#### **Replacement Dashboard**

May 6, 2014 [version 1.2]



#### **Interface Overview**



#### **UI Overview**





# 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

NAW Voink Dife			
Agent Report:	Analytics Report I	Builder:	
Agent Code:	Date Range:		
Date Range: // Total Rep. Rate: 8 % Replacement Rate: 10 %	Area:	Company(All) Northeastern Zone Pacific Zone V Albany (V48) Boston (V56) Brooklyn (V61)	e o
Generate Report	Agent Name:	Agent Code:	
	Ð		
		Generate Threshold Report	🗹 By Agent



{Release 2} 0002

## Release 3 Dashboard

Navy York Life	
Agent Report:	Quick Search: <ul> <li>Policy Number</li> <li>Client ID</li> <li>Household ID</li> <li>GO</li> </ul>
Date Range: //	Analytics Report Builder:
Generate Report	Area: Company(All) Northeastern Zone Pacific Zone Pacific Zone Albany (V48) Boston (V56) Brooklyn (V61)
	Agent Name: Agent Code:
	Generate Inreshold Report By Agent



{Release 3} 0003

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

NEV/ YONK LIFE				
Summaries: (last 30 de Area Company	ays) Total 00%	Admitted 00%	view	Quick Search:   Policy Number  Client ID  Household ID GO
>Northeastern Zone >Pacific Zone >South Central Zone >West Central Zone	00% 00% 00% 00% 00% 00% 00% 00% 00% 00%	00%	view view view view	Agent Report:       Agent Code:       Date Range:
Top 10 GO Replaceme GO Mississippi (A49) Mobile (A19)	nts: Total ▼ 25% □ 24% □	Admitted	view view	Total Rep. Rate: 8 % Replacement Rate: 10 % Generate Report
Montgomery (A05) Denver (D43) Des Moines (D59) Las Vegas (D47)	20%	00% 00% 00% 00% 00%	view view view view	Analytics Report Builder:
Los Angeles (S69) North Dakota (D61) Oklahoma City (D16) Saint Louis (D53)	15% <b>1</b> 3% <b>1</b> 2% <b>1</b> 2% <b>1</b> 2%	00% 00% 00% 00%	view view view view	Area: Company(All) Northeastern Zone Pacific Zone Pacific Zone Albany (V48) Boston (V56) Brooklyn (V61)
view all Recruiter Summary by General Office	GO: GO			Agent Name: Agent Code: C
				Generate Threshold Report Dy Agent



{Release 3 - 4th Priority} 0004

## Agent Report



## Dashboard Home

YORK Ulfe					
Summaries: (last 30 da	ays)	A	_		
Area Company	00%	00%	view	(	Quick Search: <ul> <li>Policy Number</li> <li>Client ID</li> <li>Household ID</li> <li>GO</li> </ul>
>Northeastern Zone	00%	00%	view	Aq	Agent Report:
>Pacific Zone >South Central Zone >West Central Zone	00%	00%	view view view		Agent Code:
Top 10 GO Replaceme	nts:				Total Rep. Rate: 8 %
GO Mississippi (A49)	Total 🔹	Admitted	view	F	Replacement Rate: 10 %
Mobile (A19) Montgomery (A05)	24%	00%	view view	ΙL	Generate Report
Denver (D43) Des Moines (D59)	20%	00%	view view	Ar	Analytics Report Builder:
Las Vegas (D47)	15%	00%	view		Date Range:
North Dakota (D61) Oklahoma City (D16) Saint Louis (D53)	13% 12% 12% 12%	00%	view view view view	/	Area: Company(All) Northeastern Zone Pacific Zone Pacific Zone Albany (V48) Boston (V56) Brooklyn (V61)
<u>view all</u>				/	Agent Name: Agent Code:
General Office	GO				•
					Generate Threshold Report 🗌 By Agent



## Agent Report: Result

<b>WAR</b>					Quick	Search: (	Policy	Numbe	er () Clie	nt ID 🔾	Househ	old ID			GO
Agent: John Smith; Agent Co Contact Type: zzzzzz, Star	ode: 000000 t Date: 00/0	00 I 0/000	GO Co 0, curr	de: <u>000000</u> ent filter1: x	0 I Zone xxxxxxxx	: <u>xxxxxxxxx</u> xxxxxxxxxx	(XXXXXX (X					Colur	mn Selec	tion	₽ 🕞
Replacement Rates:       Company Admitted: 00%       Company All Potential: 00%         GO Admitted:       00%       GO All Potential: 00%															
Date Range:	Client Name (Owner)	Age	Client ID	Hausehold ID	Insured/A nnuitant Name	Insured/Ann uitant Age	Agent FYC	State	Policy#	Agt Shr	Product Type	Policy Status	Rpi Dale	Face Amount	Annusl Premium / Annuity Pd Amount
Criteria Name 🛡 🕂															
Generate 🗹 📑	PAID CASES	 													
	Client Name (Owner)	Age	Client ID	Household ID	Insured/A nnuitant Name	Insured/Ann uitant Age	Agent FYC	State	Policy#	Agt Shr	Product Type	Policy Status	Policy Date	Face Amount	Annual Premium / Annuity Pd Amount
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## **Column Selection**

Agent: John Smith, Agent Code: 00000000, ourrent filter1: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	New York Life				Quick S	Search: @	Policy	Numbe	r () Clie	nt ID 🔾	House	old ID			GO
Replacement Rotes:       Company Admitted:       00% GO Admitted:       Company All Potential:       00% GO All Potential:       Annual Insured/Ann Agent Insured/Ann Agent Went Code       Product Palicy       Product Palicy       Product Palicy       Product Palicy       Product Palicy       Annual Product Palicy       Annual Product       Annual Prod	Agent: John Smith; Agent Code: 00 Contact Type: zzzzzz, Start Date:	0000000 1 0	GO Cod 0, curre	le: <u>000000</u> ent filter1: x	0   Zone	: <u>xxxxxxxxx</u> xxxxxxxxxxx	(XXXXXX XX					Colur	nn Selec	tion	₽ [•
Date Range:       Image:       Client Name       Insured/Ann Agent       Insured/Ann Agent       State       Policy       Ages       Column Selection:       Intermum /         Agent Code       X	Replacement Rates:       Company Admitted: 00%       Company All Potential: 00%         GO Admitted:       00%														
Client Name       Client Ion       Client Ion       Insured/Annuitant Insured/Ann Agent uitant Age       FYC       State       Policy#       Agt Shr       Produ       Insured/Annuitant Insured/Annuitant Uitant Age       Insured/Annuitant Uitant Age       FYC       State       Policy#       Agt Shr       Fype       Insured/Annuitant Insured/Annuitant Uitant Age       Insured/Annuitant Uitant Age       FYC       State       Policy#       Agt Shr       Fype       Insured/Annuitant Uitant Age       Insured/Annuitant FYC       Insured/Annuitant Uitant Age       Insured/Annuitant Product       Insured/Annuitant Uitant Age       Insured/Annuitant Uitant Age       Insured/Annuitant Uitant Age       Insured/Annuitant Product       Insured/Annuitant Uitant Age       Insured/Annuitant Product       Insured/Annuitant Trype       Insured/Annuitant Trype <td>Date Range: //</td> <td>Vanne ) Age / V /</td> <td>Client ID </td> <td>Hausehald ID</td> <td>Insured/A nnuitant Name</td> <td>Insured/Ann uitant Age</td> <td>Agent FYC</td> <td>State</td> <td>Policy#</td> <td>Agt 5hr</td> <td>Product Type (</td> <td>Policy Column Se When co</td> <td>election: mplete c Cance</td> <td>Face lick 'Apply'</td> <td>Annusl Premium / Annuity Pd</td>	Date Range: //	Vanne ) Age / V /	Client ID 	Hausehald ID	Insured/A nnuitant Name	Insured/Ann uitant Age	Agent FYC	State	Policy#	Agt 5hr	Product Type (	Policy Column Se When co	election: mplete c Cance	Face lick 'Apply'	Annusl Premium / Annuity Pd
	Client I (Owner 	Name r) Age 7 V	Client ID M	Household ID	Insured/A nnuitant Name	Insured/Ann uitant Age	Agent FYC	State	Palicy#	Agt Shr	Produ Type				Jial 1ium / Jity Pd Unt



## **Column Selection: Result**

NAW YORK UIFE			Q	uick Search: (	Policy Numbe	r () Client ID () House	ehold ID	GO
Agent: John Smith; Agent Co Contact Type: zzzzz, Star	ode: 00000000   GC t Date: 00/00/0000,	Code: curren	0000000   t filter1: xxxxx	Zone: <u>xxxxxxxx</u> xxxxxxxxxxxxxx	Column Selection	₽₽		
Replacement Rates: Comp GO Ac	any Admitted: 00% dmitted: 00%	Comp GO A	any All Poten I Potential: 00	tial: 00% )%				
Date Range:	Client Name (Owner)	Age	Client ID	Hausehald ID	<u></u> Ροίεγ#			
Criteria Name 🛡 🕂								
Generate 🗹 🗗	PAID CASES:					* 		
	Client Name (Owner)	Age	Client ID	Household ID	Policy#	-		
						- - -		
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#### **Threshold Report**



## Dashboard Home

Summaries: (last 30 d Area Company > <u>Northeastern Zone</u> >Pacific Zone	ays) Total 00%	Admitted 00%	<u>view</u> view	Quick Search:  Policy Number O Client ID O Household ID GO Agent Report:
>South Central Zone >West Central Zone	00%	00%	view view	Agent Code: Date Range: // III // III Total Ben Bate: 8 %
GO Mississippi (A49) Mobile (A19) Montgomery (A05)	Total 25% 24% 20% 20%	Admitted 00% 00% 00%	view view view	Replacement Rate: 10 % Generate Report
Des Moines (D43) Las Vegas (D47) Los Angeles (S69)	20%		view view view view	Analytics Report Builder:          Date Range:       / /         Area:       Company(All)
Oklahoma City (D16) Saint Louis (D53) view all	12%	00%	view view view	Northeastern Zone     Boston (V56)       Pacific Zone     Brooklyn (V61)
Recruiter Summary by General Office ▼	GO: GO			Generate Threshold Report By Agent



## Threshold: Results

Navy Vorkk Vorkk				Quick S	earch:	Polic	cy Number	⊖Client I	D () Hou	sehold IC				30
Replacement Report from 5 Minimum Surrender Charge Additional Threshold 1: xxxx	5/1/0000 to 7/ Amount: \$00	/1/0000 ,000, New Pol	cy Group: al Thresho	ANN, Age	ent Repl		nt Count: 3	3		- 0	Column	Selection		
Additional Threshold 3 xxxx	Agents that	ditional Thresh met threshol	old 4: xxx) d: 00	k, Addition	nal Three	shold 5:	xxxx,							
Total Ben Bate	Agent Nam	e Agent Code	Recruite Name	r Recruite Code	GO	z	ione i	Total Repl Rate	FYC from Repl	Total (all pr	FYC rods)	% FYC from Repl	Repl Rat based o rpt crite	te an tria
8 % X	Able     Baxter     Clark							%(_/_)	\$	\$		%		
10 % 🗴	Er <u>Driver</u> Er <u>Exxex</u> Er Fish													
Criteria Name 💌 🕂	Refresh Replacemen	nt Details:												
Generate 🗹 🗹	Agent Name	Agent Code	Client Name (Owner)	lge (	Client ID	Househo	old nnuitant Name	A Insured/A nnuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status
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	Baxter						<u>.   .</u>	<u> </u>						$\vdash$
	Clark													$\vdash$
	Driver													
	Driver													
	Driver												<u> </u>	<u> </u>



## Selected from Agent List

				Quick	Search:	Policy	y Number	⊖Client I	D () Hou	sehold ID			0	30
Replacement Report from 5 Minimum Surrender Charge	5/1/0000 to 7/ Amount: \$00	/1/0000 ,000, New Po	licy Group	ANN, A	gent Repl	acemen	t Count: 3	}		- (	Column	Selection	5	₽
Additional Threshold 3 xxxx	Agents that	ditional Thresh met threshol	nold 4: xxx	x, Additi	onal Thre	shold 5:	xxxx,							
Total Rep. Rate:	Agent Nam	e Agent Code	Recruite Name	er Recrui Code	iter GIO	Zo	one l	Total Repl Rate	FYC from Repl	Total (all pr	FYC ods)	% FYC from Repl %	Repl Rat based o rpt crite	e n ria
8 % X Replacement Rate:	Baxter     Clark     Driver											70		
Criteria Name (+)	Refresh													
Generate V 13	Replacemen	t Details:	Client			Hausaha	Insured/A	Insured/A					Draduat	Delieu
	Agent Name	Agent Code	(Owner)	Age	Client ID	ID Houseno	Name	Age	Agent FYC	State	Policy #	Agt Shr	Type	Status
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# Viewing Individual Agent

				Quick	Search:	●Poli	cy Number	⊖Client i	ID ⊖Hou	sehold I[				GO
placement Report from imum Surrender Charge	5/1/0000 to 7 Amount: \$00	/1/0000 0,000, New Po	licy Group:	ANN, A	gent Rep	aceme	nt Count: 3			- (	Column S	Selection		· <b>D</b> •
ditional Threshold 3 xxx>	(xxxxxxxxxx) (xxxxxxxx; Ad	ditional Thres	hold 4: xxx	x, Additi	ional Thre	shold 5	: xxxx,							
Range:	Agent Name	Agent Code	Recruite Name	r Recru Code	iter GO		Zone F	fotal Repl Rate	FYC from Repl	n Total (all p	FYC 9 rodis) f	% FYC from Repl	Repl Ra based o rpt crite	te on eria
Rep. Rate: % X	Refresh	nt Details:						<u>% (/)</u>	\$	Ş	i	70	/>	
<b>%</b> (X)	Agent Name	Agent Code	Client Name (Owner) A	\ge	Client ID	Househ ID	old nnuitant Name	Insured/A nnuitant Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Statu:
eria Name 💌 🕂	Fish							 			 			+
	Fish							<u>  .</u>						+
ierate 🗹 🖸	Fish													$\uparrow$
	Fish													
•														
	Diacement Report from imum Surrender Charge ditional Threshold 1: xxxx Range: /// Range: /// Range: /// Range: /// Range: /// Range: /// Range: /// Range: /// Range: /// Rep. Rate: % x acement Rate: % x aria Name  Pria Name 	blacement Report from 5/1/0000 to 7 imum Surrender Charge Amount: \$00 ditional Threshold 1: xxxxxxxxxxxxx Ad Range: /	Diacement Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Po ditional Threshold 1: xxxxxxxxxxxxx, Additional Threshold 3 xxxxxxxxxx, Additional Threshold 3 xxxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxxx, Additional Threshold 3 xxxxxx, Addition	Image:       Image:	Image:       Agent Name       Agent Code       Recruiter         Agent Name       Agent Name       Agent Code       Recruiter         %       X       Refresh       Replacement Details:         %       X       Agent Name       Agent Code       Name         %       X       Refresh       Agent Name       Agent Name         %       X       Fish       Image:       Client         %       X       Fish       Image:       Agent Name         %       X       Fish       Image:       Agent Name         %       X       Image:       Refresh       Image:       Imag	Second State S	Delacement Report from 5/1/0000 to 7/1/0000         imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement         itional Threshold 1: xxxxxxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxx         itional Threshold 3 xxxxxxxxxxx, Additional Threshold 4: xxxx, Additional Threshold 5         Range:       Agent Name       Agent Code       Recruiter       Recruiter       GO         Image:       Image: <td< td=""><td>Descement Report from 5/1/0000 to 7/1/0000         imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3         itional Threshold 1: xxxxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxxxxxxx         itional Threshold 3: xxxxxxxxxxxx, Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,         Range:      </td><td>Second Statement Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3 State State</td><td>Image: Content Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3 Itional Threshold 1: xxxxxxxxxxxxx , Additional Threshold 2: xxxxxxxxxxxxxxx , Additional Threshold 5: xxxx, Range: Content Recruiter Recruiter Go Zone Reter Repl FYC from Repl Fish Rep. Rate: % (_/</td><td>Image:       Image:       Image:</td><td>Isocement Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3   Itional Threshold 1: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</td><td>Image:      </td><td>Image:       Column Selection         Agent Negort from 5/1/0000 to 7/1/0000       Column Selection         Stional Threshold 1 xxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</td></td<>	Descement Report from 5/1/0000 to 7/1/0000         imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3         itional Threshold 1: xxxxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxxxxxxx         itional Threshold 3: xxxxxxxxxxxx, Additional Threshold 4: xxxx, Additional Threshold 5: xxxx,         Range:	Second Statement Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3 State	Image: Content Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3 Itional Threshold 1: xxxxxxxxxxxxx , Additional Threshold 2: xxxxxxxxxxxxxxx , Additional Threshold 5: xxxx, Range: Content Recruiter Recruiter Go Zone Reter Repl FYC from Repl Fish Rep. Rate: % (_/	Image:       Image:	Isocement Report from 5/1/0000 to 7/1/0000 imum Surrender Charge Amount: \$00,000, New Policy Group: ANN, Agent Replacement Count: 3   Itional Threshold 1: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Image:	Image:       Column Selection         Agent Negort from 5/1/0000 to 7/1/0000       Column Selection         Stional Threshold 1 xxxxxxxxxxxx, Additional Threshold 2: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx



#### Agent Threshold Report



## Dashboard Home

Summaries: (last 30 d Area Company > <u>Northeastern Zone</u>	ays) Total 00%	Admitted 00%	<u>view</u>	Quick Search: <ul> <li>Policy Number</li> <li>Client ID</li> <li>Household ID</li> </ul> GO Agent Report:
> <u>Pacific Zone</u> > <u>South Central Zone</u> > <u>West Central Zone</u> Top 10 GO Replaceme	00%	00%	view view view	Agent Code: Date Range: / / IIII / / IIIIIIIIIIIIIIIIIIIIIIII
GO Mississippi (A49) Mobile (A19) Montgomery (A05)	Total 25% 24% 20% 20%	Admitted 00% 00% 00% 00% 00% 00% 00% 00% 00% 00%	view view view	Replacement Rate: 10 % Generate Report
Des Moines (D59) Las Vegas (D47) Los Angeles (S69) North Dakota (D61)	20%	00%	view view view view	Analytics Report Builder: Date Range: / / III / III Area: Company(All) Albany (V48)
Oklahoma City (D16) Saint Louis (D53) <u>view all</u>	12%	00%	view view	Northeastern Zone     Boston (V56)       Pacific Zone     Brooklyn (V61)       Agent Name:     Agent Code:
General Office	GO			Generate Threshold Report



## Agent Threshold: Results

<b>WARE</b>			Quick Se	arch: OP	olicy Nu	mber 🔿	Client ID ⊖H	lousehold I	D		GO
Report by Agent; Replacem Minimum Surrender Charge Additional Threshold 1: xxxx	hent Report from 5/1/0000 Amount: \$00,000, New Po xxxxxxxxxxxxxxxx; Additio	) to 7/1/00 olicy Grou onal Thres	000 p: ANN, Age hold 2: xxxx	nt Replacer	nent Co	ount: 3		— (	Column Se	election	₽ 🕩
Additional Threshold 3 xxxx Date Range:	Agents that met thresh	shold 4: xx	xxx, Addition	al Threshold	1 5: xxx)	<,					
Total Rep. Rate:	Agent llame	Agent Code	Recruiter Name	Recruiter Code	G0	Zone	Total <u>Repl</u> Rate	FYC from Repl	Total FVC (all prods)	% FYC from Repl	Repl Rate based on rpt criteria
8 % × Replacement Rate: 10 % ×	Agentson; John Smithson; Joe Quayle; Mark Robertson; Eli						%(_/_)	\$	\$	%	<u>%(_/_)</u>
Criteria Name 💌 🕂	Theodore; Jim										
Generate 🗹 🗹											
•											



## Agent Threshold: Detail

Nevy York Life	Quick Search: <ul> <li>Policy Number</li> <li>Client ID</li> <li>Household ID</li> </ul>
Agent: John Agentson {000 Contract Type: xxxxxxxxx	00000], GO Name: Greater New York General Office (G000), Zone: xxxxxxxxxxxxxxxxxxxxxx xxxx; Start Date: 00/00/0000
	REPLACEMENTS:
Image:       Image:	New Policy: Owner: John Q Public (56), Client ID: 00000000, Household ID: 000000000, Insured: Jamie R Public (53), State: New Jersey Policy #: 000000000, Product Type: xxxxxxxxxxxx, 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: 000000000, Insured: Jamie R Public (53) Policy #: 000000000, Product Type: xxxxxxxxxxxxxxx, Policy Dt: xxxxxxxxxx, Status: xxxxxxxxxxxx Selling Agent: John Agentstein, Trans Type: xxxxxxxxxx, Trans Dt: xxxxxxxxxx, Trans Amount: \$000000 Surr Chg Amt: \$000000, Replace Company: xxxxxxxxxxx
Criteria Name (+) Generate V 📑	New Policy: Owner: John Q Public (56), Client ID: 00000000, Household ID: 000000000, Insured: Jamie R Public (53), State: New Jersey Policy #: 000000000, Product Type: xxxxxxxxxxxxxx, 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: xxxxxxxxxxxxxxxxxxx, Policy Dt: xxxxxxxxx, Status: xxxxxxxxxxxxx Solling Agent: John Agentation Tong Type: xxxxxxxxxxxxxxxxx, Policy Dt: xxxxxxxxx, Status: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxXXXXXXXX
	Selling Agent: John Agentstein, Trans Type: xxxxxxxxxxxxx, Trans Dt: xxxxxxxxxxxxxxxxx, Trans Amount: \$000000 Surr Chg Amt: \$000000, Replace Company: xxxxxxxxxxxxx
	PAID CASES:
	Owner: John Q Public (56), Client ID: 00000000, Household ID: 000000000, Insured: Jamie R Public (53), State: New Jersey Policy #: 000000000, Product Type: xxxxxxxxxxxxxxxxxx, 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 O. Public (56). Client ID: 00000000. Household ID: 000000000. Insured: Jamie B. Public (53). State: New Jersey



## **Quick Search**



## Dashboard Home

YONK						
Summaries: (last 30 da Area Company	ays) Total 00%	Admitted 00%	view	Quick Search:	⊖Client ID ⊖Household ID	GO
> <u>Northeastern Zone</u> > <u>Pacific Zone</u> > <u>South Central Zone</u> > <u>West Central Zone</u> Top 10 GO Replaceme <u>GO</u> Mississippi (A49) Mobile (A19) Montgomery (A05)	00% 00% 00% 00% 00% 00% 00% 00% 00% 00%	00% 00% 00% 00% 00% 00% 00% 00% 00% 00%	view view view view view view	Agent Report: Agent Code: Date Range: / / Total Rep. Rate: 8 % Replacement Rate: 10 % Generate Re	eport	
Denver (D43) Des Moines (D59) Las Vegas (D47)	20%	00%	view view view	Analytics Report Builder: Date Range: / /		
Los Angeles (S69) North Dakota (D61) Oklahoma City (D16) Saint Louis (D53)	15%	00%  00%  00%  00%  00%  00%  00%  00%	view view view view	Area: Company(All Northeastern Pacific Zone	I) Albany (V48) Boston (V56) Brooklyn (V61)	Ø
view all Recruiter Summary by General Office	60: 60			Agent Name:	Agent Code:	0
				Generate		/ Agent



## **Quick Search: Results**

Auricksearch: Policy # 000000.						Quick Sear	ch:	lumber (	)Client I	D O Ho	ousehold ID				
Agent CodeClient Name CodeAge AgeClient ID Lousehold ID tant Name tant Name	uicksearch: Policy	r # 00000	000.								Co	lumn	Selection	] [	3
William Mangano         899148         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano         899148         Mark Depew         55         \$250914         \$0506070000608656         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano         899148         Mark Depew         55         \$250914         \$0506070000608656         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano         899148         Mark Depew         55         \$500942         \$0506070000608656         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano         899148         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano         899148         Mark Depew         55         \$1.079         OH         \$8484969         100         VA         active         \$,           William Mangano	Agent Name	Agent Code	Client Name (Ovner)	Age	Client ID	Household ID	Insured/Annui tant Name	Insured/ Annuita nt Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	F
William Mangano         899148         Mark Depew         55         3280942         02607000008855         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         3580942         0506070000608656         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         3580942         0506070000608656         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         5,           William Mangano         <	William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5,
William Mangano         899148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$3.070         OH         \$8484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           William Mangano         899148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           William Mangano         89148         Mark Depew         55         \$1,079         OH         \$8484969         100         VA         active         5,           Mark Depew         56         20.00000000000000000000	William Mangano	899148	Mark Depew	55	<u>3580942</u>	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5,
William Mangano         899148         Mark Depew         55         \$1,079         OH         58484969         100         VA         active         \$5	William Mangano	899148	Mark Depew	55	<u>3580942</u>	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5/
	William Mangano	899148	Mark Depew	55	<u>3580942</u>	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5,



## **Quick Search: Details**

Policy # 000000 (X) Details: Client 0000000 ID (x) Column Selection Policy Agent Name Agent Client Name Age Client ID Household ID Insured/Annui Annuita Agent Name Insured/Annui Agent Name OH S8437523 100 VA surr 7/5						Quick Searc	n:   Policy N	umber (	)Client I[	Оно	usehold ID				GO
Auricksearch: Client ID: 00000000 Agent Agent Client Name Age Client ID Household ID William Mangano 899148 Mark Depew 358091 (056607000608655) Agent Name OH 58437523 100 VA surr 7/5	Policy # 0000000	{x] De	tails:Client:00	0000	0 ID {x]										
Agent Name         Client Name (Dorner)         Age         Client ID         Household ID         Insured/Annuit         Agent Name rit Agent         Agent State         Policy         Agt         Product         Policy         Rpl           WIIIiam Mangano         899148         Mark Depew         3580944         0506070000608655         0         0H         58437523         100         VA         surr         7/5	uicksearch: Client	ID: 0000	000000								Col	umn S	Selection	) [	⊧□
William Mangano         899148         Mark Depew         358094         0506070000608656         0H         58437523         100         VA         surr         7/5	Agent Name	Agent Code	Client Name (O <del>v</del> ner)	Age	Client ID	Housebold ID	Insured/Annui tant Name	Insured/ Annuita nt Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	Rpl D
	William Mangano	899148	Mark Depew		358094	0506070000608656				он	58437523	100	VA	surr	7/5,
			_												



## **Quick Search: Details**

uicksearch: Hous	ehold ID:	tails:Policy #	00000	000 {x] \D	etails:Household ID:00	00000 {x]				Col	umn S	Selection	) []	₽ []•
Agent Name	Agent Code	Client Name (O <del>v</del> ner)	Age	Client ID	Household ID	Insured/Annui tant Name	Insured/ Annuita nt Age	Agent FYC	State	Policy #	Agt Shr	Product Type	Policy Status	Rpl D
William Mangano	899148	Mark Depew		<u>3580942</u>	<u>0506070000608656</u>				он	584933 <b>0</b> 4				
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5/30/
William Mangano	899148	Mark Depew	55	<u>3580942</u>	0506070000608656	Mark Depew	55	\$1,079	ОН	58484969	100	VA	active	5/30/
William Mangano	899148	Mark Depew	55	3580942	0506070000608656	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5/30/
William Mangano	899148	Mark Depew	55	<u>3580942</u>	<u>0506070000608656</u>	Mark Depew	55	\$1,079	он	58484969	100	VA	active	5/30/
William Mangano	899148	Mark Depew		<u>3580942</u>	<u>0506070000608656</u>				он	62833065				
William Mangano	899148	Mark Depew		<u>3580942</u>	<u>0506070000608656</u>				он	48215106				
William Mangano	899148	Mark Depew		3580942	0506070000608656				он	58447159				
William Mangano	899148	Mark Depew		<u>3580942</u>	0506070000608656				он	39140374				
William Mangano	899148	Mark Depew		<u>3580942</u>	0506070000608656				он	391369 <b>0</b> 9				
William Mangano	899148	Mark Depew		3580942	0506070000608656				он	58314997				

## Summaries



## Dashboard Home

Navy York Life	
Summaries: (last 30 days) Area Total Admitted Company 00% 00% <u>view</u>	Quick Search: <ul> <li>Policy Number</li> <li>Client ID</li> <li>Household ID</li> <li>GO</li> </ul>
>Northeastern Zone       00%       00%       view         >Pacific Zone       00%       00%       view         >South Central Zone       00%       00%       view         >West Central Zone       00%       00%       view	Agent Report: Agent Code: Date Range: //
GO Total        Admitted         GO       Total       Admitted         Mississippi (A49)       25%       00%       view         Mobile (A19)       24%       00%       view         Montgomery (A05)       20%       00%       view	Total Rep. Rate: 8 % Replacement Rate: 10 % Generate Report
Denver (D43)       20%       00%       view         Des Moines (D59)       20%       00%       view         Las Vegas (D47)       15%       00%       view         Los Angeles (S69)       15%       00%       view         Nexth Delate (D61)       12%       00%       view	Analytics Report Builder:       Date Range:     / /       Area:     Company(All)
North Dakota (D61)       13%       00%       View         Oklahoma City (D16)       12%       00%       view         Saint Louis (D53)       12%       00%       view         view all       00%       12%       00%       12%	Ared.     Northeastern Zone       Pacific Zone     Boston (V56)       Brooklyn (V61)
Recruiter Summary by GO:	Generate Threshold Report 🗌 By Agent



## Dashboard: Zone Expanded

YONK				
Summaries: (last 30 de	ays)			
Area	Total	Admitted		Quick Search: Blatian Number O Client ID O Haussheld ID
Company	00%	00%	view	
v West Central Zone	Total	Admitted		Agent Report:
Arkansas (D13)	00%	00% 🔲	iev	
Austin (D01)	00%	00%	Viev	Agent Code:
Baton Rouge (D18)	00% 🔲	00% 🔲	viev	Date Banger
Cedar Rapids (D57)	00%	00%	viev	
Colorado (D44)	00%	00%	viev	Total Rep. Rate: 8 %
Dallas (D27)	00%	00% 🔲	viev	Replacement Rate: 10 %
Denver (D43)	00% 🔲	00% 🔲	viev	78
Des Moines (D59)	00% 🔲	00% 🔲	viev	Generate Report
El Paso (D15)	00% 🗖	00% 🗖	viev	
Fort Worth (D07)	00% 🔲	00% 🔲	viev	Analytics Report Builder:
Great Plains (S92)	00% 🗖	00% 🗖	viev	
Greater Chicago (A50	100% 🔲	00% 🔲	viev	Date Range:
Greater Kansas City	(00% 🗖	00% 🔲	viev	
Houston (D03)	00% 🔲	00% 🔲	viev	Area: Company(All) Albany (V48)
Illinois (A57)	00%	00% 🗖	viev	Pacific Zone
Kansas (D54)	00% 🔲	00% 🔲	viev	
Louisiana (D24)	00%	00%	viev	Agent Name: Agent Code:
Milwaukee (A56)	00%	00%	viev	
Minnesota (D55)	00%	00%	viev	
Nebraska (S94)	00%	00%	viev	
New Mexico (D34)	00%	00%	viev	Generate Threshold Report
New Orleans (D21)	00%	00%	viev	



[DODD]

## Replacement Summary: Product

Nevy York He		¢	Quick Sea	rch: @Po	licy Nur	nber ⊖Cl	ient ID (	)Househo	Id ID			GO	]
Company > West Central	<u>Zone</u> > Arkansas (D13)								Colur	nn Selecti	on	8 D	•
West Central Zone							Ň	√iew By: P	roduct	l <u>General</u>	Office I	Recruit	er
Arkansas (D13) 🔹 🔻			2011 - all r	epl	20	11-admitte	d repl			2012 - all re	рI	20	12 -
	Product	Repl	Paid Cases	Repl Rate	Repl	Paid Cases	Repl Rate	% internal	Repl	Paid Cases	Repl Rate	Repl	Pa.
Vear Bange	Fixed Life	26,542	289,623	9%	26,542	289,623	9%	56%	25,062	302,121	8%	25,062	31
	Variable Life	151	1,634	9%	151	1,634	9%	83%	183	2,798	7%	183	
2011 2013	TOTAL LIFE:	26,693	291,257	9%	26,693	291,257	9%	<b>51</b> %	25,245	304,919	8%	25,245	31
	-												$\square$
Generate 🗹 🗖	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	
	TOTAL ANNUITY	12,409	45,148	27%	12,409	45,148	27%		<b>13,0</b> 98	46,807	28%	13,098	4
													$\square$
	TOTAL LIFE AND ANNUITY	39,102	336,405	<b>11.6</b> D%	39,102	336,405	11.60%		38,343	351,726	10.90%	38,343	35
	FYC Summary Chart:												
		2011	2012	2013*									
	FYC From Replacements												
	Total FYC (all products)												
	% FYC from Replacements												
◀	h												



# Replacement Summary: GO

Quick Search:   Policy Number  Client ID  Household ID	GO
Company > West Central Zone > Arkansas (D13)	81
West Central Zone View By: Product   General Office	I <u>Recruiter</u>
Arkansas (D13)     Total Repl     Admitted     Non-Admitted     Internal     External     FYC     Total       General Office     Zone     Active Agents     Total Repl     Admitted     Repl Rate     Repl Rate <th>FYC % II from acts) Repl</th>	FYC % II from acts) Repl
Year Range:         Arkenses (D13)         _% (_/_)         % (_/_) <th>%</th>	%
2011 2013	
Generate 🗹 🗖	
│	



## Replacement Summary: Recruiter

	and a Arkanaga (D12)							00
Company > West Central Z	one > Arkansas (D13)					Colum	n Selection	₽ 🕞
West Central Zone 💌					View	By: <u>Product</u> I	General Office	Recruiter
Arkansas (D13)	Recruiter	# Active Recruits	Admitted <u>Repl</u> Rate	Non- Admitted Repl Rate	Internal <u>Repl</u> Rate	External <u>Repl</u> Rate	FYC from Repl	Total F (all product
Year Range:	Able, Scott (00000000)	6	%(_/_)	% (/)	%	%	Ş	\$
	Brown, Mike (0000000)	17	%(_/_)	% (/)	%	%	υ,	\$
2011 2013	Charles, John (0000000)	6	%(_/_)	% (/)	%	%	\$	\$
	Dragon, Kim (0000000)	17	%(_/_)	% (/)	76	%	\$	\$
Generate 🗹 🖬	Essex, Mary (0000000)	6	%(_/_)	% (/)	%	%	\$	\$
	Smith, John (0000000)	17	%(_/_)	% (/)	%	%	\$	\$



#### Recruiter



## Dashboard Home

Area Company	Total 00%	Admitted 00%	view		Quick Search:	Policy Number O Client ID O Household ID
>Northeastern Zone	00%	00%	view		Agent Report:	
> <u>Pacific Zone</u> > <u>South Central Zone</u>	00%	00%	view		Agent Code:	
>West Central Zone	00%	00%	view		Date Range:	
Des Moines (D59)	20%	00%	view	T	Analytics Repor	
Los Angeles (S69)	15%	00%	view		Date Range:	
North Dakota (D61) Oklahoma City (D16 Saint Louis (D53)	13% 12% 12%	00%	view view view		Area:	Company(All) Northeastern Zone Pacific Zone Albany (V48) Boston (V56) Brooklyn (V61)
view all					Agent Name:	Agent Code:
Recruiter Summary I	by GO:					



#### Selected GO Recruiter

NORA CONTRACTOR OF				
Summaries: (last 30 days)				
Area Total Admitted Company 00% 00% <u>view</u>		Quick	Search:	Policy Number      O Client ID      O Household ID
>Northeastern Zone 00% 00% view	1	Agent R	eport:	
>Pacific Zone 00% 00% view				
>South Central Zone 00% 00% view	11	Agent	Code:	
>West Central Zone 00% 00% view		Date R	ange:	
Des Moines (D59) 20% 00% vie	<u>, 1 - </u>	Analyt	cs Repor	rt Builder.
Las Vegas (D47) 15% 🔲 00% 🛄 vie		Date	Rande	
Los Angeles (S69) 15% 🛄 00% 🛄 vie	(		tunge.	
North Dakota (D61) 13% 🛄 00% 🛄 vie	1	Area:		Company(All) 📮 Albany (V48)
Oklahoma City (D16) 12% 🌄 00% 🛄 vie	1			Northeastern Zone Boston (V56)
Saint Louis (D53) 12% 🌄 00% 🌉 vie	1			Pacific Zone 🛛 🔽 Brooklyn (V61)
view all		1.000	Nomo	Agent Code:
		Agen	name.	Agent Code.
Recruiter Summary by GO:	2			
Alaska GO (S47) 🔻 GO		Ð		
Able Scott 0000000 view	1			Generate Threshold Report 🔲 By
Brown Mike 0000000 view				
Charles John 0000000 view				
Dragon Kim 0000000 view				
Essex Mary 0000000 view				
Smith John 0000000 view				



## **GO** Recruiter View

			Quie	ck Search: 🔘 🖡	<sup>p</sup> olicy Numb	er () Client ID	⊖Household ID		GO
P	acific Zone > Alaska GO (S47): Rec	uriters					Colum	n Selection	₽ [+
	Recruiter Summary:								
	Recruiter	# Active Recruits	Admitted <u>Repl</u> Rate	Non- Admitted Repl Rate	Internal Repl Rate	External <u>Repl</u> Rate	FYC from Repl	Total FYC (all products)	% FYC from Repl
	Able, Scott (0000000)	6	%(_/_)	%(_/_)	%	%	\$	\$	%
	Brown, Mike (0000000)	17	%(_/_)	%(_/_)	%	%	\$	\$	<u>.        %</u>
	Charles, John (0000000)	6	%(_/_)	%(_/_)	%	%	\$	\$	%
	Dragon, Kim (0000000)	17	%(_/_)	%(_/_)	%	%	\$	\$	%
	Essex, Mary (0000000)	6	%(_/_)	%(_/_)	%	%	\$	\$	%
	Smith, John (0000000)	17	%(_/_)	%(_/_)	%	%	\$	Ş	<u> </u> %
									0.05



#### **Recruiter Detail**

VOIN		Quick	Search:   Policy	Number OClie	ent ID () Hou	sehold ID		GC
Alaska GO (S47): Recuriters {x]	Recruiter: Johr	n Smith {x]						
acific Zone > Alaska GO (S47): Rec	uriters > Detail					Column	Selection	80
Recruiter Summary:								
Recruiter	# Active Recruits	Admitted <u>Repl</u> Rate	Non- Admitted Repl Rate	Internal <u>Repl</u> Rate	External Repl Rate	FYC from Repl	Total FYC (all products)	% FY from Repl
John Smith (0000000)	6	% (/)	%(_/_)	%	%	\$	Ş	%
Agent Detail:								
Agent	Start Date - Current Contract	Admitted <u>Repl</u> Rate	Non- Admitted Repl Rate	Internal <u>Repl</u> Rate	External <u>Repl</u> Rate	FYC from Repl	Total FYC (all products)	% FY from Rep
Pierce, Hawkeye (00000000)	4/1/2014 - PTAS	% (/)	%(_/_)	%	%	\$	Ş	%
Houlihan, Margaret (00000000)	3/17/1982 - N9	% (/)	%(_/_)	%	%	Ş	Ş	%
Potter, Sherman (0000000)		% (_ /)	%(_/_)	%	%	Ş	\$	%
Hunnicut, BJ (0000000)		% (_ /)	%(/_)	%	%	\$	\$	9
Klinger, Maxwell (0000000)		% (/)	%(_/_)	%	%	Ş	Ş	%
McIntire, John (00000000)		% (/)	% ( / )	%	%	s	s	9

