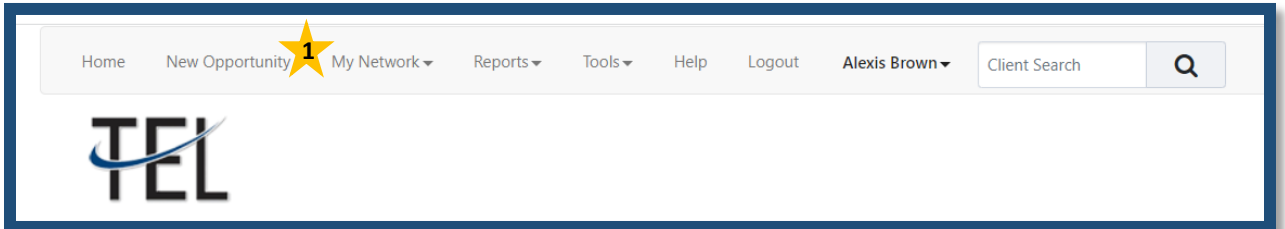


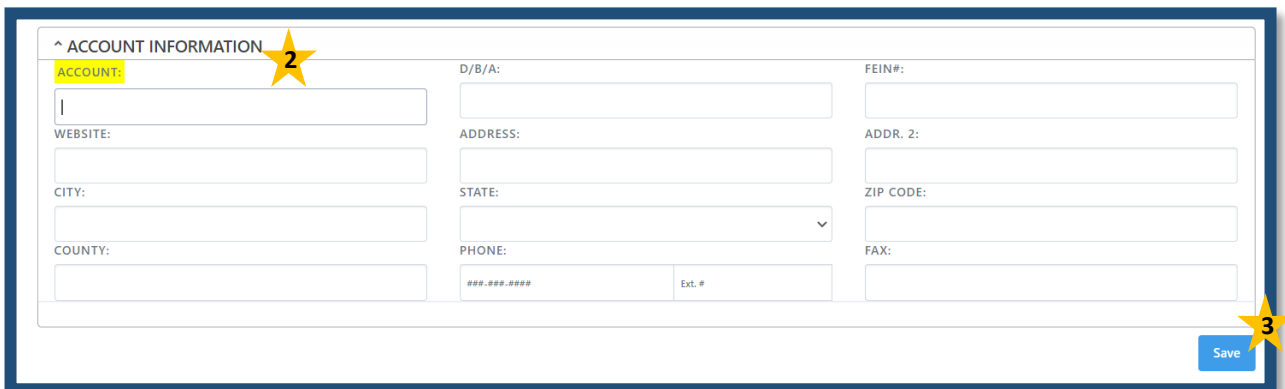
Entering New Client Prospect

1. Click New Opportunity from the Main Menu



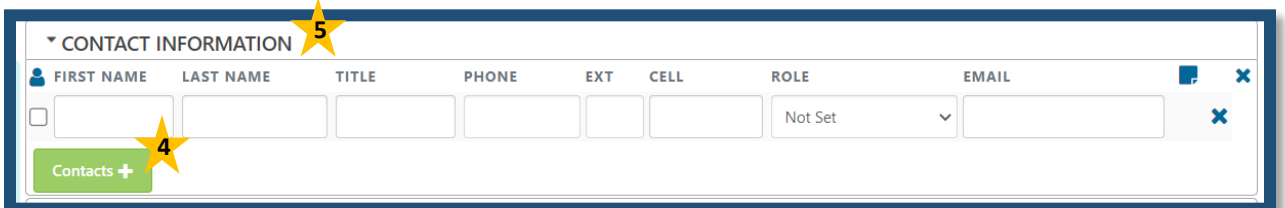
The screenshot shows the top navigation bar of the application. The 'New Opportunity' menu item is highlighted with a yellow star containing the number 1. Other menu items include Home, My Network, Reports, Tools, Help, Logout, and Alexis Brown. A search bar labeled 'Client Search' is also visible.

2. Enter Account Information
3. Click Save



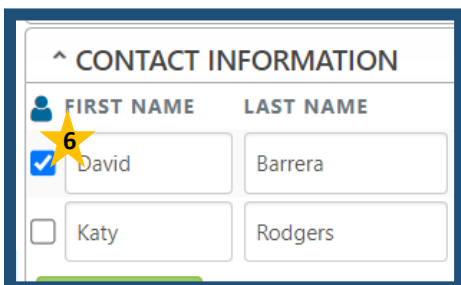
The screenshot shows the 'ACCOUNT INFORMATION' form. The 'ACCOUNT:' field is highlighted with a yellow star and the number 2. Other fields include WEBSITE, CITY, COUNTY, D/B/A, ADDRESS, STATE, PHONE, FEIN#, ADDR. 2, ZIP CODE, and FAX. A 'Save' button is located at the bottom right, highlighted with a yellow star and the number 3.

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



The screenshot shows the 'CONTACT INFORMATION' section. A table with columns for FIRST NAME, LAST NAME, TITLE, PHONE, EXT, CELL, ROLE, and EMAIL is visible. A yellow star with the number 5 points to the table header. Below the table is a green 'Contacts +' button, highlighted with a yellow star and the number 4.

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



The screenshot shows the 'CONTACT INFORMATION' table. The 'David' contact is selected, indicated by a checked checkbox and a yellow star with the number 6. The 'Katy' contact is unselected. The table has columns for FIRST NAME and LAST NAME.

i-Linked Step – By – Step Instructions

7. Enter Client Demographic Information

- Pay Frequency is a required field

DEMOGRAPHIC INFORMATION 7

BUSINESS TYPE: [Dropdown]
STATES OPERATING: Florida
INDUSTRY: [Dropdown]
LEAD SOURCE: [Text Box]

YEARS: [Text Box] # LOCATIONS: [Text Box] NAICS SIC: [Text Box]

WORKERS' COMPENSATION INSURANCE

EMPLOYEES: 0 EST. PAYROLL: 0 PAY FREQUENCY: [Dropdown] AVG HOURS/EE: 0

CURRENT PROVIDER: [Text Box] SUTA RATE: 0.00 MOD RATE: 0.00 EFFECTIVE DATE: [Text Box]

WC EX-DATE: [Text Box] PAYROLL RENEWAL DATE: [Text Box] CURR. PREMIUM: 0.00

8. Click Class Code + button

9. Enter all Client Workers Comp Codes

- Click Class Code + button to add additional WC Code lines
- 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

EMPLOYEE CODES / WC CODES: 9

STATE	ZONE	CODE	DESCRIPTION	#FT EES	#PT EES	ANNUAL AMT.
FL	0			0	0	0.00

Class Code + 8 Import Codes + Download Blank Import Sheet

NATURE OF BUSINESS / DESCRIPTION OF OPERATIONS 10

11. Select New Opportunity from the Opportunity Status drop-down

12. Click Save

SET STATUS

OPPORTUNITY STATUS: New Opportunity 11 PRIORITY: Normal SET ALERT: None

WC UNDERWRITING: Not Sent To Underwriting CLAIM STATUS: None

Save 12