

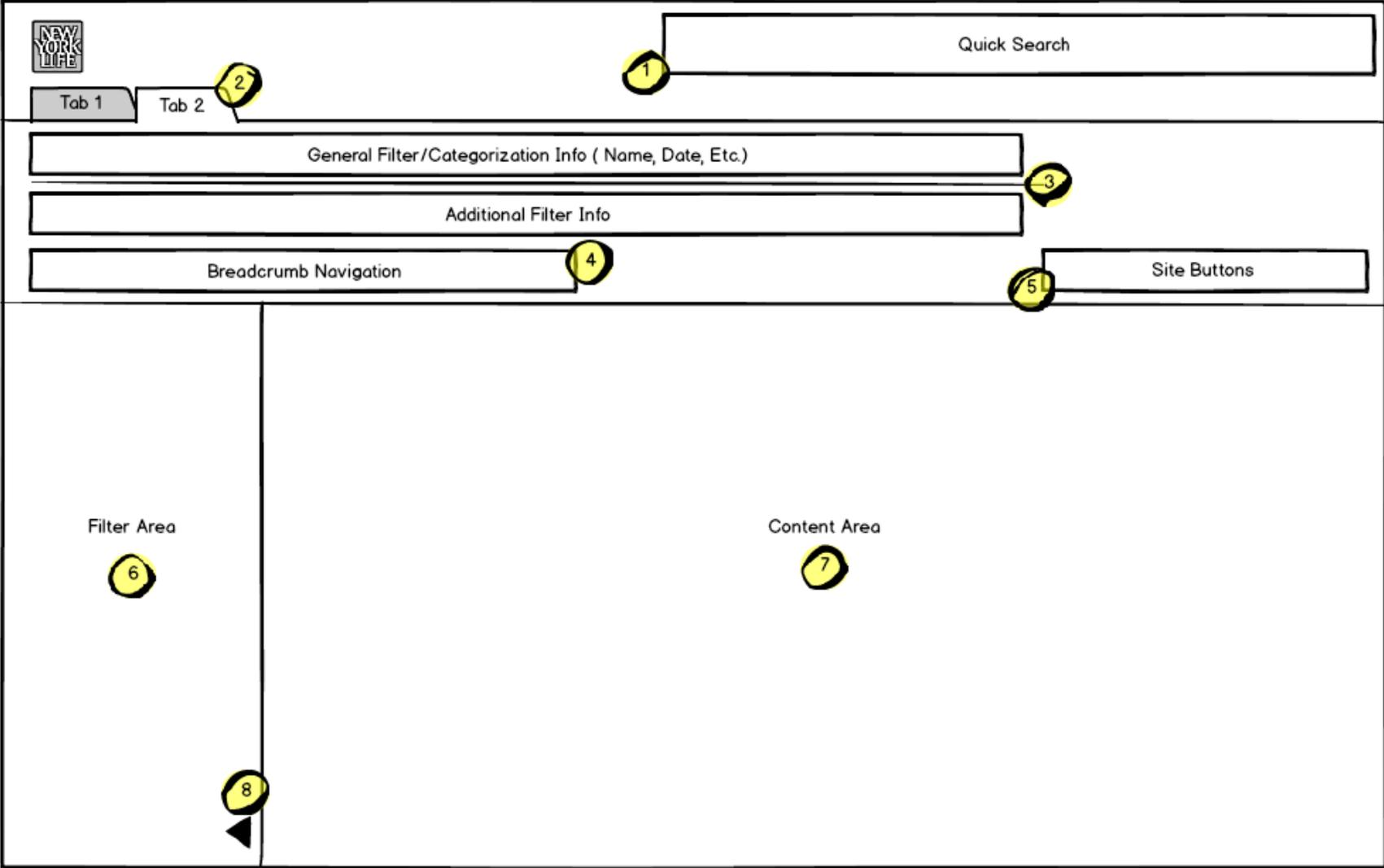
# Replacement Dashboard

May 6, 2014 [version 1.2]



# Interface Overview

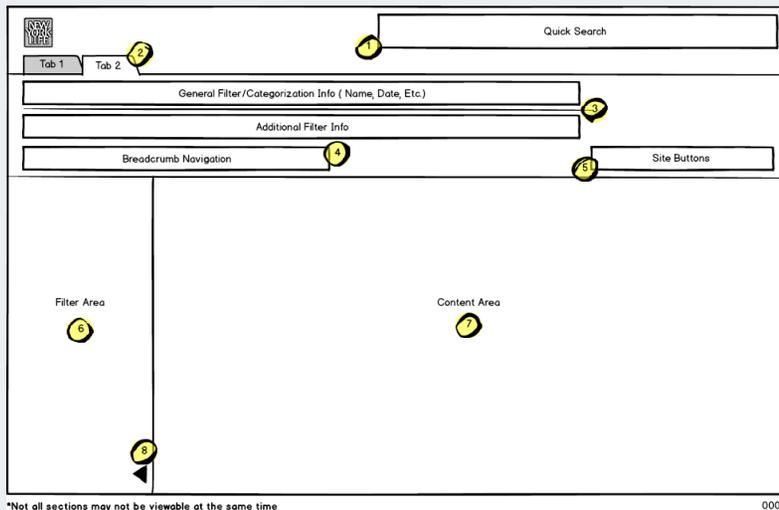
# UI Overview



\*Not all sections may not be viewable at the same time



# Detail



1. Quick Search  
On all pages – results pop in a new window
2. Tab Bar  
Used for drill-down within quick search
3. Filter Display  
The filters used to create the current display
4. Breadcrumb Navigation  
Clickable element to traverse from Agent to GO to Zone to Company info
5. Site Buttons  
Print, Export and Column selection buttons
6. Filter Area  
Selection area to choose and apply filters
7. Content Area
8. Filter Toggle  
Toggle to expand and collapse filter area

# Wireframes

# Dashboards

# Release 2 Dashboard



**Agent Report:**

Agent Code:

Date Range:

Total Rep. Rate:  %

Replacement Rate:  %

**Analytics Report Builder:**

Date Range:

Area:  Albany (V48)  
 Boston (V56)  
 Brooklyn (V61)

Agent Name:  Agent Code:

By Agent

# Release 3 Dashboard



Agent Report:

Agent Code:

Date Range:  /   /

Total Rep. Rate:  %

Replacement Rate:  %

Quick Search:  Policy Number  Client ID  Household ID

Analytics Report Builder:

Date Range:  /   /

Area:

Agent Name:  Agent Code:

By Agent

# Release 3 Dashboard (4<sup>th</sup> priority)



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼
GO

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Analytics Report Builder:

Date Range:  /    /

Area: 

Company(All)  
Northeastern Zone  
Pacific Zone

Albany (V48)  
Boston (V56)  
Brooklyn (V61)

Agent Name:  Agent Code:

By Agent



{Release 3 - 4th Priority} 0004

# Agent Report



# Dashboard Home



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Analytics Report Builder:

Date Range:  /    /

Area: 

Company(All)  
Northeastern Zone  
Pacific Zone

Albany (V48)  
Boston (V56)  
Brooklyn (V61)

⊖

Agent Name:  Agent Code:  ⊖

By Agent



# Column Selection



Quick Search:  Policy Number  Client ID  Household ID

Agent: John Smith; Agent Code: 00000000 | GO Code: [0000000](#) | Zone: [xxxxxxxxxxxxxxx](#)  
 Contact Type: zzzzzz, Start Date: 00/00/0000, current filter1: xxxxxxxxxxxxxxxxxx

Replacement Rates: Company Admitted: 00%    Company All Potential: 00%  
 GO Admitted: 00%    GO All Potential: 00%

Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy#	Agt Shr	Product Type	Policy	Face	Annual Premium / Annuity Pd
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
PAID CASES:													
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								

Date Range:      
 Agent Code:  (X)  
 Criteria Name:  (+)

Column Selection:  
 When complete click 'Apply'



# Threshold Report

# Dashboard Home



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Analytics Report Builder:

Date Range:  /    /

Area: Company(All)  
Northeastern Zone  
Pacific Zone  Albany (V48)  
Boston (V56)  
Brooklyn (V61)

Agent Name:  Agent Code:

By Agent

# Threshold: Results



Quick Search:  Policy Number  Client ID  Household ID

Replacement Report from 5/1/0000 to 7/1/0000  
 Minimum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3

Additional Threshold 1: xxxxxxxxxxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxxxxxxx  
 Additional Threshold 3 xxxxxxxxxxxx, Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,

Date Range:

Total Rep. Rate:  %

Replacement Rate:  %

Criteria Name

**Agents that met threshold: 00**

Agent Name	Agent Code	Recruiter Name	Recruiter Code	GO	Zone	Total Repl Rate	FYC from Repl	Total FYC (all prods)	% FYC from Repl	Repl Rate based on rpt criteria
<input checked="" type="checkbox"/> Able						%( / )	\$	\$	%	%( / )
<input checked="" type="checkbox"/> Baxter										
<input checked="" type="checkbox"/> Clark										
<input checked="" type="checkbox"/> Driver										
<input checked="" type="checkbox"/> Exxex										
<input checked="" type="checkbox"/> Fish										

**Replacement Details:**

Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status
Able													
Able													
Baxter													
Clark													
Driver													
Driver													
Driver													

# Selected from Agent List



Quick Search:  Policy Number  Client ID  Household ID

Replacement Report from 5/1/0000 to 7/1/0000  
 Minimum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3

Additional Threshold 1: xxxxxxxxxxxxxxxxxxxx; Additional Threshold 2: xxxxxxxxxxxxxxxxxxxx  
 Additional Threshold 3 xxxxxxxxxxxx; Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,

Date Range:

Total Rep. Rate:  %

Replacement Rate:  %

Criteria Name

**Agents that met threshold: 00**

Agent Name	Agent Code	Recruiter Name	Recruiter Code	GO	Zone	Total Repl Rate	FYC from Repl	Total FYC (all prods)	% FYC from Repl	Repl Rate based on rpt criteria
<input type="checkbox"/> Able						%( / )	\$	\$	%	%( / )
<input type="checkbox"/> Baxter										
<input type="checkbox"/> Clark										
<input type="checkbox"/> Driver										
<input type="checkbox"/> Exxer										
<input checked="" type="checkbox"/> Fish										

**Replacement Details:**

Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/A nnuitant Name	Insured/A nnuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status
Fish													
Fish													
Fish													
Fish													
Fish													

# Viewing Individual Agent



Quick Search:  Policy Number  Client ID  Household ID

Replacement Report from 5/1/0000 to 7/1/0000  
 Minimum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3

Additional Threshold 1: xxxxxxxxxxxxxxxxxxxxxx; Additional Threshold 2: xxxxxxxxxxxxxxxxxxxxxx  
 Additional Threshold 3 xxxxxxxxxxxxxx; Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,




Agent Name	Agent Code	Recruiter Name	Recruiter Code	GO	Zone	Total Repl Rate	FYC from Repl	Total FYC (all prods)	% FYC from Repl	Repl Rate based on rpt criteria
Fish						%( / /)	\$	\$	%	%( / /)

**Replacement Details:**

Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status
Fish													
Fish													
Fish													
Fish													
Fish													

Date Range:

Total Rep. Rate:  %

Replacement Rate:  %

Criteria Name

# Agent Threshold Report

# Dashboard Home



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Analytics Report Builder:

Date Range:  /    /

Area: Company(All)  
Northeastern Zone  
Pacific Zone  Albany (V48)  
Boston (V56)  
Brooklyn (V61)

Agent Name:  Agent Code:

By Agent

# Agent Threshold: Results



Quick Search:  Policy Number  Client ID  Household ID

Report by Agent; Replacement Report from 5/1/0000 to 7/1/0000  
 Minimum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3

Additional Threshold 1: xxxxxxxxxxxxxxxxxxxxxx; Additional Threshold 2: xxxxxxxxxxxxxxxxxxxxxx  
 Additional Threshold 3 xxxxxxxxxxxxxx; Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,

Date Range:

Total Rep. Rate:  %

Replacement Rate:  %

Criteria Name

**Agents that met threshold: 00**

Agent Name	Agent Code	Recruiter Name	Recruiter Code	GO	Zone	Total Repl Rate	FYC from Repl	Total FYC (all prods)	% FYC from Repl	Repl Rate based on rpt criteria
<a href="#">Agentson, John</a>						%( / )	\$	\$	%	%( / )
<a href="#">Smithson, Joe</a>										
<a href="#">Quayle, Mark</a>										
<a href="#">Robertson, Eli</a>										
<a href="#">Theodore, Jim</a>										

# Agent Threshold: Detail



Quick Search:  Policy Number  Client ID  Household ID

Agent: John Agentson (0000000), GO Name: Greater New York General Office (G000), Zone: xxxxxxxxxxxxxxxxx  
 Contract Type: xxxxxxxxxxxxxxxx; Start Date: 00/00/0000




---

Date Range:

Total Rep. Rate:  
 %

Replacement Rate:  
 %

Criteria Name



**REPLACEMENTS:**

**New Policy:**  
 Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53), State: New Jersey  
 Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxx, Agent Share: 100%, Policy Status: Inforce  
 Replace Date: 00/00/0000, Face Amt: \$00,000,000, Ann Prem/Annuity Pd Amt: \$000000, Total Premiums Paid 1st Year: \$00000

**Replaced Policy: (Admitted Indicator)**  
 Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53)  
 Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxx, Policy Dt: xxxxxxxxxxxxx, Status: xxxxxxxxxxxxx  
 Selling Agent: John Agentstein, Trans Type: xxxxxxxxxxxxxxxxx, Trans Dt: xxxxxxxxxxxxxxxxx, Trans Amount: \$000000  
 Surr Chg Amt: \$000000, Replace Company: xxxxxxxxxxxxxxxxx

**New Policy:**  
 Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53), State: New Jersey  
 Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxx, Agent Share: 100%, Policy Status: Inforce  
 Replace Date: 00/00/0000, Face Amt: \$00,000,000, Ann Prem/Annuity Pd Amt: \$000000, Total Premiums Paid 1st Year: \$00000

**Replaced Policy: (Admitted Indicator)**  
 Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53)  
 Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxx, Policy Dt: xxxxxxxxxxxxx, Status: xxxxxxxxxxxxx  
 Selling Agent: John Agentstein, Trans Type: xxxxxxxxxxxxxxxxx, Trans Dt: xxxxxxxxxxxxxxxxx, Trans Amount: \$000000  
 Surr Chg Amt: \$000000, Replace Company: xxxxxxxxxxxxxxxxx

---

**PAID CASES:**

Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53), State: New Jersey  
 Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxx, Agent Share: 100%, Agent FYC: \$0000000, Policy Status: xxxxx  
 Policy Date: 00/00/0000, Face Amount: \$000000, Ann Prem/Annuity Pd Amt: \$000000, Total Premiums Paid 1st Year: \$00000

Owner: John Q Public (56), Client ID: 00000000, Household ID: 0000000000, Insured: Jamie R Public (53), State: New Jersey

# Quick Search

# Dashboard Home



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>

> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼
GO

Quick Search:

Policy Number
  Client ID
  Household ID
 
GO

Agent Report:

Agent Code:

Date Range:  /  -  /

Total Rep. Rate:  %

Replacement Rate:  %

Generate Report

Analytics Report Builder:

Date Range:  /  -  /

Area: 

Company(All)  
Northeastern Zone  
 Pacific Zone

Albany (V48)  
 Boston (V56)  
 Brooklyn (V61)

Agent Name:  Agent Code:

Generate Threshold Report  By Agent

# Quick Search: Results



Quick Search:  Policy Number  Client ID  Household ID

Quicksearch: Policy # 0000000. Column Selection  

Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	Rpl Date
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20

# Quick Search: Details



Quick Search:  Policy Number  Client ID  Household ID

Policy # 0000000 {x} Details:Client:0000000 ID {x}

Quicksearch: Client ID: 000000000

Column Selection




Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	Rpl Dat
William Mangano	899148	Mark Depew		358094	0506070000608656				OH	58437523	100	VA	surr	7/5/20

# Quick Search: Details



Quick Search:  Policy Number  Client ID  Household ID

Policy # 0000000 {x} Details:Policy #0000000 {x} Details:Household ID:0000000 {x}

Quicksearch: Household ID: 00000000

Column Selection

Agent Name	Agent Code	Client Name (Owner)	Age	Client ID	Household ID	Insured/Annuitant Name	Insured/Annuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	Rpl Date
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	58493304				
William Mangano	899148	Mark Depew	55	<a href="#">3580942</a>	<a href="#">0506070000608656</a>	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	<a href="#">3580942</a>	<a href="#">0506070000608656</a>	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	<a href="#">3580942</a>	<a href="#">0506070000608656</a>	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew	55	<a href="#">3580942</a>	<a href="#">0506070000608656</a>	Mark: Depew	55	\$1,079	OH	58484969	100	VA	active	5/30/20
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	62833065				
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	48215106				
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	58447159				
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	39140374				
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	39136909				
William Mangano	899148	Mark Depew		<a href="#">3580942</a>	<a href="#">0506070000608656</a>				OH	58314997				

# Summaries

# Dashboard Home



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
>Northeastern Zone	00%	00%	<a href="#">view</a>
>Pacific Zone	00%	00%	<a href="#">view</a>
>South Central Zone	00%	00%	<a href="#">view</a>
>West Central Zone	00%	00%	<a href="#">view</a>

Top 10 GO Replacements:

GO	Total	Admitted	
Mississippi (A49)	25%	00%	<a href="#">view</a>
Mobile (A19)	24%	00%	<a href="#">view</a>
Montgomery (A05)	20%	00%	<a href="#">view</a>
Denver (D43)	20%	00%	<a href="#">view</a>
Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

General Office
▼
GO

Quick Search:  Policy Number  Client ID  Household ID  GO

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Generate Report

Analytics Report Builder:

Date Range:  /    /

Area: 

Company(All)  
Northeastern Zone  
 Pacific Zone

Albany (V48)  
 Boston (V56)  
 Brooklyn (V61)

Agent Name:  Agent Code:

Generate Threshold Report  By Agent



0010

# Dashboard: Zone Expanded



Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>

v West Central Zone	Total	Admitted	
Arkansas (D13)	00%	00%	<a href="#">view</a>
Austin (D01)	00%	00%	<a href="#">view</a>
Baton Rouge (D18)	00%	00%	<a href="#">view</a>
Cedar Rapids (D57)	00%	00%	<a href="#">view</a>
Colorado (D44)	00%	00%	<a href="#">view</a>
Dallas (D27)	00%	00%	<a href="#">view</a>
Denver (D43)	00%	00%	<a href="#">view</a>
Des Moines (D59)	00%	00%	<a href="#">view</a>
El Paso (D15)	00%	00%	<a href="#">view</a>
Fort Worth (D07)	00%	00%	<a href="#">view</a>
Great Plains (S92)	00%	00%	<a href="#">view</a>
Greater Chicago (A59)	00%	00%	<a href="#">view</a>
Greater Kansas City (00%	00%	00%	<a href="#">view</a>
Houston (D03)	00%	00%	<a href="#">view</a>
Illinois (A57)	00%	00%	<a href="#">view</a>
Kansas (D54)	00%	00%	<a href="#">view</a>
Louisiana (D24)	00%	00%	<a href="#">view</a>
Milwaukee (A56)	00%	00%	<a href="#">view</a>
Minnesota (D55)	00%	00%	<a href="#">view</a>
Nebraska (S94)	00%	00%	<a href="#">view</a>
New Mexico (D34)	00%	00%	<a href="#">view</a>
New Orleans (D21)	00%	00%	<a href="#">view</a>

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:  /    /

Total Rep. Rate:  %

Replacement Rate:  %

Analytics Report Builder:

Date Range:  /    /

Area:

Agent Name:  Agent Code:

By Agent

# Replacement Summary: Product



Quick Search:  Policy Number  Client ID  Household ID

Company > [West Central Zone](#) > Arkansas (D13)
Column Selection  

West Central Zone ▼  
 Arkansas (D13) ▼  
  
 Year Range:  
   
  
  

View By: Product | [General Office](#) | [Recruiter](#)

Product	2011 - all repl			2011 - admitted repl			% Internal	2012 - all repl			2012 -	
	Repl	Paid Cases	Repl Rate	Repl	Paid Cases	Repl Rate		Repl	Paid Cases	Repl Rate	Repl	Pa
Fixed Life	26,542	289,623	9%	26,542	289,623	9%	56%	25,062	302,121	8%	25,062	30
Variable Life	151	1,634	9%	151	1,634	9%	83%	183	2,798	7%	183	
<b>TOTAL LIFE:</b>	<b>26,693</b>	<b>291,257</b>	<b>9%</b>	<b>26,693</b>	<b>291,257</b>	<b>9%</b>	<b>61%</b>	<b>25,245</b>	<b>304,919</b>	<b>8%</b>	<b>25,245</b>	<b>34</b>
Investment Annuities - Variable	4,703	25,787	18%	4,703	25,787	18%		4,781	26,431	18%	4,781	2
Income Annuity	6,301	12,160	52%	6,301	12,160	52%		7,452	15,223	49%	7,452	1
Investment Annuities - Fixed	1,405	7,201	20%	1,405	7,201	20%		865	5,154	17%	865	
<b>TOTAL ANNUITY</b>	<b>12,409</b>	<b>45,148</b>	<b>27%</b>	<b>12,409</b>	<b>45,148</b>	<b>27%</b>		<b>13,098</b>	<b>46,807</b>	<b>28%</b>	<b>13,098</b>	<b>4</b>
<b>TOTAL LIFE AND ANNUITY</b>	<b>39,102</b>	<b>336,405</b>	<b>11.60%</b>	<b>39,102</b>	<b>336,405</b>	<b>11.60%</b>		<b>38,343</b>	<b>351,726</b>	<b>10.90%</b>	<b>38,343</b>	<b>39</b>

FYC Summary Chart:

	2011	2012	2013*
FYC From Replacements			
Total FYC (all products)			
% FYC from Replacements			

# Replacement Summary: GO



Quick Search:  Policy Number  Client ID  Household ID

Company > [West Central Zone](#) > Arkansas (D13)
Column Selection  

▼

▼

Year Range:



View By: [Product](#) | [General Office](#) | [Recruiter](#)

General Office	Zone	# Active Agents	Total Repl Rate	Admitted Repl Rate	Non-Admitted Repl Rate	Internal Repl Rate	External Repl Rate	FYC from Repl	Total FYC (all products)	% FYC from Repl
Arkansas (D13)			__% ( __ / __ )	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$	__%

# Replacement Summary: Recruiter



Quick Search:  Policy Number  Client ID  Household ID

Company > [West Central Zone](#) > Arkansas (D13)
Column Selection  

West Central Zone ▼  
 Arkansas (D13) ▼  
  
 Year Range:  
   
  
  

View By: [Product](#) | [General Office](#) | Recruiter

Recruiter	# Active Recruits	Admitted Repl Rate	Non-Admitted Repl Rate	Internal Repl Rate	External Repl Rate	FYC from Repl	Total F (all product)
<a href="#">Able, Scott</a> (00000000)	6	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$
<a href="#">Brown, Mike</a> (00000000)	17	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$
<a href="#">Charles, John</a> (00000000)	6	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$
<a href="#">Dragon, Kim</a> (00000000)	17	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$
<a href="#">Essex, Mary</a> (00000000)	6	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$
<a href="#">Smith, John</a> (00000000)	17	__% ( __ / __ )	__% ( __ / __ )	%	%	\$	\$

# Recruiter

# Dashboard Home

**NEW YORK LIFE**

Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
> <a href="#">Northeastern Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">Pacific Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">South Central Zone</a>	00%	00%	<a href="#">view</a>
> <a href="#">West Central Zone</a>	00%	00%	<a href="#">view</a>

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:

Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Recruiter Summary by GO:

Analytics Report Builder:

Date Range:

Area:

Agent Name:  Agent Code:

By Agent

# Selected GO Recruiter

**NEW YORK LIFE**

Summaries: (last 30 days)

Area	Total	Admitted	
Company	00%	00%	<a href="#">view</a>
>Northeastern Zone	00%	00%	<a href="#">view</a>
>Pacific Zone	00%	00%	<a href="#">view</a>
>South Central Zone	00%	00%	<a href="#">view</a>
>West Central Zone	00%	00%	<a href="#">view</a>

Quick Search:  Policy Number  Client ID  Household ID

Agent Report:

Agent Code:

Date Range:

Des Moines (D59)	20%	00%	<a href="#">view</a>
Las Vegas (D47)	15%	00%	<a href="#">view</a>
Los Angeles (S69)	15%	00%	<a href="#">view</a>
North Dakota (D61)	13%	00%	<a href="#">view</a>
Oklahoma City (D16)	12%	00%	<a href="#">view</a>
Saint Louis (D53)	12%	00%	<a href="#">view</a>
<a href="#">view all</a>			

Analytics Report Builder:

Date Range:

Area:  Albany (V48)  Boston (V56)  Brooklyn (V61)

Agent Name:  Agent Code:

By Agent

Recruiter Summary by GO:

Able	Scott	0000000	<a href="#">view</a>
Brown	Mike	0000000	<a href="#">view</a>
Charles	John	0000000	<a href="#">view</a>
Dragon	Kim	0000000	<a href="#">view</a>
Essex	Mary	0000000	<a href="#">view</a>
Smith	John	0000000	<a href="#">view</a>

# GO Recruiter View



Quick Search:
 Policy Number
  Client ID
  Household ID

Pacific Zone > Alaska GO (S47): Recruiters
Column Selection

**Recruiter Summary:**

Recruiter	# Active Recruits	Admitted Repl Rate	Non-Admitted Repl Rate	Internal Repl Rate	External Repl Rate	FYC from Repl	Total FYC (all products)	% FYC from Repl
Able, Scott (00000000)	6	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%
Brown, Mike (00000000)	17	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%
Charles, John (00000000)	6	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%
Dragon, Kim (00000000)	17	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%
Essex, Mary (00000000)	6	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%
Smith, John (00000000)	17	__% (_ / _)	__% (_ / _)	%	%	\$	\$	. __%

# Recruiter Detail



Quick Search:  Policy Number  Client ID  Household ID

Alaska GO (S47): Recruiters {x}
Recruiter: John Smith {x}

Pacific Zone > Alaska GO (S47): Recruiters > Detail
Column Selection




**Recruiter Summary:**

Recruiter	# Active Recruits	Admitted Repl Rate	Non-Admitted Repl Rate	Internal Repl Rate	External Repl Rate	FYC from Repl	Total FYC (all products)	% FYC from Repl
John Smith (0000000)	6	__% ( / )	__% ( / )	%	%	\$	\$	__%

**Agent Detail:**

Agent	Start Date - Current Contract	Admitted Repl Rate	Non-Admitted Repl Rate	Internal Repl Rate	External Repl Rate	FYC from Repl	Total FYC (all products)	% FYC from Repl
<a href="#">Pierce, Hawkeye</a> (00000000)	4/1/2014 - PTAS	__% ( / )	__% ( / )	%	%	\$	\$	__%
<a href="#">Houlihan, Margaret</a> (00000000)	3/17/1982 - N9	__% ( / )	__% ( / )	%	%	\$	\$	__%
<a href="#">Potter, Sherman</a> (00000000)		__% ( / )	__% ( / )	%	%	\$	\$	__%
<a href="#">Hunnicut, BJ</a> (00000000)		__% ( / )	__% ( / )	%	%	\$	\$	__%
<a href="#">Klinger, Maxwell</a> (00000000)		__% ( / )	__% ( / )	%	%	\$	\$	__%
<a href="#">McIntire, John</a> (00000000)		__% ( / )	__% ( / )	%	%	\$	\$	__%