

# Software Tips for New York Life Broker Illustration Software

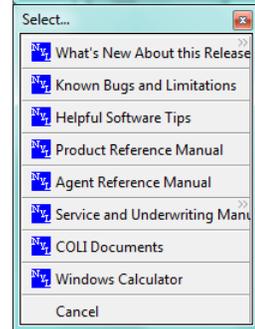
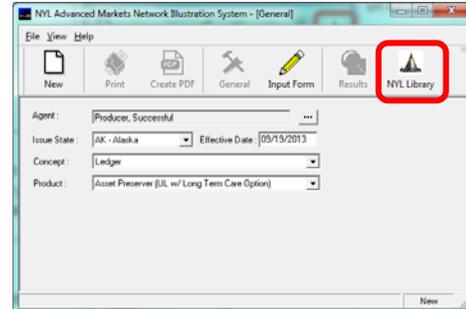
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# Software Tips for New York Life Broker Illustration Software

## Tip #1 The Library

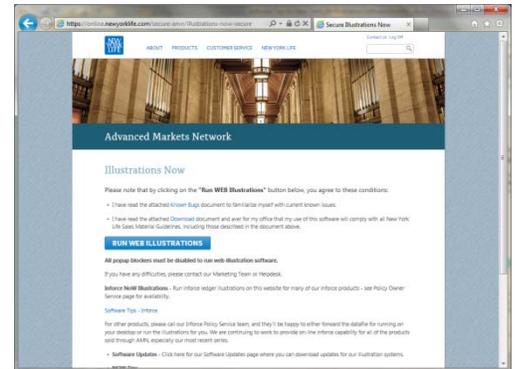
The Library icon has a lot of great information about our products and our software.



What's New and Known Bugs contain important information you should read and know about each release.

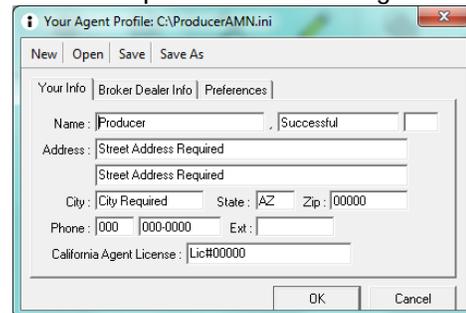
Agent Reference Manual: In depth information about all of our Retail products.

For the same great information about our products on the web, go to [www.nylamn.newyorklife.com](http://www.nylamn.newyorklife.com) for the latest product fact sheets, Agent Manual, on all of the products offered thru AMN.



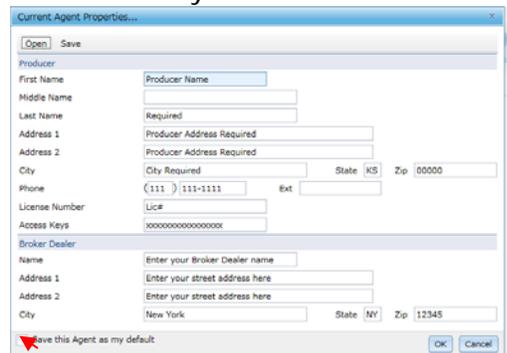
## Tip #2 Set up agents

On NYLBIS' General screen, click on the ellipse "..." next to Agent.



Save each under a different name as needed.

On NoW, click the Agent button to open and use your desktop agent files. You may also create new ones.



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## Tip #3 Which product is best suited for a particular insured?

Run just one illustration to find out!

Pick a universal or whole life product.

Input the Insured age/rating.

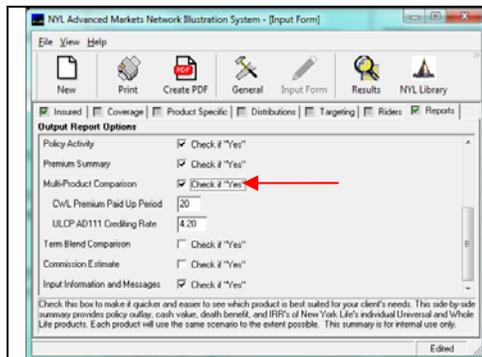
Input the coverage, solving for death benefit or premium if desired.

Under Reports, check the "Multi-Product Comparison."

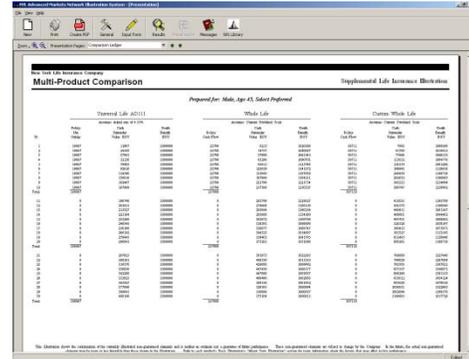
Then click on:

You've just run all products with just one run!

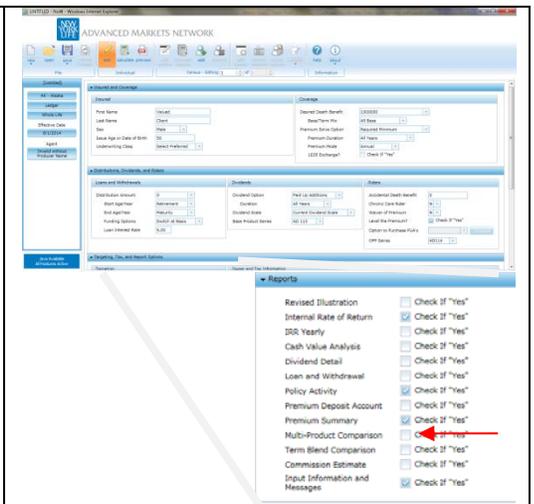
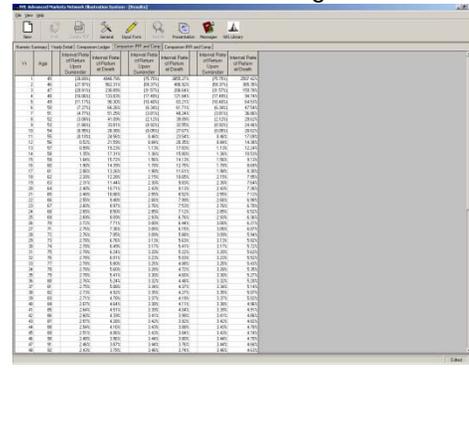
*This internal use only comparison also has a summary of IRR's and commission estimates at the bottom - see examples at right.*



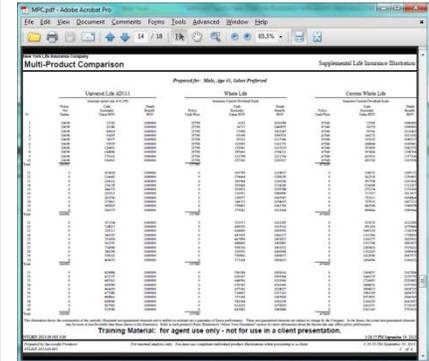
Click on **Presentation**.



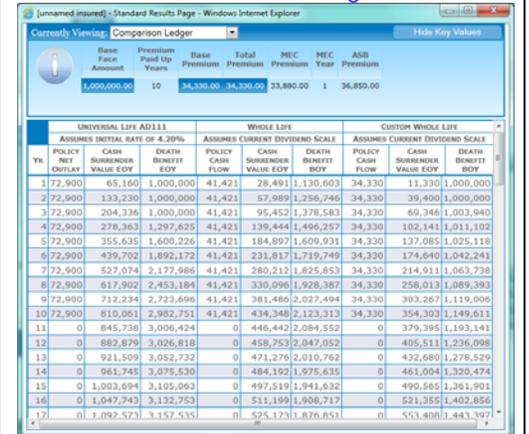
Click on **Results** to see grid view



Click on **PDF Preview**



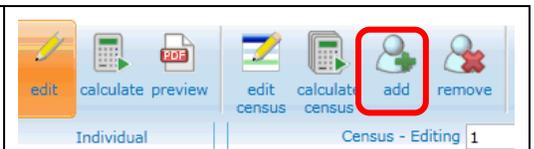
Click on **Calculate** to see grid view



## Tip #4 Quickly batch run Multiple Insureds!

Do you need a number of scenarios?

Create the first illustration, then click Add for each life.



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<b>Desktop</b>	<b>Web</b>
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Use the Column Selector to add and remove questions from your Census.

You may also Copy Paste data (a single column at a time) from a spreadsheet by left clicking at the top of the census column, and selecting Paste.

(IE 9 and later)

You may also Edit as needed.

Save (just in case!).

Click Calculate Census.

The Calculation Status window will display; when each individual has completed, you may Click on the PDF or Grid.

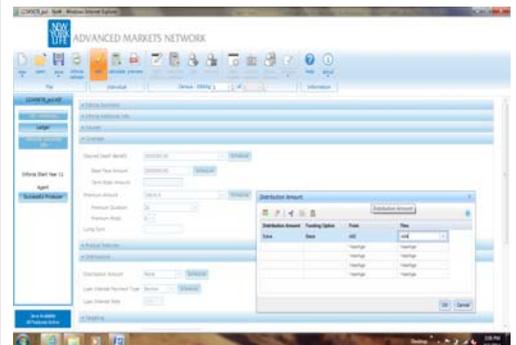
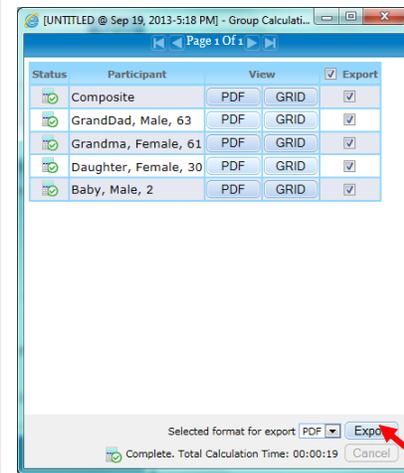
Once it completes, you may also Click on Export (at the bottom) to save all of the PDF or CSV results to your desktop.

You may also use New Case from Import, and copy/paste a census from a spreadsheet into the web system. Call us and we can assist you.

## Tip #5 In-force Illustrations Online

Select New Inforce Case, and input the policy or group number. It will load the inforce data within seconds.

You may then edit the premiums, illustrate distributions, as needed.



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## Troubleshooting

A large Internal Use Only / Not Available for Sale watermark stamp is appearing on the output pages. Why?  
If the watermark stamp appears on the output, it is an indication that the system detected an invalid illustration and perhaps changed one of your inputs.

1. Look at the top of the Input Messages page (last pages of the printout). It should display a message that indicates what the problem is, such as the death benefit was below the minimum allowed.
2. Is the agent information complete? For non-variable products, a valid illustration requires the agent's name, address and phone number, and for California, the agent's insurance license number. For variable products, the Broker-Dealer information must be provided.
3. Desktop Only - If the state is not an approved valid state for that product, the Input Messages will note the product is not valid for the time period. (The Web will not allow you to pick non-available products.)
4. Desktop Only -- Did you deselect an output page before printing? This feature allows the user to save paper during the analysis process, but the entire presentation must print for the client.

We try to make the error messages easily understood as to what changed. If you are unable to find the source of the problem, e-mail us the saved input or PDF of the output; we'll see if we can identify the problem, and/or run the illustration for you.