New Case dialog box on top of the active page. Use the New Case dialog box to create a new product or composite, sales concept, template, or in-force reprojection illustration or to copy case data from the current active case to a new product illustration. For instructions, see New Case.

#### Case Management Navigation Button

Click the **Case Management** navigation button to access the Case Management pages. For instructions, see Case Management.

- Cases – search for, open, move, copy, assign, delete, import and export cases
- Folders – organize cases within folders: open folders to view and manage cases as on the Cases page, add new folders, delete folders and move cases, delete folders and cases, import cases, edit folder properties and share folders
- Shared Cases – view, copy, update and export cases shared to you from other ForeSight users
- Home Office (Home Office users only) – view, update, copy and export cases that have been shared with you by the carrier
- Edit Templates – open, edit and delete your user-defined illustration templates

#### Contact Management Navigation Button

Click the **Contact Management** navigation button to access the Contact Management page.

Use the Contact Management page to manage your contacts using the Contact List tab. This is where you add, delete and search for contacts or start a new case for a contact. For instructions, see Contact Management.

When you add a contact or open a saved contact, the Contact Information pages become available.

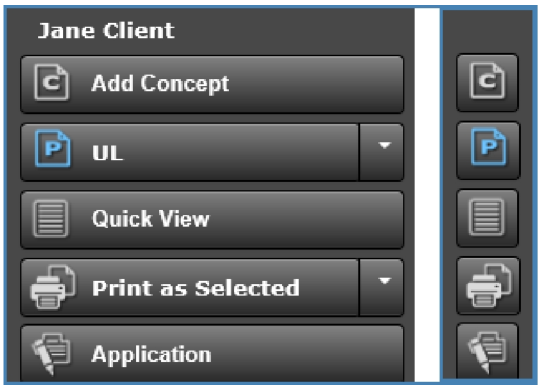
- Use the Contact Information pages to add and edit contact information and open cases for a contact. For instructions, see Contact Information.
- The Reports page is not fully available. Use the Reports page to create a profile report with only a cover page for the selected contact. For instructions, see contact Reports.

## Active Case Pane

The Active Case pane contains the case name and navigation buttons (or icons in optimized view) that provide access to the illustration pages within the active case Concept, Product, Quickview, Print as Selected (quick print), and Application pages. These pages are available only when an active case is open.

- When you begin an illustration and enter the case name in the Start Illustration dialog box, the case name appears above the navigation buttons in the Active Case pane.




- When you begin a Composite illustration, the Product button changes to a Composite button, the Add Concept button changes to an Illustrations button, and a Table Input button is added to the pane. The Table Input button is available only with a Composite illustration.


**Add Concept Navigation Button**

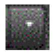
 

Click the **Add Concept** navigation button to open the Select Concept dialog box on top of the active page. Use the Concept pages to add or change a concept for an active case. When you add a concept, the Add Concept navigation button changes to the concept name. For instructions, see Concept.

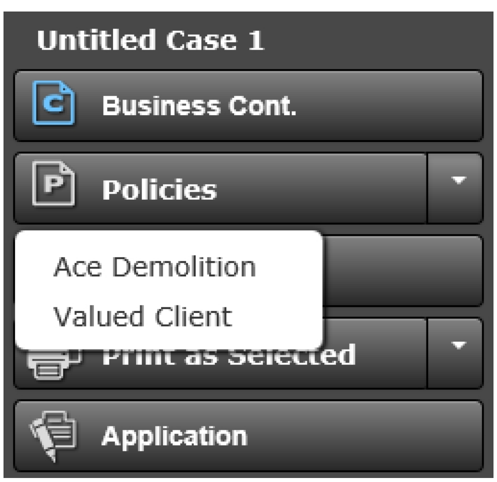
### Concept Navigation Button

Click the **Concept** navigation button to access the Concept pages in an illustration. These pages vary by the product type and selected concept for the active case.

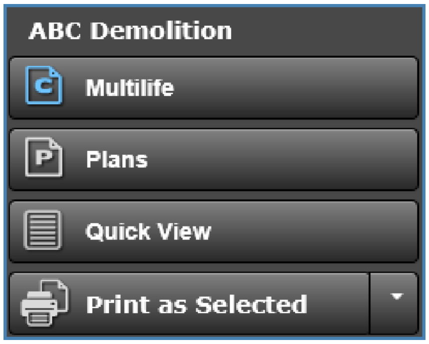
When a concept illustration case is open, the concept navigation button in the active case pane gains a Down Arrow  menu control on the right of the navigation button. Click the down arrow to remove a concept from an active case. For instructions, see [Concept](#).

When a concept has multiple illustrations, the Product button changes to a Policies or Plans button with a selection list for the individual policy illustrations or plans.


- In the Business Continuation concept, click the **Down Arrow** on the right of the **Policies** button and click a policy name to display the policy illustration.

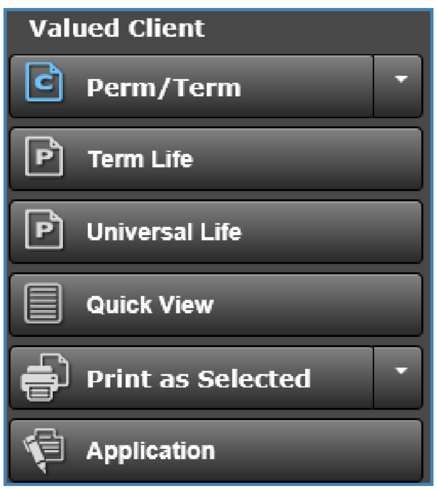





- In the Multilife concept, click the **Down Arrow** on the right of the **Plans** button and click a plan name in the View Plans dialog box to display the plan illustration.

Perm vs Term and Mortgage Cancellation concepts require two Product buttons.




#### Product Navigation Button

Click the **Product** navigation button to access the Product pages in the illustration. These pages vary by the product type and selected product for the active case.

If you add a concept to the active case, the Product menu control is disabled. For instructions on adding or changing a product from the Concept page, see Concept.

When a product illustration case is open, the Product navigation button in the Active Case pane gains a Down Arrow menu control on the right of the navigation button, which is used to change the product from the Product page or begin a Composite illustration. For instructions, see Product.

#### Table Input Navigation Button (Composite Illustration Only)

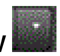
 

In a Composite Illustration, click the Table Input navigation button to open the Table Input dialog box where you can view illustration schedule information in a single table view. For instructions, see Table Input.

#### Quick View Navigation Button

Click the **Quick View** navigation button to open the Quickview dialog box and view calculated values for the active case and create custom views for the calculated values. For instructions, see Quickview.

#### Print as Selected Navigation Button

Click the **Print as Selected** navigation button to print the reports selected on the Reports page within the illustration. Click the Down Arrow  menu control on the right of the navigation button to print only the basic illustration required reports. For instructions, see Print as Selected.

#### Application Navigation Button

Click the **Application** navigation button to open the Application page where you can create and update an application and view policy information for the case. For instructions, see Application.

### Active Contact Pane

The Active Contact pane contains the contact name and navigation buttons (or icons in optimized view) that provide access to the Contact Information pages and contact Reports page for the selected contact. These pages are available when an active contact is open in Contact Management.


#### Contact Information Navigation Button

Click the **Contact Information** navigation button to open the Contact Information pages for the active contact. Use these pages to edit the contact information for the active contact and save it in Contact Management. For instructions, see Contact Information.

#### Reports Navigation Button

Click the **Reports** navigation button to open the page in Contact Management to create and preview reports for the active contact. Currently, only a cover page is created for Reports. For instructions, see contact Reports.

## System Pages and Controls

Following are common ForeSight system pages and controls.

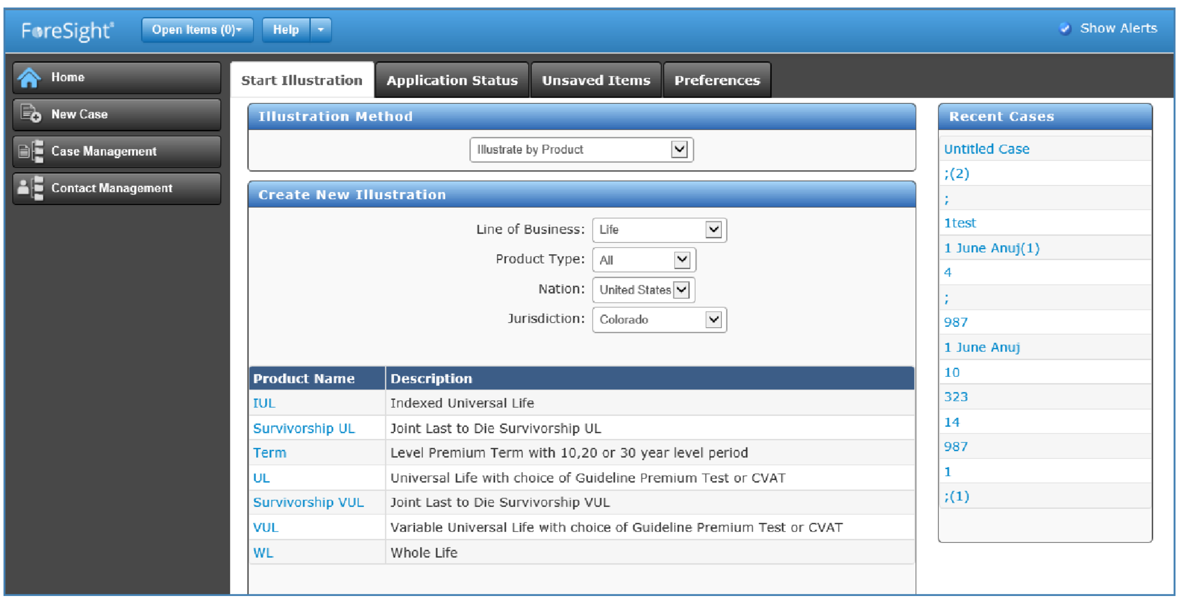
### Page Types

#### Standard Pages

Standard pages include navigation tabs and a content pane. The navigation pane on the left side, the information pane on the right side, and menu bar functionality are available with standard pages.

Standard pages are members of a group of pages. Access Standard pages by clicking navigation buttons in the left side pane and then clicking navigation tabs across the top of the content pane.

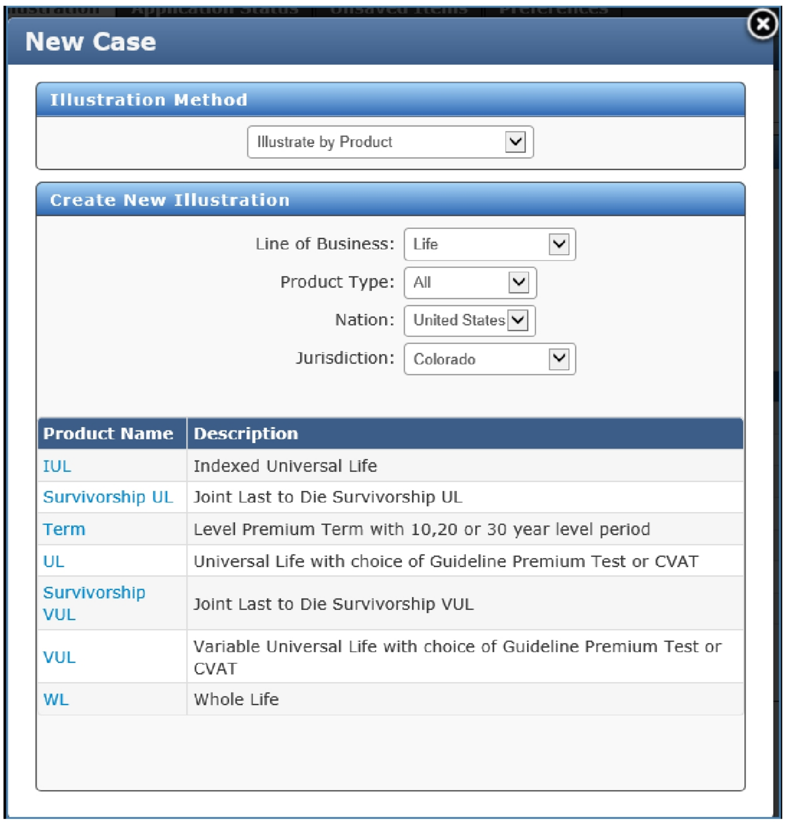
In the Home page group, the Start Illustration page, Application Status page, Unsaved Items page and Preferences page are examples of standard pages.



## Dialog Boxes

Dialog boxes perform a single activity or function and do not include a left side navigation pane, right side information pane and menu bar functionality. Open a dialog box by clicking a button or link on a standard page or menu or by clicking a navigation button in the left side pane. You must close a dialog box before you can go to the next task. New Case and Quickview are examples of dialog boxes.



## Page Controls

### Navigation Tabs

Click navigation tabs above the content pane to access Standard pages within a group of pages.

The background color on the navigation tab changes to white when the page is active. In the following example, the Start Illustration page is active among the Home pages.


### Sections

Most pages contain sections, which are a collection of related data fields.

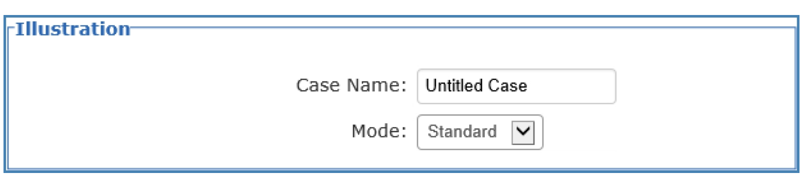
Sections fully expand when you first open a page. In the following examples, the Illustration Method section is on the Start Illustration standard page.

1. Click the **Illustration Method** section title bar to collapse and hide the Illustration Method section inputs.


2. Click the **Illustration Method** section title bar again to expand the Illustration Method section and show inputs.


### Groups on Modal Pages

Modal pages contain groups of data fields instead of sections. Groups have a header title and a border. Groups do not collapse and expand. In the following example, the Illustration group is on the New Case dialog box.




### Tab Key

Press the Tab key (or click each field or applicable button) to move among fields and buttons on a page.

Press Shift+Tab to move through the fields and buttons in reverse order.

### Text Boxes on the iPad

Text boxes have different behavior on the iPad.

- When you touch a text box, it clears the value.
- If you navigate off (close the keyboard or use the next or previous buttons), and the text box is still blank, the system reverts to the previous value.
- If the text box is not blank, the system performs the standard ForeSight formatting and processing.
- To intentionally leave a text box blank on the iPad, type a space in the field and then tab off the field.

### Slider

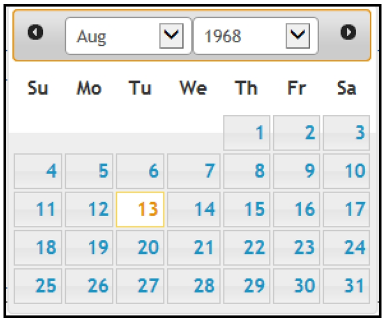
If a year or age text field has a slider available below the field, type a value in the text field or use the slider to change the value.


- Move the slider to the left to decrease the year or age value.
- Move the slider to the right to increase the year or age value.

### Date

To have the system enter a date, click the calendar button and then select a month, year and day on the calendar.


1. To the right of the date field, click the calendar button to open a calendar.
2. Select a month and a year in the lists at the top of the calendar.




3. Click a day on the calendar to have the system enter the selected month, day and year into the date field.

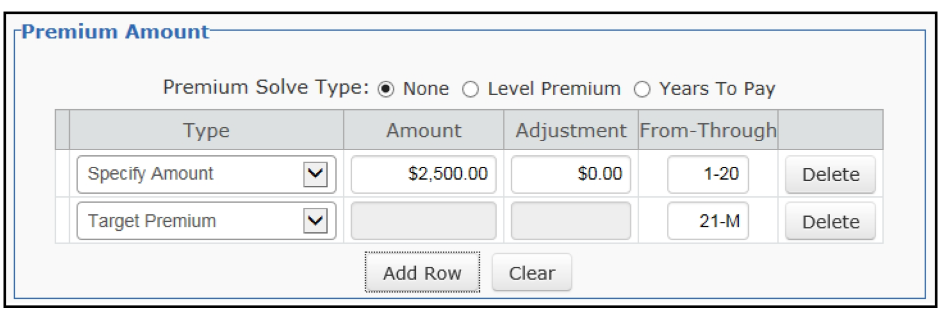

Click outside the calendar to close the calendar without adding a date to the date field.

## Schedule

### Overview

A standard schedule consists of:

- A schedule frame
- An optional solve selection, which often overrides the schedule
- Columns for validation error icons, option selections, and data entry
- Buttons for clearing inputs and adding and deleting rows




### Create a Schedule

1. Select a Solve.

    - Click an option button to select a solve as shown above.
    - When multiple solve options exist, select a solve option in a drop-down list.
    - Click **None** to not use a solve.

    The selected solve option may disable some or all of the schedule inputs.

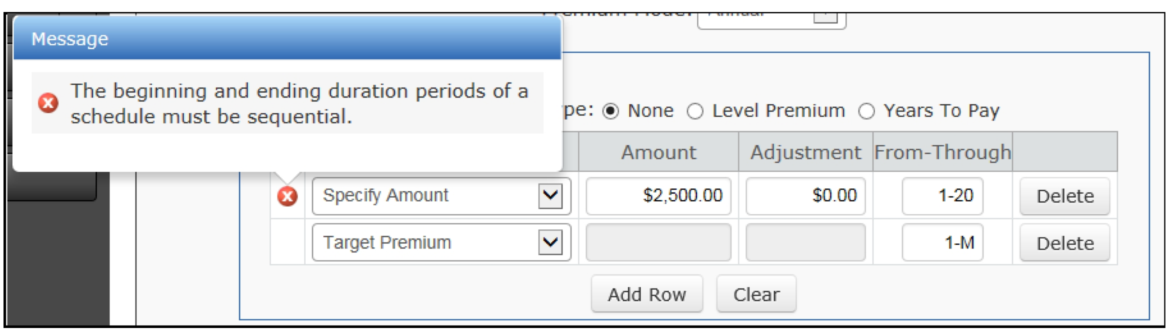
2. View errors in the Alerts column and make corrections as you create the schedule.

    ForeSight runs full validation rules for schedule selections and entries.

    - Solve Type alert icon displays to the right of the last solve option.
    - Schedule entry alert icons appear in the first column on the left of the schedule.

    Point to the icon to view the alert message for the schedule row and then make changes to the schedule to fix the error.

    For example, the following alert error message for the schedule indicates that the From age entry in the From-Through column needs to be sequential for the Premium schedule. Change the From age entry to year 21 in the second row to make the duration values sequential and fix the error.




3. In the remaining columns of the schedule, work from left to right selecting options from the drop-down list fields and entering data in the text fields. Use the schedule buttons to add and delete rows or clear the schedule and start over.

    Schedule Columns:

- **Method** column: The Method column is an optional column that contains a selection list. A Method column is often included in a Disbursement schedule where you can select a disbursement option from the list (Loans, Withdrawals, Switch At Basis, etc.).
- **Type** column: The Type column is where you select a schedule type from the drop-down list. Examples: In a Face Amount schedule, the Type drop-down list might contain Specify Amount, Seven Pay Face, Guideline Face and Target Face options. Select one of those options on which to base the schedule.
- **Amount** column: The Amount column is where you type a numeric dollar value for each row in the schedule.
- **Percent** column: The Percent column is where you type a numeric percentage value for each row in the schedule. For example, type a percentage value in the Percent column of an Assumed Rate of Return schedule.
- **Adjustment** column: The Adjustment column is available only when you set the Type column to Specify Amount. Adjustments are not available for calculated amounts, such as when you set Type to Target Premium.
- **From-Through** column: The From-Through column entries determine the schedule durations.
    - Retirement Age – indicate by entering an **R** in the From-Through column. This represents the retirement policy year.
    - Policy Maturity – indicate by entering an **M** in the From-Through column. This represents the policy maturity year. The M can only be entered as the final Through entry of the schedule.
    - No-gap schedules require no gaps in the duration of the schedule. For each row in a no-gap schedule, the From-Through entries must be sequential from row to row with no gaps in years and you must provide an entry for every year from issue to maturity.

      Example: The From-Through entry for row 1 is 1-20 and the entry for row 2 is 21-M (Maturity). This provides no gaps between the Through age in row

1 and the From age in row 2 and the From-Through years range from policy year 1 to policy maturity.

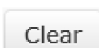
- Allow-gap schedules allow gaps in years between rows.

  Example: The From-Through entry for row 1 is 1-10 and the entry for row 2 is 20-22. This schedule allows gaps in years between the Through age in row 1 and the From age in row 2.

- ForeSight schedules and Table Input are Beginning of Year (BOY) oriented for Policy Age and Year. The From entry is the first day of the policy year entered, or the first day of the policy year that the participant is the age entered at the beginning of the year. The Through entry is the last day of the policy year entered, or the last day of the policy year that the participant is the age entered at the beginning of the year.

Schedule Buttons:

- 

Click the **Add Row** button to add a row to the schedule.
- 

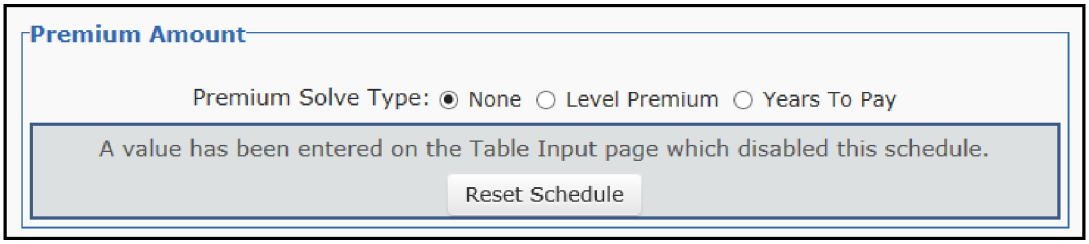
Click the **Clear** button to clear entries from the schedule and reset the schedule to the system default values.
- 

Click the **Delete** button on the right of a row to remove the row from the schedule.

**Table Input Override**

When you type values on the Table Input page that affect a schedule, the schedule becomes disabled.

Click the **Reset Schedule** button on the schedule to re-enable the schedule and reset the associated column entries on the Table Input page to match the schedule.




## Table Input

**Overview**

In the Product page group, click the Table Input navigation tab within an illustration to use the Table Input page to type or change schedule values and recalculate illustration values.

**IMPORTANT!** The illustration values you change on the Table Input page columns override values entered on the associated schedules. Also, selecting a solve anywhere on the user interface sets the corresponding columns on the Table Input page to display "Solve" and to not accept input.

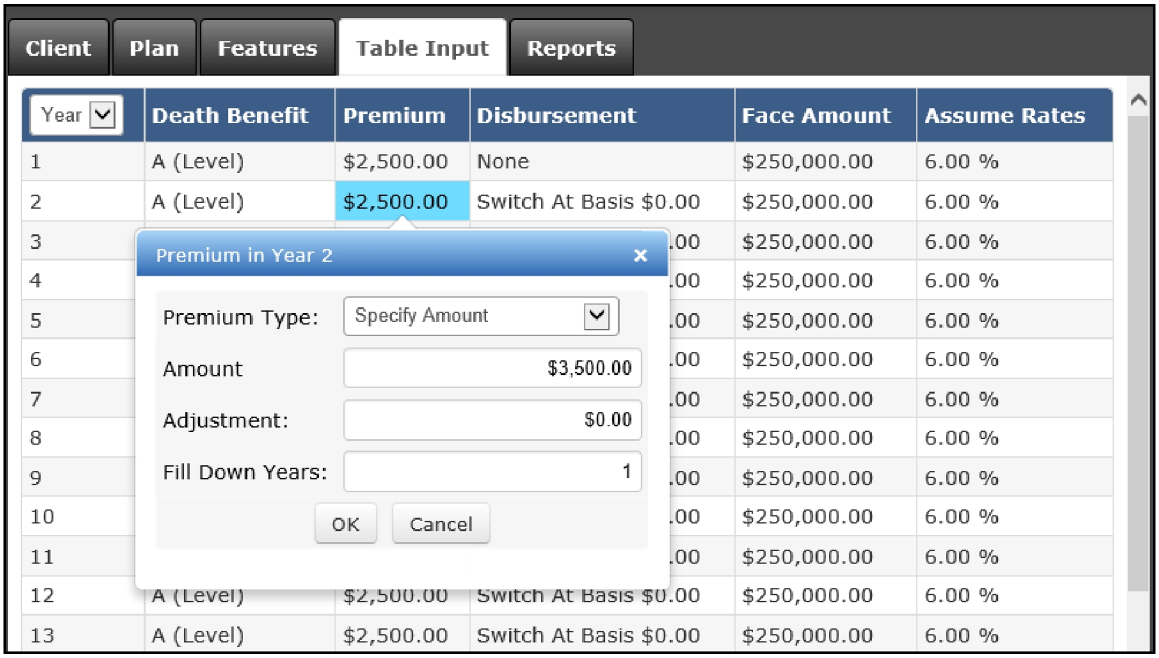
**Change and Recalculate Illustration Input Values in a Column on the Table Input Page**

**NOTE:** Composite illustrations use a Table Input dialog box, which is opened by clicking the Table Input button in the left navigation pane. The Table Input dialog box functions identically to the Table Input page that is accessed via a navigation tab in the illustration pages.

Example:

1. Click the entry for year **5** in the **Premium** column on the Table Input page to open a Premium in Year 5 dialog box.



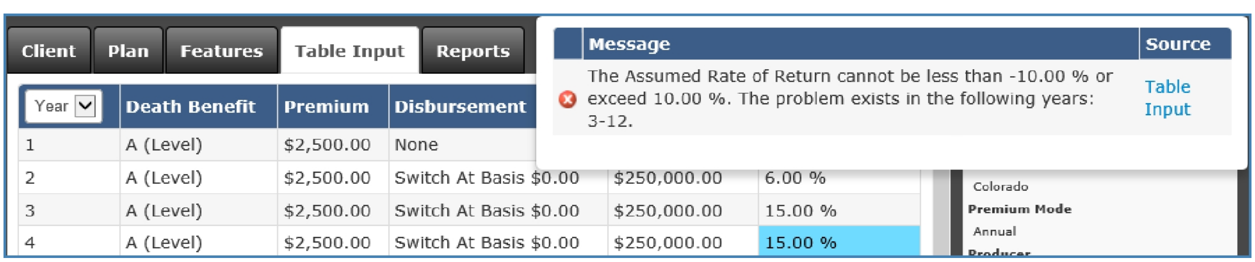

2. On the dialog box in **Amount**, change the dollar amount of the Premium to **$3500**.
3. In **Fill Down Years**, type the number **10**.
4. Click **OK** to save your changes to the Premium column on the Table Input page.

   The system updates the Premium column values to $3500 for years 5 through 14 (10 years).

### Table Input Page Alert Errors and Messages

ForeSight displays alert errors and messages using the Show Alerts feature on the upper right.

> Solve error messages do not display on the Table Input page because you cannot correct them on this page.



## Reports

### Overview

In the illustration page group, click the Reports navigation tab to access the Reports page to enter producer override information and select, render, print and save the illustration reports for the active case.

> **NOTE:** The available sections and options on the Reports page within an illustration vary by line of business and product or concept for the active case.

### Change Producer Information for the Illustration

Select a Producer from Contact Management to change the producer for the current illustration.

1. Within an active illustration, click the **Reports** navigation tab.
2. In the **Producer Information** section, make changes to producer information for the illustration as applicable.
    - As applicable, add or change information in the Producer Information fields on the Reports page.
    - To change the producer for the illustration, click the **Select Producer** button. In the **Select Contact** dialog box, enter the name of the producer to add for the case in **Search for Contacts** and click . In the search results, click the **Producer Name** link to add the selected producer to the illustration.

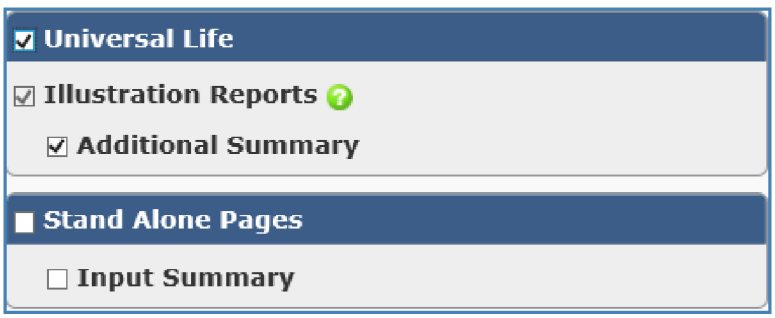
### Create, Preview, Print and Save Reports

1. Within an active illustration, click the **Reports** navigation tab.
2. If a **Reports Options** section is included on the Reports page, select a **Years to Illustrate** option in the list.
3. In the **Reports Display** section, select the report pages to display.
    - If a sales concept is included in the case, select the check box next to the Concept Name to include all available report pages for the concept, or select individual concept report pages or charts to include.

Point to the question mark to the right of a report type name, such as Illustration Reports or Presentation, to view a list of required reports that are automatically included.


- Select the check box next to the Product Name to include all available report pages for the product. Or, select individual product report pages to include.




- Select the check box next to **Stand Alone Pages** (e.g., Input Summary, Storyboard, etc.) to include all standalone reports pages in the reports, or select individual standalone reports pages to include. You can print standalone reports separately from the illustration reports. Standalone reports can be printed when the illustration has errors.

4. Depending on the type of illustration, do one of the following to render and display the selected reports in a separate browser window:

   - Product illustration: click the **Print Illustration As Selected** button.

If standalone reports are available, click the Down Arrow menu control on the right of the **Print Illustration As Selected** button and click **Print Stand Alone Pages Only** to print only the selected Stand Alone pages.

- Concept illustration: click the **Print Concept plus Illustrations** button. Click the Down Arrow menu control on the right of the **Print Concept plus Illustrations** button and click **Print Concept Reports Only** to print only the concept reports or click **Print Stand Alone Pages Only** to print only the selected Stand Alone pages, if available.


If the browser displays a message that it has stopped working, do nothing and wait for the reports to finish rendering.

5. On the reports display pages, scroll down to move through the pages of the rendered reports.

**NOTE:** ForeSight reports are rendered in Portable Document File (PDF) format. View PDF files using a PDF reader. We recommend using the latest version of Adobe Reader, which you can download for free from the Adobe website.

6. Pause the mouse over the browser window until the PDF reader toolbar  appears.
7. Do any of the following:

- Click the **Print** button on the PDF reader toolbar to open a typical system Print dialog box (or a Print pane depending on the browser) and print the reports. The appearance of the Print button varies by browser.
- Click the **Save** button on the PDF reader toolbar to open a typical Microsoft Save As dialog box and save the reports. The appearance of the Save button varies by browser.

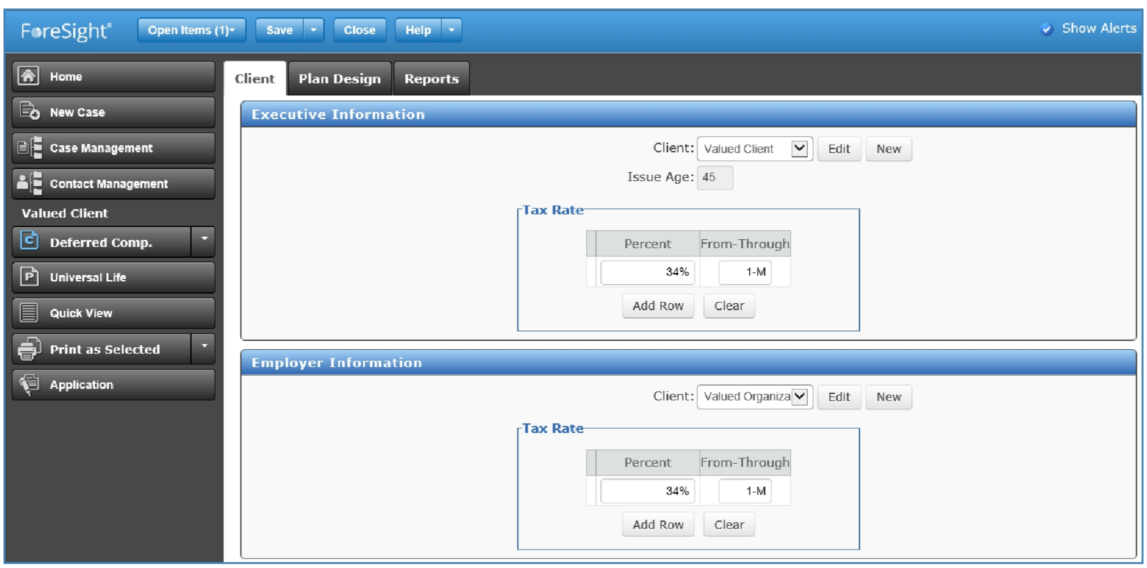
## Active Case

When you start an illustration or open an existing case, the pages for completing the illustration become available. On the left, use the active case navigation buttons to open the active case pages to enter product information, change the product or create a Composite illustration, add or remove a sales concept, view calculation results, print reports, and optionally complete an application for the illustration case.

> **NOTE:** See Start Illustration and New Case for instructions about creating various types of illustrations including entering producer override information, selecting display options and rendering illustration reports.

### Concept

On the left in the active case pane, click the **Concept** navigation button to go to the sales concept pages.




These pages vary by product type and concept for the active case.

Use the navigation tabs above the content pane to go to each of the Concept pages. Work from top to bottom on each page to enter illustration inputs on all the concept pages for the active case.

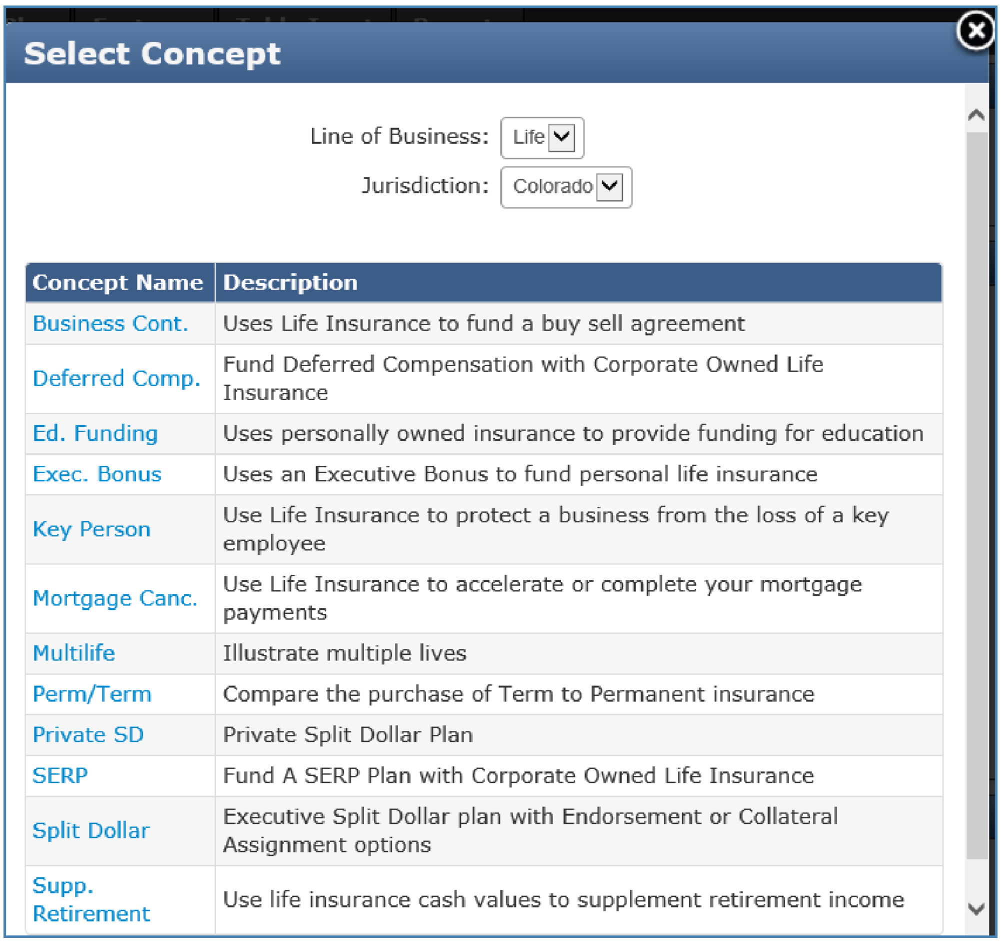
 

#### Add or Change the Concept for an Active Case

Use the Select Concept dialog box to add or change the concept for the active case.

### Add a Concept to the Active Case

1. On the left in the active case pane, click the **Add Concept** navigation button to open the Select Concept dialog box.




| Concept Name | Description |
|---|---|
| Business Cont. | Uses Life Insurance to fund a buy sell agreement |
| Deferred Comp. | Fund Deferred Compensation with Corporate Owned Life Insurance |
| Ed. Funding | Uses personally owned insurance to provide funding for education |
| Exec. Bonus | Uses an Executive Bonus to fund personal life insurance |
| Key Person | Use Life Insurance to protect a business from the loss of a key employee |
| Mortgage Canc. | Use Life Insurance to accelerate or complete your mortgage payments |
| Multilife | Illustrate multiple lives |
| Perm/Term | Compare the purchase of Term to Permanent insurance |
| Private SD | Private Split Dollar Plan |
| SERP | Fund A SERP Plan with Corporate Owned Life Insurance |
| Split Dollar | Executive Split Dollar plan with Endorsement or Collateral Assignment options |
| Supp. Retirement | Use life insurance cash values to supplement retirement income |

2. In the drop-down lists, select the **Line of Business**, **Jurisdiction** and **Presentation Type** for the case.

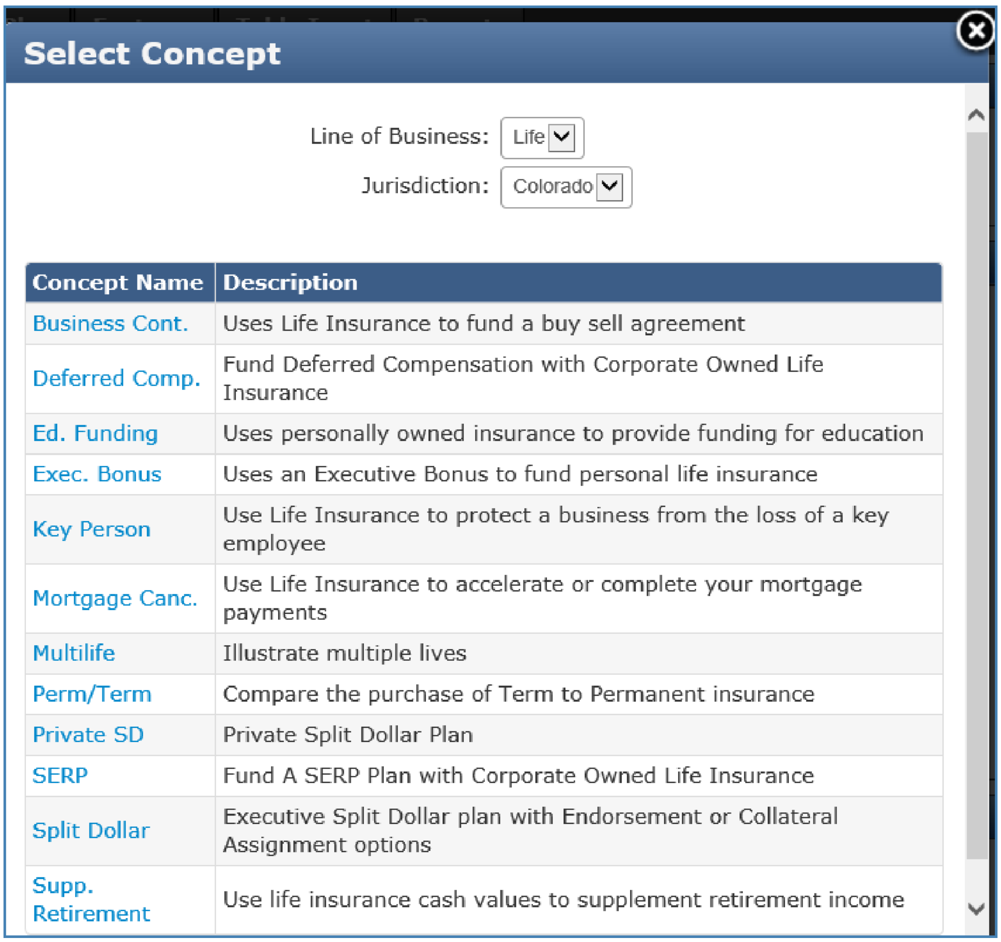
   Presentation Type is available only when more than one Presentation Type exists.

3. In the grid, click a link under **Concept Name** to add the selected concept to the active case.

### Change the Concept for the Active Case

1. On the left in the active case pane, click the **Concept** navigation button to open the selected concept for the case.
2. On the right of the **Concept** navigation button, click the **Down Arrow** to open the Concept menu and then click **Remove Concept** to remove the concept from the case.
3. On the left, click the **Add Concept** navigation button to open the Select Concept dialog box.



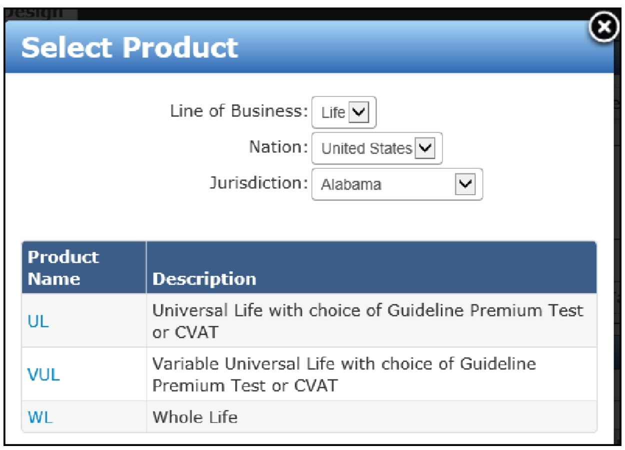

4. In the drop-down lists, select the **Line of Business**, **Jurisdiction** and **Presentation Type** for the case.
5. In the grid, click a link under **Concept Name** to add the selected concept to the active case.

### Add or Change the Product for the Active Case from the Concept Page

Use the Select Product dialog box to add or change the product for the active case from the concept page.

1. On the left in the active case pane, click the **Concept** navigation button to access the Concept pages.
2. Find the **Product Selection** section on one of the concept pages.
3. Next to the **Product** field, click the **Select** button to open the Select Product dialog box.




4. In the drop-down lists, select the **Line of Business**, **Nation**, **Jurisdiction** and **Presentation Type** for the case.

   Presentation Type is available only when more than one Presentation Type exists.

5. In the grid under **Product Name**, click a product name link. The system opens the selected Product pages for the active case.

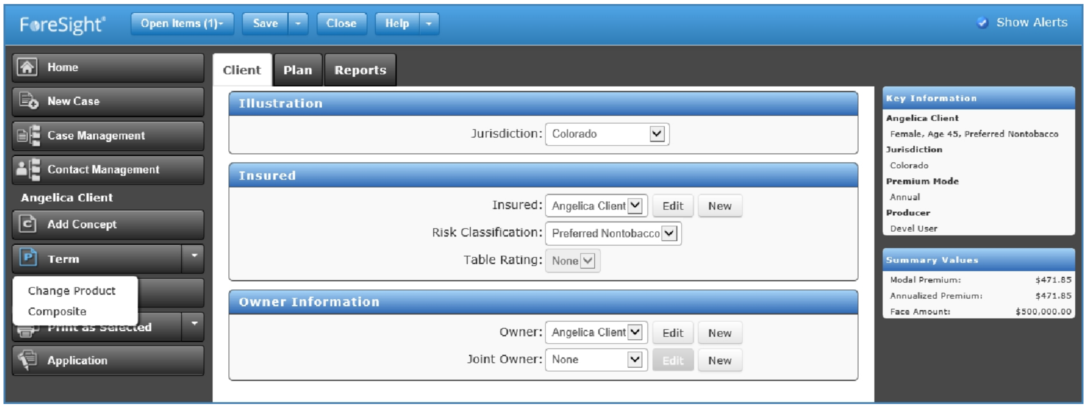
   Or, click the close button on the upper right to close the Select Product dialog box without selecting a different product for the active case.

### Remove the Concept from the Active Case

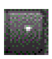
Click the **Down Arrow** on the right of the **Concept** navigation button and click **Remove Concept** to remove the sales concept from the active case.

## Product

On the left in the active case pane, click the **Product** navigation button to access the Product pages.

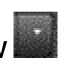



These pages vary by line of business and product for the active case. Work from top to bottom on each page to enter illustration inputs on all the product pages in the active case.

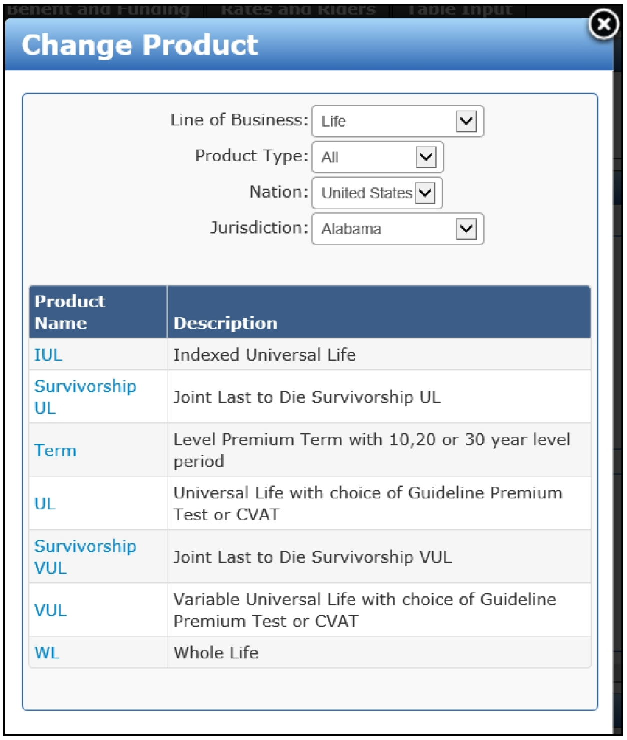
Click the Down Arrow  menu control on the right of the **Product** navigation button to change the product for the active case or to create a Composite illustration.

### Change the Product for the Active Case

While in an active case that has a product, but does not have a concept, use the Change Product command to select a different product for the case from the Change Product dialog box.

1. On the left in the active case pane, click the Down Arrow  menu control on the right of the **Product** navigation button and click **Change Product** to open the Change Product dialog box.




2. In the drop-down lists, select the **Line of Business**, **Product Type**, **Nation**, **Jurisdiction** and **Presentation Type** for the case.

   Presentation Type is available only when more than one Presentation Type exists.

3. In the grid under **Product Name**, click a product name link. The system opens the selected Product pages for the case.

   Click the close button on the upper right to close the Change Product dialog box without selecting a different product for the case.

**NOTE:** When the active case has a product and a concept, the Product menu control on the right of the Product navigation button is disabled. For instructions on changing the product from the Concept page, see Concept.

### Create a Composite Product Illustration

On the left in the active case pane, click the Down Arrow menu control on the right of the **Product** navigation button and click **Composite** to begin a composite illustration. See Create a Composite Illustration for instructions.

### Quickview

On the left in the active case pane, click the **Quick View** navigation button to open the Quickview dialog box.

Use Quickview to view illustration calculations for the active case in columnar or graph display format and to add and manage custom views for viewing illustration calculations.

#### View Calculated Illustration Values

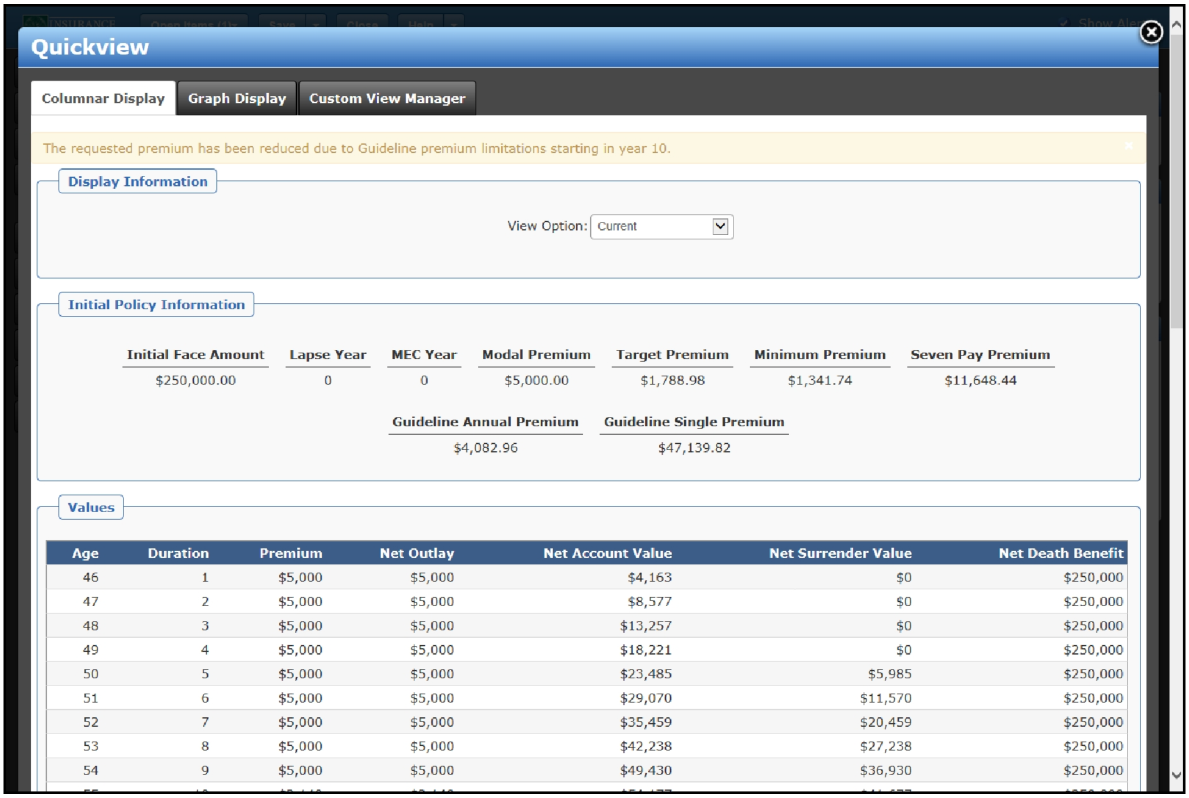
1. After completing the illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box to view the calculated illustration values.
2. Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

   a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Scroll down to view all of the information.




## Graph Display

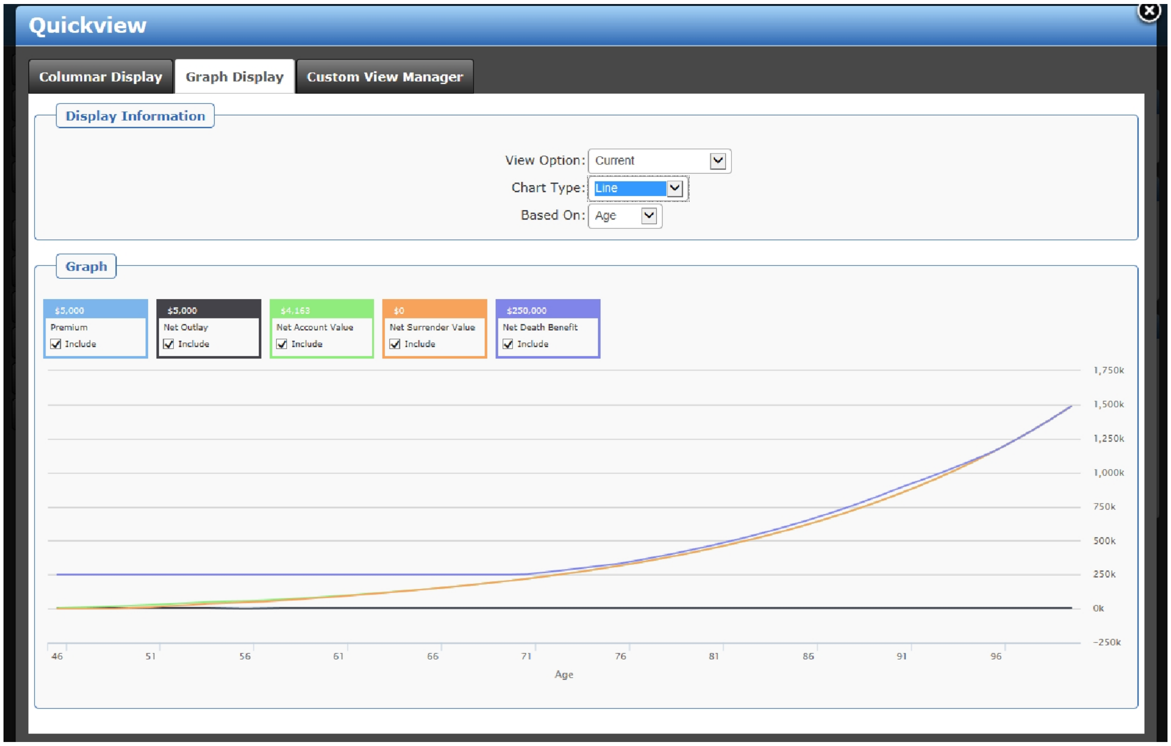
a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Select an option in each of the **Chart Type** and **Based On** lists.

c. In the **Graph** section, select the check box for each value to include on the graph.

   Clear a check box to exclude the value from the graph.



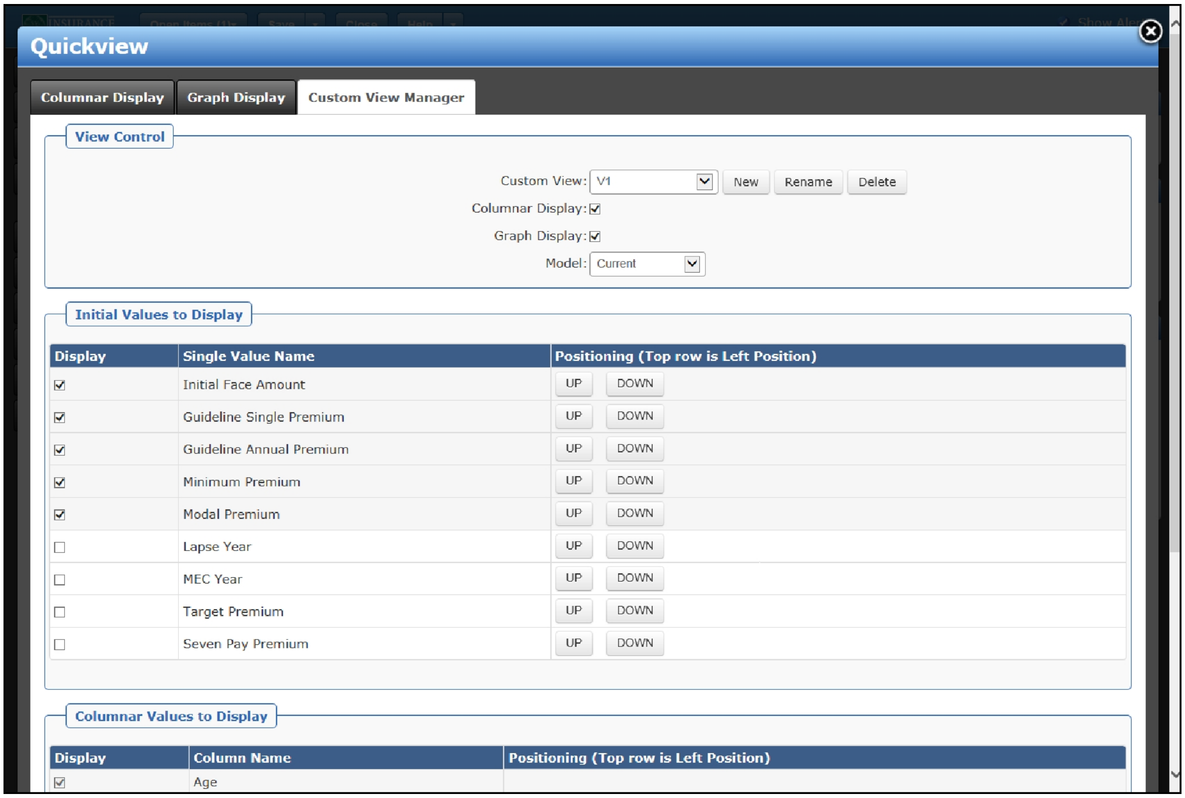

d. Zoom feature: Drag the mouse over an area of the graph to zoom in to the selected area. Click the **Reset zoom** button on the upper right of the graph to reset the graph to the default view setting.

3. After viewing the calculated illustration values, click the close button to close the Quickview dialog box and return to the previous page.

hexure

### Add, Rename, and Delete Custom Views




Add your own custom views on the Custom View Manager tab in Quickview and then select your custom views from the View Option list on the Columnar Display and Graph Display navigation tabs. ForeSight does not limit the number of custom views.

> **NOTE:** Custom views are not shareable with other users.

### Custom View Rules

- Each product maps to a specified custom Quickview set.
- Custom views can contain data from a single module only.
- A custom view can contain only a single model of data.

### Add a Custom View in Quickview

1. On the left in the active case pane, click the **Quick View** navigation button to open the Quickview dialog box.

2. Click the **Custom View Manager** navigation tab.
3. In the **View Control** group, do the following:

    a. Next to the **Custom View** list, click the **New** button.
    b. In the **New View** dialog box, type a **View Name** for the new view and click the **Save** button.
    c. In **Columnar Display** and **Graph Display**, select the check box for each display type to include in the new custom view.
    d. In **Model**, select a model option (Current, Guaranteed, MidPoint) for the new custom view.
4. In the **Initial Values to Display** grid, do the following:

    a. In the **Display** column, select the check box for each Single Value Name to include in the new custom view.
    b. In the **Positioning** column for each selected Single Value Name, click the **Up** or **Down** button to position the Single Value Name in the display order for the new custom view. Repeat for each selected Single Value Name as applicable.
5. In the **Columnar Values to Display** grid, do the following:

    a. In the **Display** column, select the check box for each Column Name to include in the new custom view.
    b. In the **Positioning** column for each selected Column Name, click the **Up** or **Down** button to position the Column Name in the display order for the new custom view. Repeat for each selected Column Name column as applicable.
6. Click the **Columnar Display** tab or **Graph Display** tab as applicable for the new custom view.
7. In **View Option**, select the new custom view name in the list to view illustration calculations in the new custom view.
8. After viewing the calculated illustration values, click the close button to close the Quickview dialog box and return to the previous page.

### Rename a Custom View in Quickview

1. On the left in the active case pane, click the **Quick View** navigation button to open the Quickview dialog box.
2. Click the **Custom View Manager** navigation tab.
3. In the **View Control** group in **Custom View**, select the name of the custom view.
4. In the **Rename View** dialog box, type the new name for the custom view and click the **Save** button.

**Delete a Custom View in Quickview**

1. On the left in the active case pane, click the **Quick View** navigation button to open the Quickview dialog box.
2. Click the **Custom View Manager** navigation tab.
3. In the **View Control** group in **Custom View**, select the name of the custom.
4. Click the **Delete** button.
5. On the **Delete View** dialog box, click the **Yes** button to delete the selected view.

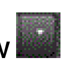
## Print as Selected

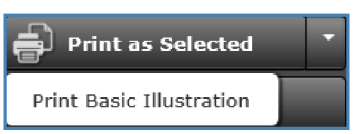
**NOTE:** Click the Reports navigation tab within the illustration to access the Reports page where you enter producer override information and select, render, print and save the illustration reports for the active case. For instructions, see Reports in System Pages and Controls.

On the left in the active case pane, use the 

navigation button to quickly render reports for the illustration.

- Click **Print as Selected** to render the reports that are selected on the Reports page within the illustration.

- On the right of the **Print as Selected** button, click the Down Arrow  menu control and click **Print Basic Illustration** to render only the required reports for the illustration. These basic reports do not include any optional or supplemental reports.




**NOTE:** The available sections and options on the Reports page within an illustration vary by line of business and product or concept for the active case.

## Application

On the left in the active case pane, click the **Application** navigation button to open the Application page.


After running reports and saving a case, use this page to create or update an application for the case.

**NOTE:** This page is available only when an electronic application fulfillment system, such as FireLight®, integrates with ForeSight. Refer to the electronic application system documentation for more information

**Application Rules**

The system does not allow:

- Attachment of an advanced marketing sales concepts to a single product illustration that has an electronic application attached.
- Removal of an advanced sales marketing concept from a multiple product illustration case after an application is attached.
- Change of Product and/or the Jurisdiction in a single illustration (standard case) after an application is created. Copy the case and change the Product and Jurisdiction in the new copy of the case. NOTE: Application data is not copied to the new case.

- Change of Jurisdiction in a Composite case illustration after an application is created. Create a new illustration in the case using the new Jurisdiction. NOTE: Application data is not copied to the new case.
- Change of Jurisdiction in an advanced marketing sales concept case or child illustration after an application is created for that illustration. Copy the case and change the jurisdiction in the new copy of the case/illustration. NOTE: Application data is not copied to the new case.
- Deletion of a standard case while an active application is attached. When the attached application has been completed and has a status of “Complete” the illustration can be deleted.
- Deletion of a Composite case with applications attached. When all attached applications have been completed and has a status of “Complete” the case can be deleted.
- Deletion of an advanced marketing sales concept case while an active application is attached to the child illustration(s). When the attached application(s) have been completed and have a status of “Complete” the case can be deleted.
- Removal of an advanced sales marketing concept from a multiple product illustration because it affects the product illustrations (only one illustration is retained).

The system allows removal of an advanced sales marketing concept from a single product illustration case because after an electronic application is attached it does not affect the product values.

When any case/illustration with an application attached is exported, any attached electronic application information/association is NOT copied to the export file.

#### Create an Application for a Case

> **NOTE:** ForeSight does not support applications for Inforce, Inforce Multilife, or Multilife case types.

Run reports and Save the case before beginning an application. Otherwise an error occurs.

### Single Product Illustration within a Case

1. On the left in the active case pane, click the **Application** navigation button to open the Application page.
2. Click the **Create Application** link to open an electronic application system and create an application for the active case.
3. When finished creating the application, log off and close the electronic application system.

### Multiple Product Illustrations within a Case

If multiple illustrations and multiple applications are possible within a case, ForeSight lists each product illustration as an option for selection. (For example, a Perm vs. Term concept case with at least two product illustrations, such as Term and Whole Life, would appear as two product illustrations in the list.)

1. On the left in the active case pane, click the **Application** navigation button to open the Application page.
2. Select a product illustration in the list to open the electronic application system in a separate web browser tab or window and create an application for the selected product.
3. When finished creating the application, log off and close the electronic application system.
4. Repeat steps 1 through 3 for each of the remaining illustrations.

#### Update an Application and View Policy Information

> **NOTE:** If electronic signatures are already captured in the application process, updating the application could reset the application status and negate any already captured electronic signatures.

If you change an illustration, it must be saved prior to any application update.

### Update an Application from the Application Status Page

1. On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.

2. In the **Applications** grid, click a link in the **Name** column to open the active application in the electronic application system, such as FireLight, where you can view or update the application.
3. Refer to the electronic application system documentation for instructions.

### Update an Application and View Policy Information within the Active Case

1. On the left in the active case pane, click the **Application** navigation button to open the Application page.
2. In the **Policy** section, view the policy application status and policy number for the case.
3. In the **Application** section, click the **Update Application** link to open the application in the electronic application system and update the application.
4. Refer to the electronic application system documentation for instructions.

# Information Pane

The information pane on the right side contains quick reference information panes for product illustration pages.

The right side pane auto-sizes with the screen width. When the screen width is less than 1200 pixels, icons appear on the right of the screen. Point to an icon to view the right side information pane.

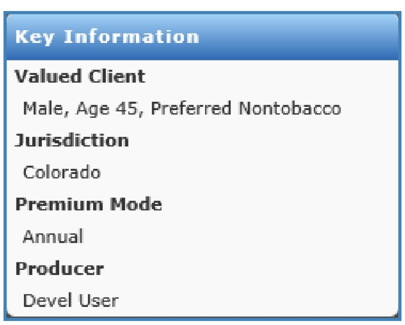
## Key Information Pane

### View Key Information for the Case or Contact

1. In optimized view, point to the icon to view the Key Information pane.
2. On the right side, the Key Information pane displays a summary of information about the active case or contact for quick reference from all pages in the illustration or contact editor. It also displays information about the active producer.

   The types of information displayed in the Key Information pane vary by product type. The Key Information pane does not appear for concept, composite, or in-force illustrations.

   In the following example, the Key Information pane displays the client name, gender, age, and risk classification along with the jurisdiction, premium mode, and producer name for the active case.

### Show or Hide the Key Information Pane

1. On the left, click the **Home** navigation button.
2. Above the center content pane, click the **Preferences** navigation tab.

3. In the **Illustration** section, do one of the following:

   Select the **Show Key Information Pane** check box to enable and show the Key Information pane.

   Clear the **Show Key Information Pane** check box to disable and hide the Key Information pane.

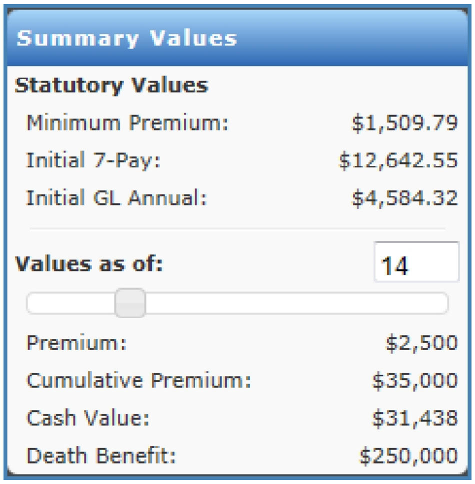
## Summary Values Pane

On the right side, the Summary Values pane displays real-time calculated values as you enter inputs or make changes in the active case. The Summary Values pane is viewable with all product illustration pages.

### View Summary Values for Various Years or Ages

1. If in optimized view, point to the icon on the right of the screen to view the Summary Values pane.
2. Use the **Values as of** text box or the slider below the text box to change the year or age and recalculate the summary values:
   - Type a different age or year in the text box to display summary values for the age or year entered.
   - Below the text box, move the slider to the right to increase the year or age. Move the slider to the left to decrease the year or age. The value changes based on the slider position. If the text box entry is an age, the slider uses age values. If the text box entry is a year, the slider uses year values.




3. If calculation errors occur from invalid entries, the Summary Values pane displays a message.

### Show or Hide the Summary Values Pane

1. On the left, click the **Home** navigation button.
2. Above the center content pane, click the **Preferences** navigation tab.
3. In the **Illustration** section, do one of the following:

   Select the **Enable Real-time Calculations** check box to enable and show the Summary Values pane.

   Clear the **Enable Real-time Calculations** check box to disable and hide the Summary Values pane.

# Get Help and View Version Information

## Find Help about a Feature

1. Click the **Help** menu button to open the Help in a separate web browser tab.
2. Click a main topic in the top navigation bar to find Help for that area in ForeSight. For example, click **Home** on the top navigation bar to access Help for the Start Illustration, Application Status, Unsaved Items, and Preferences pages.
3. Click the **Search** box , type a keyword or phrase in the search box and press Enter or click to view a list of topics that contain the search keyword or phrase. Click a link in the search results list to open the topic.

   To narrow the search results, type a search phrase enclosed within quotes (" ") to ensure all the words in the phrase exist within the topic. For example, type "new illustration" to narrow the search results to only topics with "new illustration" within the topic.

4. Click a thumbnail image to expand the image to full size. Click the full size image to return to a thumbnail image.

   Some images are thumbnail images for devices with smaller viewing areas.

5. Click the browser **Back** button to return to the search results list.
6. On the topic tool bar, click the **Expand All** button to expand every topic on the active page. Click the button again to collapse all topics on the page.
7. On the topic tool bar, click the **Print** button to print the active help topic.
8. Click the **ForeSight** logo on the banner to return to the Welcome page.

## Terminology Used in ForeSight Help

The following terms appear in this Help system.

**Active case**, **active contact** or **active page** means the case, contact or page that you are currently viewing in ForeSight.

**Illustration** and **case** are interchangeable. When you create an illustration, ForeSight creates a case for the illustration. When you save a case, you add the case to a folder in Case Management where you can later access the case.

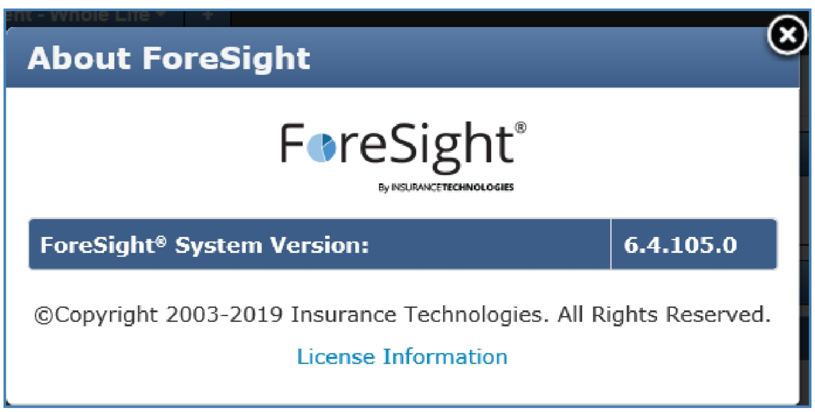
**Select** a check box means to click the check box so that it has a check mark in it.

**Clear** a check box means to click a selected check box so the check box is blank with no check mark in it.

**Point to** means to pause the mouse over an item, for example, point to an item to view a tool tip or informational message.

## View ForeSight Version Information

1. On the **Help** menu, click **About ForeSight** to view ForeSight system version information.
2. Click the button to close the About ForeSight dialog box.




## Close ForeSight

Close the web browser to close ForeSight.

# Home

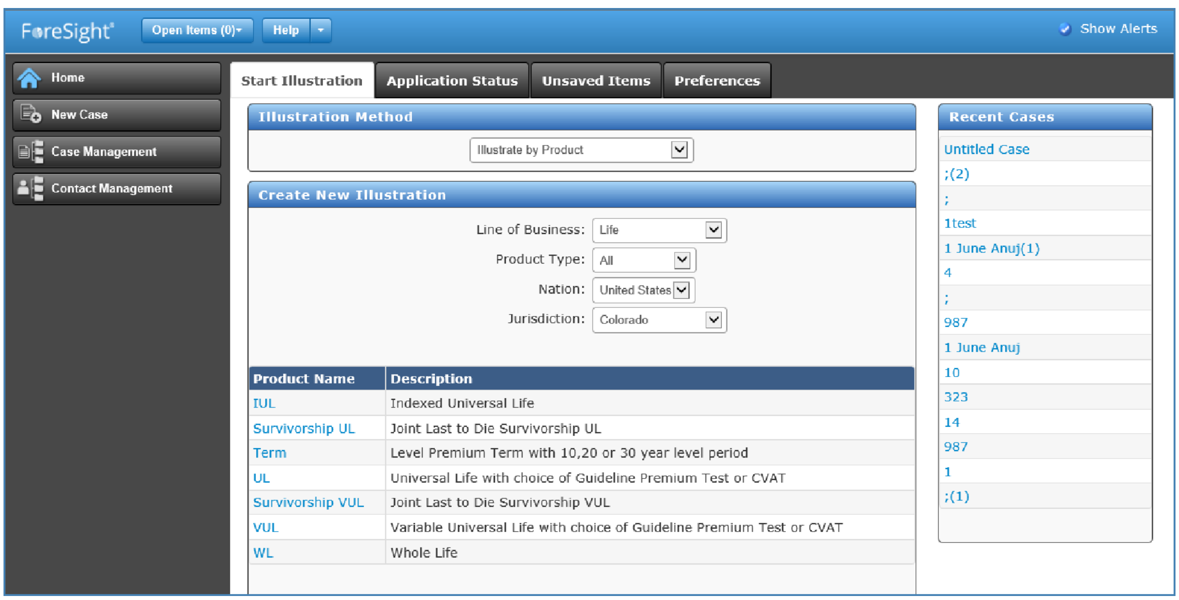
After initial log on, ForeSight opens to the Home pages. Use the Home pages, in combination with the Global Navigation Pane, as the starting point for all ForeSight activities.

When on another page in the system, click the logo on the banner or click the **Home** navigation button on the left side to go to the Home pages.

Use the navigation tabs above the content pane to go to each of the following Home pages.

## Start Illustration

On the left, click the **Home** navigation button, or click the **Start Illustration** navigation tab within the Home pages, to open the Start Illustration page.




Use the Start Illustration page (or New Case dialog box) to create a new illustration, create and use illustration templates, and open recently saved cases.

### Create a New Illustration

Work from top to bottom on the Start Illustration page to create a new illustration.

1. Click the **Home** navigation button to go to the Start Illustration page.
2. In the **Illustration Method** section list, select the type of illustration to create.

   Illustrate by Product

   Illustrate by Sales Concept

   Illustrate by Template

   Illustrate Using Published Templates

   Illustrate Inforce Reprojection

**See Also:**

Create a Composite Illustration

Create a Multilife Illustration

Create an Illustration Template

## Open Recent Cases

1. On the left, click the **Home** navigation tab to open the Start Illustration page.
2. On the right in the **Recent Cases** section, click a case name link to open a recently saved case.

> **NOTE:** To change the number of cases displayed in the Recent Cases pane, change the **Recent List Items** setting in Preferences.

## Illustrate by Product

### Begin a Product Illustration

1. On the **Navigation Pane**, do one of the following to start a new illustration.
   - Click **Home** to open the Start Illustration page.
   - Click **New Case** to open the New Case dialog box.
2. In the **Illustration Method** section list, select **Illustrate by Product**.

3. In the **Create New Illustration** section, select an option from each of the **Line of Business**, **Product Type**, **Nation**, **Jurisdiction** and **Presentation Type** lists.

   Nation is hidden when only one Nation is available. Presentation Type is hidden when Standard is the only presentation type available.

4. Click a link in the **Product Name** column of the grid.

   The Start Illustration or New Case dialog box opens.

5. Do one of the following:

   - For a new contact: on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields.

     In the **Birthdate** field, click the calendar button, select a month and year in the calendar, then click a day of month to enter the birth date.

   - For an existing contact saved in Contact Management or in an external CRM: on the **Select Contact** tab, select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact. ForeSight populates the selected contact's information into the applicable fields on the illustration.

6. In the **Illustration** group, enter the **Case Name** and select the **Standard** option button.

   To create a composite illustration, select the **Composite** option button. For instructions, see Create a Composite Illustration.

7. Click **OK** to begin an illustration (active case) for the selected product.

### Complete the Illustration on the Active Case Pages

On the left, use the navigation buttons to move among the pages in the active case. Work from top to bottom and complete all sections on each page.

1. On the left, the **Product** navigation button is active. Enter client-specific data for the illustration on the Product pages. Use the navigation tabs at the top to move among the Product pages.

(Optional) Click the **Down Arrow** on the right of the **Product** navigation button and click one of the following options:

- **Change Product** to change the product for the active case. For instructions, see Product.
- **Composite** to begin a composite case. For instructions, see Create a Composite Illustration.

2. If applicable, click the **Add Concept** navigation button to go to the Select Concept dialog box and add a sales concept to the illustration. For instructions on adding or changing a concept for an active case, see Concept.

   Click the **Concept** navigation button to enter client-specific data for the sales concept. ForeSight requires a product selection on one of the concept illustration pages.

   (Optional) Click the **Down Arrow** on the right of the **Concept** navigation button and click **Remove Concept** to remove the concept from the active case. This is not available with every sales concept.

3. After completing the product and optional concept illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box to view the calculated illustration values.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

   a. Select a **View Option** in the list. View options include standard views and your custom views.
   b. Scroll down to view all of the information.

   **Graph Display**

   a. Select a **View Option** in the list. View options include standard views and your custom views.

   b. Select an option in each of the **Chart Type** and **Based On** lists.
   c. In the **Graph** section, select the check box for each value to include on the

graph.

Clear a check box to exclude the value from the graph.

Click the close button on the upper right to close the Quickview dialog box and return to the previous page.

For instructions on creating, renaming, and deleting custom views on the Custom View Manager tab, see Quickview.

4. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

**NOTE:** The available sections and options on the Reports page vary by line of business and product or concept for the active case.

   a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.
   b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any stand alone pages, optional or supplemental reports to include.
   c. Click **Print Illustration as Selected** to create the reports.

      The reports open in a PDF viewer.

   d. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar appears. Click the print button to print the report or click the save button to save the report.

5. Do one or more of the following on the menu bar:

   - Click **Save** to go to the Save dialog box and enter a **Case Name** and **Folder Location** to save the case.
   - Click the **Down Arrow** on the right of the **Save** menu and then click **Save As** to go to the Save As dialog box and save the case with a new name and

folder location or to save the case as a user-defined template to use as a starting basis for new illustrations.

- Click **Close** and click **Yes** on the **Close** dialog box to close the case.

6. After running reports and saving the case, click the **Application** navigation button to go to the Application page and create an application for the case. Click the **Create Application** button to begin the application process. For instructions, see Application.

> **NOTE:** This feature is available only when ForeSight integrates with an electronic application fulfillment system such as FireLight®.

# Illustrate by Sales Concept

## Begin a Sales Concept Illustration

1. On the **Navigation Pane**, do one of the following to start a new illustration.
   - Click **Home** to open the Start Illustration page.
   - Click **New Case** to open the New Case dialog box.
2. In the **Illustration Method** section list, select **Illustrate by Sales Concept**.
3. Select an option from each of the **Line of Business**, **Nation**, **Jurisdiction** and **Presentation Type** lists.

   Nation is hidden when only one Nation is available. Presentation Type is hidden when Standard is the only presentation type available.

4. Click a link in the **Concept Name** column of the grid to begin an illustration (active case) for the selected concept.

   The Start Illustration or New Case dialog box opens.

5. Do one of the following:
   - For a new contact: on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields.

     In the **Birthdate** field, click the calendar button, select a month and year in the calendar, then click a day of month to enter the birth date.

   - For an existing contact saved in Contact Management or in an external CRM: on the **Select Contact** tab, select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact. ForeSight populates the selected contact's information into the applicable fields on the illustration.
6. In the **Illustration** group, enter the **Case Name**.
7. Click **OK** to begin an illustration (active case) for the selected concept.

## Complete the Illustration on the Active Case Pages

On the left, use the navigation buttons to move among the pages in the active case. Work from top to bottom and complete all sections on each page.

1. On the left, the **Concept** navigation button is active. Enter client-specific data for the sales concept. ForeSight requires a product selection on one of the concept illustration pages. Use the navigation tabs at the top to move among the Concept pages.

   (Optional) Click the **Down Arrow** on the right of the **Concept** navigation button and click **Remove Concept** to remove the concept from the active case. If applicable, click the **Add Concept** navigation button to go to the Select Concept dialog box and add a different sales concept to the illustration. For instructions on adding, changing or removing a concept for an active case, see Concept.

2. Click the **Product** navigation button to go to the Product pages. Enter client-specific data for the illustration on the Product pages. Use the navigation tabs at the top to move among the Product pages. For instructions on changing the product from the Concept page, see Concept.

3. After completing the concept and product illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box to view the calculated illustration values.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

   a. Select a **View Option** in the list.

   b. Scroll down to view all of the information.

   **Graph Display**

   a. Select a **View Option** in the list.

   b. Select an option in each of the **Chart Type** and **Based On** lists.

   c. In the **Graph** section, select the check box for each value to include on the graph.

      Clear the check box to exclude the value from the graph.

Click the close button on the upper right to close the Quickview dialog box and return to the previous page.

4. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

> **NOTE:** The available sections and options on the Reports page vary by line of business and product or concept for the active case.

   a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.
   b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any supplemental or Stand Alone reports to include.
   c. (Optional) In the **Producer Information** section, enter producer override information for the current case only. ForeSight saves the producer information within the active case.
   d. Click **Print Concept plus Illustrations** or select an option from the list to create the reports.

      The reports open in a PDF viewer.

   e. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar appears. Click the print button to print the report or click the save button to save the report.

5. Do one or more of the following on the menu bar:

   - Click **Save** to go to the Save dialog box and enter a **Case Name** and select a **Folder Location** to save the case.
   - Click the **Down Arrow** on the right of the **Save** menu and then click **Save As** to go to the Save As dialog box and save the case with a new name and

folder location or to save the case as a user-defined template to use as a starting basis for new illustrations.
    - Click **Close** and click **Yes** on the **Close** dialog box to close the case.
6. After running reports and saving the case, click the **Application** navigation button to go to the Application page and create an application for the case. Click the **Create Application** button to begin the application process. For more instructions, see Application.

> **NOTE:** This feature is available only when ForeSight integrates with an electronic application fulfillment system such as FireLight®.

## Illustrate by Template

### Begin an Illustration Using a Template

1. On the **Navigation Pane**, do one of the following to start a new illustration.
    - Click **Home** to open the Start Illustration page.
    - Click **New Case** to open the New Case dialog box.
2. In the **Illustration Method** section list, select **Illustrate by Template**.
3. In the **Create New Illustration** grid, click a template name link.

### Complete the Illustration on the Active Case Pages

On the left, use the navigation buttons to move among the pages in the active case. Work from top to bottom and complete all sections on each page.

1. Click the **Product** navigation button.
2. Enter client-specific data for the illustration on the Product pages.

   Next to **Client** fields, click the **Edit** button or **New** button to open the **Add/Edit Client** dialog box. Do one of the following as applicable: (1) on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields, (2) on the **Select Contact** tab (New button only), select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact.

ForeSight populates the selected contact's information into the applicable fields on the illustration.

3. Use the navigation tabs at the top to move among the Product pages.
4. (Optional) Click the **Down Arrow** on the right of the **Product** navigation button and click **Change Product** to change the product for the active case. For instructions, see Product.

   **NOTE:** Composite and Multilife cases cannot be templates.

   If a sales concept illustration, remove and add a different product on one of the Concept pages.

5. If applicable, click the **Add Concept** navigation button to go to the Select Concept dialog box and add a sales concept to the illustration. For instructions on adding or changing a concept for an active case, see Concept.

   Click the **Concept** navigation button to enter client-specific data for the concept. A product selection is required on one of the concept illustration pages.

   (Optional) Click the **Down Arrow** on the right of the **Concept** navigation button and click **Remove Concept** to remove the concept from the active case.

6. After completing the product and optional concept illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box to view the calculated illustration values.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

   a. Select a **View Option** in the list. View options include standard views and your custom views.
   b. Scroll down to view all of the information.

   **Graph Display**

   a. Select a **View Option** in the list. View options include standard views and your custom views.
   b. Select an option in each of the **Chart Type** and **Based On** lists.

c. In the **Graph** section, select the check box for each value to include on the graph.

   Clear the check box to exclude the value from the graph.

Click the close button on the upper right to close the Quickview dialog box and return to the previous page.

For instructions on creating, renaming, and deleting custom views on the Custom View Manager tab, see Quickview.

7. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

   **NOTE:** The available sections and options on the Reports page vary by line of business and product or concept for the active case.

   a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.

   b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any supplemental reports to include.

   c. (Optional) In the **Producer Information** section, enter producer override information for the current case only. ForeSight saves the producer information within the active case.

   d. Depending on whether this is a product or a concept illustration, click **Print Illustration as Selected** (product) or click **Print Concept plus Illustrations** (concept) or select an option from the list to create the reports.

      The reports open in a PDF viewer.

   e. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar appears. Click the print button to print the report or click the save button to save the report.

8. Do one or more of the following on the menu bar:

- Click **Save** to go to the Save dialog box and enter a **Case Name** and **Folder Location** to save the case.
- Click the **Down Arrow** on the right of the **Save** menu and then click **Save As** to go to the Save As dialog box and save the case with a new name and folder location or to save the case as a user-defined template to use as a starting basis for new illustrations.
- Click **Close** and click **Yes** on the **Close** dialog box to close the case.

9. After running reports and saving the case, click the **Application** navigation button to go to the Application page and create an application for the case. Click the **Create Application** button to begin the application process. For instructions, see Application.

> **NOTE:** This feature is available only when ForeSight integrates with an electronic application fulfillment system such as FireLight®.

## Illustrate Using Published Templates

If published templates exist for your organization and you have access to the concepts and/or products used in the published templates for new illustrations, you can select from the list of published templates created by a Home Office user with Publish access.

### Begin an Illustration Using a Published Template

1. On the **Navigation Pane**, do one of the following to start a new illustration.
   - Click **Home** to open the Start Illustration page.
   - Click **New Case** to open the New Case dialog box.
2. In the **Illustration Method** section list, select **Illustrate using Published Templates**.
3. In the **Create New Illustration** grid, click a template name link.

### Complete the Illustration on the Active Case Pages

On the left, use the navigation buttons to move among the pages in the active case. Work from top to bottom and complete all sections on each page.

1. Click the **Product** navigation button.

2. Enter client-specific data for the illustration on the Product pages.

   Next to **Client** fields, click the **Edit** button or **New** button to open the **Add/Edit Client** dialog box. Do one of the following as applicable: (1) on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields, (2) on the **Select Contact** tab (New button only), select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact. ForeSight populates the selected contact's information into the applicable fields on the illustration.

3. Use the navigation tabs at the top to move among the Product pages.
4. (Optional) Click the **Down Arrow** on the right of the **Product** navigation button and click **Change Product** to change the product for the active case. For instructions, see Product.

   **NOTE:** Composite and Multilife cases cannot be templates.

   If a sales concept illustration, remove and add a different product on one of the Concept pages.

5. If applicable, click the **Add Concept** navigation button to go to the Select Concept dialog box and add a sales concept to the illustration. For instructions on adding or changing a concept for an active case, see Concept.

   Click the **Concept** navigation button to enter client-specific data for the concept. A product selection is required on one of the concept illustration pages.

   (Optional) Click the **Down Arrow** on the right of the **Concept** navigation button and click **Remove Concept** to remove the concept from the active case.

6. After completing the product and optional concept illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box to view the calculated illustration values.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Scroll down to view all of the information.

**Graph Display**

a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Select an option in each of the **Chart Type** and **Based On** lists.

c. In the **Graph** section, select the check box for each value to include on the graph.

Clear the check box to exclude the value from the graph.

Click the close button on the upper right to close the Quickview dialog box and return to the previous page.

For instructions on creating, renaming, and deleting custom views on the Custom View Manager tab, see Quickview.

7. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

> **NOTE:** The available sections and options on the Reports page vary by line of business and product or concept for the active case.

a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.

b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any supplemental reports to include.

c. (Optional) In the **Producer Information** section, enter producer override information for the current case only. ForeSight saves the producer information within the active case.

d. Depending on whether this is a product or a concept illustration, click **Print Illustration as Selected** (product) or click **Print Concept plus Illustrations** (concept) or select an option from the list to create the reports.

   The reports open in a PDF viewer.

e. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar appears. Click the print button to print the report or click the save button to save the report.

8. Do one or more of the following on the menu bar:

   - Click **Save** to go to the Save dialog box and enter a **Case Name** and **Folder Location** to save the case.
   - Click the **Down Arrow** on the right of the **Save** menu and then click **Save As** to go to the Save As dialog box and save the case with a new name and folder location or to save the case as a user-defined template to use as a starting basis for new illustrations.
   - Click **Close** and click **Yes** on the **Close** dialog box to close the case.

9. After running reports and saving the case, click the **Application** navigation button to go to the Application page and create an application for the case. Click the **Create Application** button to begin the application process. For instructions, see Application.

> **NOTE:** This feature is available only when ForeSight integrates with an electronic application fulfillment system such as FireLight®.

# Illustrate Inforce Reprojection

## Begin an Inforce Reprojection Illustration

Select an input option for the inforce reprojection illustration in the **Create Inforce Case Using** list.

- **Import/Download Policy** downloads the inforce policy values for the new illustration.
    1. Enter a **Policy Number** and click the **Get Policy Information** button to download inforce policy information.
    2. Click **Illustrate** to begin an inforce policy illustration.

       (Optional) Click **Cancel** to cancel the inforce illustration process.

- **Download Group** downloads the group inforce values for a Multilife illustration.
    1. Enter a **Group Number** and click the **Get Group Information** button.
    2. Click **Illustrate** to begin the inforce group illustration.

       (Optional) Click **Cancel** to cancel the inforce group illustration process.

## Complete the Illustration for an Inforce Policy

On the left, use the navigation buttons to move among the pages in the active case. Work from top to bottom and complete all sections on each page.

1. On the left, the **Product** navigation button is active. Review the information on the Inforce Policy Values page. Enter client-specific data for the new inforce reprojection illustration on the Product pages, which includes the Inforce Policy Values page. Use the navigation tabs at the top to move among the Product pages. **NOTE:** The Change Product option is not available with inforce.

2. After completing the product illustration entries, click the **Quick View** navigation button to go to the Quickview dialog box and view the calculated illustration values.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Scroll down to view all of the information.

**Graph Display**

a. Select a **View Option** in the list. View options include standard views and your custom views.

b. Select an option in each of the **Chart Type** and **Based On** lists.

c. In the **Graph** section, select the check box for each value to include on the graph.

   Clear the check box to exclude the value from the graph.

Click the close button on the upper right to close the Quickview dialog box and return to the previous page.

For instructions on creating, renaming, and deleting custom views on the Custom View Manager tab, see Quickview.

3. Click the **Reports** navigation tab to go to the Reports page, select reports, and render, preview, print and save reports.

> **NOTE:** The available sections and options on the Reports page vary by line of business and product or concept for the active case.

a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.

b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any supplemental reports to include.

c. (Optional) In the **Producer Information** section, enter producer override information for the current case only. ForeSight saves the producer information within the active case.

d. Click **Print Illustration as Selected** or select an option from the list to create the reports.

The reports open in a PDF viewer.

e. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar  appears. Click the print  button to print the report or click the save  button to save the report.

4. Do one or more of the following on the menu bar:

- Click **Save** to go to the Save dialog box and enter a **Case Name** and **Folder Location** to save the case.
- Click the **Down Arrow** on the right of the **Save** menu and then click **Save As** to go to the Save As dialog box and save the case with a new name and folder location or to save the case as a user-defined template to use as a starting basis for new illustrations.
- Click **Close** and click **Yes** on the **Close** dialog box to close the case.

## Create a Composite Illustration

Use the Composite feature to group multiple illustrations under one "Composite" illustration. A Composite illustration is a container for multiple illustrations for one or more individuals.

**NOTE:** Only new business product illustrations are valid for Composite illustrations.

### Create a Composite Illustration from the Start Illustration Page or New Case Dialog Box

1. On the left, click the **Home** or **New Case** navigation button.
2. On the Start Illustration page or New Case dialog box, select an **Illustration Method**, **Line of Business**, **Product Type** or **Concept Type**, **Nation** and **Jurisdiction** as applicable. In the grid, select a **Product Name** or **Concept Name**.

   The Start Illustration or New Case dialog box opens.

   a. Enter a new contact or select an existing contact for the Primary Participant:

      - For a new contact: on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields.

        In the **Birthdate** field, click the calendar button, select a month and year in the calendar, then click a day of month to enter the birth date.

      - For an existing contact saved in Contact Management: on the **Select Contact** tab, select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact.

   b. In the **Illustration** group, select an **Illustration Role** in the list, enter the **Case Name**, and select the **Composite** option.

   c. Click **OK**.

      ForeSight populates the contact's information into the applicable fields and opens the composite illustration.

3. Fill in the illustration information using the navigation tabs to move among the illustration pages.

   In Composite illustrations, Table Input is a navigation button on the left.

4. Add another participant to the Composite illustration:

   a. On the left, click the **Composite** navigation button.
   b. On the Composite Details page in the **Participants** section, click the **Add Participant** button.
   c. In the **Add/Edit Client** dialog box, do one of the following:

      - For a new contact: on the **Input Client** tab, enter client information in the **First Name**, **Last Name**, **Birthdate**, **Age** and **Gender** fields.
      - For an existing contact saved in Contact Management: on the **Select Contact** tab, select a check box next to a name in the **Client Name** column of the grid or enter the contact's last name in the **Search for Contacts** box and click the search button to filter the list and select a contact.

      ForeSight populates the selected contact's information into the applicable fields on the illustration.

5. Add another illustration to the Composite illustration.

   a. Above the illustration pages to the right of the case name tab 

, click the plus button  to add another illustration to the Composite illustration.

      The Select Product dialog box opens.

   b. Select a **Line of Business**, **Product Type**, **Nation**, **Jurisdiction** and **Party** as applicable.

      **NOTE:** Party list selections are limited to the original Party and the participants you added in step 4c.

   c. In the grid, click a **Product Name** link as applicable.

An illustration opens and is added to the Composite illustration for the selected Party.

d. On the left, click the **Illustrations** navigation button.

e. On the **Client** page, select the Insured or Annuitant name in the list.

f. Using the navigation tabs to move among the illustration pages, fill in the applicable illustration information for the selected participant. **NOTE:** Reports selected for one participant will apply to all participants in the Composite illustration.

6. Expand the ForeSight window to the full size of the screen to view two of the Composite illustrations side by side. If the Composite illustration contains more than two illustrations, click the down arrow on the right of the case name tab 

in each view and select another illustration from the list.

7. On the left, click the **Quick View** navigation button to calculate and view the illustration values. The Quickview dialog box opens to the Columnar Display tab and displays overall Composite illustration information.

   Click a navigation tab for the format in which to view the calculated values.

   **Columnar Display**

   a. In **View Category**, select a **Party Name** and product to display illustration information and values for only the selected Party's illustration. **NOTE:** The same Party can have multiple illustrations for different products.

   b. In **View Option**, select a standard view.

   **Graph Display**

   a. In **View Category**, select a **Party Name** to display illustration information and values for only the selected Party.

   b. In **View Option**, select a standard view.

   c. Select an option in each of the **Chart Type** and **Based On** lists.

   d. In the **Graph** section, select the check box for each value to include on the

graph.

Clear a check box to exclude the value from the graph.

On the upper right, click to close Quickview.

8. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

> **NOTE:** The available sections and options on the Reports page vary by line of business and product for the active case.

   a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.
   b. In the **Reports Display** or **Report Setup** section, point to to view required reports that are automatically included in the illustration reports. You can select the check box for any stand alone pages, optional or supplemental reports to include.
   c. Click **Print Illustration as Selected** or select an option from the list to create the reports.

      The reports open in a PDF viewer.

   d. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar appears. Click the print button to print the report or click the save button to save the report.

9. Save the Composite illustration:

   a. On the menu bar, click **Save**. If you did not previously save the illustration with a case name, the Save dialog box opens.
   b. On the **Save** dialog box, type a **Name** in the box.
   c. In **Folder Location**, select an existing folder from the list.

To add a new folder for the case, type a folder name in **New Folder Name** and click **Add Folder**.

   d. Click **Save** to save the Composite illustration and return to the previous page. Click **Cancel** to return to the Composite illustration without saving.

10. (Optional) Create an application.

> **NOTE:** This feature is available only when ForeSight is integrated with an e-application program, such as FireLight®.

   a. On the left, click the **Application** navigation button.
   b. In the left column of the Application page, select the option button for the **Participant Name** and Product.
   c. Click **Create Application**.

      The e-application program opens in a separate window and displays the application in data entry mode.

      Complete and sign the application as applicable for the participant/owner.

   d. Repeat steps **a** through **c** for each Participant Name/Owner as applicable.

### Create a Composite Illustration from Contact Management

Start an illustration from contact management to import contact (participant) data to the illustration immediately. This is especially useful when starting a composite illustration from contact management to import several contacts in a single step.

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. In the **View** list, select the type of contact by which to filter the list: **Individuals**, **Producers**, **Businesses**, or **Trusts**and then select the applicable contacts in the grid.

   **Example:** To start a composite illustration for a family, select **Individuals** in **View** and select the individual family member contacts for the illustration.

3. Click the **New Case** button.

The New Case dialog box opens.

a. Select an **Illustration Method** in the list. Illustrate by Product is the default.
b. Select **Line of Business**, **Product Type**, and **Jurisdiction** in the lists. Select a **Nation** if more than one nation is available.
c. Click a **Product Name** in the grid.

   A different New Case dialog box opens to the Select Contact tab with the participants already selected in the Contacts section.

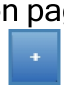
d. Go to the **Illustration** section of the Select Contact tab.
e. Select the type of illustration. Select **Composite** for multiple illustrations combined into one illustration.
f. Select the **Primary Participant** for the illustration. For a Composite illustration, this is the primary participant in the first illustration created when the case is opened.
g. Select the **Illustration Role** for the primary participant.
h. Enter a **Case Name** for the illustration.
i. Select the **Composite** option button.
j. Click the **OK** button.

   A Composite illustration opens for the Primary Participant.

4. Fill in the illustration information using the navigation tabs to move among the illustration pages.

   In Composite illustrations, Table Input is a navigation button on the left.

5. Above the illustration pages to the right of the case name tab 

, click the plus button 

 to add another illustration to the Composite illustration.

   The Select Product dialog box opens.

6. Select a **Line of Business**, **Product Type**, **Nation**, **Jurisdiction** and **Party** as applicable.

**NOTE:** Party list selections are limited to the original participants you selected in Contact Management.

7. In the grid, click a **Product Name** link as applicable.

   An illustration opens and is added to the Composite illustration for the selected Party.

8. On the left, click the **Illustrations** navigation button.
9. Using the navigation tabs to move among the illustration pages, fill in the applicable illustration information for the selected participant. **NOTE:** Reports selected for one participant will apply to all participants in the Composite illustration.
10. Expand the ForeSight window to the full size of the screen to view two of the Composite illustrations side by side. If the Composite illustration contains more than two illustrations, click the down arrow on the right of the case name tab 

in each view and select another illustration from the list.
11. On the left, click the **Quick View** navigation button to calculate and view the illustration values. The Quickview dialog box opens to the Columnar Display tab and displays overall Composite illustration information.

    Click a navigation tab for the format in which to view the calculated values.

    **Columnar Display**

    a. In **View Category**, select a **Party Name** to display illustration information and values for only the selected Party.
    b. In **View Option**, select a standard view.

    **Graph Display**

    a. In **View Category**, select a **Party Name** to display illustration information and values for only the selected Party.
    b. In **View Option**, select a standard view.
    c. Select an option in each of the **Chart Type** and **Based On** lists.
    d. In the **Graph** section, select the check box for each value to include on the

graph.

Clear a check box to exclude the value from the graph.

On the upper right, click ✖ to close Quickview.

12. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print and save reports.

> **NOTE:** The available sections and options on the Reports page vary by line of business and product for the active case.

   a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable.
   b. In the **Reports Display** or **Report Setup** section, point to ? to view required reports that are automatically included in the illustration reports. You can select the check box for any stand alone pages, optional or supplemental reports to include.
   c. Click **Print Illustration as Selected** or select an option from the list to create the reports.

      The reports open in a PDF viewer.

   d. Use the PDF viewer toolbar to view, print and save the rendered reports.

13. Save the Composite illustration:

   a. On the menu bar, click **Save**. If you did not previously save the illustration with a case name, the Save dialog box opens.
   b. On the **Save** dialog box, type a **Name** in the box.
   c. In **Folder Location**, select an existing folder from the list.

      To add a new folder for the case, type a folder name in **New Folder Name** and click **Add Folder**.

d. Click **Save** to save the Composite illustration and return to the previous page. Click **Cancel** to return to the Composite illustration without saving.

14. (Optional) Create an application.

> **NOTE:** This feature is available only when ForeSight integrates with an e-application program, such as FireLight®.

a. On the left, click the **Application** navigation button.

b. In the left column of the Application page, select the option button for the **Participant Name** if more than one participant is included in the composite illustration.

c. Click **Create Application**.

The e-application program opens in a separate window and displays the application in data entry mode.

Complete and sign the application as applicable for the participant/owner.

d. Repeat steps **a** through **c** for each Owner as applicable.

## Create a Multilife Illustration

Use the Multilife concept to group multiple individuals under one "Multi-Life" case. Essentially, a Multilife case is the main container that holds the Multilife concept, all Plans and all Census data.

### Multilife Rules

1. Multilife requires at least one plan. The first plan added is the default plan. You can change the default plan.
2. Plans need to be created first so the system can auto-associate participants with plans when you import or manually add the participants in the Census grid.
3. Changes made in a plan affect all census illustrations based on the plan.
4. Participants imported without a plan specified will be based on the default plan.
5. The product cannot be changed in an existing plan.
6. The system allows import of participant information via Microsoft Excel .xlsx or .xls files and comma separated values (.csv) files into the Census Manager. Column headers in an import file must follow the column header format and include the following column names and data types:

| Column Name | Data Type |
|---|---|
| First Name | Text |
| Last Name | Text |
| Birth Date | Date "mm/dd/yyyy" format |
| Gender | Text (Male or Female converts to Gender List Options in ForeSight) |
| Plan | Text (Must use the Plan Name assigned in the Plan Information grid of the concept) |

7. Census information is specific to the participant and can override a plan setting in the same data field name.

### Create a Multilife Illustration

1. On the **Navigation Pane**, do one of the following to start a new illustration.
    - Click **Home** to open the Start Illustration page.
    - Click **New Case** to open the New Case dialog box.
2. In the **Illustration Method** section list, select **Illustrate by Sales Concept**.
3. In **Line of Business**, select **Life**, **Disability Insurance**, or any other LOB that has a Multilife concept available.
4. Select an option from each of the **Nation**, **Jurisdiction** and, optionally, **Presentation Type** lists.

    Nation is hidden when only one nation is available. Presentation Type is hidden when Standard is the only presentation type available.

5. Click the **Multilife** link in the **Concept Name** column of the grid.
6. In the **New Case** or **Start Illustration** dialog box, enter a **Case Name** and click **OK**.

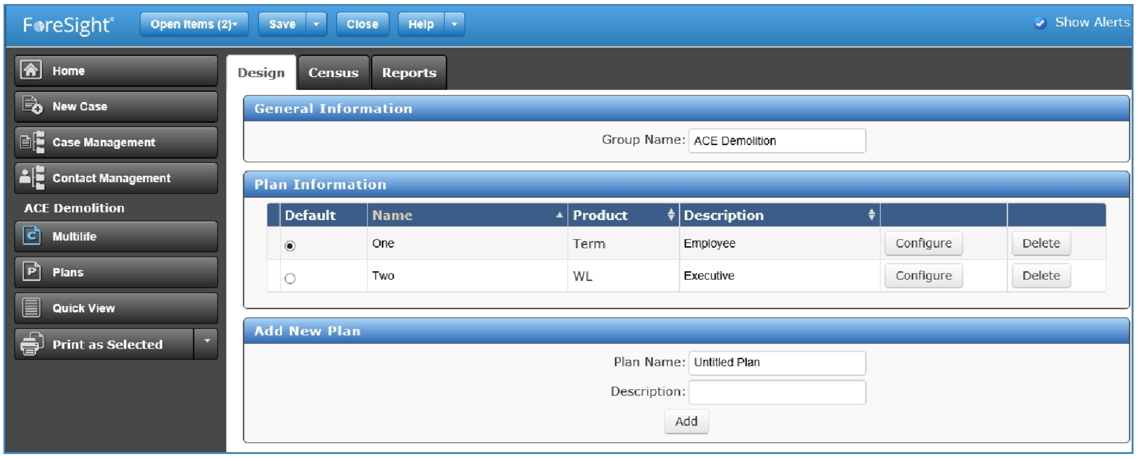
    The Multilife illustration opens.

7. On the **Design** navigation tab. Do the following:
    a. In the **General Information** section, enter the **Group Name**.
    b. In the **Add New Plan** section, enter a **Plan Name** (e.g., Plan One, Plan A, etc.), enter a **Description** and click **Add**.
    c. On the **Select a Product** dialog box, click a **Product Name** link in the grid.
    d. Fill in the fields on the illustration pages for the selected product.
8. On the left, click the **Multilife** navigation button.
9. On the **Design** navigation tab, repeat steps 7 through 8 for each additional plan.

    The system adds the new plans to the Plan Information section.

    In the following example, the Ace Demolition group has two plans: plan One is the Employee plan and plan Two is the Executive plan. Plan One is the Default plan. You can change the Default plan by selecting the plan in the **Default** column of the Plan Information grid.




10. On the **Design** page, select a Plan in the **Default** column. You will add participants to the selected plan in step 11.
11. Click the **Census** navigation tab. Use the Census Manager page to add participants to the plans by importing participants from a spreadsheet or by manually adding the participants. Then perform any row actions for participants as needed.

    Import from a spreadsheet (defined in "Multilife Rules" number 6):

    a. Click **Import Census from Spreadsheet** button.
    b. On the **Import Participants** dialog box, click **Browse**, choose the spreadsheet file to upload and click **Open**.
    c. Click **Upload**.
    d. Select a sheet in the **Please select a sheet** list and click **Upload Sheet**.
    e. In the **Grid Association** column of the Census Manager Upload grid, select the matching column names in the spreadsheet file.
    f. Click **Complete Upload**.

    Manually add a participant to the Census Manager grid:

    a. Click the **Add Row** button.
    b. In the **Plan** column of the new row, select the plan for the new participant. Enter the **First Name**, **Last Name**, **Birth Date** and **Gender** of the participant.

    Perform row actions for several participants:

a. In the left column of the grid, select the check boxes for the affected rows.
b. Click the Down Arrow on the right of the **Row Action** button and select an action.

- **Change Plan** – Select a plan for the participant in the list.
- **Include in Census** – Adds the selected participant rows to the composite.
- **Exclude From Census** – Exclude (remove) the selected participant rows from the composite.
- **Include Individual Reports** – Generate (include) Individual Participant Illustration Reports the Composite Illustration. Sets the Reports column field for the selected participant rows to Yes.
- **Exclude Individual Reports** – Do not generate (exclude) Individual Participant Illustration Reports from the Composite Illustration. Sets the Reports column field for the selected participant rows to No.
- **Delete** – Deletes all selected participant rows.

Perform row actions for a single participant: in the applicable columns, click the Down Arrow and make a new selection in list fields or edit the text in text fields.

12. Repeat steps 10 and 11 for each additional plan.
13. On the left, click the **Quick View** navigation button to view calculation results for the plans. On the upper right, click ⊗ to close Quickview.
14. Click the **Reports** navigation tab to go to the Reports page, select reports, and create, preview, print, save and download reports in a .zip file.

a. In the **Reports Options** section, select the **Years to Illustrate**, if applicable, and select an option in **Participant Illustration Reports** (None, Selected on Census Grid, or All). The 'Selected on Census Grid' option will print the individual reports for only the participant rows with a 'Yes' in the Report column on the Census tab.
b. In the **Report Setup** section, point to ? to view required reports that are automatically included in the illustration reports.

c. (Optional) In the **Producer Information** section, enter producer override information for the current case only. ForeSight saves the producer information within the active case.

d. Click **Print Concept plus Illustrations** or select an option from the list to create the reports.

   The reports open in a PDF viewer.

e. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar  appears. Click the print  button to print the report or click the save  button to save the report.

f. In the **Individual Reports** section, select the check boxes for the individual participant reports to download in a .zip file format, click the **Queue Selected** button at the bottom of grid, click the **Download** button below the grid, and then click a button or a Save option (Open, Save or Cancel) in the information bar at the bottom of the window. To download a single individual's report in a .zip file, click the **Queue** button to the right of the individual's name and Plan in the grid. To view a single individual's report, click the **View Report** button on the far right of the individual's name and Plan in the grid.

15. Save the Multilife illustration:

a. On the menu bar, click **Save**. If you did not previously save the illustration with a case name, the Save dialog box opens.

b. On the **Save** dialog box, type a **Name** in the box.

c. In **Folder Location**, select an existing folder from the list.

   To add a new folder for the case, type a folder name in **New Folder Name** and click **Add Folder**.

d. Click **Save** to save the Multilife illustration and return to the previous page. Click **Cancel** to return to the Multilife illustration without saving.

## Create an Illustration Template

Save illustrations with commonly used features and options as templates and then use the templates as a starting basis for new illustrations.

- You can save only new business Product and Sales Concept illustrations as templates. This feature is not available for Inforce, Composite, or Multilife illustrations.
- You cannot share illustration templates with other users. The templates you create are accessible only by you.
- Your illustration templates are stored on the Edit Templates page in Case Management. Use the Edit Templates page to edit and delete your templates.

### Open and Save a Case as a Template

1. On the left, click the **Case Management** navigation button.
2. On the **Cases** page, select a search option in **Search For**, enter the applicable search item in the text box and press Enter or click .
3. On the menu bar, click the **Down Arrow** on the right of the **Save** menu and then click **Save As**.

   The Save As dialog box opens.

4. In **Name**, enter a name for the new template using descriptive text for the template name. For example, enter **UL Template 500K** for a Universal Life template with a $500,000 face amount.
5. Select the **User Defined Template** check box.

   The Folder Location list disappears.

6. Click **Save**.

   The system saves and stores the new template in the User Defined Templates grid on the Edit Templates page in Case Management.

### Create and Save a New Business Illustration as a Template

1. On the left, click the **Home** or **New Case** navigation button.
2. In the **Illustration Method** list, select the **Illustrate by Product**, **Illustrate by Sales Concept**, **Illustrate by Template**, or **Illustrate using Published Templates** option.
3. In the **Create New Illustration** grid, click a link in the left column to start the new illustration case.
4. Complete each section of the illustration on all of the active case pages, working from top to bottom on each page and using the active case navigation buttons and navigation tabs to go to pages of the illustration. For instructions, see Active Case.
5. On the menu bar, click the **Down Arrow** on the right of the **Save** menu and then click **Save As**.

   The Save As dialog box opens.

6. In **Name**, enter a name for the new template using descriptive text for the template name. For example, enter **UL Template 500K** for a Universal Life template with a $500,000 face amount.
7. Select the **User Defined Template** check box.

   The Folder Location list disappears.

8. Click **Save**.

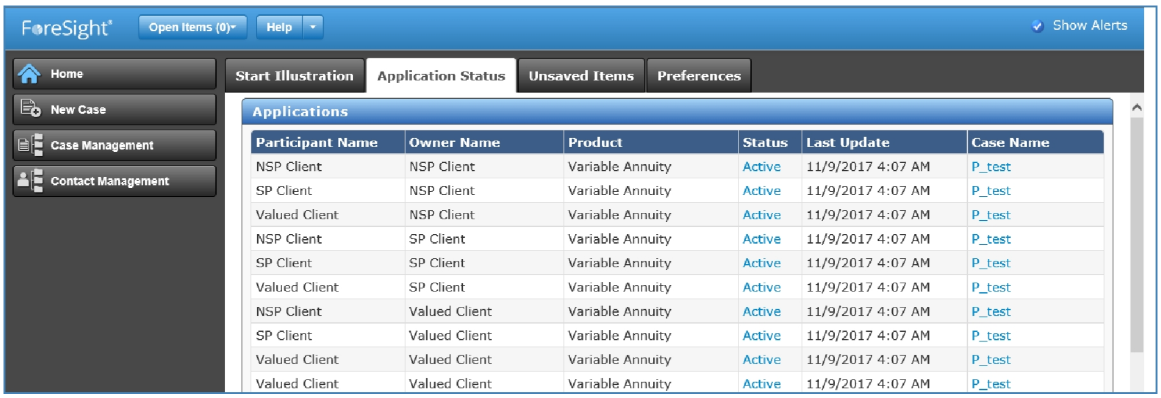
   The system saves and stores the new template in the User Defined Templates grid on the Edit Templates page in Case Management.

# Application Status

**NOTE:** This page is available only when an electronic application fulfillment system such as FireLight® integrates with ForeSight. Refer to the electronic application system documentation for detailed application instructions.

On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.




Use the grid columns to view application status, update an active application, or open a case associated with the application.

## Application Rules

The system does not allow:

- Attachment of an advanced marketing sales concepts to a single product illustration that has an electronic application attached.
- Removal of an advanced sales marketing concept from a multiple product illustration case after an application is attached.
- Change of Product and/or the Jurisdiction in a single illustration (standard case) after an application is created. Copy the case and change the Product and Jurisdiction in the new copy of the case. NOTE: Application data is not copied to the new case.
- Change of Jurisdiction in a Composite case illustration after an application is created. Create a new illustration in the case using the new Jurisdiction. NOTE: Application data is not copied to the new case.

- Change of Jurisdiction in an advanced marketing sales concept case or child illustration after an application is created for that illustration. Copy the case and change the jurisdiction in the new copy of the case/illustration. NOTE: Application data is not copied to the new case.
- Deletion of a standard case while an active application is attached. When the attached application has been completed and has a status of “Complete” the illustration can be deleted.
- Deletion of a Composite case with applications attached. When all attached applications have been completed and has a status of “Complete” the case can be deleted.
- Deletion of an advanced marketing sales concept case while an active application is attached to the child illustration(s). When the attached application(s) have been completed and have a status of “Complete” the case can be deleted.
- Removal of an advanced sales marketing concept from a multiple product illustration because it affects the product illustrations (only one illustration is retained).

The system allows removal of an advanced sales marketing concept from a single product illustration case because after an electronic application is attached it does not affect the product values.

When any case/illustration with an application attached is exported, any attached electronic application information/association is NOT copied to the export file.

## Open a Case Associated with an Application

1. On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.
2. In the **Case Name** column of the Applications grid, click a case name link to open the case associated with the application.

## Update an Active Application

**NOTE:** If electronic signatures are already captured in the application process, updating the application could reset the application status and negate any already captured electronic signatures.

### Update an Application from the Application Status Page

1. On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.
2. In the **Applications** grid, click a link in the **Status** column to open the active application in the electronic application system, such as FireLight, where you can view or update the application. Refer to the electronic application system documentation for instructions.

### Update or View an Application and View Policy Information from the Active Case

1. On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.
2. In the **Case Name** column, click a case name to open the active case in ForeSight.
3. On the left, click the **Application** navigation button to open the Application page.
4. In the **Application** section, click the **Update Application** button to open the application in the electronic application system and update the application.

   Click the **View Application** button to view the application.

5. In the **Policy** section, view the policy application status and policy number for the case.
6. Refer to the electronic application system documentation for more instructions.

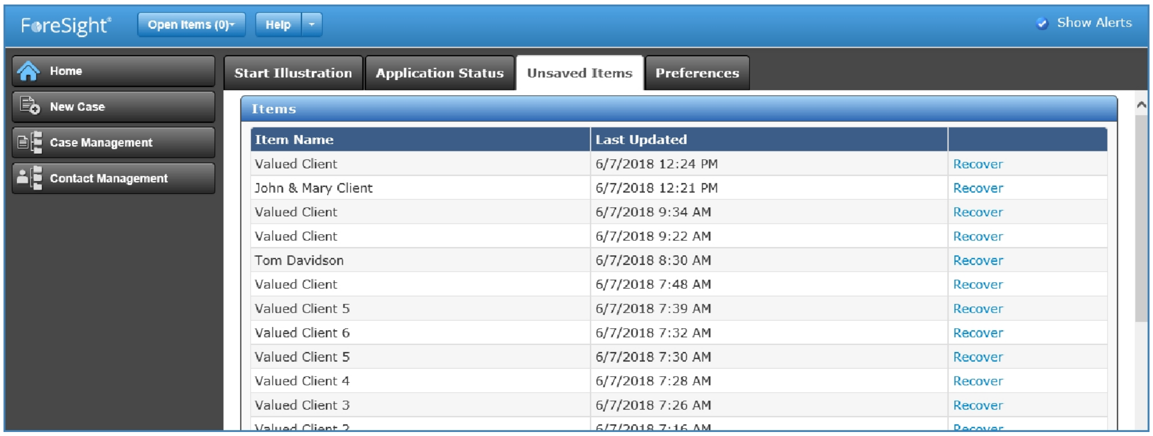
## View the Status of Active Applications

View the status of an application and open the associated case from the Application Status page.

1. On the left, click the **Home** navigation button and then click the **Application Status** navigation tab to open the Application Status page.
2. On the **Applications** grid in the **Status** column, view the application status for each application in the list.
3. In the **Last Update** column, view the date and time when you last updated the application.

# Unsaved Items

On the left, click the **Home** navigation button and then click the **Unsaved Items** navigation tab to open the Unsaved Items page.




Use the Unsaved Items page to recover unsaved items.

ForeSight stores unsaved items and unsaved item changes in a temporary database. These temporary items and changes are retained in the temporary database for up to 24 hours, depending on the time of day and frequency of the database cleanup task. When a timeout, power failure, browser closure, etc., interrupts a session, ForeSight saves the item in the temporary database and you can open it in the next session, provided the temporary database maintenance cleanup task has not deleted it.

**NOTE:** The system is unaware of, and does not list, unsaved items on this page until you close and log back on to ForeSight.

## Restore Unsaved Items

1. On the left, click the **Home** navigation button and then click the **Unsaved Items** navigation tab to open the Unsaved Items page in the content pane.

   "Valued Client" is the system default name for unsaved cases. When you start more than one unsaved case in a ForeSight session, the system appends a sequential number to each successive case name, as in "Valued Client 1".

2. Use the grid columns to locate and then recover an unsaved item.

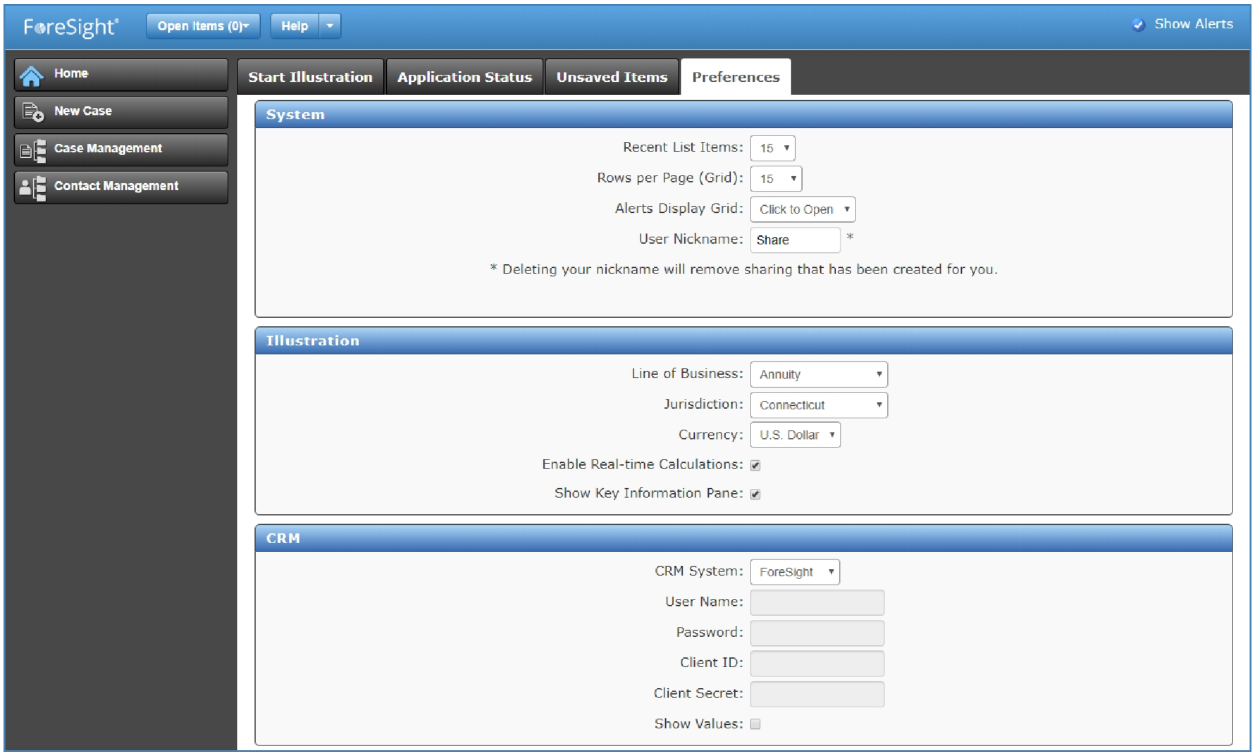
**Item Name** column displays the name (or the system default name) of the unsaved item.

**Last Updated** column displays the date and time when you last updated the unsaved item.

**Recover** - click this link to open the unsaved item so you can view, update or save the open item.

# Preferences

On the left, click the **Home** navigation button and then click the **Preferences** navigation tab above the content pane to open the Preferences page.




Use the Preferences page to set default system and illustration settings.

## Set System, Illustration, and CRM Preferences

1. On the left, click the **Home** navigation button and then click the **Preferences** navigation tab above the content pane to open the Preferences page.
2. Select options in the System and Illustration sections of the Preferences page. These preference settings determine the associated system and illustration defaults when you log on to the system.
3. If the carrier allows the use of external contacts, FireLight shows the CRM section. The CRM section settings control which system/application ForeSight uses for contacts.

### Set System Preferences

In the System section, select options and enter data to set the following system defaults.

1. **Recent List Items** option (5, 10, or 15) sets the number of rows that appear in the Recent Cases list on the Start Illustration page in the Home page group.
2. **Rows per Page (Grid)** option (15, 25, 50, or 100) sets the maximum number of rows displayed per page in all ForeSight grids.
3. **Alerts Display Grid** option sets the method for opening the Show Alerts display grid:
    - **Click to Open** requires that you click the **Show Alerts** icon or link on the menu bar to open the Show Alerts display grid.
    - **Auto Open** automatically opens the Show Alerts display grid when a validation error, warning or informational message occurs.
4. **User Nickname** is the ID used by other users to share or assign cases to you. Enter your user nickname (up to 30 characters).
    - If you delete a User Nickname, ForeSight deletes all folder sharing associated with that nickname.
    - If you change a User Nickname, ForeSight updates and retains all existing folder sharing associated with that nickname.

### Set Illustration Preferences

In the Illustration section, select options to set the following illustration defaults.

1. **Line of Business** option sets the default line of business for new illustrations and templates.
2. **Nation** option sets the default nation for new illustrations. If only one Nation is available, ForeSight hides the Nation list.
3. **Jurisdiction** option sets the default state or jurisdiction for new illustrations and templates.
4. **Currency** option sets the default currency for new illustrations. If only one Currency is available, ForeSight hides the Currency list.
5. **Enable Real-time Calculations** – select the check box to enable and show the Summary Values pane for illustrations. Clear the check box to disable and hide

the Summary Values pane. For information about the Summary Values pane, see Information Pane.

6. **Show Key Information Pane** – select the check box to enable and show the Key Information Pane with an illustration or user-defined template when a product or concept case or the contact editor is open. For information about the Key Information pane, see Information Pane.

### Set CRM Preferences

In the **CRM** section, select a CRM and enter CRM login credentials based on the selected CRM.

1. In **CRM System**, select a CRM from the list. Currently ForeSight supports three sources: **ForeSight** Contact Management (the default), **Redtail**, and **Salesforce**.
2. Enter login credentials for the selected CRM.

   **ForeSight** - requires no login credentials. This is the default, which uses ForeSight Contact Management for contacts.

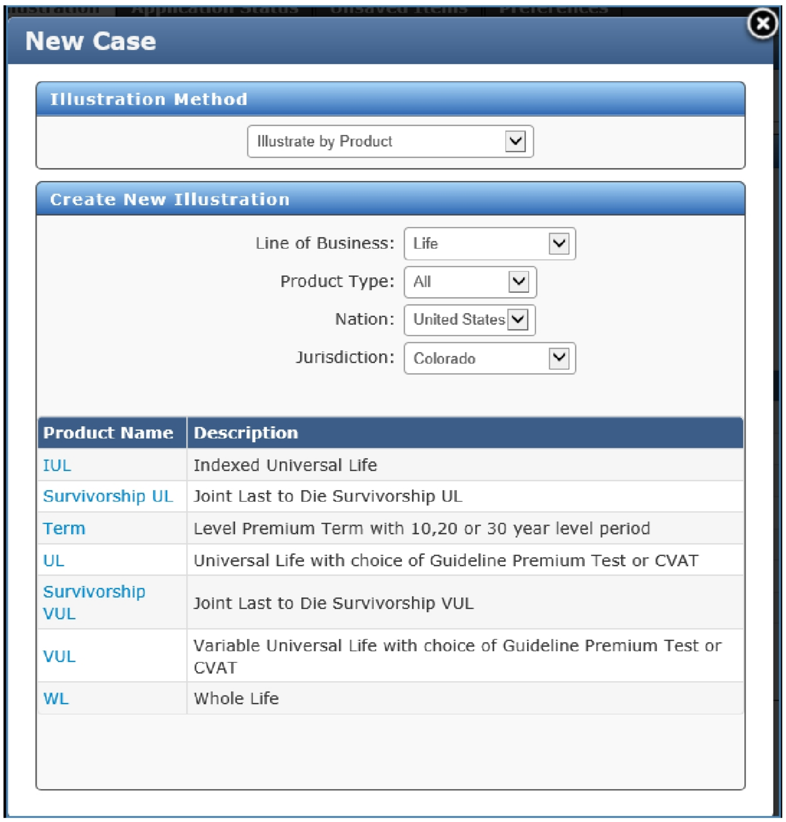
   **Redtail** - enter your Redtail **User Name** and **Password**.

   **Salesforce** - enter your Salesforce **User Name**, **Password**, **Client ID** and **Client Secret**.

3. Select the **Show Values** check box to show the login credential entries for the selected CRM.

# New Case

On the left, click the **New Case** navigation button to open the New Case dialog box.




Use the New Case dialog box to begin a new illustration, copy case data from the current active case to a new product illustration, or to create a user-defined illustration template.

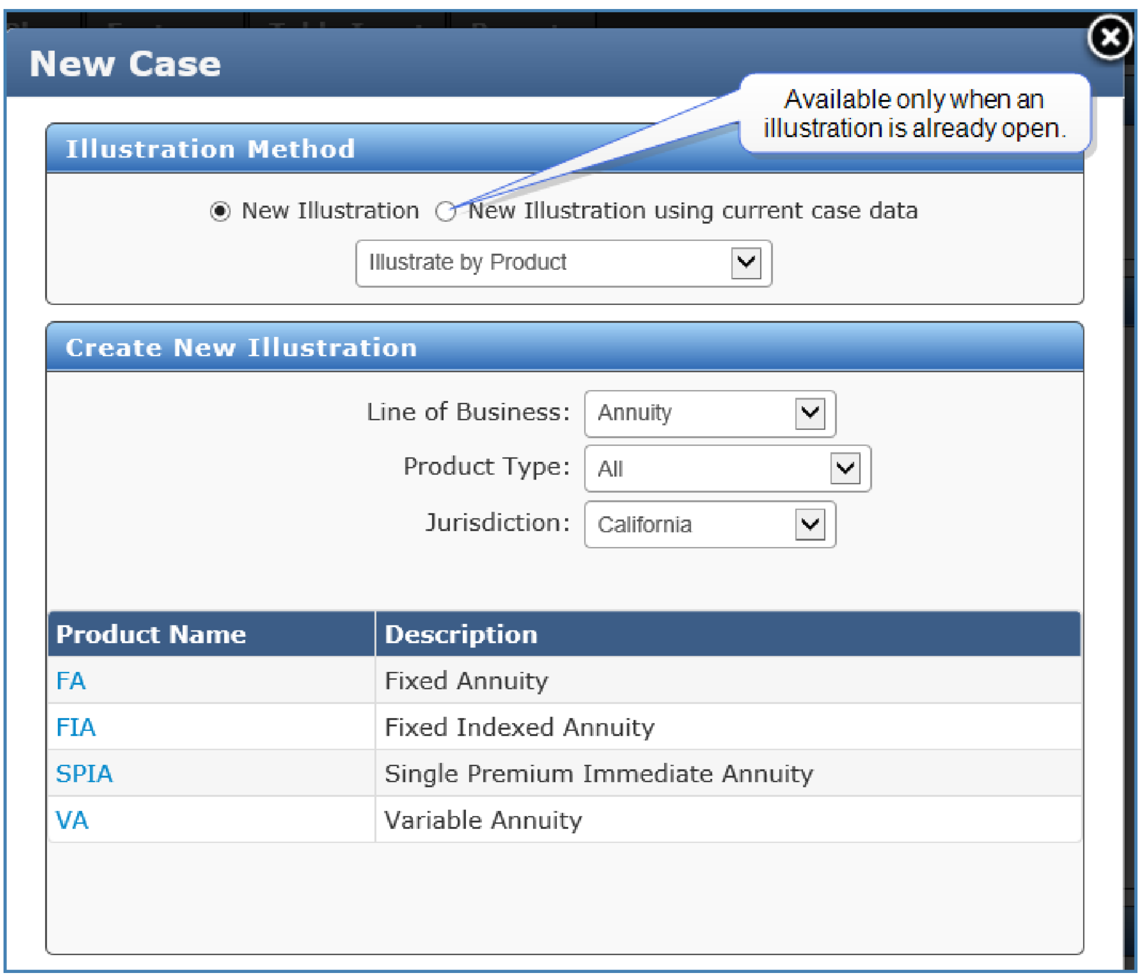
> **NOTE:** If you are not copying illustration data from an active case to a new case, you can use the New Case dialog box or the Start Illustration page to begin a new illustration or to create a user-defined template for future illustrations. The copy illustration inputs feature is available only on the New Case dialog box.

## Copy Illustration Inputs to a New Case

> **NOTE:** This feature does not apply to in-force cases. If an open concept case has no product, ForeSight disables the New Illustration using current case data option.

Copying inputs from the current active illustration to a new illustration can save time when you need to create multiple illustrations with similar inputs.

1. Open the source case from which you would like to copy illustration inputs.
2. On the left, click the **New Case** navigation button to open the New Case dialog box.
3. In the **New Illustration Options** group, select the **New Illustration using current case data** option.



This option is available only when an active case is already open.

4. In the **Illustration Method** list, ForeSight sets the option to **Illustrate by Product** and disables it.
5. In the **Create New Illustration** section, select the **Line of Business**, **Product Type**, **Nation**, **Jurisdiction** and **Presentation Type** options for the new illustration.

   Presentation Type is available only when more than one Presentation Type exists.

6. In the grid under **Product Name**, click a product name link to create the new case using the inputs from the source case.

   A new product illustration appears with applicable inputs from the original illustration.

## Create a New Illustration

Work from top to bottom on the New Case dialog box to create a new illustration.

1. Click the **New Case** navigation button to go to the New Case dialog box.
2. In the **Illustration Method** section list, select the type of illustration to create.

   Illustrate by Product

   Illustrate by Sales Concept

   Illustrate by Template

   Illustrate Using Published Templates

   Illustrate Inforce Reprojection

**See Also:**

Create a Composite Illustration

Create a Multilife Illustration

Create an Illustration Template

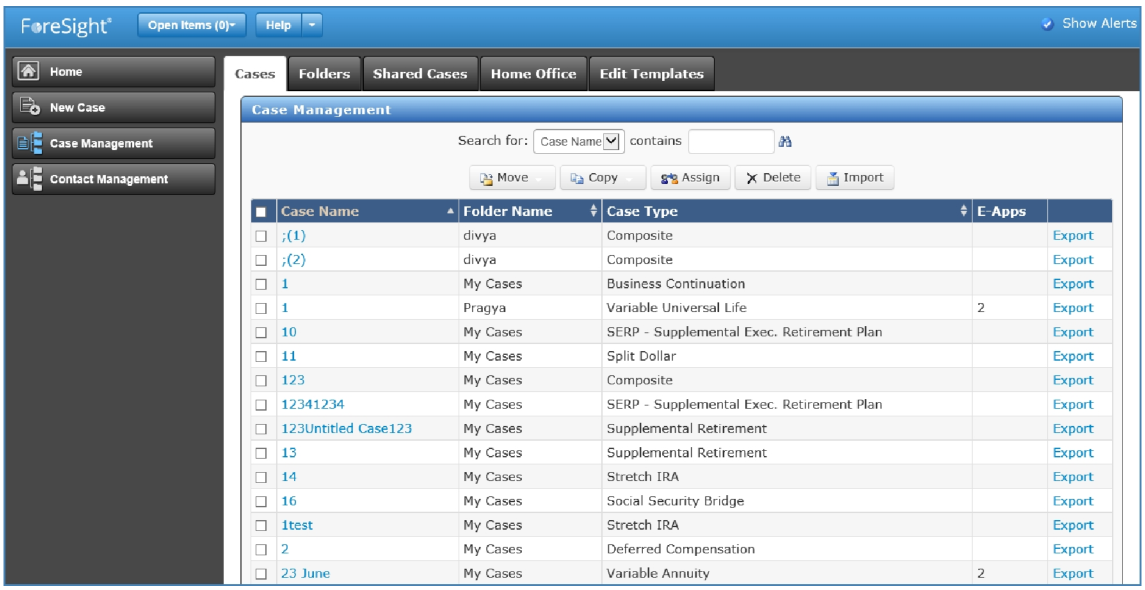
 

# Case Management

On the left, click the **Case Management** navigation button to open the Case Management pages.

## Cases

On the left, click the **Case Management** navigation button, or click the **Cases** navigation tab within the Case Management pages, to open the Cases page. The Cases page contains a master list of all cases you are associated with, sorted by case name in a grid.

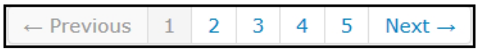



> **NOTE:** When you copy or move a case to a folder that contains a case with the same name, or copy a case to the same folder in which it resides, the system appends the copied or moved case name with the number of times that name has been duplicated in that folder. Example: The original case name in a folder is "Valued Client". When you copy or move another case with the same name to the folder, the system appends the next number to the end of the case name, as in "Valued Client 1".

Use the Case Management grid on the Cases, Folders, Shared Cases and Home Office pages to select and open items, sort the columns, search for a case, and go to multiple grid pages.

### Go to Multiple Grid Pages

1. Scroll down to the bottom of the grid page.
2. Click the **Previous**, **Next**, or numbered buttons to move through the grid pages.



### Open a Case

This feature is available in the Case Management grid on the Cases, Folders, Shared Cases and Home Office pages.

**NOTE:** The advantage of using the Folders page to open a case, is that the number of cases to search through is limited to the number of cases within a single folder versus searching through all cases in the master case list on the Cases page. Once you select a folder on the Folders page, the cases within that folder appear in a Case Management grid that is similar to the grid on the Cases page.

1. On the left, click the **Case Management** navigation button to open the Cases page in Case Management.

   If you know the folder in which the case is stored, click the **Folders** navigation tab and then click the name of the folder in the **Folder Name** column of the Folder Management grid.

2. In the **Case Name** column of the Case Management grid, click the name of the case to open the case.
3. If the case is not on the first page of the list, use the search feature or click the page navigation buttons or numbers at the bottom of the page to find the case.

### Select Items in the Grid

The selection process is the same for all grids.

- Select individual items in the grid:

  In the left column of the grid, select the check boxes to the left of the item names that you want to take action on.

- Select all of the items on the active grid page:

  Select the check box in the title row of the left column to select all of the items on the active grid page only. Click the check box again to clear the check boxes for all of the items on the active grid page.

  This does not affect the remaining grid pages.

### Sort the Grid

Most of the grid columns are sortable. Click a column title to sort the grid by that column in ascending order. Click the grid column title again to sort the column in descending order. Clicking the grid column title switches the order between ascending and descending order.

The sort icons indicate whether the column is not sorted (two arrows), the column is sorted in ascending order (upward pointing arrow), or the column is sorted in descending order (downward pointing arrow).

**Examples:**

In the Case Management grid:

- Click the **Folder Name** column title to sort the cases in the grid by folder name.
- Click the **Case Name** column title to sort the cases by Case name.
- Click the **Case Type** column title to sort the cases in the grid by case type (Variable Annuity, Universal Life, etc.).

Use the following features in the Case Management grid and toolbar to search for cases, assign cases to another user, move or copy cases to another folder, delete cases, export and import cases.

## Assign Cases to Another User

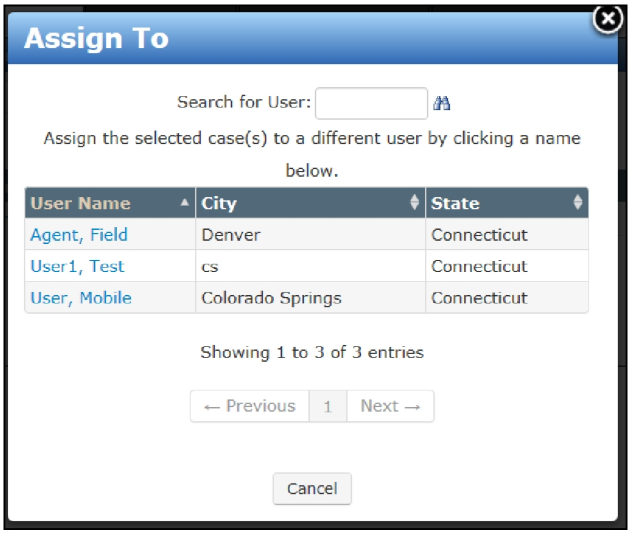
**NOTE:** This feature is available only in implementations that have case sharing enabled. This feature is not available when using the ForeSight desktop Console.

This feature is available in the Case Management toolbar on the Cases and Folders pages.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. If the cases are stored within a single folder, click the **Folders** navigation tab and then click a folder name link to display only the cases that are in the selected folder in a Case Management grid on the Folders page. Otherwise, skip this step.
3. In the left column of the Case Management grid, select the check box for each case you want to assign to another user.

4. On the Case Management toolbar, click the **Assign** button to go to the Assign To dialog box.




5. In **Search for User**, type the user name to assign the cases to and press Enter or click the button.
6. In the grid under **User Name**, click the name of the user to whom to assign the selected cases. This initiates the case assignment.

   ForeSight changes the user name for the case to the assigned user, closes the Assign To dialog box and updates the case list. Click **Close** on the confirmation dialog box. The assigned cases no longer appear in your case list.

## Copy Cases to Another Folder

This feature is available in the Case Management Grid on the Cases, Folders, Shared Cases and Home Office pages.

1. On the left, click the **Case Management** navigation button to open the Cases page.

   Do one of the following:

   - If you know the name of the folder in which the case is stored, click the **Folders** navigation tab and then click the name of the folder in the **Folder Name** column of the Folder Management grid to display only the cases within the selected folder.

- If this is a shared case, click the **Shared Cases** navigation tab to open the Shared Cases page.
- If you are a Home Office user, click the **Home Office** navigation tab.

2. In the left column of the Case Management grid, select the check box for each case you want to copy to another folder.
3. On the Case Management toolbar, click the **Copy** button and click a folder in the list.

   If using the Shared Cases or Home Office page, click the **Copy Cases** button instead.

   The Case Management grid expands as the copied cases display in the additional folder location.

## Delete Cases

This feature is available in the Case Management grid on the Cases and Folders pages.

**NOTE:** If you delete all of the cases in the Case Management grid, the grid collapses until you create and save a new case.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. If the cases to be deleted are stored within a single folder, click the **Folders** navigation tab and then click a folder name link to display only the cases in that folder in a Case Management grid on the Folders page. Otherwise, skip this step.
3. In the left column of the **Case Management** grid, select the check box for each case you want to delete.
4. On the Case Management toolbar, click **Delete** to go to the Confirm dialog box.
5. On the **Confirm** dialog box, do one of the following:
   - Click **Yes** to delete the selected case(s) and remove them from the Case Management grid, or
   - Click **No** to return to the Case Management grid without deleting the selected cases.

## Export a Case

**Important!** When exporting a case or when using "save as" with a shared case, ForeSight removes contact connections to Contact Management from the case. ForeSight does not copy one user's Contact Management information to another user. It only copies the case data.

This feature is available in on the Cases, Folders, Shared Cases and Home Office pages.

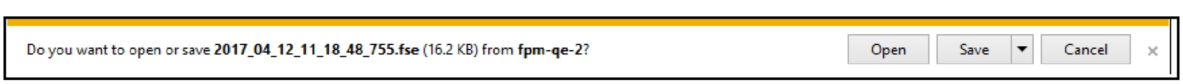
Use the export feature to save a case file to a location on a network or PC. This is especially useful for copying a case from one installation of ForeSight to another. After exporting a case file, use the Import feature to import the case file into a different installation of ForeSight.

**NOTE:** You can export only one case at a time. ForeSight saves the case file with the .fse file extension. This feature is not available on the iPad.

1. On the left, click the **Case Management** navigation button to open the Cases page.

   Or if applicable, do one of the following:

   - If you know the folder in which the case is stored, click the **Folders** navigation tab and then click the name of the folder in the **Folder Name** column of the Folder Management grid to display only the cases within the selected folder.
   - If this is a shared case, click the **Shared Cases** navigation tab to open the Shared Cases page.
   - If you are a Home Office user, click the **Home Office** navigation tab.
2. Locate the case to export in the Case Management grid.
3. In the right column of the Case Management grid, click the **Export** link for the case to export.
4. Use the web browser's procedures to download and save the exported case file. The procedures vary by browser and browser version.
5. In Internet Explorer, a notification bar appears at the bottom of the window.



Do one of the following:

- Click the **Save** button to save the export case file to the default download location on your PC.

  In Windows, the file downloads to the Downloads folder on your PC.

- Click the **Down Arrow** on the right of the **Save** button and click **Save as** to open a typical Windows Save As dialog box where you browse to a folder location in which to save the export case file.
- Click the **Cancel** button to cancel the export.

> **NOTE:** The export case file name always has a .fse extension. The default file name begins with the export date and time, for example, 2018_04_12_11_18_48_755.fse. After saving the exported case, you can rename the case file, but be sure to keep the .fse file extension. Example: Rename 2018_04_12_11_18_48_755.fse to JohnSmithVUL12.fse.

## Import a Case

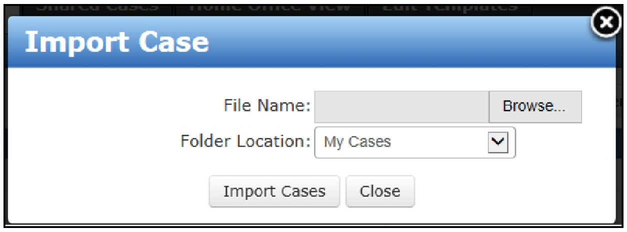
This feature is available on the Cases and Folders pages.

Use the Import feature to import cases that you previously exported from a different installation of ForeSight.

> **NOTE:** You can import only one case at a time. This feature is not available on the iPad.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. To use the Folders page to import a case, click the **Folders** navigation tab to open the Folders page.
3. On the toolbar, click **Import** in the Case Management grid (or click **Import Case** in the Folder Management grid) to open the Import Case dialog box.

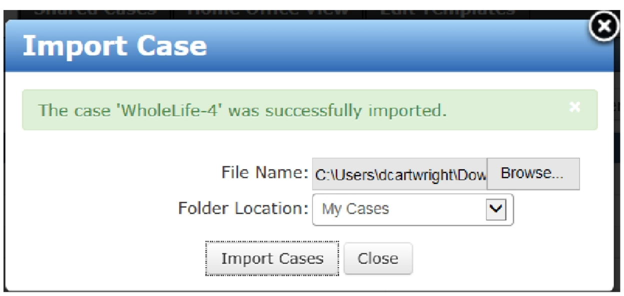



4. Click the **Browse** button to locate and click the file to import from the Windows **Choose File to Upload** dialog box. Then click **Open**.

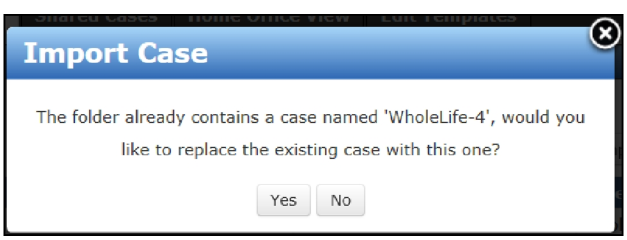
   Cases that can be imported have the .fse file extension. By default, exported case files download to the C:\Users\[YourUserID]\Downloads folder on your PC.

5. In the **Folder Location** list, select the folder to receive the case.
6. Click **Import Cases** to import the case. Click **Close** to cancel the case import.

   The status section appears at the top of the Import Case dialog box and displays the import status and result of the import action. For example, "The case 'WholeLife-4' was successfully imported."




   If the receiving folder already contains a case by the same name, the Import Case dialog box displays a message that the folder already contains a case by that name. Click **Yes** to continue the import and replace the existing case with this one, or click **No** to not import the case.




7. Repeat steps 4 through 6 for each successive case to import.

8. When finished importing cases, click **Close** to close the Import Case dialog box.

## Move Cases to Another Folder

This feature is available in the Case Management grid on the Cases and Folders pages.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. (Optional) If the cases to move are stored within a single folder, click the **Folders** navigation tab and then click a folder name link to display only the cases within the selected folder.
3. In the first left-side column of the Case Management grid, select the check box for each case you want to move.
4. On the Case Management toolbar, click **Move** and select a destination folder from the list.

   The list closes and the system moves the case to the new folder. The case now resides in the new folder location.

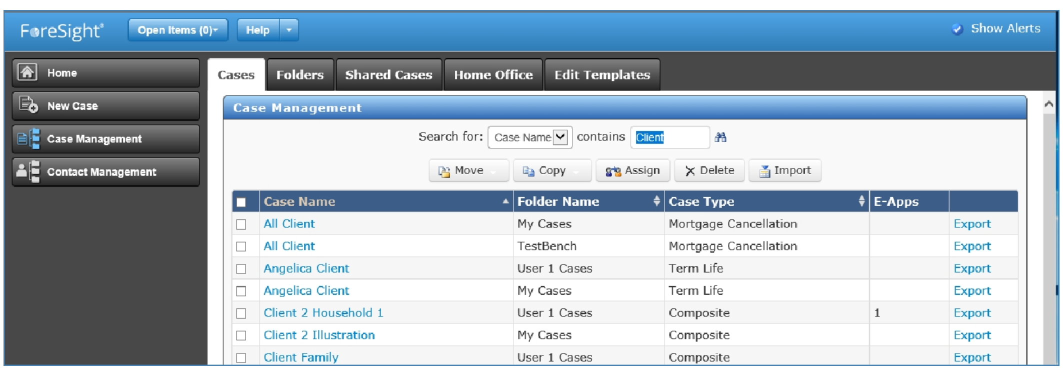
## Search for a Case

This feature is available in the Case Management grid on the Cases, Folders, Shared Cases and Home Office pages.

1. On the left, click the **Case Management** navigation button to open the Cases page in Case Management.

   If you know the folder in which the case is stored, click the **Folders** navigation tab and then click the name of the folder in the **Folder Name** column of the Folder Management grid.

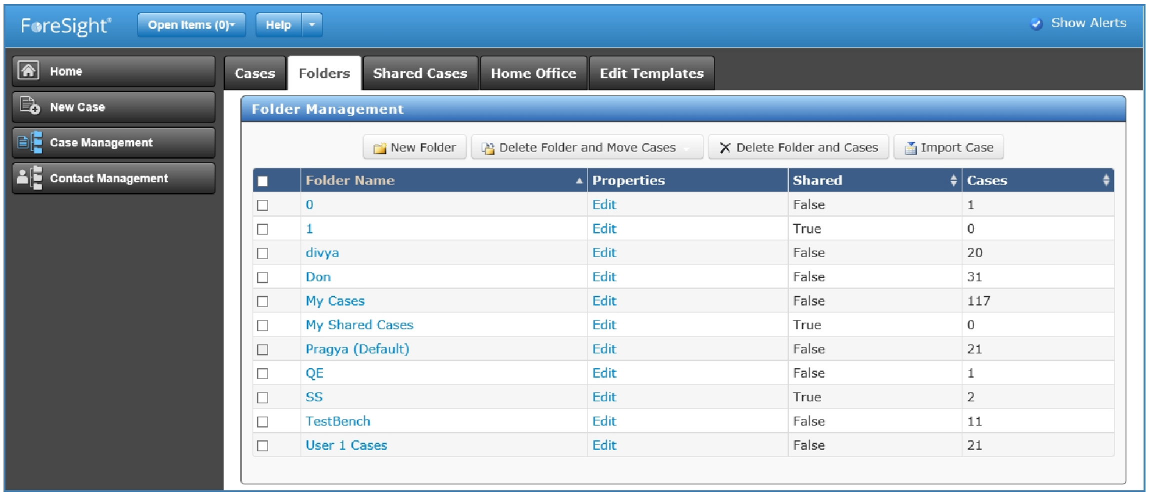
2. Above the grid in **Search for**, select an option to search by (Case Name, Producer, Insured, Annuitant, or Owner).
3. In **contains**, type the beginning letters of the Case Name, Producer, Insured, Annuitant or Owner name based on the selected search option in Search for.
4. Press Enter or click .
5. When the system displays all search results in the Case Management grid, click a case name link in the **Case Name** column to open a case.



# Folders

On the left, click the **Case Management** navigation button and then click the **Folders** navigation tab to open the Folders page.




**NOTE:** You can share cases at the folder level only. If you plan to share some of your cases with other users, you may want to add one or more folders for only shared cases. Other users can update, save and copy the cases you share with them. You can add or delete case sharing for a folder by editing the folder properties.

The Folder Management grid on the Folders page lists all of the folders that you have access to. It also lists the number of Cases within each folder, designates whether or not the folder is a Shared folder (True or False), and provides a link to the Folder Properties for each folder. All cases initially get stored in the My Cases folder until you add and use your own folders. Select a folder to view its cases in a Case Management grid.

### Open a Folder

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. Click the **Folders** navigation tab to open the Folders page.
3. In the Folder Management grid under **Folder Name**, click a folder name link to open the folder and display its cases in a Case Management grid.

4. Use the Case Management grid and toolbar to open, find, move, copy, assign, delete, import, and export cases.

#### Sort the Grid

Most of the grid columns are sortable. Click a column title to sort the grid by that column in ascending order. Click the grid column title again to sort the column in descending order. Clicking the grid column title switches the order between ascending and descending order.

The sort icons indicate whether the column is not sorted (two arrows), the column is sorted in ascending order (upward pointing arrow), or the column is sorted in descending order (downward pointing arrow).

#### Examples:

In the Folder Management grid:

- Click the **Shared** column title to sort the folders by whether the folder is shared with other users (true or false) in the folder properties.
- Click the **Cases** column title to sort the folders by the number of cases within the folder.
- Click the **Folder Name** column title to sort the folders by folder name.

The following features are available in the Folder Management grid and toolbar on the Folders page.

> **NOTE:** Use the Case Management grid and toolbar on the Folders page to do the same case management as you do on the Cases page. See the Cases page for instructions. After using the Case Management grid on the Folders page, click the **Folders** navigation tab to return to the Folder Management grid view.

### Add a New Folder

Add multiple folders for storing your cases so you can easily find your cases on the Folders page without having to search through the master case list on the Cases page.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. Click the **Folders** navigation tab to open the Folders page.

3. On the Folder Management toolbar, click **New Folder** to open the **Folder Properties** dialog box.
4. In **Folder Name**, type the title of the new folder you are adding.
5. Select the **Default Folder** check box to set the folder as the default location for your cases. If not the default folder for all your cases, leave the check box cleared.
6. (Optional) Share the cases in this folder with other users. The other users will have full access to update and save the cases within the folder.
   a. In **User Nickname**, type the nickname of a user with whom to share this folder.
   b. Click **Add User**. This saves the user to the list of users who have access to the folder.
   c. Add users as applicable.

   In the Folder Management grid, shared folders display as "True" under the Shared column. Unshared folders display as "False" under the Shared column.

7. (Optional) Remove a user's access to the folder. In the **Users who have access** column, click **Delete** to the right of the user's nickname to remove their access to the folder.
8. Click **Save** to add the new folder to the Folder Management grid. Or, click **Cancel** to return to the Folder Management grid without saving the folder.

## Delete a Folder and Cases

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. Click the **Folders** navigation tab to open the Folders page.
3. In the left column of the **Folder Management** grid, select the check box for the folder you want to delete.
4. On the Folder Management toolbar, click **Delete Folder and Cases** to open the **Confirm** dialog box.

5. Do one of the following:
   - Click **Yes** to delete the selected folder and its cases, which removes them from the grid.
   - Click **No** to return to the Folder Management grid without deleting the selected folder and its cases.

## Delete a Folder and Move the Cases

**NOTE:** You must already have a receiving folder for the moved cases before beginning this task.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. Click the **Folders** navigation tab to open the Folders page.
3. In the left column of the **Folder Management** grid, select the check box for the folder you want to delete.
4. On the Folder Management toolbar, click **Delete Folder and Move Cases** and then click the destination folder to where the cases will move.
5. On the **Confirm** dialog box, do one of the following:
   - Click **Yes** to delete the selected folder and move its cases to the destination folder.
   - Click **No** to return to the Folder Management grid without deleting the selected folder and moving its cases.

## Edit Folder Properties and Share the Folder with Other Users

Use the Folder Properties dialog box to edit folder properties and share case folders with other users.

**NOTE:** Users must enter their User Nickname on the Preferences page to share cases with other users. See Preferences.

1. On the left, click the **Case Management** navigation button to open the Cases page.
2. Click the **Folders** navigation tab to open the Folders page.
3. In the **Folder Name** column of the Folder Management grid, locate the name of the folder to edit.
4. In the **Properties** column of the grid, click **Edit** to open the **Folder Properties** dialog box.
5. Edit folder properties as applicable:
    - Type a different name in **Folder Name**.
    - Select the **Default Folder** check box to make the folder your default folder for storing cases, or clear the **Default Folder** check box when you use a different folder as the default.
6. (Optional) Share the cases in this folder with other users. The other users will have full access to update and save the cases within the folder.
    a. In **User Nickname**, type the nickname of a user with whom to share this folder.
    b. Click **Add User**. This saves the user to the list of users who have access to the folder.
    c. Add users as applicable.

    In the Folder Management grid, shared folders display as "True" under the Shared column. Unshared folders display as "False" under the Shared column.
7. (Optional) Remove a user's access to the folder. In the **Users who have access** column, click **Delete** to the right of the user's nickname to remove their access to the folder.
8. Click **Save** to save the changes for this folder and update the Folder Management grid. Click **Cancel** to return to the Folder Management grid without saving changes to the folder.

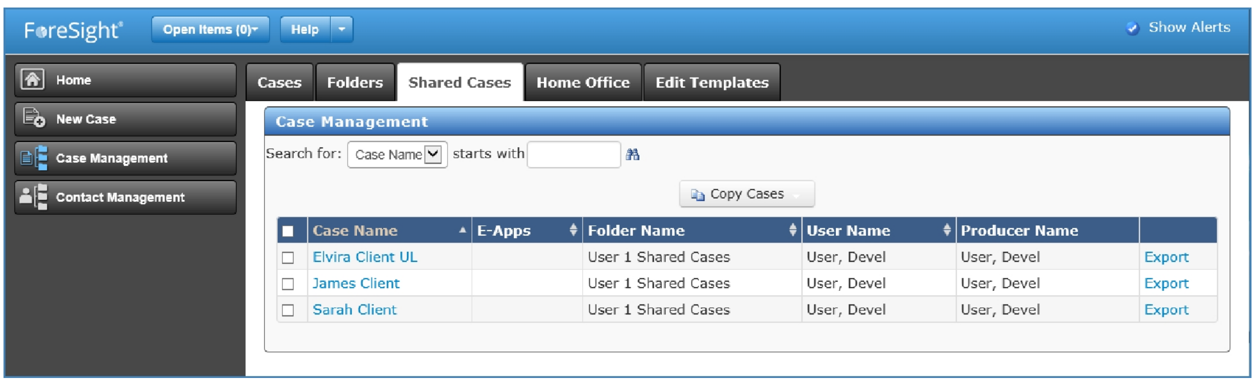
 

## Shared Cases

**Important!** When using "save as" with a shared case, ForeSight removes contact connections to Contact Management from the case. ForeSight does not copy one user's Contact Management information to another user. It only copies the case data.

Other ForeSight users can share cases with you by sharing folders on the Folders page. You need to enter your User Nickname on the Preferences page to enable other users to share case folders with you. For instructions, see Preferences.

On the left, click the **Case Management** navigation button and then click the **Shared Cases** navigation tab to open the Shared Cases page.




On the Shared Cases page, the Case Management grid lists all of the cases that other users shared with you. Use the Shared Cases page to manage cases that other users shared with you.

**NOTE:** You cannot delete or move cases that are shared with you.

Use the Case Management grid and toolbar to open, change and save a shared case.

### Open, Change and Save a Shared Case

1. On the left, click the **Case Management** navigation button to open the Case Management page group.
2. Click the **Shared Cases** navigation tab.
3. If the case is not on the first page of the grid, use the search feature to find the case.

4. In the **Case Name** column of the Case Management grid, click the name of the case to open the case.
5. Make necessary changes to the active case pages.
6. On the menu bar, click **Save** to save your updates.
7. On the menu bar, click **Close** to close the case.

**See Also:**

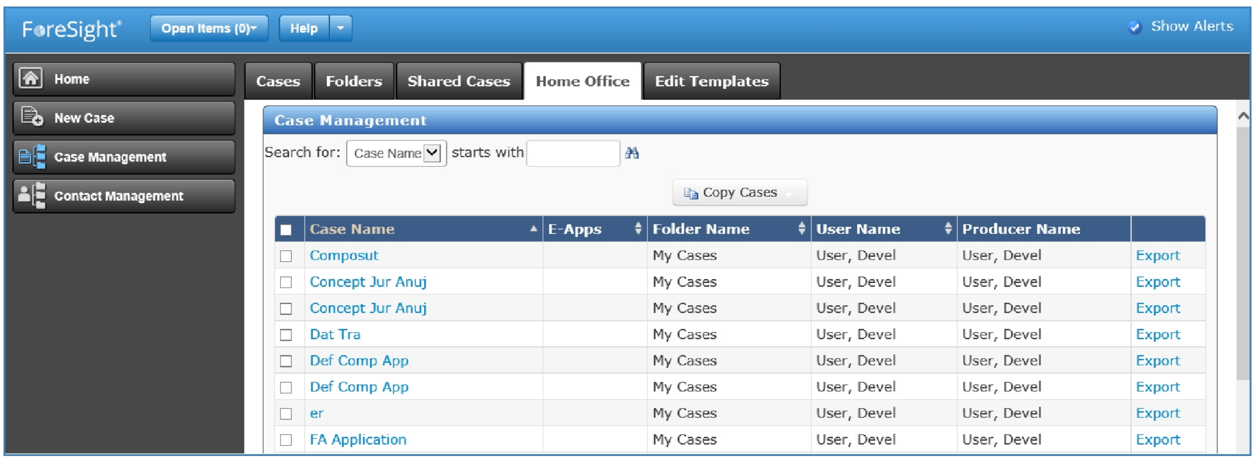
Copy Cases to Another Folder

Export a Case

# Home Office

**NOTE:** This page is for Designated Home Office Users Only. You cannot delete, move or assign cases that are listed on the Home Office page. The Home Office page is not available on the ForeSight desktop Console.

On the left, click the **Case Management** navigation button and then click the **Home Office** navigation tab to open the Home Office page.




Use the Home Office page to manage cases that the carrier shared with you.

Use the Case Management grid and toolbar to open, change and save a home office case.

## Open, Change and Save a Home Office Case

1. On the left, click the **Case Management** navigation button to open the Case Management page group.
2. Click the **Home Office** navigation tab.
3. If the case is not on the first page of the grid, use the search feature to find the case.
4. In the **Case Name** column of the Case Management grid, click the name of the case to open the case.
5. Make necessary changes to the active case pages.
6. On the menu bar, click **Save** to save your updates.
7. On the menu bar, click **Close** to close the case.

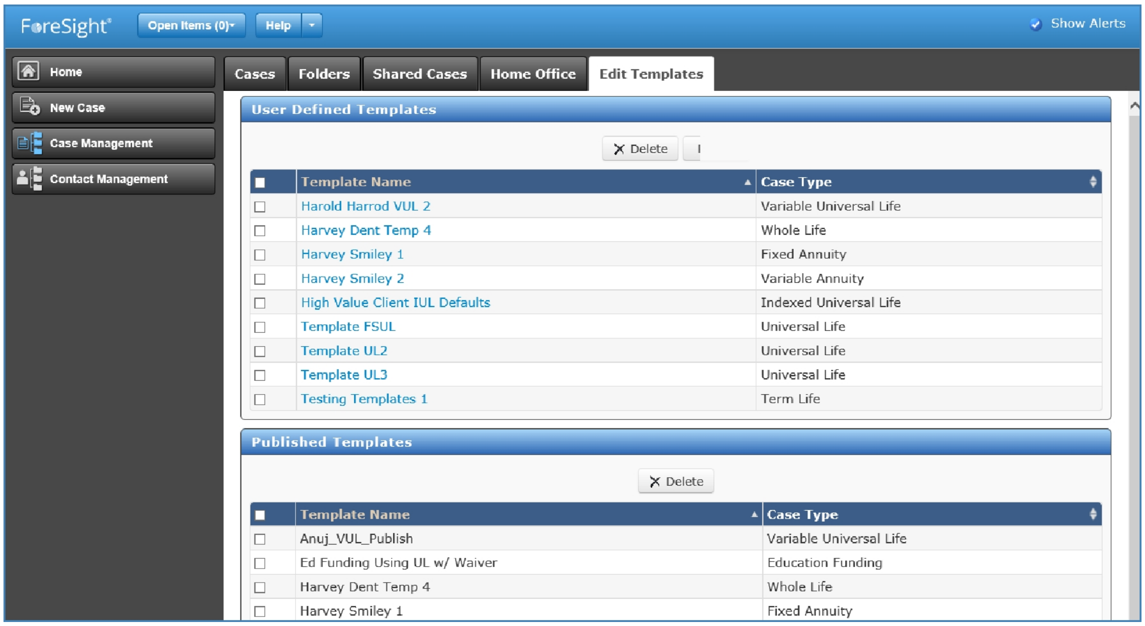
**See Also:**

Copy Cases to Another Folder

Export a Case

# Edit Templates

On the left, click the **Case Management** navigation button and then click the **Edit Templates** navigation tab to open the Edit Templates page.




The Edit Templates page lists all of the illustration templates that you can use as a starting basis for creating new illustrations. Your level of access determines what you can do on this page.

- Home Office users and Producers use the Edit Templates page to edit and delete their own user-defined templates.
- Home Office users with full Template Publishing access use the Edit Templates page to publish templates and delete published templates.
- Published templates are available only when your organization's Home Office publishes templates for use by producer user groups.

The following features are available on the Edit Templates page.

## Delete a User Defined Template

1. On the left, click the **Case Management** navigation button.
2. Click the **Edit Templates** navigation tab to open the Edit Templates page.

3. On the left of the **Template Name** column in the **User Defined Templates** grid, select the check box for each template to delete.
4. Above the grid, click the **Delete** button.
5. On the **Confirm** dialog box, click **Yes** to delete the selected templates. Click **No** to cancel the deletion.

## Edit a User Defined Template

1. On the left, click the **Case Management** navigation button.
2. Click the **Edit Templates** navigation tab to open the Edit Templates page.
3. In the **Template Name** column of the **User Defined Templates** grid, click a template name link to open the template illustration.
4. Make changes to the template.
5. On the menu bar, click **Save** to save the template.
6. On the menu bar, click **Close** to close the template.

## Delete a Published Template (Home Office Users Only)

**NOTE:** Only Home Office users with Publish access can delete published templates.

1. On the left, click the **Case Management** navigation button.
2. Click the **Edit Templates** navigation tab to open the Edit Templates page.
3. In the left column of the **Published Templates** grid, select the check boxes for the published templates to delete.
4. Above the grid, click the **Delete** button.

## Publish a User Defined Template (Home Office Users Only)

**NOTE:** Only Home Office Users with Template Publishing access can publish templates.

1. On the left, click the **Case Management** navigation button.
2. Click the **Edit Templates** navigation tab to open the Edit Templates page.

3. In the left column of the **User Defined Templates** grid, select the check boxes for the Home Office user-defined templates to publish.
4. Above the grid, click the **Publish** button.
5. Click **OK** on the confirmation dialog box.

**See Also:**

Create an Illustration Template

Illustrate by Template

Illustrate Using Published Templates

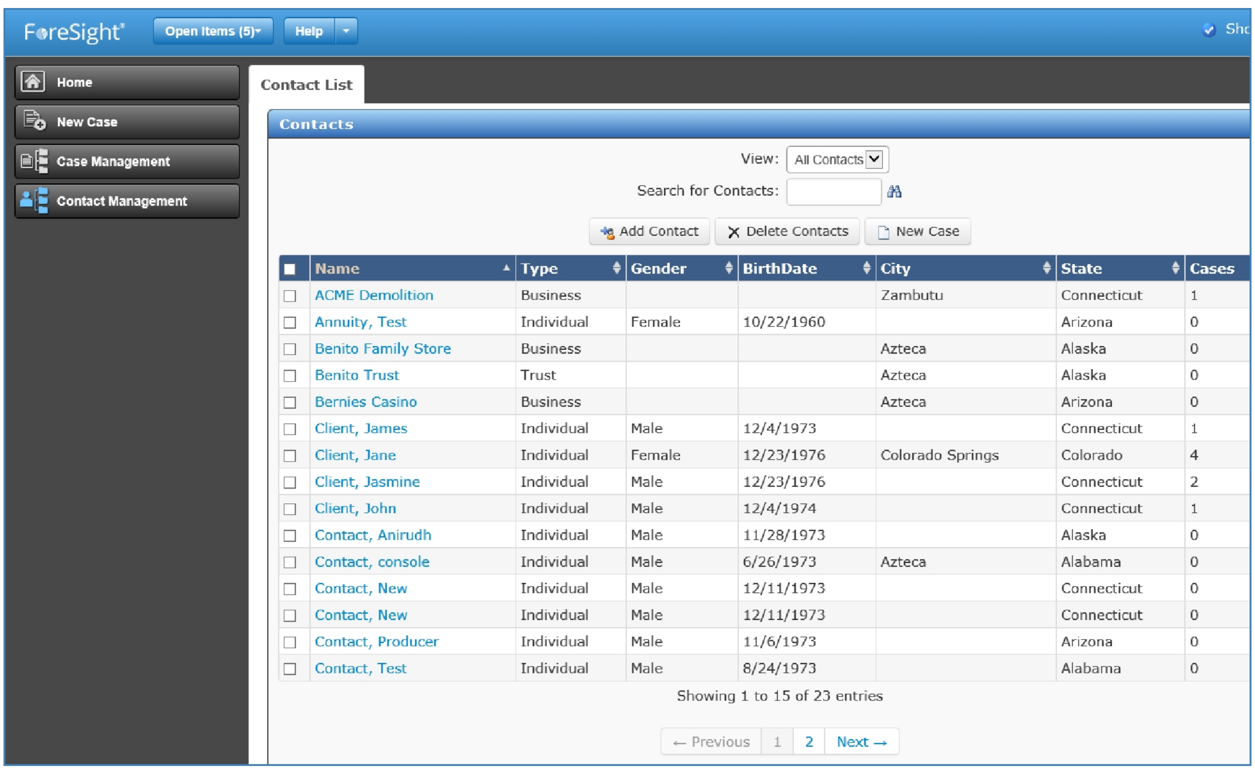
# Contact Management

**Important!** When exporting a case or when using "save as" with a shared case, ForeSight removes contact connections to Contact Management from the case. ForeSight does not copy one user's Contact Management information to another user. It only copies the case data.

On the left, click the **Contact Management** navigation button to open the Contact Management pages.

## Contact List

On the left, click the **Contact Management** navigation button to open the Contact List page.




The Contact List page grid displays a master list of all contacts to which you have access.

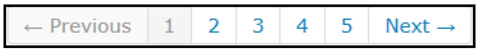
In the **View** list, select an option to filter the master list of contacts by contact type: Individuals, Producers, Businesses, and Trusts (a faster way of locating contacts).

In the Contacts grid, you can go to multiple grid pages, select contacts, and sort the grid.

### Go to Multiple Grid Pages

1. Scroll down to the bottom of the grid page.
2. Click the **Previous**, **Next**, or numbered buttons to move through the grid pages.




### Select Contacts in the Grid

- Select individual contacts:

  In the left column of the grid, select the check boxes to the left of the contact names.

- Select all of the contacts on the active grid page:

  Select the check box in the title row of the left column to select all of the contacts on the active grid page only. Click the check box again to clear the check boxes for all of the contacts on the active grid page.

  This does not select or clear contacts on the remaining grid pages.

### Sort the Contacts Grid

The Contacts grid columns are sortable by type of contact data. Click a column title to sort the grid by that column in ascending order. Click the grid column title again to sort the contacts by that column in descending order. Clicking the grid column title switches the column list order between ascending and descending order.

The sort icons indicate whether the column is not sorted (two arrows), the column is sorted in ascending order (upward pointing arrow), or the column is sorted in descending order (downward pointing arrow).

Examples:

- Click the **Name** column title to sort the contacts in the grid by name.
- Click the **Type** column title to sort the contacts in the grid by contact type.
- Click the **City** column title to sort the contacts by City.

Use the Contact List page to add and delete contacts, search for and open your saved contacts, and to start an illustration.

## Add a Contact

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. In the **View** list, select the type of contact to filter the list: **Individuals**, **Producers**, **Businesses**, or **Trusts**.
3. Click the **Add Contact** button to open the Name and Address page in Contact Information.
4. (Optional) In the Contact section, select a **Contact Type** in the list: **Individual**, **Producer**, **Business**, or **Trust**.
5. Enter the **Contact** and **Communication** section information for the new contact. The input fields vary by contact type.

   In the Communication section for Producer contacts, entries are required in the Address, City, Zip and Phone fields.

6. Do any of the following:
   - If an alert appears next to Show Alerts on the banner, click **Show Alerts** to view a list of required contact information.

     An alert appears next to any inputs that require an entry. Enter the required inputs until no alerts appear next to Show Alerts. If necessary, click **Show Alerts** again until the required contact information is complete.
   - On the menu bar, click **Save** to save the contact information.
   - On the menu bar, click **Close** to close the Contact Information page and return to the Contact Management page.

     If you did not save changes or if inputs contain errors, a Close dialog box opens.
     - Click **Yes** to save your entries and close the page. ForeSight adds the contact to the Contact Management pages. If input errors exist, an Error message appears. Click **OK** on the message, fix the errors, and try again.
     - Click **No** to close the page without saving the new contact.

- Click **Cancel** to return to the active Contact Information page for the new contact where you can add or edit contact information.

## Delete a Contact

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. In the **View** list, select the type of contact if known: **Individuals**, **Producers**, **Businesses**, or **Trusts**. Otherwise, skip this step.
3. Scroll to find the contact, or search for a contact:
    a. In **Search for Contacts**, type the beginning letters of the contact name.
    b. Press Enter or click to display all matching search results in the Contacts grid.
4. In the left column of the **Contacts** grid next to **Name**, select the check box for each contact to delete.
5. Click the **Delete Contacts** button.
6. On the Confirm dialog box:
    - Click **Yes** to delete the selected contact and remain on the Contact Management page.
    - Click **No** or click **Cancel** to not delete the selected contact and remain on the Contact Management page.

## Search for a Contact

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. In the **View** list, select the type of contact: **Individuals**, **Producers**, **Businesses** or **Trusts**.
3. Search for the contact.

a. In **Search for Contacts**, type the beginning letters of the contact name.

b. Press Enter or click 🔍 to display all matching search results in the Contacts grid.

4. In the Contacts grid under **Name**, click the contact name to open the Contact Information pages for the contact and add or edit contact information or open cases for the contact. For instructions, see Contact Information.

# Contact Information

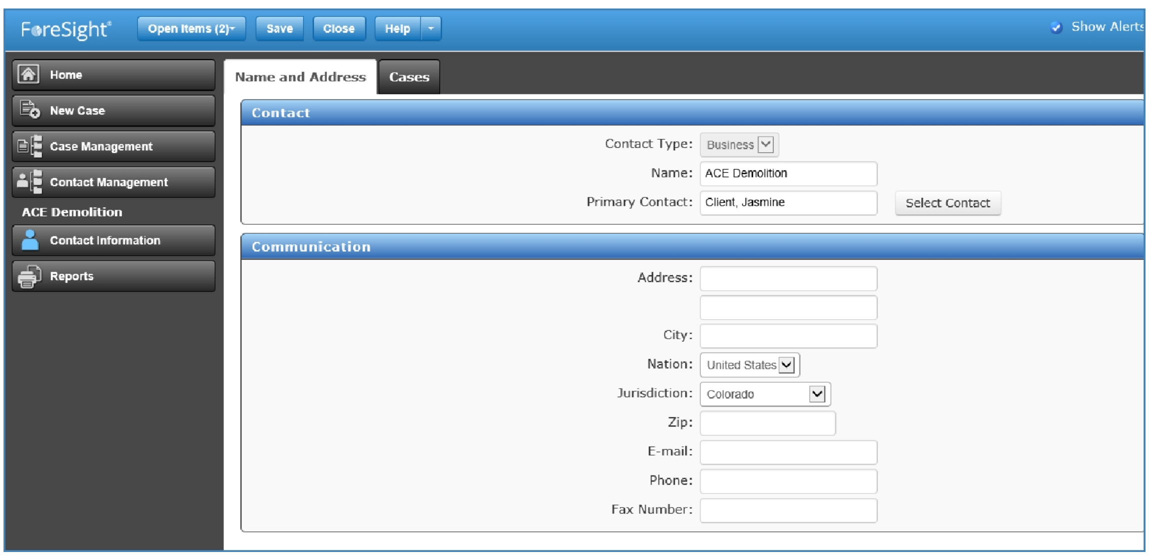
The Contact Information navigation button and pages become available when you open or add a contact from one of the Contact Management pages. For instructions, see Contact List.

On the left, click the **Contact Information** navigation button to open the Contact Information pages.

Use the Contact Information pages to add and edit contact information and open cases associated with a contact.

## Name and Address

In the Contact Information pages, click the **Name and Address** navigation tab or click the **Contact Information** navigation button to open the Name and Address page for the active contact.




Use the Name and Address page to add and edit contact information.

### Add and Edit Contact Information

1. On the left, click the **Contact Management** navigation button to open the Contact List page.

2. Add a contact or click an existing contact name in the **Name** column on the **Contact List** page to open the Contact Information pages to the Name and Address page.
3. On the Name and Address page, add or edit the Contact and Communication section information for the contact. The input fields vary by contact type.

   In the Communication section for Producer contact types, entries are required in the Address, City, Zip and Phone fields.

4. Do any of the following:

   - If an alert appears next to Show Alerts on the banner, click **Show Alerts** to view a list of required contact information.

     An alert appears next to any inputs that require an entry. Enter the required inputs until no alerts appear next to Show Alerts. If necessary, click **Show Alerts** again until the required contact information is complete.

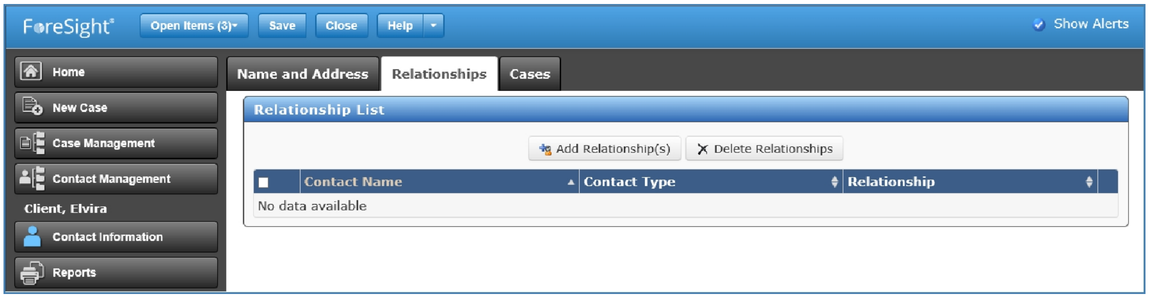
   - On the menu bar, click **Save** to save the contact information.
   - On the menu bar, click **Close** to close the Contact Information pages and return to the Contact Management page.

     If you did not save changes or if inputs contain errors, a Close dialog box opens.

     - Click **Yes** to save your entries and close the page. If input errors exist, an Error message appears. Click **OK** on the message, fix the errors and try again.
     - Click **No** to close the page without saving the contact information.
     - Click **Cancel** to return to the Name and Address page where you can add or edit contact information.

## Relationships

In the Contact Information pages, click the **Relationships** navigation tab to open the Relationships page.



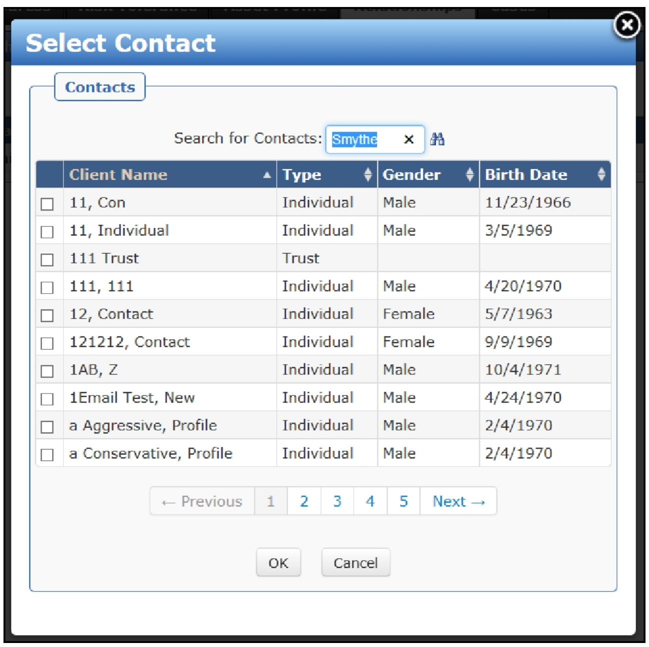

Use the Relationships page to add and delete contact relationships.

Not applicable for Producer contacts.

## Add Contact Relationships

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. On the Contact List page, open the contact for whom to add the relationships.
3. In the Contact Information pages, click the **Relationships** navigation tab.
4. In the **Relationship List** section, click the **Add Relationships** button to open the Select Contact dialog box.

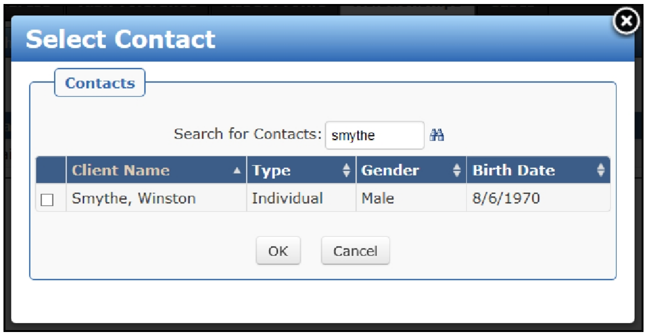



5. Search for the related contact in the Contacts grid on the Select Contact dialog box:

   a. In **Search for Contacts**, type the beginning letters of the contact name.
   b. Press Enter or click to display all matching search results in the Contacts grid.
   c. To the left of the **Client Name** column, select the check box next to the name to add as a relationship to the contact.

hexure

d. Click **OK** to add the relationship and return to the Relationships page.




(Optional) If the relationship is not in the Contacts grid on the Select Contact dialog box:

a. Click to close the Select Contact dialog box.
b. On the left, click the **Contact Management** navigation button.
c. Above the grid, click the **Add Contact** button to add a contact for the relationship.
d. Enter the information for the new contact.
e. On the menu bar, click **Save** to add the new contact.
f. Repeat steps 1 through 5 for the original contact.

6. In the **Relationship** column of the grid, select the appropriate relationship type in the list.
7. On the menu bar, click **Save**.
8. Repeat steps 4 through 7 to add more relationships.

> **NOTE:** When you add a relationship to a contact and save the contact, the system adds the relationship to the original contact and to the relationship contact. Both contacts have the relationship information.

9. Click another navigation tab in the Contact Information pages or click **Close** on the menu bar to return to the Contact List page.

### Delete Contact Relationships

1. On the left, click the **Contact Management** navigation button.
2. On the Contact List page, open the contact for whom to delete the relationships.
3. In the Contact Information pages, click the **Relationships** navigation tab to open the Relationships page.
4. In the **Relationship List** grid, select the check box for each Contact Name to delete.
5. Click the **Delete Relationships** button.
6. Click **Close** on the menu bar.
7. On the Close dialog box:

    - Click **Yes** to delete the selected relationships and return to the Contact Management page, or
    - Click **No** to not delete the relationships and return to the Contact Management page, or
    - Click **Cancel** to return to the Relationships page. The contact is no longer in the Relationship List, but it is not deleted. Click **Close** on the menu bar and click either **Yes** or **No** to exit the Relationship page.

## Cases

In the Contact Information pages, click the **Cases** navigation tab to open the Cases page.

Use the Cases page to find and open cases for the contact.

### Open Cases Associated with a Contact

1. On the left, click the **Contact Management** navigation button to open the Contact List page.
2. Search for the contact.

    a. In **Search for Contacts**, type the beginning letters of the contact name.
    b. Press Enter or click 🔍 to display all matching search results in the Contacts grid.

3. In the Contacts grid under **Name**, click the contact name to open the Contact Information pages for the contact.
4. Click the **Cases** navigation tab to open the Cases page.

   The Cases by Contact grid displays the saved cases for the contact.

   If you have a new illustration for this contact, and have not yet saved it with a case name, the "Untitled Case" illustration will not appear in the Cases by Contact grid.

5. In the **Case Name** column, click a case name link to open the case.

## Reports

When you add a new contact or open an existing contact on one of the Contact Management pages, the Reports page becomes available. Use the Reports page to create a profile report for the selected contact.

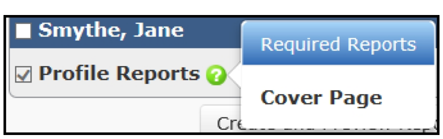
| |
|---|
| **NOTE:** The contact Profile Report includes only a cover page. |

On the left under the Contact Information button, click the **Reports** navigation button to open the Reports page.

### Create a Profile Report for a Contact

1. On the left, click the **Contact Management** navigation button.
2. Search for and open a contact in the Contact List page. For instructions, see Contact List.
3. On the left in the active contact pane, click the **Reports** navigation button to open the Rendering Reports dialog box.
4. In the **Reports Display** section, select the check boxes for the optional report pages to include, if any.

   Point to the question mark to the right of **Profile Reports** to view a list of required reports. Cover Page is the only available report.

5. Click the **Create and Preview Reports** button to generate and display the report cover page in a separate browser window.
6. On the reports display page, scroll down to move through the page of the generated report.

   The reports open in a PDF viewer.

7. Use the PDF viewer controls to save and print the reports. Pause the mouse over the PDF report page until the PDF reader toolbar  appears. Click the print  button to print the report or click the save  button to save the report.