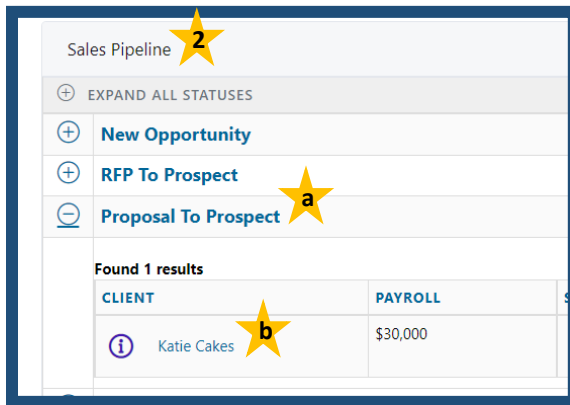
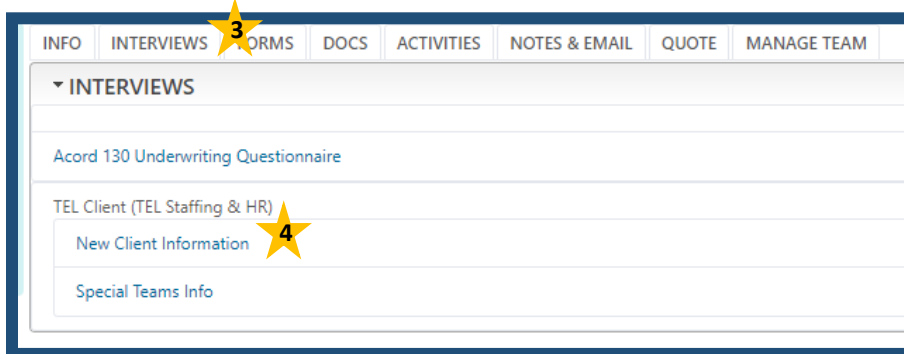


Generate Service Agreement

1. **Sign in to i-Linked**
 - a. **See Accessing i-Linked (pg. 1)**
2. **Open Prospect** from the Sales Pipeline
 - a. **Expand Proposal to Prospect List**
 - b. **Click the Client Name**



3. **Click Interviews tab**
4. **Select New Client Interview**



5. **Answer Interview Questions** accordingly
6. **Click Save**

i-Linked Step – By – Step Instructions

New Client Proposal Request:

PROPOSAL TYPE	SOURCE OF CLIENT REFERRAL
PEO	Website lead assigned to you

MAILING ADDRESS

Test delivery address 123

DATE FIRST PAY CYCLE WILL BEGIN ON	DATE FIRST PAY CYCLE WILL END ON
01/21/2022	01/22/2022

PAYROLL WILL BE SUBMITTED VIA	EMPLOYEES PAID VIA
Automated Time-clock Import	<input type="checkbox"/> Direct Deposit <input type="checkbox"/> Paper Check <input type="checkbox"/> Pay Card <input type="checkbox"/> Cash

PAYMENT WILL BE DELIVERED VIA	BIND DATE REQUESTED
<input type="checkbox"/> ACH <input checked="" type="checkbox"/> Local Courier <input checked="" type="checkbox"/> FedEx <input type="checkbox"/> UPS <input type="checkbox"/> Dropoff	01/24/2022

DATE OF FIRST PAYROLL	PAY CYCLE WILL BEGIN ON:
01/25/2022	Sunday

PAY CYCLE WILL END ON:	HOURS TO BE SUBMITTED BY 10:30 AM:
Monday	Tuesday

FUNDS WILL BE DRAWN ON:	CHECKS TO BE PICKED UP/DELIVERED:
Wednesday	Thursday

CHECKS WILL BE DELIVERED TO (ADDRESS):

1701 E. Kingsfield Rd Suite 111 Pensacola fl 32534

NEW EMPLOYEE SET-UP REQUIREMENTS

New EE instruction set here

SPECIAL INSTRUCTIONS OR COMMENTS: OPERATIONS

Special stuff for operations

HOW WILL PROSPECT/CLIENT SIGN THE SERVICE AGREEMENT?	SUBMITTED TO OPERATIONS ON:
via email from DocuSign	01/28/2022

Save **6**

7. Click Info tab
8. Select Proposal to Prospect from the Opportunity Status drop-down
9. Click Save

INFO **7** INTERVIEWS FORMS DOCS ACTIVITIES NOTES & EMAIL QUOTE MANAGE TEAM

^ PRODUCTS

▾ ACCOUNT INFORMATION

▾ CONTACT INFORMATION

▾ DEMOGRAPHIC INFORMATION

^ QUALIFICATION & FORECASTING

^ SET STATUS

OPPORTUNITY STATUS:	PRIORITY:	SET ALERT:
Signup/Fulfill 8	Normal	None
WC UNDERWRITING:	CLAIM STATUS:	
Not Sent To Underwriting	None	

Save **9**