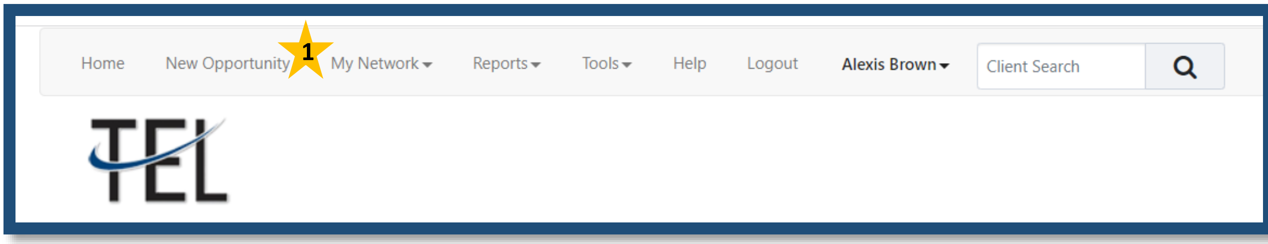
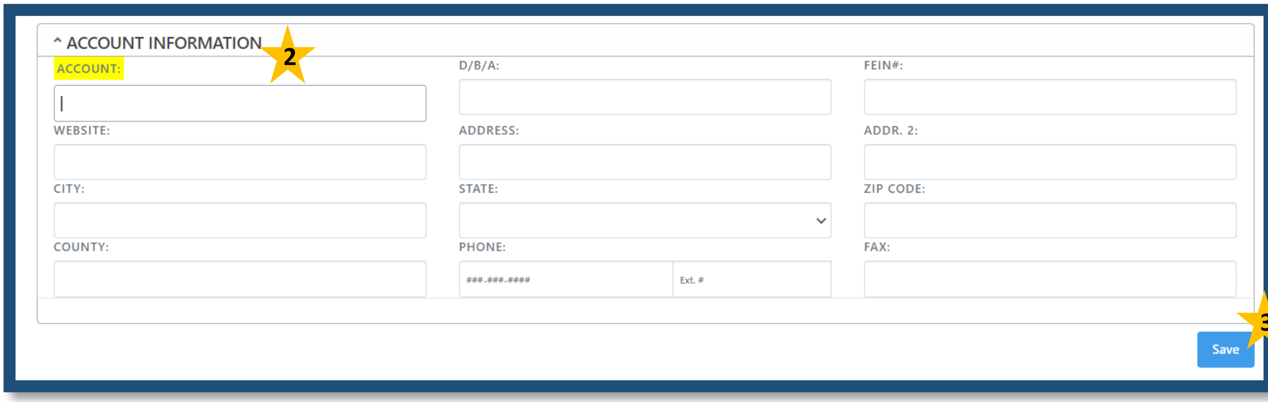
i-Linked Step – By – Step Instructions

Entering New Client Prospect

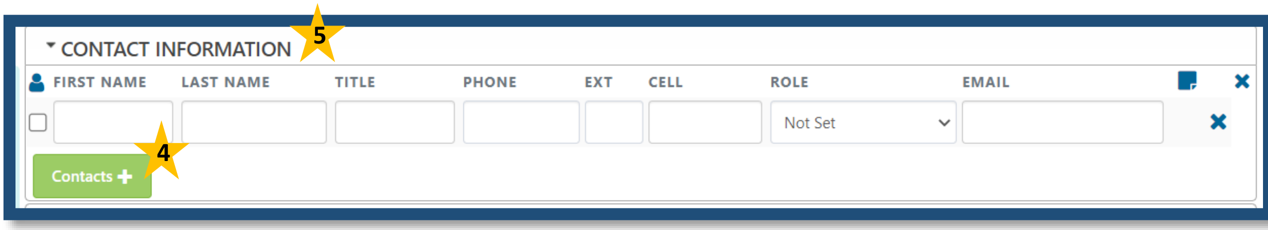
1. **Click New Opportunity** from the Main Menu



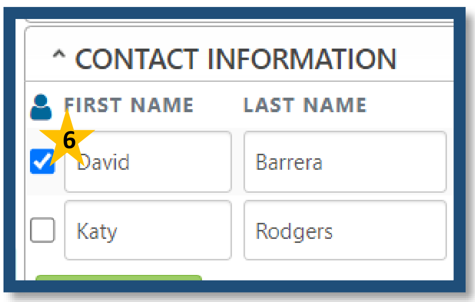
2. **Enter Account Information**
3. **Click Save**



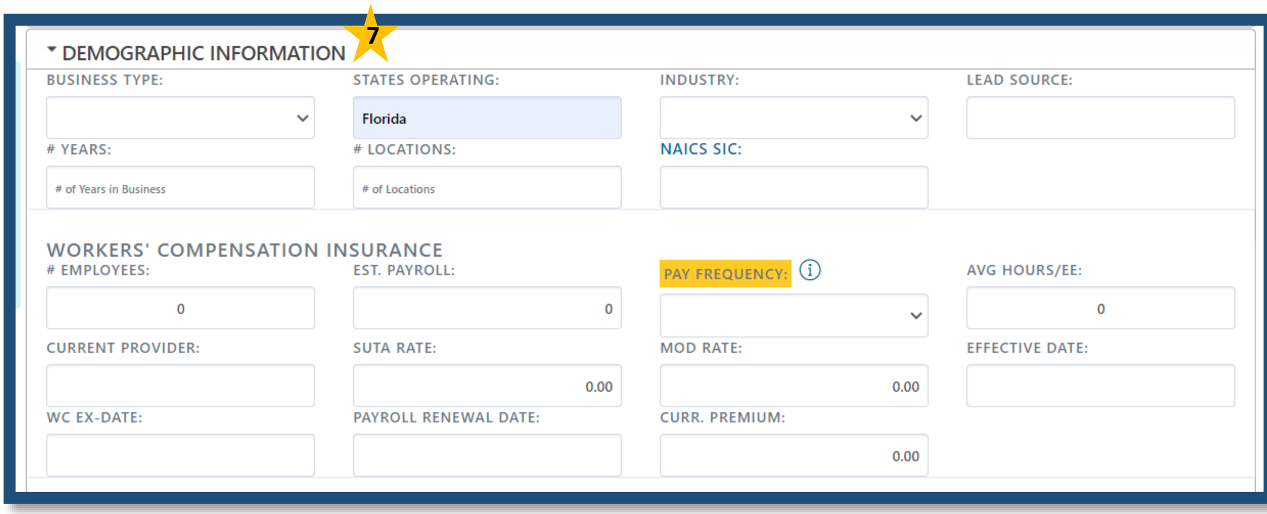
4. **Click Contacts+ button**
5. **Enter Client Contact Information** in appropriate fields
    a. Click Contacts+ button to add additional Contact lines



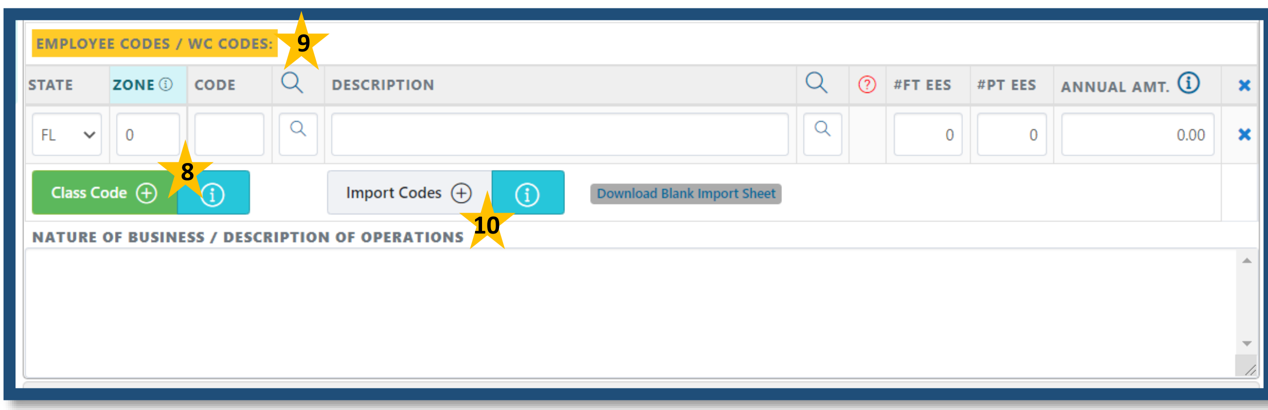
6. **Check** the **Main Client Contact** name
    a. This is the name that will show on the Client Proposal



7. **Enter Client Demographic Information**
    a. Pay Frequency is a required field



8. **Click Class Code + button**
9. **Enter** all **Client Workers Comp Codes**
    a. Click Class Code + button to add additional WC Code lines
    b. For questions on WC Codes please contact the Risk Manager at 850.476.9008 Ext. 122
10. **Enter Client Description** in Nature of Business / Description of Operations



11. **Select New Opportunity** from the Opportunity Status drop-down
12. **Click Save**